Initiation to PILOT Go-Live

1/15/2015
Onboarding Project Kickoff

4/1/2015

7/1/2015
10/1/2015
1/1/2016

10/3/2015
UC Payroll Director Summit Presentation

11/8/2015
Introduction of Salesforce Technology

3/31/2016
PILOT Go-Live
PILOT Go-Live to Campus Deployment

- 4/8/2016: SSON Runner Up: Excellence in Innovation
- 4/1/2016
- 6/16/2016: Enhancement Pre-Release
- 7/1/2016
- 8/10/2016: Enhancement Release 1
- 9/18/2016: Enhancement Release 2
- 10/1/2016
- 10/20/2016 - 12/15/2016: ALL Campus Deployment Fall 2016
- 12/15/2016
What technologies are used?

- DocuSign
- 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.
• 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

1. Dynamically Generate PDF via VisualForce (HTTPS GET)
2. Send Envelope or Template (REST Server-to-Server)
3. DocuSign Connect send Doc + Data (HTTPS POST Server-to-Server)
4. iDocs Document Importation Service (SOAP MTOM)
5. iDocs Document Ids
6. Object Update with Envelope Field Values and Docs Doc Ids (SOAP)
7. iDocs Doc Viewer (HTTPS POST via Client Web Browser)

DocuSign

Salesforce

iDocs

ITS DocuSign Connect Receiver
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

New Record Created

TRUE → IMMEDIATE ACTIONS
- Send good news email
- Create and Send Offer
- Set process stage to...
  show fewer
  Add Action

FALSE

Offer Accepted received

TRUE → IMMEDIATE ACTIONS
- Send Core Campus...
- Set process stage to...
- Offer Accepted Notify...
  show fewer
  Add Action

FALSE

TIME LAPSE → SCHEDULED ACTIONS
- Set Schedule
- Add Action

STOP
Extended Process Builder

### Call Apex

**Apex Class**

`ONB_SendOnboardingPDFViaDo...`

### Set Apex Variables

<table>
<thead>
<tr>
<th>Field</th>
<th>Type</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>DocuSign Document Name</td>
<td>String</td>
<td>UCSD Offer Letter</td>
</tr>
<tr>
<td>DocuSign Email Blurb</td>
<td>String</td>
<td>Congratulations! We are p!</td>
</tr>
<tr>
<td>DocuSign Envelope Subject</td>
<td>Formula</td>
<td>'Congratulations, ' &amp; [ON...</td>
</tr>
<tr>
<td>DocuSign Sign Here Anchor Text</td>
<td>String</td>
<td>____________________________</td>
</tr>
<tr>
<td>RecipientEmail</td>
<td>Reference</td>
<td>[ONB_Onboarding_c...</td>
</tr>
<tr>
<td>RecipientName</td>
<td>Reference</td>
<td>[ONB_Onboarding_c...</td>
</tr>
<tr>
<td>SFDC Page Reference</td>
<td>String</td>
<td>/apex/ONB_NewOfferLetter:</td>
</tr>
<tr>
<td>AdditionalEnvelopeCustomFields</td>
<td>String</td>
<td>OnboardingProcessStage:</td>
</tr>
<tr>
<td>Onboarding Record</td>
<td>Reference</td>
<td>[ONB_Onboarding__c]</td>
</tr>
<tr>
<td>Brand Id</td>
<td>String</td>
<td>dd862f4-e3b1-43d4-932c-d</td>
</tr>
</tbody>
</table>

[Save] [Cancel] [Delete]
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
- Employee Preferred First Name
- Employee Legal Middle Initial
- Employee Legal Middle Name
- Employee Legal Last Name
- Employee Legal Name Suffix
- Social Security Number
- Date of Birth

PERMANENT MAILING ADDRESS

Please provide your US mailing address.
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
<?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))"></add>
  </DSEnvelopes>
  <DSDocuments>
    <add name="Preboarding Document" DocumentNameMatch=".*" SalesforceSObject="Onboarding__c" iDocsDocTypeIds="6" SalesforceSObjectAttachDocument=""></add>
    <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="\{SalesforceSObjectId\}\"></add>
    <add name="iDocs Doc ID" 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="HRAF2\" DocumentNameMatch=".*(Offer.Letter)|(Computer_Use_Security_Statement)\"></add>
    <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>
  </DSDocuments>
  <DSTagMaps>
    <!-- Add tag maps here -->
  </DSTagMaps>
</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

<table>
<thead>
<tr>
<th>Task</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>CREATE &amp; DISTRIBUTE OFFER LETTER</td>
<td>18</td>
</tr>
<tr>
<td>PREPARE NEW HIRE FORMS</td>
<td>32</td>
</tr>
<tr>
<td>COMPLETE NEW HIRE FORMS WITH EMPLOYEE*</td>
<td>53</td>
</tr>
<tr>
<td>COMPLETE PPS ENTRY</td>
<td>20</td>
</tr>
<tr>
<td>SUBMIT NEW HIRE FORMS TO PAYROLL</td>
<td>10</td>
</tr>
<tr>
<td>NEW HIRE PROVISIONING</td>
<td>53</td>
</tr>
<tr>
<td>RECEIVE EMP. ID CARD*</td>
<td>40</td>
</tr>
<tr>
<td>RECEIVE PARKING PASS</td>
<td>45</td>
</tr>
<tr>
<td>REQUEST NEW HIRE FORMS FROM PAYROLL (IDOCS)</td>
<td>10</td>
</tr>
<tr>
<td>TOTAL TIME</td>
<td>281</td>
</tr>
</tbody>
</table>

*Current State*
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!

<table>
<thead>
<tr>
<th>Task</th>
<th>Current State</th>
<th>Onboarding Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create &amp; Distribute Offer Letter</td>
<td>18</td>
<td>10</td>
</tr>
<tr>
<td>Prepare New Hire Forms</td>
<td>32</td>
<td>0</td>
</tr>
<tr>
<td>Complete New Hire Forms with Employee*</td>
<td>0</td>
<td>15</td>
</tr>
<tr>
<td>Complete Entry</td>
<td>20</td>
<td>15</td>
</tr>
<tr>
<td>Submit New Hire Forms to Payroll</td>
<td>10</td>
<td>0</td>
</tr>
<tr>
<td>New Hire Provisioning</td>
<td>0</td>
<td>15</td>
</tr>
<tr>
<td>Receive Employee ID Card*</td>
<td>53</td>
<td>40</td>
</tr>
<tr>
<td>Receive Parking Pass</td>
<td>45</td>
<td>0</td>
</tr>
<tr>
<td>Request New Hire Forms from Payroll (IDOCs)</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Total Time</td>
<td>281</td>
<td>65</td>
</tr>
</tbody>
</table>
Onboarding Solution Demo

UCSD ONBOARDING

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

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Thank you.

Questions?