SAP Fieldglass

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eSignature with DocuSign

Content

1 eSignature with DocuSign

ESignature workflows support the needs of buyers and their suppliers or workers to have documents electronically signed using DocuSign as the provider.

DocuSign is the global leader in electronic technology for facilitating electronic exchanges of contracts and signed documents. When the DocuSign integration is enabled, standard functionality is available that allows buyers to set up their workflows using activity items. For more information about the company and its services, visit the DocuSign website: www.docusign.com .

DocuSign is a system of record and all signatures are managed within a DocuSign envelope (a unique transaction ID within the DocuSign system). DocuSign can house multiple types of documents that require signature management between buyers, suppliers, and workers.

eSignature Workflows

The integration with DocuSign allows for three different workflows to be created and used to acquire electronic signatures within DocuSign.

- DocuSign managed documents – this workflow allows buyers to utilize templates managed in DocuSign to acquire an electronic signature.
- SAP Fieldglass managed work order contracts – this workflow allows buyers and suppliers to utilize SAP Fieldglass XSL templates to produce contingent work orders and statements of work. SAP Fieldglass then sends the document to DocuSign for electronic signature. DocuSign still manages the electronic signatures, but a copy of the contract is returned to SAP Fieldglass and kept with the work order record.
- Manually uploaded attachments – this workflow allows buyers and suppliers to manually attach a document to a contingent work order or statement of work. SAP Fieldglass then sends the document to DocuSign for electronic signature. DocuSign still manages the electronic signatures, but a copy of the contract is returned to SAP Fieldglass and kept with the work order record.

> ⓘ Note
>
> DocuSign eSignature workflows are currently not available for documents and attachments for profile workers.

Getting Started

A Configuration Manager must enable the *eSignature provider* company configuration with DocuSign selected as the provider, and set up the integration for buyer companies. Your company must have at least one DocuSign account established. Your DocuSign account information is required for the integration.

2 Requirements to Get Started

To get started, a Configuration Manager user will need the following DocuSign account information required to set up the integration:

- **DocuSign URLs** - It is important to collect DocuSign URLs for both test and production environments. The URLs listed below are typically used for the DocuSign test and production environments, however they should be confirmed by your company. Note that the production environment URL requires the data center to be included the web address. DocuSign data center codes are listed here. https://status.docusign.com/?_ga=2.245504708.1771740156.1575318851-1144599369.1575318851 Contact DocuSign if additional assistance is required.
  - Test: https://demo.docusign.net/restapi
  - Production: https://[insert data center].docusign.net/restapi
- **DocuSign Account ID** - Buyers may have multiple production DocuSign accounts that they wish to utilize within a single Fieldglass buyer instance. All DocuSign account IDs that you wish to use for the integration must be provided. The DocuSign accounts used for the integration should have the Time Zone for API set to the UTC at the account level.
- JSON Web Token (JWT) - The DocuSign integration uses OAuth to authenticate. You'll need to generate a JWT for authentication for each end point. Once you've generated your JWT you can use the Configuration Manager dashboard to update your SAP Fieldglass DocuSign connection settings. To generate a token, use the following link: https://developers.docusign.com/platform/auth/jwt/jwt-get-token/ . For information about using the Configuration Manager to manage your DocuSign settings, see Create and Manage DocuSign End Points [page 4].

After you have provided the required DocuSign account information, a Configuration Manager will need to activate the *eSignature provider* company configuration with DocuSign as the provider and create the end points that connect your company's Fieldglass instance to the DocuSign account using a DocuSign provided integrator key along with the URL and account credentials your company has provided.

The next step is to configure your Fieldglass instance for use with DocuSign.

2.1 Create and Manage DocuSign End Points

DocuSign end points can be managed by your company's configuration manager.

Prerequisites

If you're setting up your DocuSign integration for the first time or you're editing your end points to add a new JWT authentication token, you'll first need to generate an access token with JSON Web Token (JWT) Grant authentication here . You'll also need the DocuSign Integration Key.

Context

You can use the DocuSign End Points tile to update your existing DocuSign end points, or add new end points. To update your existtng settings, select the *ID* from the list and choose *Edit*. To add new information, choose *Add* and follow the steps below.

Procedure

1. Enter a unique *ID* for the end point. This value cannot be changed once the settings are saved.
2. Enter the *End Point* URL.
3. Enter the DocuSign *Integrator Key*.
4. Provide the *User ID* for the end point.
5. Provide the JWT you previously generated in the *Private Key* field.
6. Optionally provide your DocuSign account *Username* and *Password*.
7. If necessary, enter the *API Account ID*.

Results

If you are upgrading your DocuSign end point, the JWT entered in the Private Key field will be used to authenticate your DocuSign integration.

3 Buyer Administration

Buyers must create DocuSign templates and eSignature Provider templates before configuring eSignature workflows with DocuSign.

DocuSign Templates

SAP Fieldglass has built a DocuSign template driven process and therefore it is an extremely important to configure templates in DocuSign for appropriate use with the Fieldglass eSignature processes.

DocuSign templates allow you to standardize the signing process by predefining certain information like recipient roles, recipient emails, signature types, and signing fields. The creation and management of DocuSign templates is managed within your DocuSign account, however you'll need the DocuSign template IDs in order to configure eSignature processes in SAP Fieldglass. Ensure the templates are configured in both DocuSign test and production accounts as the template ID could vary. If you have multiple DocSign accounts, confirm the template is configured in the same account as the SAP Fieldglass integration user.

Defining the Signing Document

If the signing document is defined in DocuSign, the PDF is stored within the template. If the signing document is defined in Fieldglass, a blank PDF can be loaded which will be replaced with SAP Fieldglass' document via the API.

Signature placeholders can be defined in a document. The following SAP Fieldglass data fields are included in the standard API and can be used to prepopulate a signature document as follows:

- DocuSign's "Full Name" tag is populated with signee name from Fieldglass.
- DocuSign's "Email" tag is populated with signee email from Fieldglass.
- If applicable, Job Posting Title from Fieldglass can be used by creating a DocuSign "Text" tag with a data label of "SAP Fieldglass Title".

The following anchor tags can be enabled by SAP Fieldglass for use in your DocuSign documents:

- The FG_SUPPLIER_NAME tag is populated with the supplier company name from Fieldglass.
- The FG_BUYER_NAME tag is populated with the buyer company name from Fieldglass.

When added to templates, invisible ink is used in documents so that the information is only visble to users who are authorized to see it.

When the company configuration is enabled, DocuSign eSignature Templates can be created in the Admin menu. eSignature templates establish a link to a buyer's DocuSign templates and therefore, buyer's must have templates set up in DocuSign prior to setting up eSignature templates in Fieldglass.

3.1 DocuSign Signing Groups

Signing Groups can be configured in DocuSign to accommodate situations where the signee can be any user who is a member of a group. Users of the group are identified in DocuSign and a Group ID is provided that can be used on Fieldglass eSignature Provider Templates. Users who are assigned to a group in DocuSign will be notified when a document is ready to be signed. Once a user from the group signs the document, no one else from the group can act on the document and the workflow continues. If the document is declined by anyone in the group, the workflow ends.

3.2 Creating DocuSign eSignature Provider Templates

eSignature provider templates in SAP Fieldglass provide a link to your company's templates in DocuSign.

To create an eSignature Provider Template, the following information is needed from the DocuSign template:

- *Template ID* is the Template ID provided by DocuSign. It is extremely important that this is accurate. This ID is used within the API transaction and if not accurate, the API will fail.
- The *Name* will default to the DocuSign template name. The name will appear for selection when configuring and initiating an eSignature process.
- *API Account ID* is provided by DocuSign.
- Recipient role and the signing order are defined on the DocuSign template. The *Recipient Role* and *Signing Order* in the eSignature Provider Template must match the information entered on the corresponding DocuSign template. If not, the API will fail.
- Multiple signers can be added to a single signing level to sign in parallel by adding the same level number for the *Signing Order* field. For example, to have multiple signers on level 2, add "2" to the Signing Order field for each signer. They can sign in any order, and once all the signers in the level have completed their signatures, the document progresses to the next signing level.
- If Group IDs are configured in DocuSign, the *Signing Group* can be set to Yes, and the *Group ID* will need to be provided.

3.3 Configuring Users

Before you execute workflows, you will need to identify users who will be allowed to electronically sign documents for your company. The following user profile flags can be enabled:

- *Can be Selected to Electronically Sign a Document* - users will be available to be selected as a signee when the workflow is initiated.
- *Can Sign/Attach Activity Item Contracts* - users will be able to act on **Manually Sign A Document** and **Add Attachment to Work Order** activity Items.

If Groups IDs are used on eSignature templates, all users who should be notified to sign a document must be included in the group in DocuSign.

3.4 XSL Templates for Fieldglass Managed Document Workflows

XSL templates in Fieldglass can be used to generate a work order or statement of work contract that is automatically attached to the corresponding document. This supports workflows where documents are managed in Fieldglass and sent to DocuSign to manage the signatures. XSL templates can be uploaded using the XSL Template admin object.

Placing DocuSign signature fields on SAP Fieldglass generated documents

When XSL templates are used to generate contracts, you may wish to define the various fields the signee is required to complete in the XSL template. Within DocuSign, there are multiple signer fields that can be added to a document with tags that guide the user through the signing process. When implementing DocuSign signature fields within a Fieldglass generated document, the following considerations should be discussed amongst the buyer, DocuSign, and SAP Fieldglass:

- Within a DocuSign template, the Autoplace function should be leveraged. Refer to DocuSign Support for more information.
- The DocuSign Autoplace function requires a string of characters to be defined per signature field. Depending on the Fieldglass generated document being buyer vs supplier defined, thought should be given to how the Autoplace string of characters will be defined within the buyer's or supplier's XSL that is stored in Fieldglass.

3.5 Configuring eSignature Workflows

Activity items must be configured to design your company's eSignature workflows.

Activity items in Fieldglass are used to trigger work items and can be used in workflows to manage the document signing process. Multiple workflows can be setup and used for different types of documents that require electronic signature. Your desired contract workflow will determine which activity items need to be setup. For example, a buyer may require an initial step, such as document validation, prior to triggering the DocuSign integration.

At a minimum, an activity item with the Completion Type: Initiate eSignature Process must be configured to kickoff the eSignature workflow. The *Actor* selected in this activity item determines the role responsible for identifying the people who need to sign the document and initiate the workflow. The action that determines when the workflow should be initiated will trigger a work item and notification.

> Example
>
> For a statement of work contract, the SOW Owner may be identified as the person who should initiate the workflow once the statement of work response is approved. On the activity item, SOW Owner would be selected as the Actor to initiate the workflow. The approval of the statement of work response will trigger the work item and notification will be sent to the Owner of the statement of work. The SOW Owner can then act on the work item and initiate the workflow.

When configuring an Initiate eSignature Process activity item, a DocuSign eSignature Template must be selected. Once an eSignature template is selected, the *Recipient Role* and *System Role* fields become available for selection on the activity item.

- The Recipient Roles available to be selected are based on those entered on the eSignature Provider Template, which match the Recipients on the corresponding DocuSign template. If recipients are configured on the template, at least one recipient role is required for each template added to the activity item. If there are no recipients configured for the selected template, the following will display: *No recipient role defined*.
- A System Role can be selected if there is a corresponding role available for the recipient role selected. The system role automatically pulls information about the signee, such as name and email address, and displays that information when the workflow is initiated.

> ⓘ Note
>
> This Completion Type is available for all buyers but cannot be configured unless the eSignature provider company configuration is enabled and an eSignature template is created for use with DocuSign.

Your workflows will determine other activity items that need to be defined. Others may include, but are not limited to the following:

- Add Attachment to Work Order
- Validate a Document
- Add Attachment to Statement of Work

3.5.1 Configuring eSignature Workflows with Conditional Activity Item Rules

You can configure your eSignature workflow to trigger based on specific, company-tailored conditions by using Rule Engine rules.

There are situations where companies need documents to be signed electronically according to predefined criteria. This approach is available using the Conditional Activity Item Rules functionality with eSignature workflows.

> ⓘ Note
>
> This functionality can't be used with prerequisites.

When creating *Manage Contract/eSignature* type activity items that have *Initiate eSignature Process* completion types, on the form page, select a rule from the *Rule (optional)* dropdown field (the dropdown displays all previously configured rules created from the Rule Engine admin object). This action assigns the rule to the activity item.

When the predefined rule conditions for the activity item are met, the activity item is added to the document. Supported objects include contingent and services work orders, contingent and SOW worker records, and Resource records when the activity item is configured with the appropriate activity item type.

ⓘ Note

The Rule (optional) field is only available when certain values are chosen for the When will this be due at document creation? field. If an incompatible value is chosen, the Rule (optional) field doesn't display.

3.5.2 Auto Initiating eSignature Workflows

You can configure the eSignature workflow to begin automatically in order to expedite document signing.

The *Auto Initiate eSignature Process* rule, which enables the auto initiate eSignature workflow, is available when creating activity items that have a *Manage Contract/eSignature* type and *Initiate eSignature Process* completion type. The rule only displays when the *eSignature Provider* selection is set to *DocuSign*. Select *Yes* on the rule to enable the workflow.

Whenthe rule is enabled, no user directly receives a work item during this process; however, an actor must still be chosen for the *Actor* field in case any manual intervention is needed during the process.

ⓘ Note

When the Auto Initiate workflow is successful, the Mark As Complete message, notification, and work item that is normally sent to activity item actors is not sent in this case to the selected actor.

When choosing a DocuSign eSignature template, ensure that the template adheres to the following:

- A selection must be chosen from the *System Role* dropdown menu for signing levels. The system role must be only one user and not a group of users. Templates can't include levels that were configured with signing groups, as signing groups aren't compatible with this type of workflow.

  ⚠ Caution

  If the Auto Initiate process is not possible due to the System Role user having a Closed or Inactive status, the system does not initiate the process and the activity item follows the manual process as though the Auto Initiate eSignature Process rule is set to No. The work item and notification is sent to the actor using the standard Mark as Complete messaging.

- Templates must have their *Define Recipient Information* field set to *Yes*.
- Only one DocuSign template can be selected.

When new rule is enabled, the Initiate eSignature Process completion type activity items are automatically initiated. Any levels, prerequisites, and due on information are all possible triggers for an activity item to initiate. Regardless of how an activity item has been associated to a document (manually, rule engine, activity checklist, etc.), the auto initiate process triggers the activity item once the work item is due. When an activity item with the rule enabled is reopened, the activity item auto initiates again.

Activity items that have been withdrawn don't auto initiate again.

→ Remember

Without the Auto Initiate eSignature Process rule enabled, the *Persons who have received Work Item* field on documents normally lists the name of the person who actually received the work item. When the Auto Initiate eSignature Process rule is enabled, a user does not receive the work item, but they have the ability to manage it, therefore the name displays as *Activity Item Manager*.

⚠ Restriction

This functionality is currently not available for consolidated workers.

3.6 System Roles

System Roles can be used when configuring Initiate eSignature Process activity items to automatically populate the name of the person in the selected role on the Initiate eSignature Process modal.

Using system roles eliminates the need to manually select a user, thus bringing greater efficiency and accuracy in the signing process. The table below describes the system roles that are available to be selected on the eSignature template.

Available System Roles

System Role	Notification Recipient
Job Seeker/Worker	The job seeker, worker, or SOW worker.
Work Order Owner's Supervisor	The Primary Supervisor listed on the user's profile for the Owner on the work order.
Cost Center Owner	The Owner of the Primary Cost Center on the worker, work order, or work order revision. If the Initiate eSignature Process is triggered prior to the worker record being created, the recipient comes from the value on the work order for contingent workers or the value on the statement of work for SOW workers. If it is triggered after the worker is created, the recipient comes from the value on the worker record.
Statement of Work Owner's Supervisor	Then Primary Supervisor listed on the user's profile for the Owner on the statement of work.
Coordinator	The Coordinator on the job posting.
SOW Owner	The Owner on the statement of work.
Distributor	The Distributor on the job posting.
Work Order/Work Order Revision Owner	The Owner on the work order or work order revision.
Job Posting Owner	The Owner on the job posting.
Worker's Supervisor	The Supervisor associated to the Primary Cost Center on the work order.
Job Posting Owner's Supervisor	The Primary Supervisor listed on the user's profile for the Owner on the job posting.

4 Triggering eSignature Workflows

The setup of Initiate eSignature Process activity items determines when eSignature workflows are triggered.

The user selected as the Actor on the Initiate eSignature Process activity item is responsible for making sure the correct recipients receive the notification from DocuSign along with a link to the document in DocuSign. When triggering the workflow, the Initiate eSignature Process modal displays and the actor will select a template and the recipients who should sign the document.

If a system role is used on the template, the signee information is automatically populated on the modal as a recipient. If a Group ID is used on the template, the name of the group is also automatically populated on the modal and notification will be sent to all members of the group. Other recipients can be selected based on the template definition.

Recipients can be:

- The person responsible for initiating the process - If the person who receives the work item to begin the DocuSign process is also required to sign the document, that person would select themselves to receive notification from DocuSign.
- An existing user - Users who have the *Can be Selected to Electronically Sign a Document* user profile option enabled and have access to the document can be selected from a list.
- Manually entered - A name and email address can be entered for the person who should receive the notification from DocuSign.

Workflow Actions

Once signers are selected, the process can be initiated. The selected template information and all of the signer information entered by the actor is sent to DocuSign. If there is a Add attachment to Work Order prerequisite to the Initiate eSignature Process activity item, the document attached to the Work Order will be sent also.

- DocuSign opens an envelope for the document to be signed and notifies the signers via email.
- Once all recipients sign the document, the work item is auto-marked complete and the DocuSign envelope is closed.
- If any of the recipients decline to sign, the DocuSign envelope is closed. In this case, the activity item remains active and the actor can initiate the eSignature process again, if needed.

The Actor who initiates the eSignature process can:

- Resend DocuSign Invitation - In situations where the signature request email gets deleted or accidentally lost, you can resend invitation to sign. This option is available on the activity item once the Initiate eSignature action has occurred and before the envelope is completed in DocuSign. Once the button is selected, the email invitation is resent to the signer(s) at the current level of the signing process. For signing groups, the invitation is resent to all the members of the signing group. When an invitation is successfully resent, a comment is automatically generated in the Comments section of the activity item details page.

- View eSignature Status - the eSignature status can be viewed at any time when the status of the activity item is Pending. This action displays a preview of the document along with its status. Possible document statuses are Pending Signature, Signed, and Rejected.
- Withdraw eSignature Process - the actor can use this option to end the process at any time while the document is Pending Signature or after the signer has declined to sign the document and the status is Rejected.

4.1 DocuSign Managed Documents

The DocuSign Managed Documents workflow allows buyers to utilize their DocuSign templates to display documents and acquire the necessary electronic signatures.

The following is required to use this workflow:

- A DocuSign template
- An SAP Fieldglass eSignature Provider template
- At least one Initiate eSignature Process activity item

> ⓘ Note
>
> When DocuSign templates are used to produce documents, tools within DocuSign can be used to enhance the electronic signature process. Refer to DocuSign for information on using these tools.

Workflow Example

The following is an example of an activity item that supports the DocuSign Managed Documents workflow. Note that all fields are not described in the table. All required fields and other desired information should be entered as well.

Field	Sample Value
Action	Assign Recipients for eSignature
Completion Type	Initiate eSignature Process
Usage	Mandatory
Prerequisite	(Not required.)
Actor	Supplier Account
Due	On Work Order Accept
eSignature Provider Template	(Select one ore more templates.)
Recipient Role	Worker
SAP Fieldglass Role	Job Seeker/Worker

In the example setup above, the activity will be triggered when the supplier accepts the work order. The supplier (Actor) is responsible for initiating the workflow and identifying the worker (Recipient Role) required to sign the document. Fieldglass will populate the worker's details when the supplier initiates the process.

4.2 Send Attachments to DocuSign

The Send Attachments to DocuSign workflow can be used to allow customers to manage their own documents and still have DocuSign manage the signatures. This workflow supports documents that are manually attached to work orders and documents that are generated using the XSL template admin object and automatically attached to the work order.

The following is required to use these workflows:

- A DocuSign template
- An SAP Fieldglass eSignature Provider template
- At least one Initiate eSignature Process activity item
- An Add Attachment to Work Order activity item

In these workflows, the Initiate eSignature Process activity item will be set up with an Add Attachment to Work Order activity item as the prerequisite. This ensures the attachment is added prior to initiating the eSignature process.

The DocuSign workflows require that a template be set up in DocuSign, even if the document is being managed outside of DocuSign. The eSignature Provider Template must also be set up and it must include a template ID from DocuSign.

When this workflow is used, it’s recommended that a blank document is used when creating the DocuSign template to create a placeholder. When an attached document is sent to DocuSign for electronic signature, DocuSign swaps out the placeholder document used to set up the template with the attached document.

> ⓘ Note
>
> Documents that are attached to work orders manually or automatically and sent for electronic signature in DocuSign do not have access to any of the DocuSign tools that may enhance the eSignature process, such as signature anchors.

Workflow Example

The following is an example of an activity item that supports the Send Attachments to DocuSign workflow. Note that all fields are not described in the table. All required fields and other desired information should be entered as well.

Field	Sample Value
Action	Attach Work Order Contract
Completion Type	Add Attachment to Work Order

Field	Sample Value
Usage	Mandatory
Prerequisite	(Not required.)
Actor	Administrator
Due	On Work Order/ Work Order Revision Accept
Document XSL Template	(Select a template.)

In the example setup above, the activity will be triggered when the supplier accepts the work order/ work order revision. The supervisor (Actor) is responsible for either attaching the contract for manual attachment workflows or verifying the auto-attached contract for auto-generated attachment workflows.

This item will be used as a prerequisite on an Initiate eSignature Process activity item. It will automatically be marked complete when an attachment is added (automatically or manually). Once marked complete, the Initiate eSignature Process work item will be triggered.

The Initiate eSignature Process activity item can be setup with the prerequisite as follows. Note that all fields are not described in the table. All required fields and other desired information should be entered as well.

Field	Sample Value
Completion Type	Initiate eSignature Process
Usage	Mandatory
Prerequisite	(Select the Add Attachment to Work Order activity item.)
Actor	Supplier
Completion Based on Prerequisite	Yes
eSignature Provider Template	(Select one ore more templates.)

5 Supplemental DocuSign Workflows

Additional options can be configured to supplement your DocuSign esignature workflows.

- The **DocuSign Certificate of Completion** option provides an audit trail for a completed DocuSign esignature workflow for compliance purposes. The certificate is permanently stored in the SAP Fieldglass application.
- The **Termination Letter** esignature workflow supports situations that require a signed termination letter be stored on the worker record.

5.1 DocuSign Certificate of Completion

Often companies require a permanent audit trail for a completed DocuSign esignature workflow for compliance purposes. DocuSign provides this information in a Certificate of Completion that is permanently stored in the SAP Fieldglass application.

The DocuSign Certificate of Completion is available when a signature workflow is completed and it includes the sender, signer, approver, and recipient actions of the DocuSign envelop. When this feature is enabled, the Certificate of Completion will be attached and stored alongside the associated document in SAP Fieldglass.

This functionality uses an API to retrieve the Certificate of Completion attachment.

To use this option, the following set up is required:

- The *DocuSign certificate of completion* company configuration must be enabled.
- The *Attach Certificate of Completion to Parent Document* field must be enabled for your DocuSign end point.

When this feature is enabled, the Certificate of Completion will be attached when the following activity item types are triggered and completed:

- Add Attachment to Contingent Work Order
- Add Attachment to Statement of Work
- Manage Contract/eSignature - Initiate eSignature Process

5.2 Termination Letter eSignature Workflow

SAP Fieldglass supports esignature workflows that require a signed termination letter be stored on the worker record.

This workflow supports situations where termination is planned on a certain date as well as situations that require immediate termination. In both scenarios, when a termination letter must be signed and stored on the worker record, the initiate esignature process can now be triggered twice to accommodate both the onboarding contract signature process and the termination letter signature process. Once the termination signature process is complete, the signed termination letter is stored on the worker record.

To use this workflow, you'll need to configure a corresponding template in DocuSign. In SAP Fieldglass you'll need to create a new link to your template in DocuSign using the *DocuSign eSignature Template* admin object. In addition, if you want to have the termination letter automatically generated and uploaded to the work order, you'll need to configure and upload an XSL template.

Configure Activity Items

Add Attachment to Contingent Work Order

This activity item has to be configured with the *When will this Activity Item be due?* field set to one of the following options: *On Worker Close* or *On Worker End*. On Worker Close supports situations that require immediate termination and is triggered when the worker is closed. On Worker End supports situations where termination is planned and it is triggered after the worker is closed on the Actual End Date.

When an activity item of this type is attached that is due on Work Order / Work Order Revision Accept, the system will allow another activity item of the same type as long as it is due on Worker Close or Worker End Date. If the due type is the same as one that is already attached to a work order, the system will replace it.

Initiate eSignature Process Actvity Item

This activity item is needed to define the DocuSign template and the recipients who are required to sign the termination letter.

> ⓘ Note
>
> The termination wofklow does not support the Validate a Document activity item. If this activity item is used, when the worker is closed, the activity item will be canceled and the Validate and Reject buttons are no longer available.

Using the Termination Letter Workflow

Sample Workflow

1. Notification of worker termination.
2. Termination activity item is manually added to the work order.
3. Worker is closed.
4. Termination letter is sent to the supplier and is signed in DocuSign.
5. The signed letter is attached to the work order.

> ⓘ Note
>
> If a work order that is still in Accepted status (not yet confirmed) has a termination activity item attached, that activity item will be canceled if the work order is closed, as per standard functionality. Only work orders that are confirmed will follow the termination letter workflow.

5.3 Remove Completed Contract

At times, contracts or documents that have been completed via the DocuSign eSignatutre workflow, need to be recalled due to required changes or corrections. The Remove Completed Contract workflow supports these scenarios.

Users with permission can reopen completed 'add attachment' activity items that are used in the DocuSign worklows for contingent work orders and statements of work. Reopening the activity items sets them back to pending status, allowing a new attachment to be added, replacing the existing attachment. The following activity item types are applicable to this workflow:

- Add Attachment to Contingent Work Order
- Add Attachment to Statement of Work

> ⓘ Note
>
> This functionality is not available for DocuSign workflows that use a **Validate a Document** activity item.

A **Reopen** button is available on the above mentioned activity items when they are in Completed status. A validation runs to confirm that there was a previous document attached to a work order or statement of work via the activity item. When the activity item is reopened, the following occurs:

- The status of the activity item changes to Pending and it is unassigned. All due dates are blank.
- The **Add Attachment** button becomes available on the activity item.
- The **Initiate eSiganture Process** activity item is also reopened.
- Any other prerequisite activity items are reopened.
- The original DocuSign envelope is withdrawn.
- The esignature workflow is restarted.

When the workflow is re-initiated, the actor can use the activity item **Add Attachment** button to replace the original attachment on the work order or statement of work.

> ⓘ Note
>
> This workflow cannot be used if there is more than one DocuSign envelope in the esignature chain.

System Automated Attachments

Contracts can be system-generated from an XSL template and automatically attached to a work order or statement of work. If a an automated attachment requires correction, it implies that the issue is on the work order or the XSL template. The Reopen button is available on the completed activity items for both automated and manual attachments. Before proceeding with the reopen workflow, the work order or statement of work should be revised to correct issues, or the XSL template should be edited.

Certificate of Completion

If your company is using the **Attach Certificate of Completion** configuration, the reopen workflow will result in a new certificate being generated and attached, replacing the original certificate.

Important Disclaimers and Legal Information

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