



Bond AdaptSuite Adobe EchoSign Integration

This document explains how to set up and use the AdaptSuite integration with EchoSign. Please contact your Account Manager or Bond Support at (800) 925 1519 for questions or assistance. If you are a SaaS client, please contact Bond Support to complete the first step, and then move on to the [Manage Partner Integrations](#) section in this document.

Adobe EchoSign API & URL Settings

Once your account is set up with Adobe EchoSign, they will provide you with an API Key and a Web Services URL. These will be needed for your initial set up. Access System Settings, and then go to Integration Settings. Click Edit, and then scroll to the EchoSign section. Update the following information.

System Settings

- Installation Settings
- License Manager
- General Settings
- adapt.studio Settings
- Integration Settings**
- File Transfer Settings
- Entity XML Mapping
- Documents
- Journal

Integration Settings

Activate PAM backoffice export?	No
Hosted Type	Client
Transfer Type	Local Network Drive
Path	\\192.168.11.58\AD58SalesBO
Activate Quickbooks backoffice export?	Yes
Output Type	CSV
Hosted Type	Client
Transfer Type	Local Network Drive
Path	\\192.168.11.58\AD58SalesBO
Indeed Integration	☐ Create XML Entity
Master Key	Q3Y5BGF6K2L36C
EchoSign- active	☒
Storage Location	Electronic Onboarding Forms
Web Services URL	https://secure.echosign.com/services/EchoSignDoc

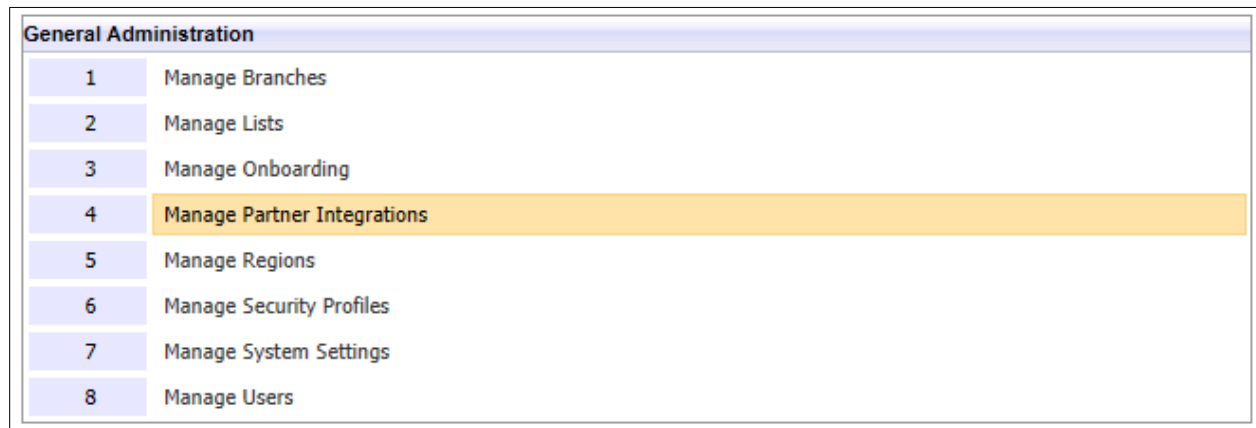


Attribute Name	Description
Master Key	Copy the API Key received from Adobe EchoSign to this field.
EchoSign	Set to TRUE to make Adobe EchoSign Active
Storage Location	Global setting - select the default storage location of documents need to be filed in AdaptSuite. User can override this default setting at the document level in the Manage Onboarding area in Administration. Currently there are 2 settings to select from: • <u>Vendor(Offsite)</u>: Form is stored on the EchoSign website and is NOT stored within AdaptSuite • <u>Electronic Onboarding Form</u>: Stored within AdaptSuite and Adobe EchoSign
Web Services URL	While the API will be unique, the URL will be the same for every account: https://secure.echosign.com/services/EchoSignDocumentService15

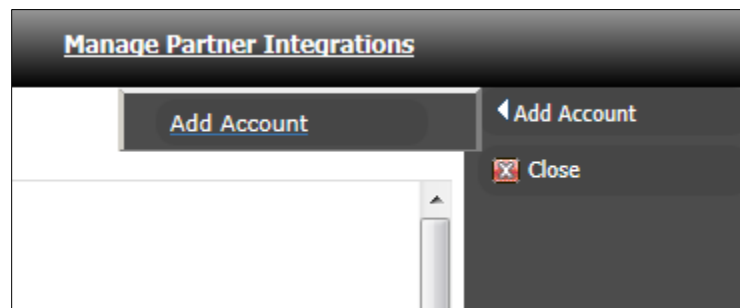


Manage Partner Integrations

After the Integration Settings have been added in the System Settings profile, login with a user that has access to General Administration. Click on Manage Partner Integrations.



From the fly out menu on the right, click on Add Account, then select Add Account.





Select EchoSign from the list of Partner Integrations available. Add in the name of the account, and then the User Name and Password that are associated with your Adobe EchoSign account.

Add Account

Partner Integration

EchoSign

Account Name

ABC Account

User Name

test123

Password

password123

Notes

Confirm

Cancel

Once the account has been added, select it from the list, and click Add Users.

Partner Integration Accounts

☒	Partner Integ...	Account Name	User Name	Input Dt	Updated Dt	Active
☒	EchoSign	QA Test Account	qatestbondus@gmail.com	4/11/13	5/7/13	Yes

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View Users

Add Users

Remove Users



An AdaptSuite user can only be linked to one Adobe EchoSign account, although you can set up multiple accounts. Check off the box next to the User ID and click Confirm. This means that the users selected have the ability to use the Adobe EchoSign integration and can send out Onboarding requests directly from AdaptSuite to Candidates.

Add Users to Partner Integration Account

Users

☒ User ID	First Name	Last Name
☐ brobertson	Barbara	Robertson
☐ christopher	Christopher	Vigil
☐ dcat	Din	Cat
☐ FA_AD58SalesBO	FA	AD58SalesBO
☐ gmorg	Gerry	Morgan
☐ indi	Indi	Babra
☐ jason	Jason	Fulwood
☐ JB	Joe	Barta
☐ joe	Joe	Trivisone
☐ larryj	Larry	Jasinover
☐ mark	Mark	Miller
☐ micki	Micki	Marvin
☐ mike	Mike	Kaine
☒ mwalker	Megan	Walker
☐ tommy	Thomas	Payson



Confirm

Close

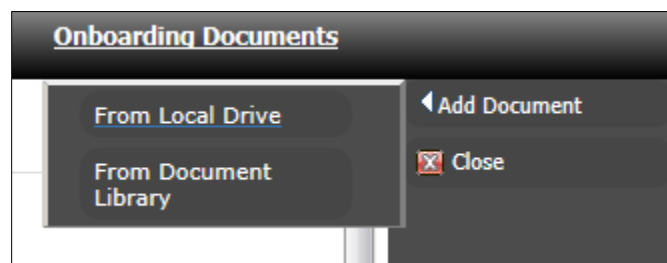


Manage Onboarding

After the Adobe EchoSign account has been added to the Manage Partner Integrations section, you can add documents to be used during the Onboarding process. From General Administration, select Manage Onboarding.



Documents can be added from a Local Drive or from the Document Library. To get started, click on the fly out menu from the right, and select Add Document. Then, select where you would like to add the document from.





The new document will default to Active. The Group items pull from one of the code groups accessible in the Manage Lists section in Administration. Examples would be Hiring Forms, Tax Forms, and Client Requirements. They are used to group 'like' documents together. For the Hiring Requirements, this indicates how the status of the form should affect the assignment/placement workflow. What type of alert would you like to send the user? Your options are Prevent Placement, Warning Only or No Warning.

Electronic Onboarding forms will be transmitted to the candidate via the Adobe EchoSign integration for electronic signature. The Storage Location selects the default storage location of the signed documents. Electronic Onboarding Forms means that the forms are stored within AdaptSuite AND in your Adobe EchoSign account. Vendor means they are stored offsite, and only with Adobe EchoSign, not in AdaptSuite. The location pulls from the system settings as a default, but can be changed for each individual document if needed.

Requires 2 Signatures means that the Candidate AND a representative from your company will need to sign the document. Finally, browse out to the location of your document and add it to AdaptSuite. Click Confirm to save the new Onboarding document

Add Document from Local Drive

Active

Y

Group

Hiring Forms

Hiring Requirement

No Warning

For Electronic Onboarding only

Storage Location

Electronic Onboarding Forms

Requires 2 Signatures

☐

Select one Document only

Attachment

	Name ▲	Description	Default	Size	Type	Created By	Created On	M B
	TagDirectDeposit	TagDirectDeposit		30.208KB	doc	Megan Walker	6/4/13	M W

Confirm

Cancel

Add Next Form



Once the document has been added, you will see it in the list of Onboarding Documents. In order to allow access to the document, branches must now be added. A single document can be associated to one or more branches. When on a Candidate's record, the forms displayed for selection will be based on the Candidate's branch. For example: if the candidate is associated to Branch B, then the forms available for selection are forms associated to Branch B in the Manage Onboarding section in Administration.

Put a check mark in the box next to the file name you wish to modify, and then click Add Branch.

Onboarding Documents

Forms

☒	File Name	Display Name	Group	Hire Req	Storage Loc ...	2 Signatures	Active
☐	Credit_Drug_textTag	Credit_Drug_textTag	Hiring Forms	Warning Only	Electronic Onboarding Forms	No	Y
☐	CreditRef_Disclosure_Notice	CreditRef_Disclosure_Notice	Hiring Forms	Warning Only	Electronic Onboarding Forms	No	Y
☐	drugtest	drugtest	Hiring Forms	Prevent Placement	Electronic Onboarding Forms	No	Y
☐	Employment Agreement	Employment Agreement	Hiring Forms	Warning Only	Electronic Onboarding Forms	No	Y
☒	TagDirectDeposit	Direct Deposit Authorization Form	Hiring Forms	No Warning	Electronic Onboarding Forms	No	Y

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The Add Branches to Forms screen opens. Place a check mark in the box next to the branches that should be assigned access to this document. Click the Confirm button.

Add Branches to Forms

Branches

☒	Branch Code	Branch Name	Active?
☒	Central Atlanta	Central Atlanta	Yes
☒	Default Branch	Default Branch	Yes
☒	East Atlanta Branch	East Atlanta Branch	Yes
☐	North Atlanta	North Atlanta	Yes
☐	Northeast Atlanta	Northeast Atlanta	Yes
☐	Northwest Atlanta	Northwest Atlanta	Yes
☐	South Atlanta	South Atlanta	Yes
☐	Southwest Atlanta	Southwest Atlanta	Yes
☐	West Atlanta	West Atlanta	Yes

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Confirm Close

Click on the View Branches button if you wish to see a list of all branches with access to the form.

☒ TagDirectDep
osit

Direct Deposit
Authorization Form

Hiring
Forms

No Warning

Electronic
Onboarding
Forms

No

Y

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Update Single Update Multiple View Branches Add Branch Remove Branch

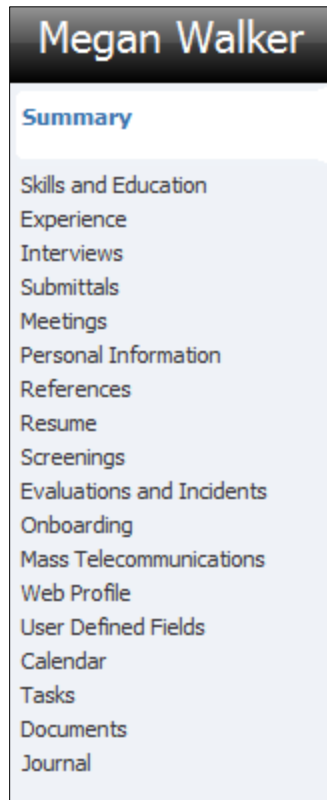
Branches

Branch Code	Branch Name
Central Atlanta	Central Atlanta
Default Branch	Default Branch
East Atlanta Branch	East Atlanta Branch



Candidate Onboarding Process

Once the Onboarding documents are added to Administration, the documents can be used to send to Candidates for completing and an electronic signature. From the Candidate record, click on the Onboarding segment link from the main menu.





On the Onboarding segment, click on the Add button to add a new Onboarding document.

Onboarding

« < 1 of 1 from [Search Results](#) > »

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|| < > ||

AddUpdateRemoveSend Form RequestEmail

The Add Onboarding Record workflow has three parts. The top Search Filter section is used to isolate forms to use in the workflow. The number of forms authorized for use by the branch may be numerous and this offers an easy way to extract forms for use without paging through all available. The next section is a list box of authorized Onboarding Forms. The bottom section is cross reference and follow-up fields. Associate a company or job order to an Onboarding form and create a date to check on the status of the form.

You can add a cross reference to a company, job order or assignment by searching and selecting a record of one of those types. This will add a link to that record in the form request record created at the conclusion of this workflow. Enter a date to set a reminder to follow-up on the form request(s).

Add Onboarding Record

Search Filters

Name  

Group 

☒	Name	Group	Hire Req	Expiration Date
☒	Direct Deposit Authorization Form	Hiring Forms	No Warning	

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Navigation:    

Candidate 

Company  

Job Order  

Assignment  

Follow-up Date    By 

Alarm? ☒ Time 



Once the Onboarding record has been added, select the check box for the record, and click on Send Form Request from the bottom of the screen.

Onboarding

« < 1 of 1 from [Search Results](#) > »

☒	OB ID	Name	Status	Company	Job Title	Hire Req	Recvd Dt	E-Sent Dt	Group	E
☒	236	Direct Deposit Authorization Form	New			No Warning			Hiring Forms	

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Add
 Update
 Remove
 Send Form Request
 Email



The candidate's email address is populated and non-modifiable. If the candidate does not have an email address the workflow will not open. You can send a copy of the email to another address by using the CC line. Email addresses are separated by semi-colon. This copy is not a link to the actual form(s) to be signed but a notification that forms are out for signature. Add a message in the free text box (1000 character limit).

The E-Sign Options are listed below the email address and message box. Enter the number of days the candidate has to sign the form(s) before they expire. After a form signature request expires a new request must be sent. Set a reminder to automatically notify the candidate to sign and return the form(s). Security Options are available to restrict access to the form when viewing and signing; if a security option is selected a password must be supplied. The user should then notify the candidate if a password is required work with the document.

The forms selected from the Onboarding segment are displayed below the security options section. If a form should be removed from the list, select the form and click the icon. Click confirm to continue the workflow or cancel to abort.

Send Form Request to Candidate

Recipient

meganvwalker@gmail.com

CC(s)

Separate email addresses by ";"

Subject

Please complete Direct Deposit Authorization Document

Message

Megan,

Please complete the Direct Deposit Authorization Form so that we can start processing this for you starting next week. If you have it to us by Friday, that would be great.

Any questions, please let me know

Thanks

Brenda

(1000 Max.)

E-Expiration Date

14 Day(s)

Reminder

Weekly

Signature Type

ESIGN

Security Options

☐ Password Protect Viewing
 ☐ Password Protect Signing

Password

Form(s)

☒	Form Name	Storage Location	Required
☐	TagDirectDeposit	Electronic Onboarding...	No



Once the E-Onboarding request has been sent out, this section can be viewed by clicking on the Onboarding ID from the Onboarding segment on the Candidate record. This contains all of the fields set up when creating the form request, and will show the current Status and any Status Details for this document.

E-Onboarding

Recipient	meganvwalker@gmail.com	Status	E-Submitted
CC(s)		Status Details	
Subject	Please complete Direct Deposit Autho		
Message	Megan, Please complete the Direct Deposit Authorization Form so that we can start processing this for you starting next week. If you have it to		

E-Expiration Date	14	Day(s)
Reminder	Weekly	
Signature Type	ESIGN	
Security Options	☐ Password Protect Viewing ☐ Password Protect Signing	
Password		

E-Sent Date	6/5/13	By	Megan Walker
Received Date			



Onboarding E-mails – Candidates Process

Once the form request has been sent, the Candidate will receive an e-mail, notifying them that the document is waiting to be read, completed and eSigned. The e-mail will contain a link for them to click and access the document. The e-mail will also contain any expiration information, if you indicated there was an expiration date.

Send. Sign. Done.™

QAtest Account (Bond International Software QA) originally wrote:

"Megan, Please complete the Direct Deposit Authorization Form so that we can start processing this for you starting next week. If you have it to us by Friday, that would be great. Any questions, please let me know Thanks Brenda"

[Click here to review and eSign Please complete Direct Deposit Authorization Document](#)

With just **one simple step**, you can electronically sign this document. After you eSign **Please complete Direct Deposit Authorization Document**, all parties will receive a final PDF copy by email.

Do you need to forward this to a party authorized to sign it? [Click here](#)

This document is available for signing until June 19, 2013 and will expire thereafter.



The Candidate will then review the document online. Depending on the nature of your document, they may have fields to complete, if text tags were used. A button at the bottom of the document will exist to Click to eSign. NOTE: For more information the process, consult with your Adobe EchoSign Acct Manager.

1
2

Direct Deposit Authorization Form

1. Review the document.

2. Fill out any required fields.

You need to **sign in 1 location(s)** and **fill in 8 mandatory field(s)**.

3. Click the button at the bottom to eSign.

Electronic Funds Transfer Authorization

I hereby authorize my employer to directly deposit my pay in the bank account(s) listed below in the percentages specified. (If two accounts are designated, deposits are to be made in whole percentages of pay to total 100%.) I have attached a voided check or deposit slip for each account specified below. This authorization is to remain in force until the company has received written authorization from me of its termination or change.

Also, I grant ABC Staffing the right to correct any Electronic Funds Transfer resulting from an erroneous overpayment by debiting my account to the extent of such overpayment.

Name:

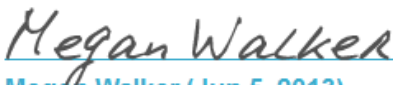
Address: Line 1:
Line 2:
City: State: Zip:

[Click to eSign](#) OR [I will not eSign this document Somebody else should sign](#)

The Candidate enters their name (either typing or drawing if they have a tablet) and clicks Apply to save.

1 Enter Your Name
2 Review Your Signature
3

OR [Provide your Web Identity](#) [f](#) [in](#) [s](#) [?](#)



Megan Walker (Jun 5, 2013)

[I would like to draw my signature](#)

[Apply](#) [Cancel](#)



If the document was set up to require two signatures, the user submitting the request will need to log in and also e-Sign the document.

Street Address:	
City, State & Zip:	
Telephone:	
Account Number:	294574589389
Routing Number:	061000052
Percent of pay:	20
Signature: <u>Megan Walker</u> Megan Walker (Jun 5, 2013)	Signature:  Click to Sign
Email: meganwalker@gmail.com	Email: qatestbondus@gmail.com

The Candidate will receive an e-mail indicating that the document is completed and filed. They will have link to access the saved document.



Electronic Funds Transfer Authorization

I hereby authorize my employer to directly deposit my pay in the bank account(s) listed below in the percentages specified. (If two accounts are designated, deposits are to be made in whole percentages of pay to total 100%.) I have attached a voided check or deposit slip for each account specified below. This authorization is in effect in force until the company has received written authorization from me of its termination or change.

Also, I grant ADP Inc. the right to correct any Electronic Funds Transfer resulting from an erroneous assignment by debiting my account to the extent of such overpayment.

Name: Megan Walker
Address: Line 1: 123 Old Road
Line 2:
City: Roswell State: GA Zip: 30076
Telephone:
Company Use Only: Effective Date: _____

Account #1
Checking ☒ Savings ☐
Bank Name: Bank of America
Street Address:
City, State & Zip:
Telephone:
Account Number: 18574521364
Routing Number: 061000052
Percent of pay: 80

Account #2
Checking ☒ Savings ☐
Bank Name: Bank of America

**Direct Deposit Authorization Form
(between Megan Walker and Bond International Software QA) is
Signed and Filed!**

From: QAtest Account (Bond International Software QA)
To: Megan Walker

Attached is a final copy of Direct Deposit Authorization Form.

Copies have been automatically sent to all parties to the agreement.

You can view [a copy](#) in your EchoSign account.

Why use EchoSign:

- Exchange, Sign, and File Any Document. In Seconds!
- Set-up Reminders. Instantly Share Copies with Others.
- See All of Your Documents, Anytime, Anywhere.



Reviewing Completed Onboarding Forms

Once completed, a signed PDF version of the document will be sent back in to AdaptSuite and added back to the appropriate Onboarding record for the Candidate. The document can then be opened and read as needed.

Summary

Candidate	Adam Garnder	Status	E-Completed
Form Name	Employment Agreement	Hiring Requirement	Warning Only
Form Group	Hiring Forms	Received Date	6/6/13
		Expiration Date	

Company
Job Order
Assignment

Onboarding Forms

Name ▲	Description	Default	Size	Type	Created By	Created On	Modified
audit report.pdf	audit report		56.262KB	pdf	WebServiceUser	6/6/13	WebSer
Employment Agreement.pdf.pdf	Employment Agreement.pdf ✓		190.029KB	pdf	WebServiceUser	6/6/13	WebSer

Input	6/6/13	By	Megan Walker	ID	242
Updated	6/6/13	By	Megan Walker		



An audit report document will also come back for each form. This will provide a log of the steps completed during the life cycle of the document. Milestones such as eSigning by the Candidate or User will be time stamped.

-  **Document created by Development Account (devtestbondus@gmail.com)**
June 05, 2013 - 3:08 PM PDT - IP address: 207.106.161.3
-  **Document emailed to Din cat (din.cat@bond-us.com) for signature**
June 05, 2013 - 3:08 PM PDT
-  **Document viewed by Din cat (din.cat@bond-us.com)**
June 05, 2013 - 3:09 PM PDT - IP address: 207.106.161.1
-  **Din cat (din.cat@bond-us.com) uploaded the following supporting documents:**
 -  **depositslip**
 -  **resumetext**June 05, 2013 - 3:11 PM PDT
-  **Document esigned by Din cat (din.cat@bond-us.com)**
Signature Date: June 05, 2013 - 3:11 PM PDT - Time Source: server - IP address: 207.106.161.1
-  **Signed document emailed to Din cat (din.cat@bond-us.com) and Development Account (devtestbondus@gmail.com)**