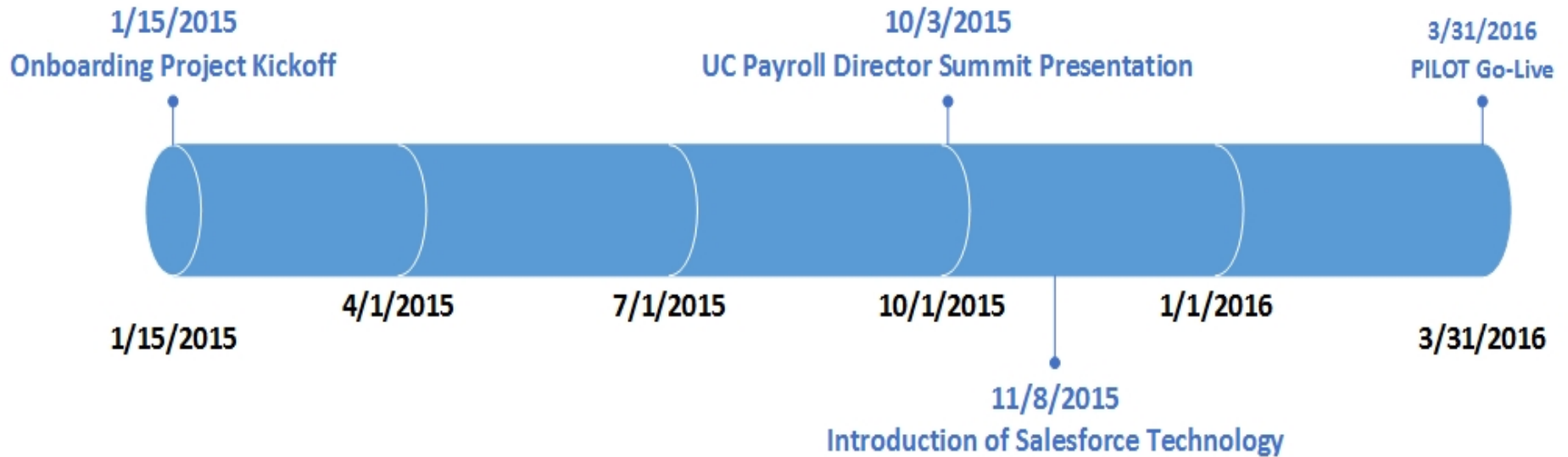


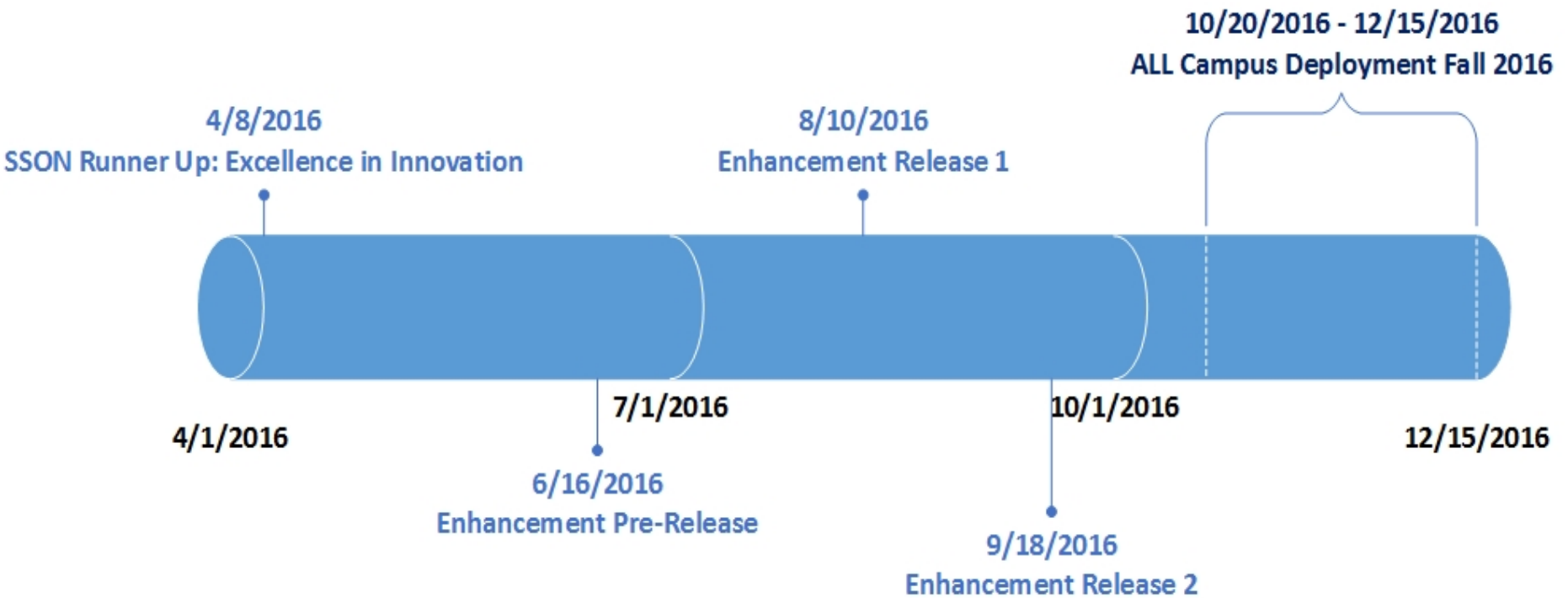
# UCSD Onboarding

July 12, 2016

## Initiation to PILOT Go-Live



## PILOT Go-Live to Campus Deployment



# What technologies are used?

**Docu**Sign®



iDocs

salesforce®



- Leading e-Signature solution
- Cloud-based (SaaS)
- Excellent integration capabilities
  - SOAP and REST web services
  - DocuSign Connect notifications
- Form capabilities
  - RegEx, Conditional Fields, Formula Fields, Required Fields, etc.



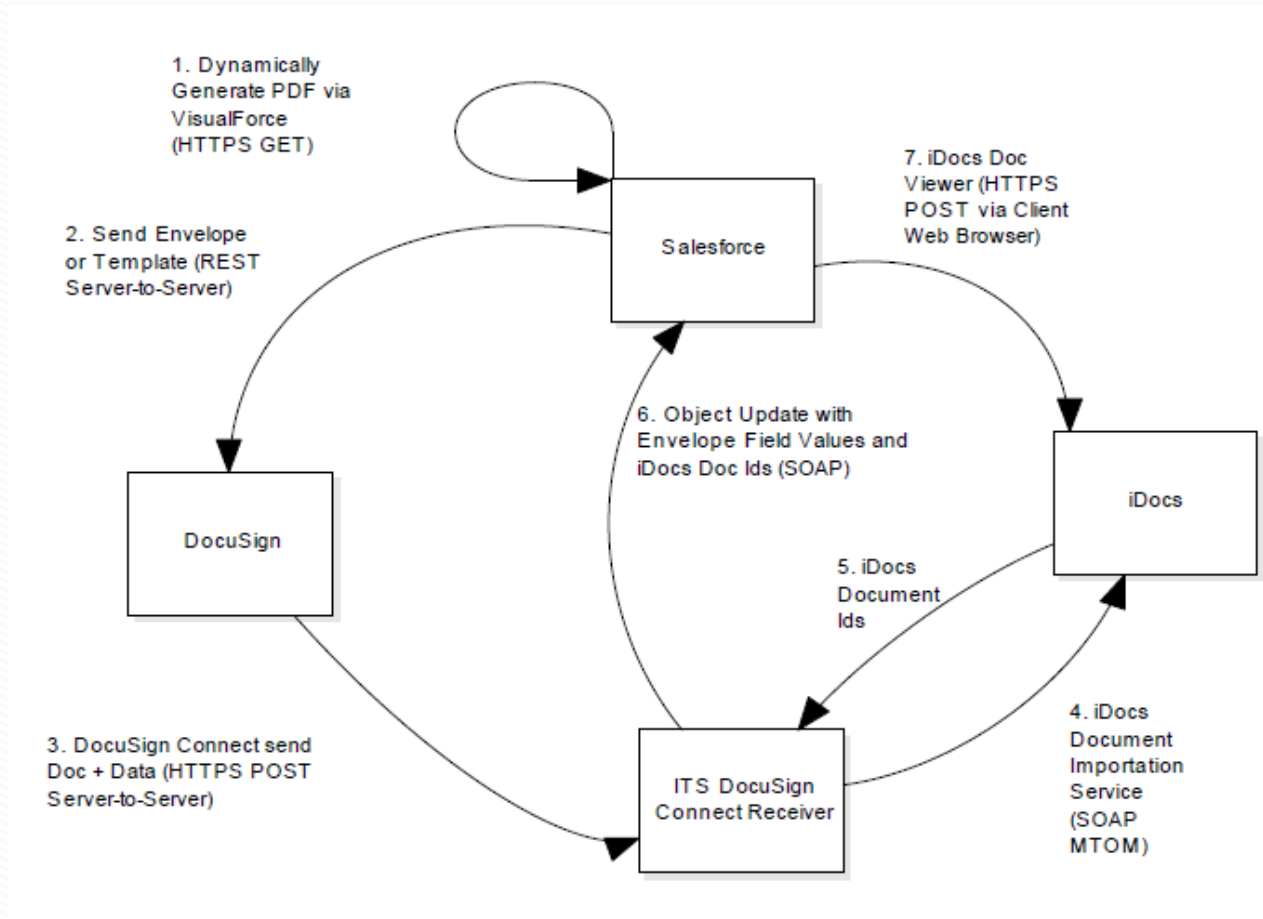
iDocs

- BFS Document Management System
  - Houses over 25.5 Million Pages in 70 Document Types
  - Support for PDF, Word, Excel, PowerPoint, RTF, TIFF, JPEG, PNG, BMP, GIF, PostScript
- Windows Communication Framework based API
- Flexible MTOM SOAP Document Importation WS
  - Supports Browser-based Drag-n-Drop multi file upload
  - Scanning, Print-To, Fax-In, sFTP, custom



- Flexible PaaS
- Flexible Declarative Workflow Engine
  - Visual “Lightning” Process Builder
- Great as “Glue”
  - Support for consuming and serving REST, SOAP, and oData
  - Support for UI Integration
- Flexible Security Model
  - Object (Table), Instance (Record), and Field level security

# System Data Flow

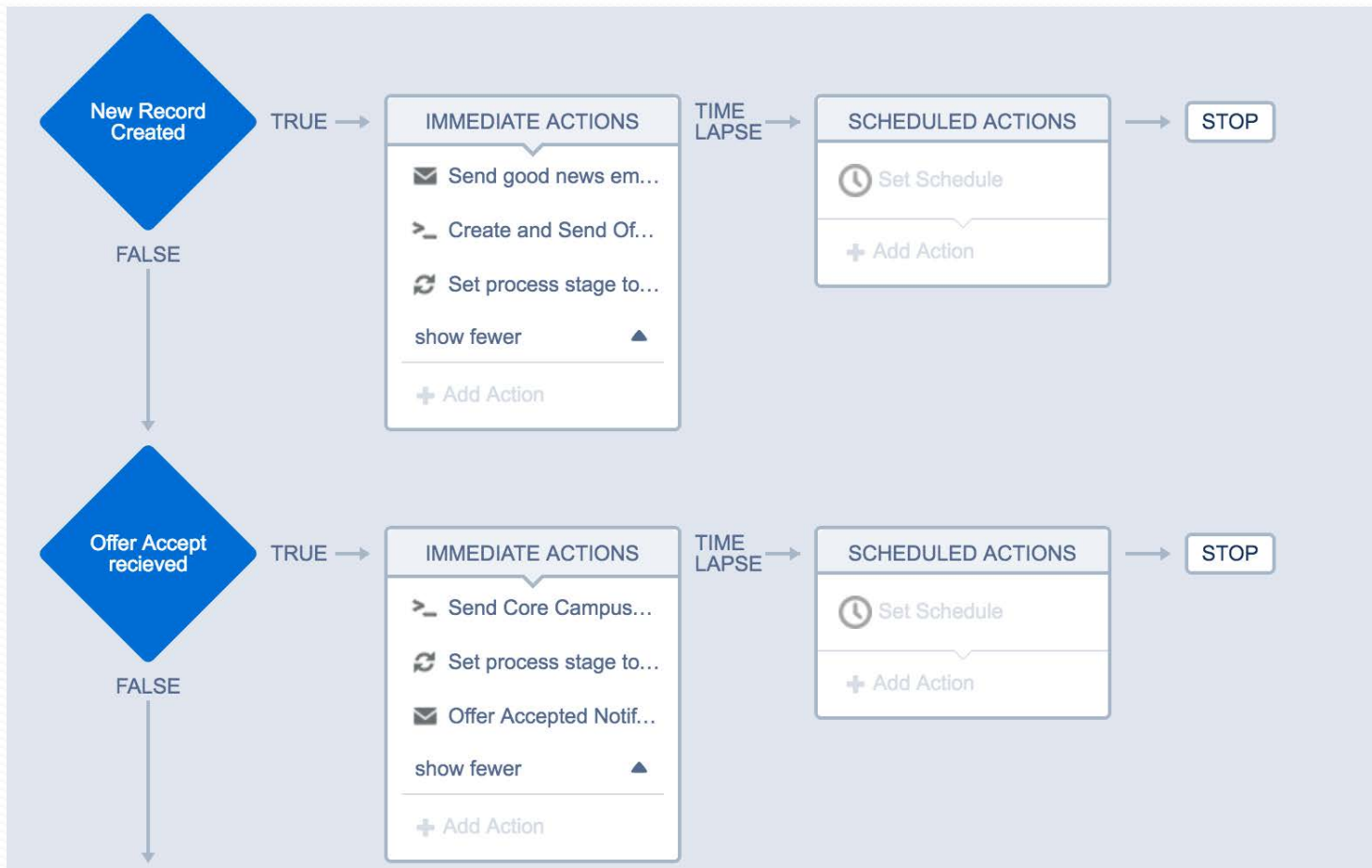




# Force Platform Implementation

- Campus Single Sign On Integration (SAML)
- APEX composition templated UCSD Look and Feel
- Uses Fieldsets to reduce code and allow for easy declarative customization
- Workflow built on Process Builder
  - Extended using APEX InvocableMethods
- Simple Visual Force page creates Offer Letter
- Outbound DocuSign REST integration
  - Use POJO style entity class JSON serialization/deserialization

# Workflow in Process Builder



# Extended Process Builder

Call Apex ?

Apex Class \* i

ONB\_SendOnboardingPDFViaDo...

Set Apex Variables

Field *	Type *	Value *
DocuSign Document Name	String	UCSD Offer Letter
DocuSign Email Blurb	String	Congratulations! We are pl
DocuSign Envelope Subject	Formula	'Congratulations, ' & [ON...
DocuSign Sign Here Anchor Text	String	_____
RecipientEmail	Reference	[ONB_Onboarding_c... Q
RecipientName	Reference	[ONB_Onboarding_c... Q
SFDC Page Reference	String	/apex/ONB_NewOfferLetter
AdditionalEnvelopeCustomFields	String	OnboardingProcessStage,( X
Onboarding Record	Reference	[ONB_Onboarding_c] Q X
Brand Id	String	d46f03f4-e2c4-4544-823c-f X

Save Cancel Delete

Roles

Candidate 1 [];

Message

UC San Diego New Hire Forms to Be Completed

Tag for:



Candidate 1 []

Standard | [Custom](#)

- Signature
- Optional Signature
- Initial Drag and drop Signature
- Optional Initial
- Signer Attachment
- Full Name
- First Name
- Last Name
- Email Address
- Company
- Title
- Date Signed
- Approve
- Decline
- Data Field
- Check Box
- Radio Button
- Drop Down
- Note
- Formula

# UC San Diego

## Employee Data Gathering Form

### PERSONAL INFORMATION

Please enter legal name information as it appears on your Social Security Card or legal work authorization documents.

Employee Legal First Name	<input type="text"/>
Employee <b>Preferred</b> First Name	<input type="text"/>
Employee Legal Middle Initial	<input type="text"/> (N/A if no middle initial)
Employee Legal Middle Name	<input type="text"/> (N/A if no middle name)
Employee Legal Last Name	<input type="text"/>
Employee Legal Name Suffix	<input type="text" value="-- select --"/>
Social Security Number	<input type="text"/>
Date of Birth	<input type="text"/>

### PERMANENT MAILING ADDRESS

Please provide your US mailing address

Save

Preview

<Go Back

| Save Changes

| Discard Changes

| Save template as...

# Force Platform Implementation

- Domain Specific Language based DocuSign Listener Relay
- Integrates using flexible Salesforce SOAP Partner API
- Automatic field mapping
- Support for saving signed docs as attachments too
- iDocs Document Viewer for Salesforce
  - Built on the Salesforce Canvas UI integration technology
  - Built on leading open source technology

# DocuSign Connect Listener

- Flexible XML Configuration

```
<?xml version="1.0" encoding="UTF-8"?>
<DocuSignConnectConfig>
  <DSEnvelopes>
    <add name="Preboarding POC Envelope" SubjectMatch=".*(Employment with UC San Diego)|(In Person)|(UC San Diego New Hire Forms to Be Completed)|(W
      <DSDocuments>
        <add name="Preboarding Document" DocumentNameMatch=".*" SalesforceSObject="Onboarding_c" iDocsDocTypeIds="6" SalesforceSObjectAttachDocumen
          <DSTagMaps>
            <add name="Full Name" iDocsIndexName="colEmpName" ValueFormat="{Candidate full name}"></add>
            <add name="Emp No" iDocsIndexName="colEmpNum" ValueFormat="{Employee Number}"></add>
            <add name="Date" iDocsIndexName="colDocDate" SalesforceFieldName="OfferAcceptedOn_c" ValueFormat="{&lt;DSNow&gt;}"></add>
            <add name="Status" iDocsIndexName="colStatus" ValueFormat="Completed"></add>
            <add name="Department Code" iDocsIndexName="colDeptCode" ValueFormat="{Department Code}"></add>
            <add name="DocuSign Envelope ID" iDocsIndexName="colDSEnvId" ValueFormat="{&lt;DSEnvelopeId&gt;}"></add>
            <add name="Salesforce SObject Id and Onboarding Transaction Id" iDocsIndexName="colTransId" SalesforceFieldName="Id" ValueFormat="{Sales
            <add name="SSN" iDocsIndexName="colSSN" ValueFormat="{SSN}"></add>
            <add name="iDocs DocID" SalesforceFieldName="iDocsId_c" ValueFormat="{&lt;iDocsCompositeDocumentId&gt;}"></add>
            <add name="Process Stage" SalesforceFieldName="ProcessStage_c" ValueFormat="{OnboardingProcessStage}"></add>
            <add name="Record Type 1" iDocsIndexName="colDocType" ValueFormat="I-9" DocumentNameMatch=".*I-9.*"></add>
            <add name="Record Type 2" iDocsIndexName="colDocType" ValueFormat="HPAF2" DocumentNameMatch=".*((Offer.Letter)|(Computer_Use_Security_Stat
            <add name="Record Type 3" iDocsIndexName="colDocType" ValueFormat="PDF" DocumentNameMatch=".*Employee_Data_Gathering.*"></add>
            <add name="Record Type 4" iDocsIndexName="colDocType" ValueFormat="W4" DocumentNameMatch=".*W4.*"></add>
            <add name="Record Type 5" iDocsIndexName="colDocType" ValueFormat="DISPO" DocumentNameMatch=".*Dispo.*"></add>
            <add name="Record Type 6" iDocsIndexName="colDocType" ValueFormat="OATH" DocumentNameMatch=".*Oath.*"></add>
          </DSTagMaps>
        </add>
      </DSDocuments>
    </add>
  </DSEnvelopes>
</DocuSignConnectConfig>
```

# iDocs Doc Viewer for Salesforce

- UI Integration via Salesforce Canvas technology
- Built on the Mozilla PDF.js Project
- Mobile Friendly
- Effectively controls client caching
- Convention based configuration

# What This Means for Business...

- New Hires across campus are given consistent pre-boarding experience irrespective of department
- All offers of employment will have a formal written Offer Letter
- Departments can enter New Hires into PPS up to 14 days in advance of their start date- funding data not entered until start date
- Increased time to productivity –access to business systems and email in advance of start date, LMS and AYSO access by day 2
- Ability to print 15 day complimentary parking pass prior to coming to campus on first day



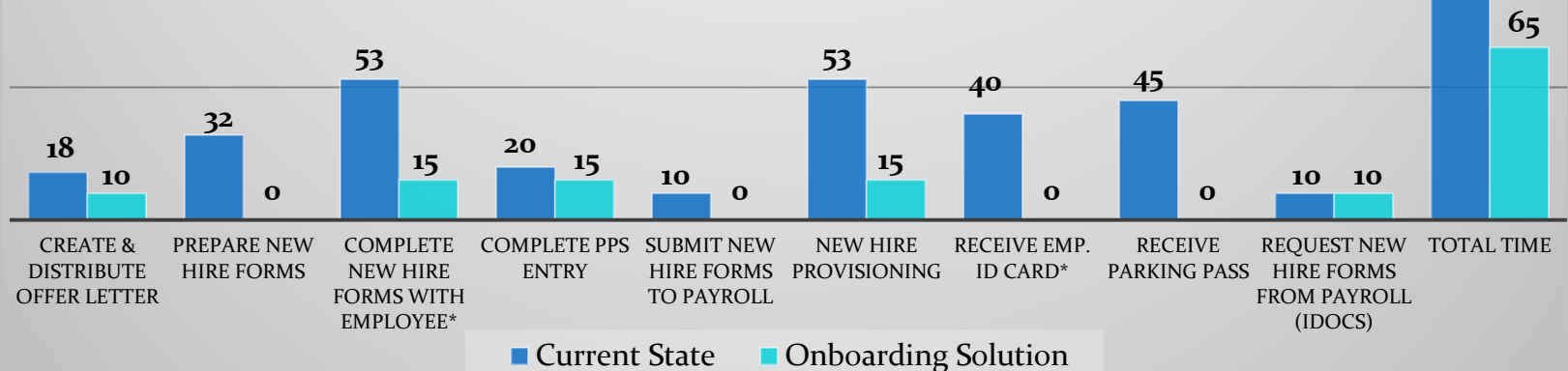
## Time to Hire a New Career Employee



## Time to Hire a New Career Employee

- 26 onboarding records to date
- 15 completed pre-boarding and started work
  - 46% completed new hire paperwork on same day as accepting their offer
  - 33% completed new hire paperwork in less than a week after accepting their offer

**77%  
Reduction  
in Time!**



# Onboarding Solution Demo

The screenshot shows a web browser window with the following elements:

- Browser Tab:** UCSD Onboarding
- Address Bar:** <https://qa-act-crm.cs43.force.com/ucsdhr/a1e/o>
- Navigation Bar:** UCSD ONBOARDING (left), UC San Diego (right), and "You are logged in | LOG OUT" (top right).
- Menu:** Home, Actions, and a search icon (Q-).
- Content Area:**
  - UCSD Onboarding Center
  - Welcome, hiring professional, to the UC San Diego Virtual Onboarding Site. From this site, you are able to perform a variety of onboarding tasks, which include:
    - Prepare and distribute an offer letter to a new hire
    - Automatically distribute campus core hiring forms for electronic completion and signature
    - Prepare and distribute a welcome letter that provides the new hire with essential information they need on or before their first day
- Footer:**
  - UC San Diego 9500 Gilman Dr. La Jolla, CA 92093 (858) 534-2230
  - Copyright © 2016 Regents of the University of California. All rights reserved.
  - [Terms & Conditions](#) | [Feedback](#)
  - UC San Diego logo



Thank you.

Questions?