



Adobe Sign for Workday

Customer On-Boarding Guide

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Overview

This document will provide Workday customers with the required steps for integrating Adobe Sign into your Workday tenant. The document is an installation guide and not intended to be a comprehensive training manual for Workday.

In order to use Adobe Sign within Workday you will need to possess or develop an understanding of how to create and modify Workday items such as: Business Process Framework, Tenant Set-up and configuration, Reporting and Workday Studio Integration.

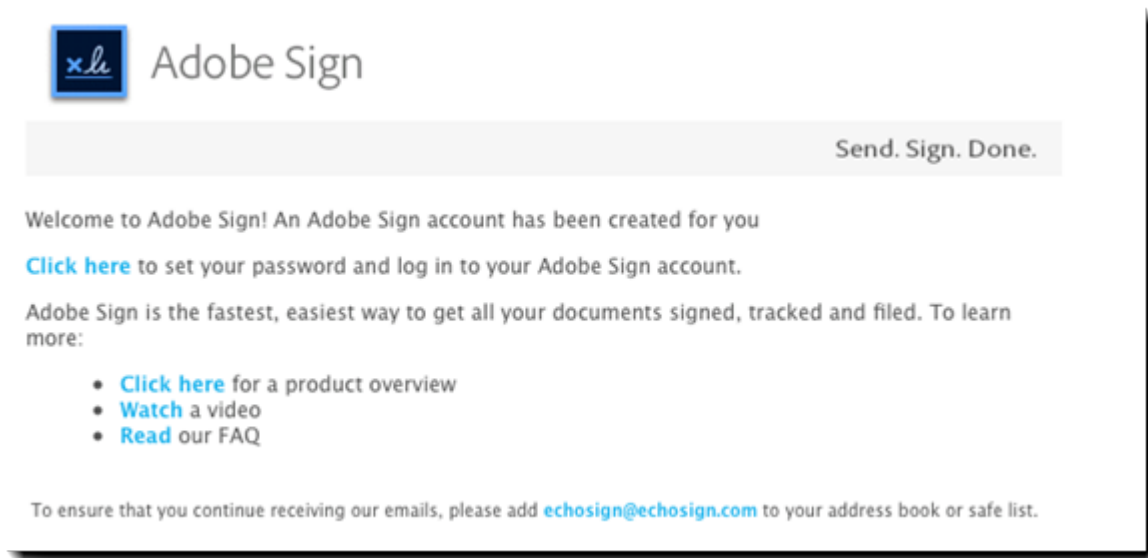
The high level steps to complete integration are:

- Activate your Administrative account in Adobe Sign (New Customers Only)
- Configure a Group in Adobe Sign to hold the Workday integration user/key
- Contact Adobe Sign Support to enable/verify integration settings
- Generate an Integration Key in Adobe Sign
- Install the Integration Key into the Workday Tenant

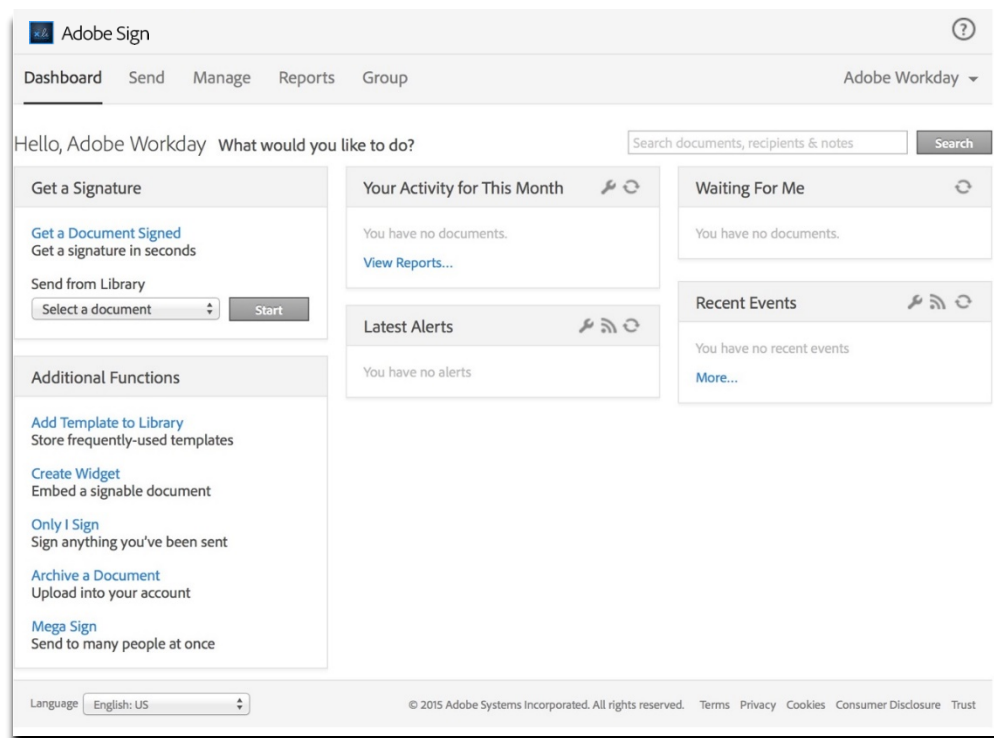
Activating Your Adobe Sign Account

Existing customers with established accounts can skip to the [Configure Adobe Sign for Workday](#) step.

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



Following the directions in the email will initialize your account and take you into your Adobe Sign dashboard.



Configure Adobe Sign for Workday

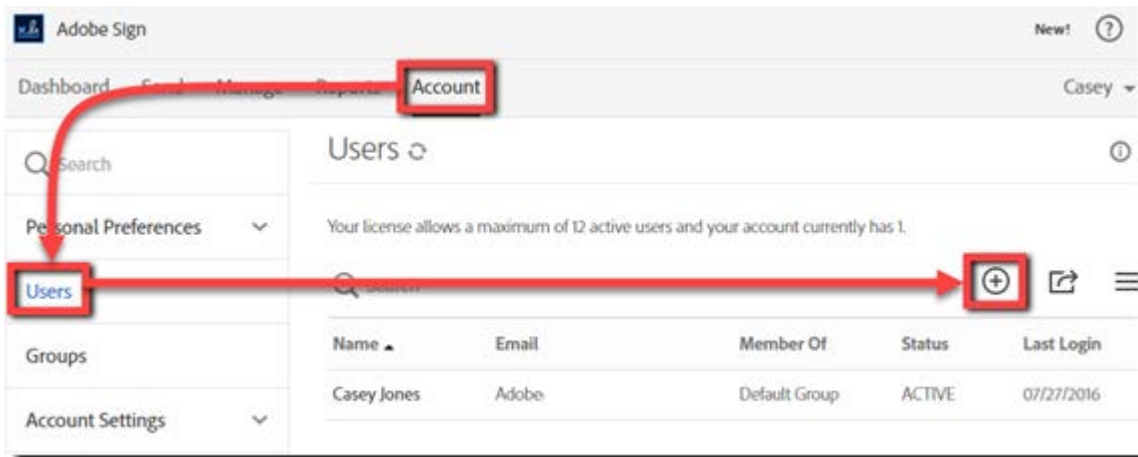
Configuring Adobe Sign for Workday requires two dedicated objects to be generated in the Adobe Sign system:

- A “Workday group”
Workday requires a dedicated “group” within the Adobe Sign account to enable integration functionality. The Adobe Sign group will be used to control only the Workday usage of Adobe Sign. Any other potential usage (Salesforce.com, Arriba, etc.) will not be impacted.
e.g.: The Workday group will have email notifications suppressed so that Workday users only receive notifications within their Workday inbox.
- An authenticating user to hold the integration key
Within the group there should be one (and only one) **group level** administrator. This user will be the authoritative user holding the integration key. It is recommended that a functional (but real) email address be used, such as **HR@MyDomain.com**.
By using a functional email instead of a personal one, you reduce the risk of having the user disabled at some future date and consequently disabling the integration.

Create a User and Group in Adobe Sign

To create a user in Adobe Sign:

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



A pop-up will appear asking for the new user's details:

- Provide a functional email that **you have access to**
 - This user will hold the Integration Key
 - The email address needs to be an actual address for verification
- Enter an appropriate First and Last name value
- Select [**Create a new group for this user**] from the *User Group* picklist
- Provide the *New Group Name* with an intuitive name like “**Workday**”
- Click **Save**

Create

Create a user | Create users in bulk

Email Address: HRAdmin@MyDomain.com

First Name: HR

Last Name: Admin

User Group: [Create a new group for this user]

New Group Name: Workday

☐ View Their Agreements

Cancel Save

The pop-up will disappear, bringing you back to the *Users* page. You will see the new user listed with a **CREATED** status.

Users

Your license allows a maximum of 12 active users and your account currently has 1.

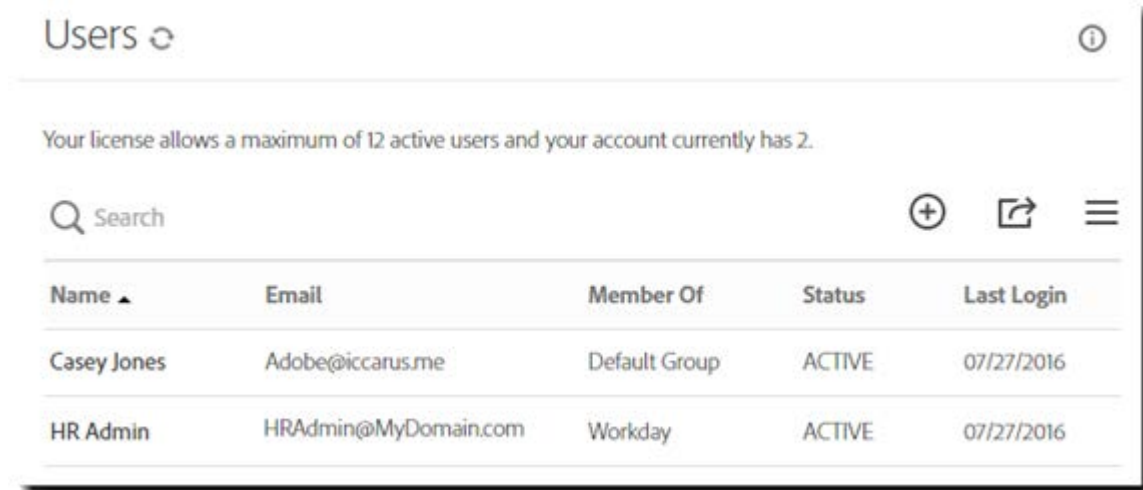
Search

Edit user | Deactivate User | Resend Email | Reset Password

Casey Jones	Adobe	Default Group	ACTIVE	07/27/2016
HR Admin	HRAdmin@MyDomain.com	Workday	CREATED	

The “Created” status indicates that the user has not yet verified their email address.

- Log into the new user’s email box
- Find the “Welcome to Adobe Sign” email
- Click where it says *Click here to set your password*
- Set the password
 - This action will change the status of the user in the system to ACTIVE

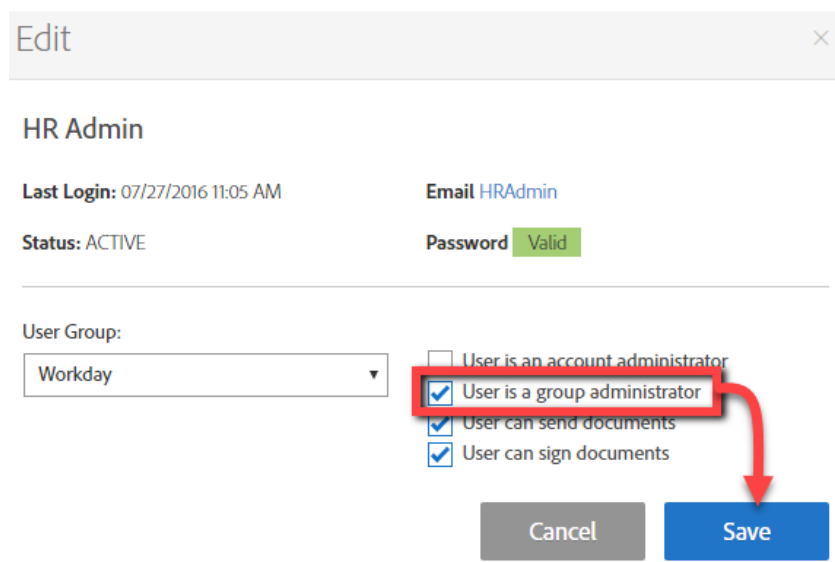


Name ▲	Email	Member Of	Status	Last Login
Casey Jones	Adobe@iccarus.me	Default Group	ACTIVE	07/27/2016
HR Admin	HRAdmin@MyDomain.com	Workday	ACTIVE	07/27/2016

Define the Authenticating User

To promote the new user in the Workday group:

- Navigate to the *Users* page (if not already there)
- Double-click the user in the Workday group
 - This will open an *Edit* page for the user’s permissions
- Check the **User is a group administrator** box
- Click **Save**



Edit

HR Admin

Last Login: 07/27/2016 11:05 AM Email: HRAdmin

Status: ACTIVE Password: Valid

User Group:
Workday ▼

- ☐ User is an account administrator
- ☒ User is a group administrator
- ☒ User can send documents
- ☒ User can sign documents

Cancel Save

Verify Settings with Adobe Sign Support

Adobe Sign Support needs to configure the group and administrative user in the Adobe Sign environment to enable the integration functions. If you are an existing customer with an established account, you can contact your Success Manager to ensure this is completed.

New customers that haven't been assigned a Success Manager can contact support directly to verify the account is fully configured:

- [Open a ticket with Adobe Sign support](#)
- Please provide:
 - The name of the group you created
 - The email address of the Workday group administrator
- Please request:
 - Verification that the group and user are configured for access to Workday

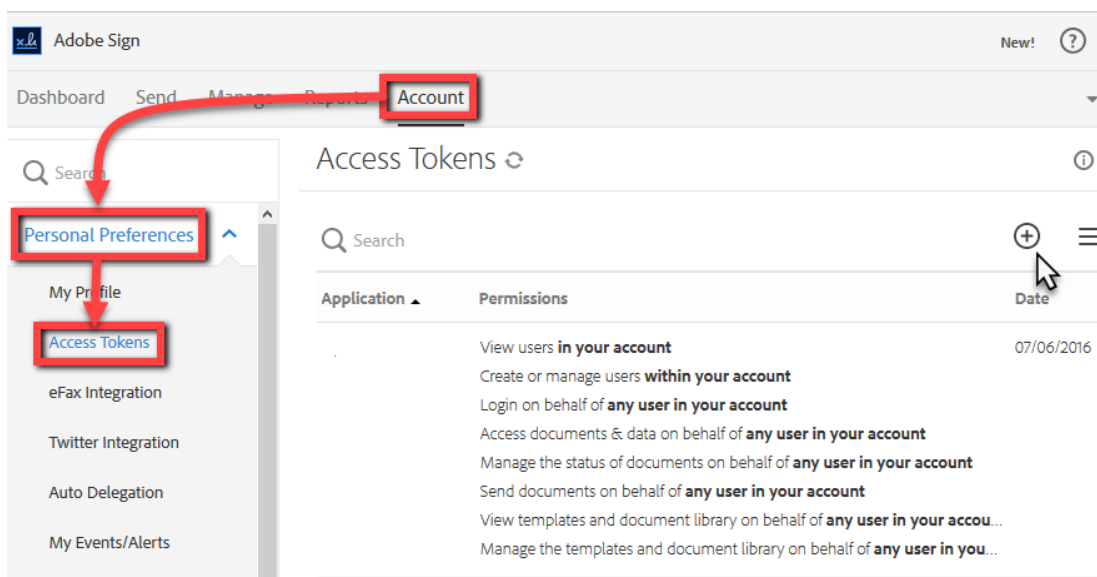
Generate an Integration Key

Once verification is received that the group and user are properly enabled, the group level administrator will have rights to generate Access Tokens (Integration Keys).

New installations require an integration key to be generated in Adobe Sign and then entered 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:

- Log into your group level administrator in Adobe Sign
- Navigate to **Account > Personal Preferences > Access Tokens**
- Click the **circled plus icon** on the right side of the window



The *Create Integration Key* interface will load:

Provide an intuitive name for your key (e.g. Workday)

The Integration Key must have the following elements enabled:

- agreement_read
- agreement_write
- agreement_send
- widget_read
- library_read

Create Integration Key

Integration Keys can be used to enable legacy third-party applications to access Adobe Sign data.
If your application requires an Integration Key, create one by providing a name below and selecting which permissions to grant to this application.
This Integration Key will have **permanent access** to your account until it is revoked.

Integration Name:

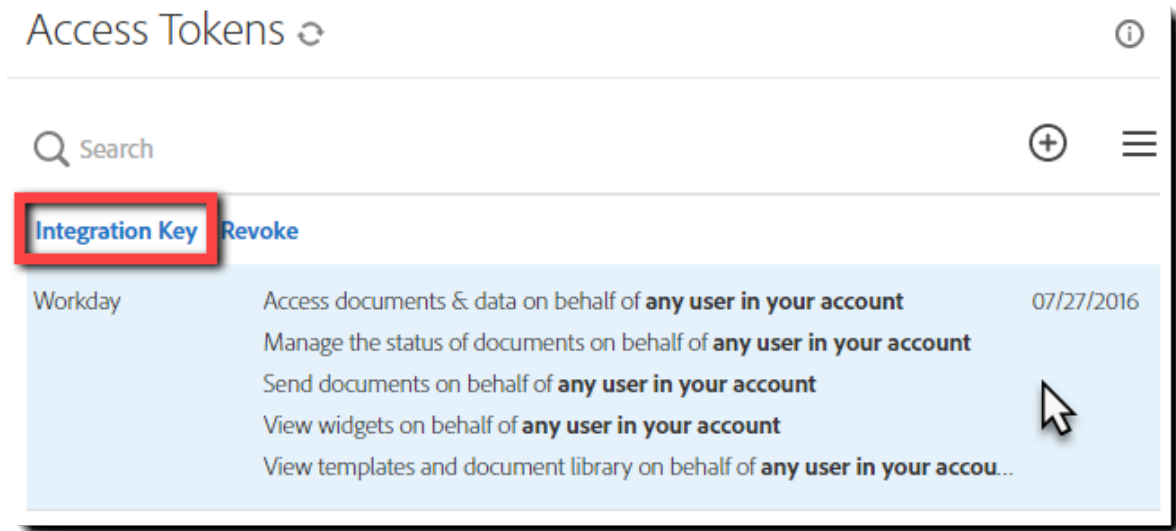
Enabled?	Scope	Description
<input type="checkbox"/>	user_read	View users in your account
<input type="checkbox"/>	user_write	Create or manage users within your account
<input type="checkbox"/>	user_login	Login on behalf of any user in your account
<input checked="" type="checkbox"/>	agreement_read	Access documents & data on behalf of any user in your account
<input checked="" type="checkbox"/>	agreement_write	Manage the status of documents on behalf of any user in your account
<input checked="" type="checkbox"/>	agreement_send	Send documents on behalf of any user in your account
<input checked="" type="checkbox"/>	widget_read	View widgets on behalf of any user in your account
<input type="checkbox"/>	widget_write	Create, edit or publish widgets on behalf of any user in your account
<input checked="" type="checkbox"/>	library_read	View templates and document library on behalf of any user in your account
<input type="checkbox"/>	library_write	Manage the templates and document library on behalf of any user in your account
<input type="checkbox"/>	workflow_read	View workflows on behalf of any user in your account
<input type="checkbox"/>	workflow_write	Create workflows on behalf of any user in your account

Cancel Save

- Click **Save** when the key is configured.

The *Access Tokens* page will be exposed showing the key(s) designed in your account.

- Click the key definition created for Workday
 - The *Integration Key* link will be exposed at the top of the definition
- Click the **Integration Key** link



The Integration key will be exposed.

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



Configuring the Workday Tenant

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.

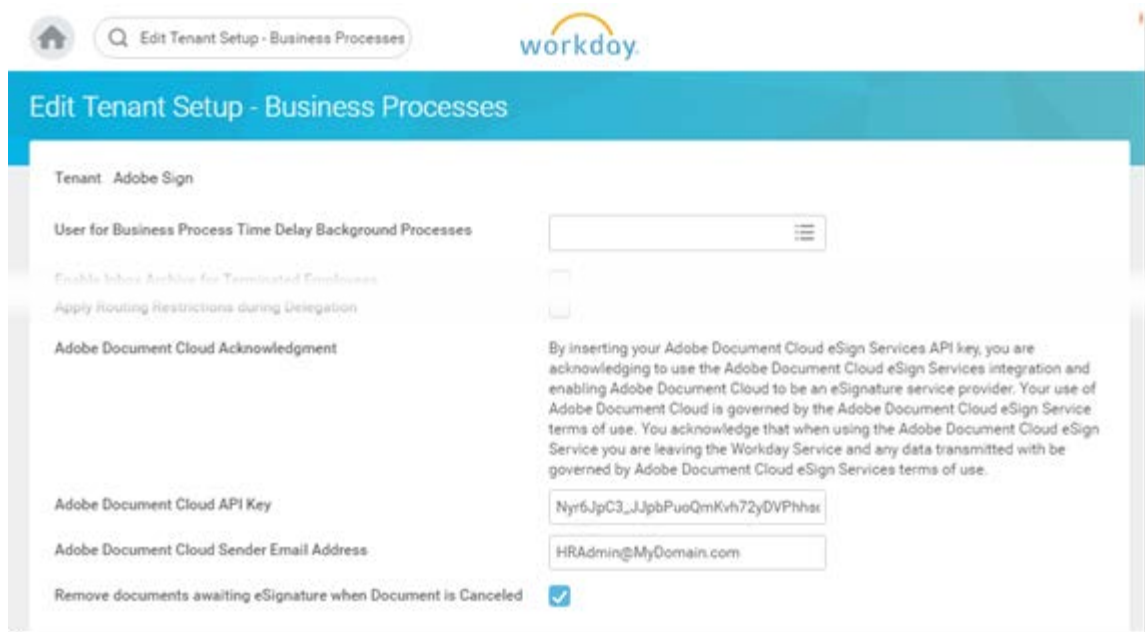
Note: Adobe Sign is branded as “Adobe Document Cloud” throughout the Workday environment.

To install the Integration Key:

- Log into Workday as an account administrator
- Search for **Edit Tenant Setup - Business Processes**

The Edit Tenant Setup - Business Processes page will load. There are four fields that pertain to the Adobe Sign integration:

- 🚦 **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 administration in Adobe Sign
- 🚦 **Remove documents awaiting eSignature when Document is Canceled** – An optional configuration that will remove documents from the signature cycle if a document is cancelled in Workday.



The screenshot shows the 'Edit Tenant Setup - Business Processes' page in the Workday interface. The page has a blue header with the Workday logo and a search bar containing 'Edit Tenant Setup - Business Processes'. Below the header, the page is titled 'Edit Tenant Setup - Business Processes'. The main content area is divided into two columns. The left column contains several configuration options, each with a label and a corresponding input field or checkbox. The right column contains a text area for the 'Adobe Document Cloud Acknowledgment' and a text field for the 'Adobe Document Cloud API Key'. The 'Remove documents awaiting eSignature when Document is Canceled' checkbox is checked.

Field	Value
Tenant	Adobe Sign
User for Business Process Time Delay Background Processes	
Enable Inbox Archive for Terminated Employees	<input type="checkbox"/>
Apply Routing Restrictions during Delegation	<input type="checkbox"/>
Adobe Document Cloud Acknowledgment	By inserting your Adobe Document Cloud eSign Services API key, you are acknowledging to use the Adobe Document Cloud eSign Services integration and enabling Adobe Document Cloud to be an eSignature service provider. Your use of Adobe Document Cloud is governed by the Adobe Document Cloud eSign Service terms of use. You acknowledge that when using the Adobe Document Cloud eSign Service you are leaving the Workday Service and any data transmitted with be governed by Adobe Document Cloud eSign Services terms of use.
Adobe Document Cloud API Key	Nyr6JpC3_JJpbPuoQmKrh72yDVPPhar
Adobe Document Cloud Sender Email Address	HRAdmin@MyDomain.com
Remove documents awaiting eSignature when Document is Canceled	<input checked="" type="checkbox"/>

Complete the installation:

- Paste your Integration key into the *Adobe Sign API Integration Key* field
- Enter the email address of the group level administrator (created in Adobe Sign) into the *Adobe Document Cloud Sender Email Address* field
- Click **OK**

Adobe Document Cloud API Key

Nyr6JpC3_JJpbPuoQmKvh72yDVPhhsx

Adobe Document Cloud Sender Email Address

HRAdmin@MyDomain.com

Remove documents awaiting eSignature when Document is Canceled



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

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. This allows you to specify role based groups that will sign in sequence. Parallel signing groups are not supported.

For assistance configuring the Review Document step, refer to the Quick Start guide here: https://helpx.adobe.com/sign/help/Workday/quick_start.html

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
https://doc.workday.com/#/reader/3DMnG~27o049IYFWETfTQ/zhA~hYlID3Hv1wu0CvHH_g
- Review Documents Step
<https://doc.workday.com/#/reader/3DMnG~27o049IYFWETfTQ/TboWWKQemecNipWgxLAjqg>
- Dynamic Document Generation
<https://community.workday.com/node/176443>
- Offer Document Generation Configuration tips
<https://community.workday.com/node/183242>

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

https://helpx.adobe.com/content/dam/help/en/sign/adobesign_text_tags_guide.pdf

Review Document configuration and examples

https://helpx.adobe.com/sign/help/Workday_Quick_Start.html