## Workday Trial Installation{#workday-trial-installation}

#### Overview {#overview}

This document is designed to help Workday customers learn how to activate a trial account with Adobe Sign and then integrate it into Workday tenant. To use Adobe Sign within Workday, you need to know how to create and modify Workday items such as:

- Business Process Framework
- Tenant Set-up and configuration
- Reporting and Workday Studio Integration

**Note**: If you have an existing Adobe Sign account, there is no need to start a trial. You may contact your Client Success Manager to request Workday integration.

The high-level steps to complete integration are:

- Activate your trial account with Adobe Sign
- Generate an Integration Key in Adobe Sign
- Install the Integration Key into the Workday Tenant

#### Activate Your Adobe Sign Trial Account {#activate-sign-trial-account}

To request a 30-day trial of Adobe Sign, you need to fill this registration form.

**Note**: We strongly recommend that you use a valid functional email address to create the trial and not a temporary email. You need to access this email to verify the account, so the address must to be valid.

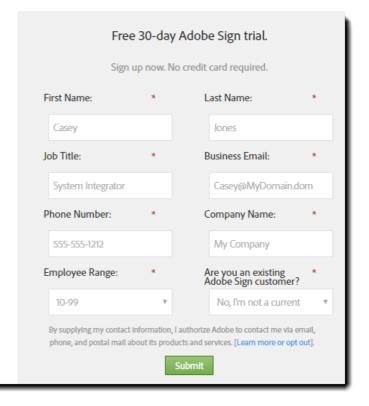
#### Request a trial.

Adobe Sign streamlines the signing process in Workday.

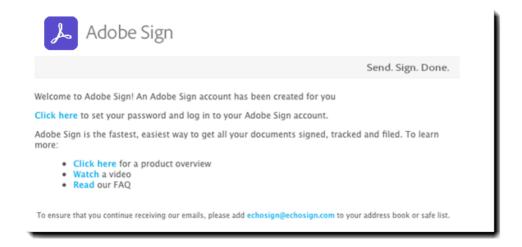
With trusted e-signatures from Adobe integrated directly into Workday, your employees can accelerate signatures in processes such as NDAs, offer letters, onboarding and training compliance.

Easily collect legally binding e-signatures—from anywhere, on any device—to increase organizational efficiency and agility, reduce legal risk, and impress employees and contractors with a delightful digital experience.

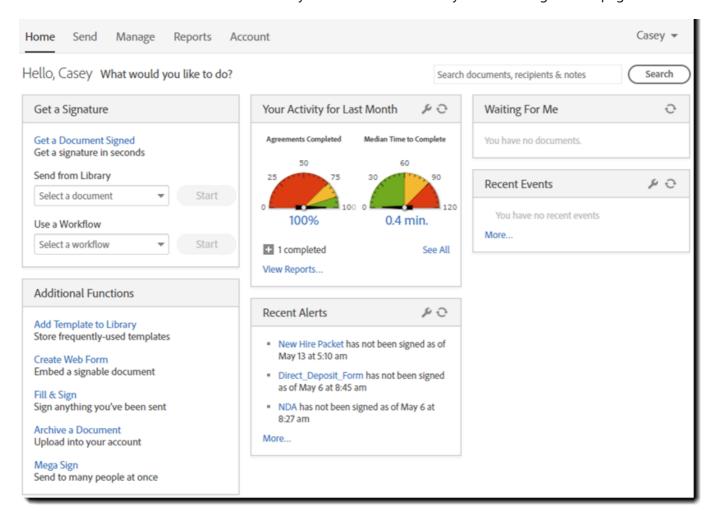
Simply fill out the form to request a trial.



Within one business day, an Adobe Sign on-boarding specialist provisions your account (in Adobe Sign) for Workday. Once complete, you receive a confirmation email as shown below.



Follow the directions in the email to initialize your account and access your Adobe Sign Home page.



## Generate an Integration Key {#generate-an-integration-key}

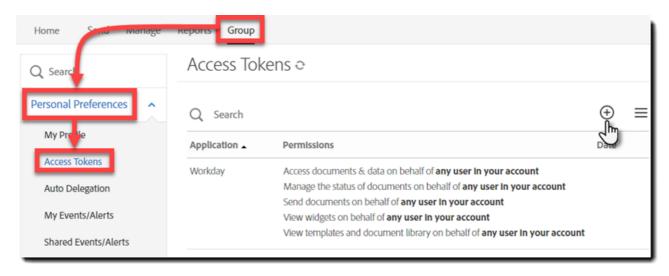
For new installations, you need to generate an integration key in Adobe Sign and then enter it into Workday. This key authenticates the Adobe Sign and Workday environments to trust each other and share content.

To generate an Integration Key in Adobe Sign:

1. Log in to your administrator in Adobe Sign.

- 2. Navigate to Account > Personal Preferences > Access Tokens.
- 3. Click the **circled plus icon** on the right side of the window.

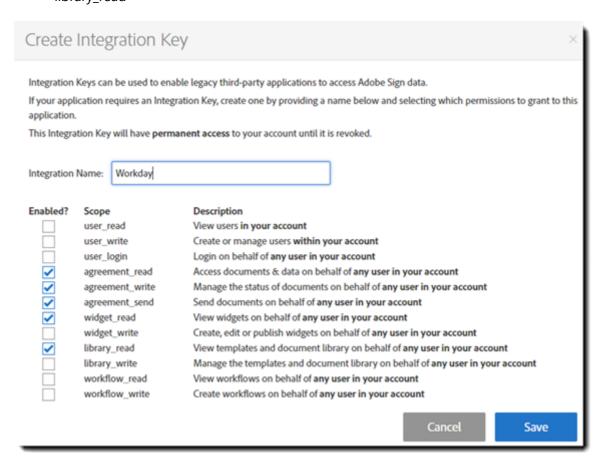
It opens the Create Integration Key interface.



4. Provide an intuitive name for your key, such as Workday.

The Integration Key must have the following elements enabled:

- o agreement\_read
- o agreement\_write
- o agreement\_send
- o widget\_read
- library\_read



#### 5. Click Save

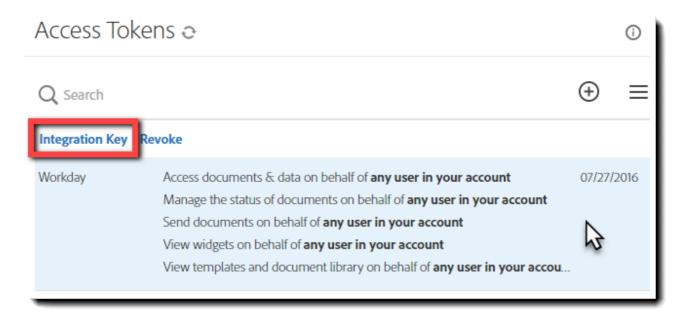
The Access Tokens page is exposed showing the keys designed in your account.

6. Click the key definition created for Workday

The Integration Key link is exposed at the top of the definition

7. Click the **Integration Key** link.

It exposes the Integration key.



- 8. Copy this key and save in a secure place for the next step.
- 9. Click OK



## Configure the Workday Tenant {#configuring-the-workday-tenant}

Install the Integration Key {#install-the-integration-key}

Installing the Integration Key into the Workday tenant establishes the trust relationship with Adobe Sign. Once that relationship is in place, any Business Process can have a *Review Document* step added that enables the signature process.

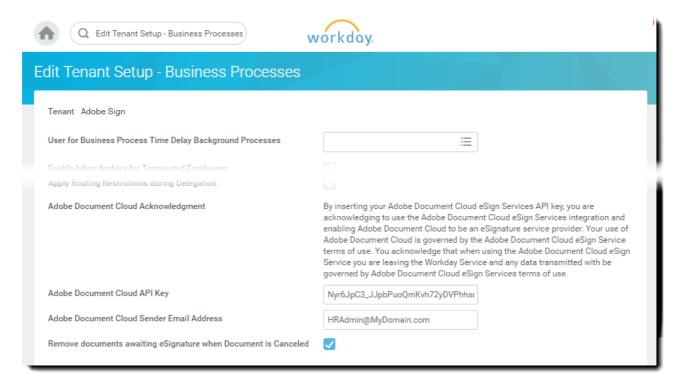
Note: Adobe Sign is branded as "Adobe Document Cloud" throughout the Workday environment.

To install the Integration Key:

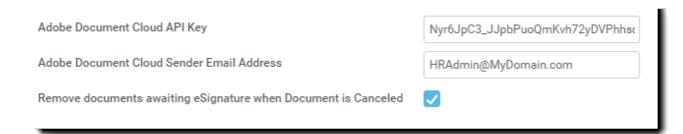
- 1. Log in to Workday as an account administrator
- 2. Search for Edit Tenant Setup Business Processes

It opens the Edit Tenant Setup - Business Processes page.

- 3. Provide information for the following four fields:
  - Adobe Document Cloud Acknowledgment: A fixed text acknowledgment of the integration.
  - **Adobe Document Cloud API Key**: Where the Integration Key is installed
  - Adobe Document Cloud Sender Email Address: The email address of the group level administrator in Adobe Sign
  - Remove documents awaiting eSignature when Document is Canceled: An optional
    configuration that removes documents from the signature cycle if a document is canceled in
    Workday.



- 4. Next, complete the installation:
  - 1. Paste your Integration key into the Adobe Sign API Integration Key field.
  - 2. Enter the email address of the Adobe Sign administrator into the *Adobe Document Cloud Sender Email Address* field
  - 3. Click OK



Adobe Sign functionality can now be added to any Business Process by adding a *Review Document* step and configuring it to use "**eSign by Adobe**" as the eSignature type.

Configure the Review Document step {#configure-the-review-document-step}

The document for the Review Document step can be a static document; a document generated by a Generate Document step within the same business process; or, a formatted report created with the Workday Report Designer. All of these cases can be augmented with Adobe Text Tags to control the look and position of the Adobe Signing specific components. The document source must be specified within the business process definition. It is not possible to upload an ad hoc document while the business process is executing.

Unique to using Adobe Sign with a Review Document step is the ability to have serialized Signer Groups. Signer groups allow you to specify role-based groups that sign in sequence. Adobe Sign does not support parallel signing groups.

For assistance configuring the Review Document step, you may refer to the Quick Start guide.

## Support {#support}

Workday Support {#workday-support}

Workday is the integration owner, and should be your first point of contact for questions about the scope of the integration, feature requests, or problems in day to day function of the integration.

The workday community has several good articles on how to troubleshoot the integration and generate documents:

- Troubleshoot eSignature Integrations
- Review Documents Step
- Dynamic Document Generation
- Offer Document Generation Configuration tips

#### Adobe Sign Support {#adobe-sign-support}

Adobe Sign is the integration partner, and should be contacted if the integration is failing to obtain signatures, or if notification of pending signatures fails.

Adobe Sign Customers should contact their Customer Success Manager (CSM) for support. Alternatively, Adobe Technical Support can be reached by phone: 1-866-318-4100, wait for product list then enter: 4 and then 2 (as prompted).

- Adding Adobe Text Tags to Documents
- Review Document configuration and examples

#### **Contact Adobe Sign Support**

# Workday Installation Guide{#workday-installation-guide}

#### **Contact Adobe Sign Support**

#### Overview {#overview}

**BEST** 

This document explains how to integrate Adobe Sign into your Workday tenant. To use Adobe Sign within Workday, you need to know how to create and modify Workday items such as:

- Business Process Framework
- Tenant Set-up and configuration
- Reporting and Workday Studio Integration

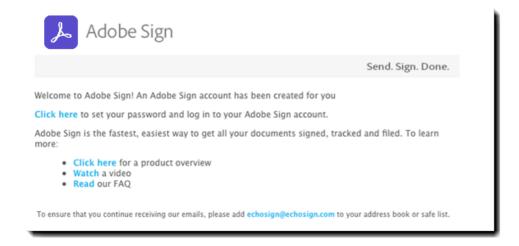
The high-level steps to complete integration are:

- Activate your Administrative account in Adobe Sign (New Customers Only)
- Configure a Group in Adobe Sign to hold the Workday integration user
- Establish the OAuth relationship between Workday and Adobe Sign

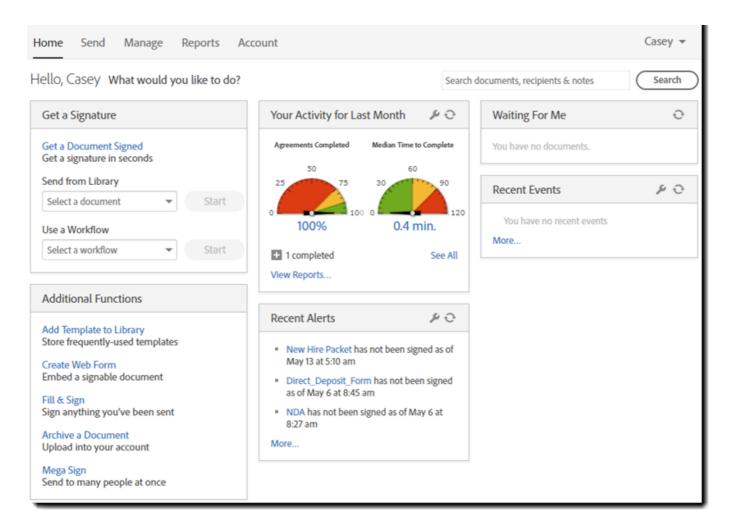
## Activate Your Adobe Sign Account {#activating-your-adobe-sign-account}

Existing customers with established accounts can skip to the Configure Adobe Sign for Workday step

For customers who are new to Adobe Sign and do not have a pre-existing log-in, an Adobe on-boarding specialist provisions your account (in Adobe Sign) for Workday. Once complete, you receive a confirmation email:



You need to follow the directions in the email to initialize your account and access your Adobe Sign *Home* page.



## Configure Adobe Sign for Workday {#config}

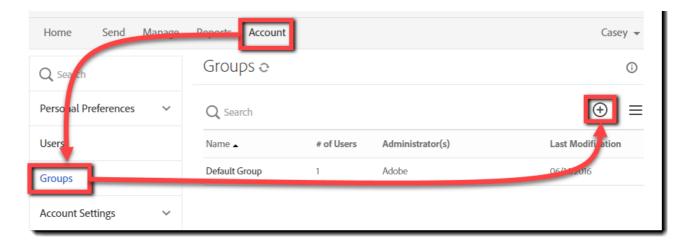
To configure Adobe Sign for Workday, you need to generate following two dedicated objects in the Adobe Sign system:

- A Workday group: Workday requires a dedicated "group" within the Adobe Sign account to enable
  integration functionality. The Adobe Sign group is used to control only the Workday usage of Adobe
  Sign. Any other potential usage, such as Salesforce.com or Arriba is not impacted. The email
  notifications are suppressed in Workday group so that the Workday users only receive notifications
  within their Workday inbox.
- An authenticating user to hold the integration key: A Workday group must have only one group level administrator, who is the authoritative holder of the integration key. We recommend that the administrator use a functional email address such as **HR@MyDomain.com** instead of a personal email to reduce the risk of having the user disabled in future and consequently disabling the integration.

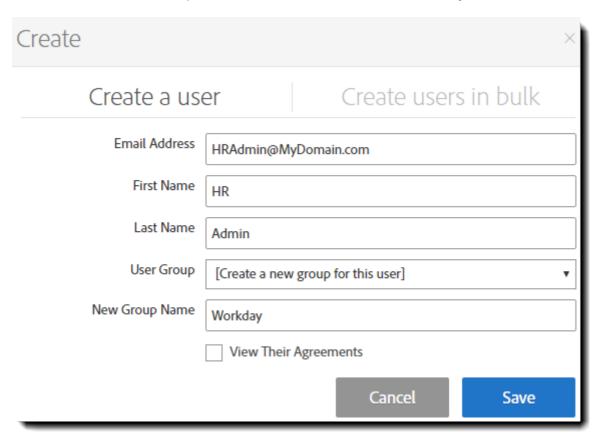
Create a User and Group in Adobe Sign {#create-a-user-and-group-in-adobe-sign}

To create a user in Adobe Sign:

- 1. Log in to Adobe Sign as the account administrator
- 2. Navigate to **Account > Users**
- 3. Click the **circled plus sign** to create a new user

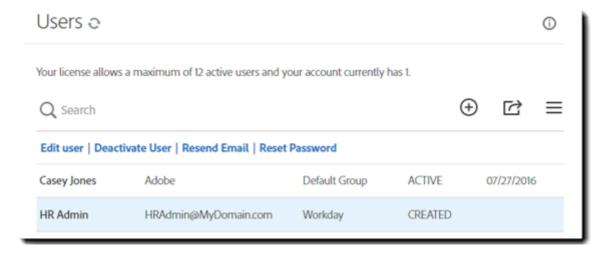


- 4. In the dialog that opens, provide the new user details:
  - o Provide a functional email that you can access.
  - Enter an appropriate First and Last name value.
  - Select **Create a new group for this user** from the User Group.
  - Provide the New Group Name with an intuitive name like "Workday"



#### 5. Click Save

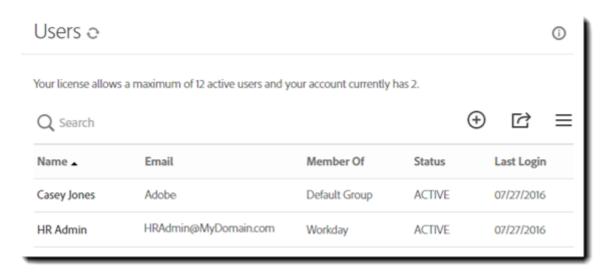
It brings you back to the *Users* page that lists the new user with a **CREATED** status.



To verify the email address of the user with "Created" status:

- 1. Log in to the new user's email.
- 2. Find the "Welcome to Adobe Sign" email.
- 3. Click where it says **Click here to set your password**.
- 4. Set the password.

Once you verify the email address, the status of the user changes from "CREATED" to "ACTIVE".



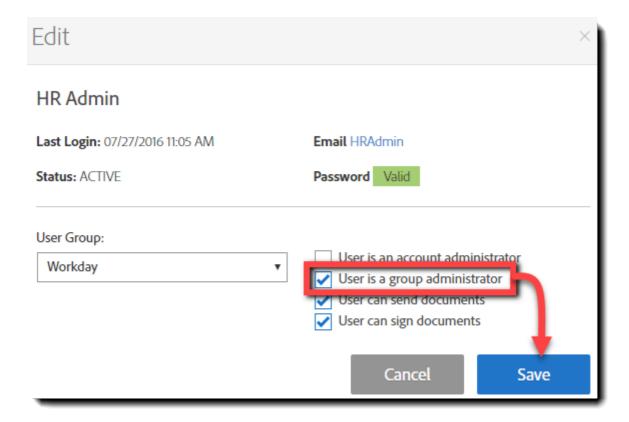
Define the Authenticating User {#define-the-authenticating-user}

To promote the new user in the Workday group:

- 1. Navigate to the *Users* page (if not already there).
- 2. Double-click the user in the Workday group.

This opens an *Edit* page for the user permissions.

- 3. Check the User is a group administrator box.
- 4. Click Save.



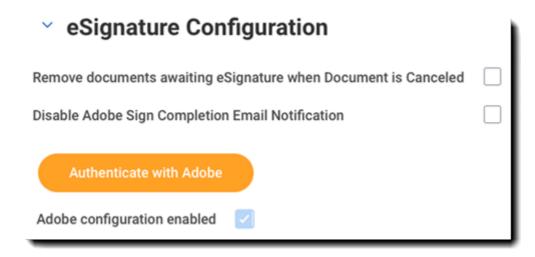
## Configure the Workday Tenant {#configure-workday}

To complete the connection between the Workday tenant and Adobe Sign, we need to establish a trusted relationship between the services. Once done, we can add a Review Document step that enables the signature process through Adobe Sign.

Note: Adobe Sign is branded as Adobe Document Cloud throughout the Workday environment.

To establish the trusted relationship:

- 1. Log in to Workday as an account administrator
- Search for Edit Tenant Setup Business Processes
   It loads the Edit Tenant Setup Business Processes page
- 3. Locate the eSignature Configuration section:



4. Click Authenticate with Adobe.

This starts the OAuth2.0 authentication sequence.

5. When asked, provide the credentials for the Adobe Sign Group admin that you created earlier.

6. Approve the access to Adobe Sign.

Note: Make sure that you completely log out of any other Adobe Sign instance before proceeding.

Once connected, the Adobe configuration enabled checkbox is set and you can begin using Adobe Sign with Workday.

Configure the Review Document step {#configure-review}

The document for the Review Document step can be either one of the following:

- A static document
- A document generated by a Generate Document step within the same business process
- A formatted report created with the Workday Report Designer

You may add any of these docs with Adobe Text Tags to control the look and position of the Adobe Signing specific components. The document source must be specified within the business process definition. It is not possible to upload an ad-hoc document while the business process is executing.

Unique to using Adobe Sign with a Review Document step is the ability to have serialized Signer Groups. This allows you to specify role-based groups that sign in sequence. Adobe Sign does not support parallel signing groups.

For assistance configuring the Review Document step, refer to the Quick Start guide.

## Support {#support}

Workday Support {#workday-support}

Workday is the integration owner, and should be your first point of contact for questions about the scope of the integration, feature requests, or problems in day to day function of the integration.

You may refer to the following Workday community articles on how to troubleshoot the integration and generate documents:

- Troubleshoot eSignature Integrations
- Review Documents Step
- Dynamic Document Generation
- Offer Document Generation Configuration tips

Adobe Sign Support {#adobe-sign-support}

Adobe Sign is the integration partner, and should be contacted if the integration is failing to obtain signatures, or if notification of pending signatures fails.

Adobe Sign Customers should contact their Customer Success Manager (CSM) for support. Alternatively, Adobe Technical Support can be reached by phone: 1-866-318-4100, wait for product list then enter: 4 and then 2 (as prompted).

- Adding Adobe Text Tags to Documents
- Review Document configuration and examples

## Common Questions {#faq}

Why is the status not being updated within Workday even the document is fully signed? {#why-is-the-status-not-being-updated-within-workday-even-the-document-is-fully-signed}

The root of this problem can be that the Candidate has not clicked the Submit button in Workday after signing in Adobe Sign.

Per Workday task Check eSignature Signing Status: "To start the process, the user can submit the associated Inbox task."

Per Workday Development: The original signing completes the process only if the user submits the Inbox task after signing the document. The signers have to always submit the Inbox task in Workday after they complete the signing on Adobe Sign. Post signing, the iframe is closed and the user is redirected to the same task where they can click the submit button to complete the process.

# Workday Quick Start Guide{#workday-quick-start-guide}

#### **Contact Adobe Sign Support**

#### Overview {#overview}

This document is designed to help Workday administrators understand how to customize the Workday Business Processes to include Adobe Sign for obtaining e-signatures. To use Adobe Sign within Workday, you need to know how to create and modify Workday items such as:

- Business Process Framework
- Tenant Set-up and configuration
- Reporting and Workday Studio Integration

## Accessing Adobe Sign within Workday {#access-adobe-sign}

Adobe Sign electronic signature capability is surfaced as 'Review Document step' action within the Business Process Framework (BPF) and as a Distribute Documents task.

#### Review Document Step {#review-document-step}

Adobe Sign for Workday is exposed via the *Review Document step* that you can add to any of over 400 Business Processes within Workday, including *Offer*, *Distribute Documents and Tasks*, *ropose Compensation*, and more.

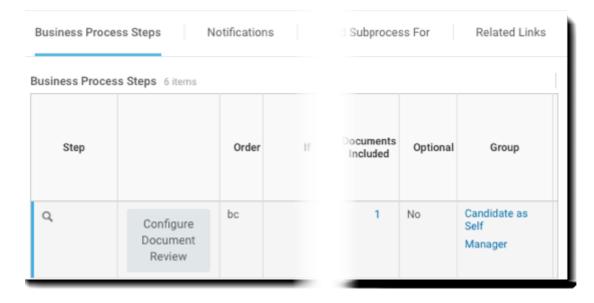
You may refer to the Workday community articles on Review Document step.

There is a 1:1 relationship between *Review Document* steps and billable transactions with Adobe Sign. You can combine multiple documents within a single *Review Document* step and they are presented as a single package for signature.

**Note**: Only a single *dynamic* document can be referenced within a specific *Review Document* step.

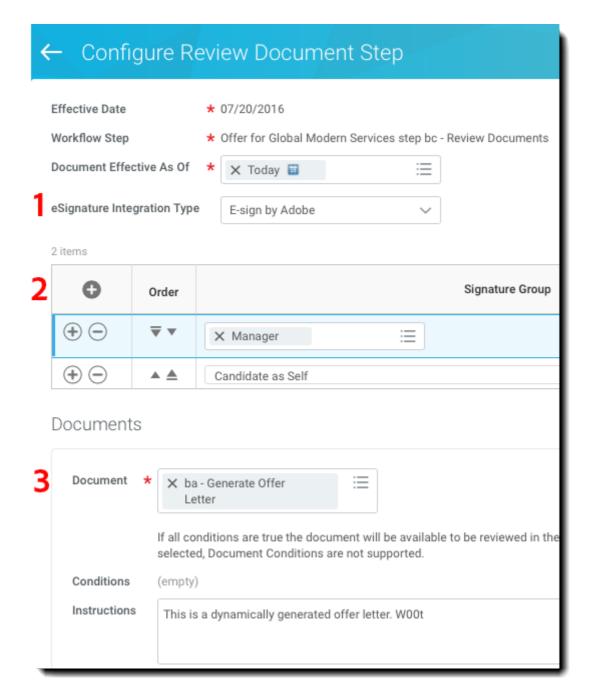
To define a functional Review Document step:

- 1. Insert a **Review Document** step.
- 2. Specify the Groups (roles) that can act upon the Review Document step.



To configure the Document Review step:

- 1. Specify the eSignature Integration type as eSign by Adobe.
- 2. Add rows to the Signature Grid
  - The signature grid specifies the serial order in which the document is routed for signature. Each row can contain one or more roles and each row represents a step in the signing process.
  - Every member of the role within a particular step is notified that a signing event is pending.
  - Once a single person from the role signs, the row step is completed and the document is moved to the next row step.
  - When all rows have been signed, the Review Document step is complete.
- 3. Specify the document to be signed. If this is an Offer BP, you can use the document from a Generate Document step. Otherwise, choose an existing document or report.
- 4. Repeat step 3 for as many documents as you require.



5. Optionally, add a 'redirect user' for capturing 'decline to sign' actions. When users decline, Workday reroutes the documents to a configured security group for review.

From the related actions menu of a *Review Documents* step, select **Business Process > Maintain Redirect**. Next, select one of the following:

- **Send Back**: To enable security group members to send a step back to a prior step in the business process. The business process restarts from that step.
- **Move to Next Step**: To enable security group members to forward a step to the next step in the business process.
- **Security Groups**: To redirect steps in the business process flow. Security groups that display at this prompt are selected in the business process security policy in the *Redirect* section.

## Business Process Step Notes {#business-process-step-notes}

The Business Process Framework is powerful; however, you need to ensure that:

• Every Business Process must have a completion step, which is ideally at the end of the business process.

- A completion step is set off of the related actions menu of the search icon. This is possible only while "viewing" the BP and not while "editing" it.
- Every step of the business process is executed sequentially.

You can change the order of a step by changing the order value. For instance, to insert a step between items "c" and "d", specify a new item as "ca"

#### Example: Offer {#example-offer}

The Offer BP is a subprocess of the Job Application Dynamic BP that needs to be configured to execute the Offer BP. It is triggered when the Job Application state is moved to "Offer" or "Make Offer".

In the below example, a Review Document step is using a Dynamic Document step for both North America and Japan.

![Example of a Workday Business Process](images/bp-for-offersmaller-575.png)

#### This BP does the following:

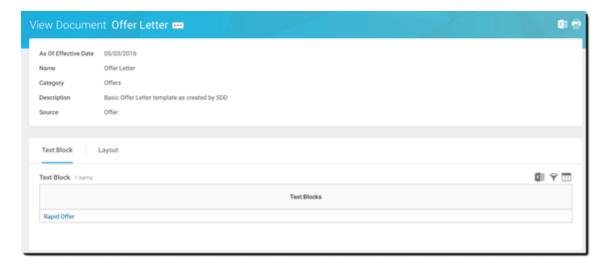
- Asks the initiator of the BP to propose compensation for the candidate (step b).
- Uses a step condition to test whether the current country is NOT Japan.

If true, it executes step "ba" which uses an English language document.

If false, it executes step "bb" which uses a Japanese language document.

- Defines the signature process in the Document Review step "bc".
- Defines the decision point to make an offer in the required completion step "d".

The Dynamic document being generated in step "ba" is called *Offer Letter* and contains a single text block named *Rapid Offer*. You can add multiple text blocks such as header, salutation, compensation, stock, closing, terms, and more as required.



The Dynamic offer letter below is created in the Workday rich text editor. The items highlighted in *gray* are Workday provided objects that reference contextual data.

Items in {{brackets}} are Adobe Text tags.

#### Congratulations!

Dear First Name,

We strive to hire everyone - and you are no exception.

We are pleased to offer you the position of Business Title - Proposed at Company for Position Restrictions. We propose to pay you eventually the sum of Base Pay per year.

Please sign, respond by COB Today + 1 Day.

```
{{Signature_es_:signer1:signature}}

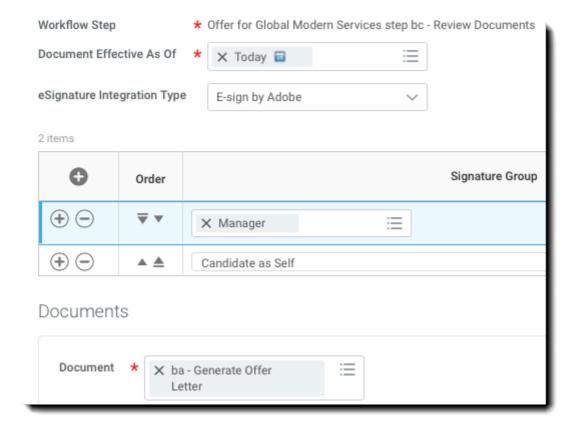
Manager
{{Date_es_:signer1:date}}

{{Signature_es_:signer2:signature}}

Candidate Name
{{Date_es_:signer2:date}}
```

Within the *Review Document* step, the dynamic document is referenced from the previous step and defines the sequential signature process via two signing groups.

The behavior illustrated below will route the dynamically generated document first to the Hiring Manager, and then to the Candidate.

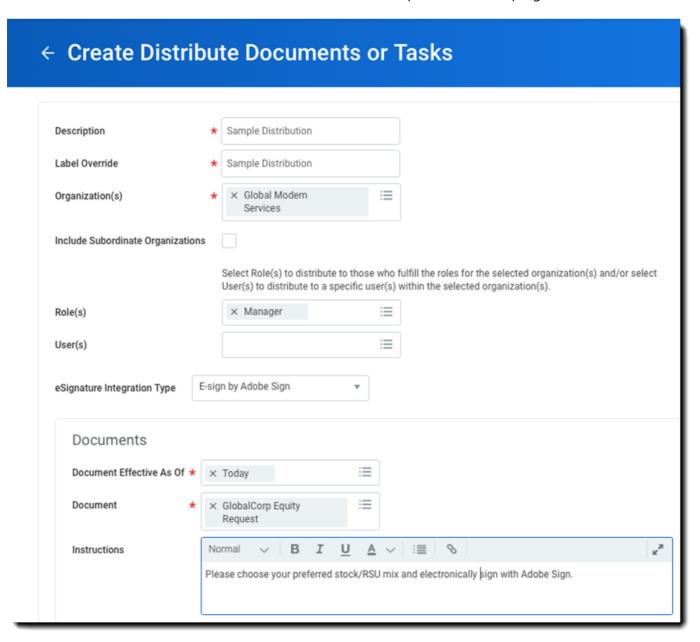


Example: Distribute Documents {#example-distribute-documents}

Introduced in Workday 30, the Mass Distribute Documents or Tasks task can be used to send a single document to a large group (<20K) of individual signers. It is limited to a single signature per document. Creation of a distribution is performed by accessing the 'Create Distribute Documents or Tasks' action from the search bar.

Example: Send an employee equity choice form to all managers with Global Modern Services. You can further filter it to individual managers, if desired.

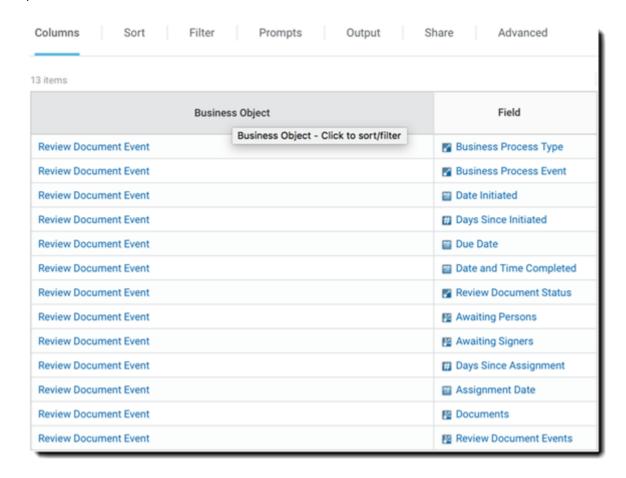
You can also access the **View Distribute Documents or Tasks** report to track the progress of the distribution.



#### Example: Reporting {#example-reporting}

Workday has a rich reporting infrastructure. To look at the details of the Adobe Sign process, inspect the elements of the *Review Document Event*.

Below is a simple custom report that can be run across all BPs looking for Adobe Sign transactions and their status.



The following report was generated by looking at *Offer, Onboarding,* and *Propose Compensation* BPs within an implementation tenant.

#### You can see:

- The documents out for signature
- The associated BP step
- The next person awaiting signature

Business Process Type	Business Process Event	Date Initiated	Days Since Initiated	Due Date	Date and Time Completed	Review Document Status	Awaiting Persons	Awaiting Signers	Days Since Assignment	Assignment Date	Documents
Offer	Review Documents for Offer for Job Application: David Ortiz - R-00048 Program Manager	07/13/2016	6		07/13/2016 12:05:41.884 PM				0		
Offer Offer	Review Documents for Offer for Job Application: richard schmidt - R-00048 Program Manager	07/13/2016	6		07/13/2016 09:34:50.047 AM	Completed			0		
Offer	Review Documents for Offer for Job Application: David Ortiz - R-00048 Program Manager	07/13/2016	6		07/13/2016 12:06:48.690 PM	Not Started	David Ortiz	David Ortiz	6	07/13/2016 12:06:00.670 PM	
Onboarding	Review Documents for Onboarding for Vikesh Chopra	07/18/2016	1			Not Started	Logan McNeil Vikesh Chopra	Vikesh Chopra	1	07/18/2016 10:45:51.235 AM	Proprietary Rights Agreement

## Signed Documents {#signed-documents}

The Workday signature cycle suppresses all email notifications by Adobe Sign. Users are informed of pending actions within their Workday inbox.

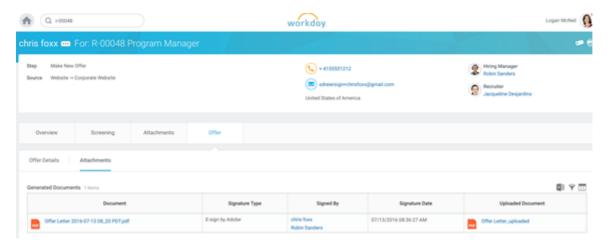
Once a document is signed by all Signature Groups, a copy of the signed document is distributed to all members of the Signature Group via email.

To suppress this behavior, you may contact your Adobe Sign Success Manager or the Adobe Sign Support team.

Within Workday, you can access the signed documents on the full process record. You may find:

- Worker documents on the Worker Profile, and
- Candidate documents (offer letters) on the Candidate profile

The below image shows a signed offer letter for the candidate Chris Foxx.



## Support {#support}

Workday Support {#workday-support}

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• Adding Adobe Text Tags to Documents

Get File