

**DocuSign®**

# E-signature

Integration guide

May 2021

**LinkedIn** Talent Hub

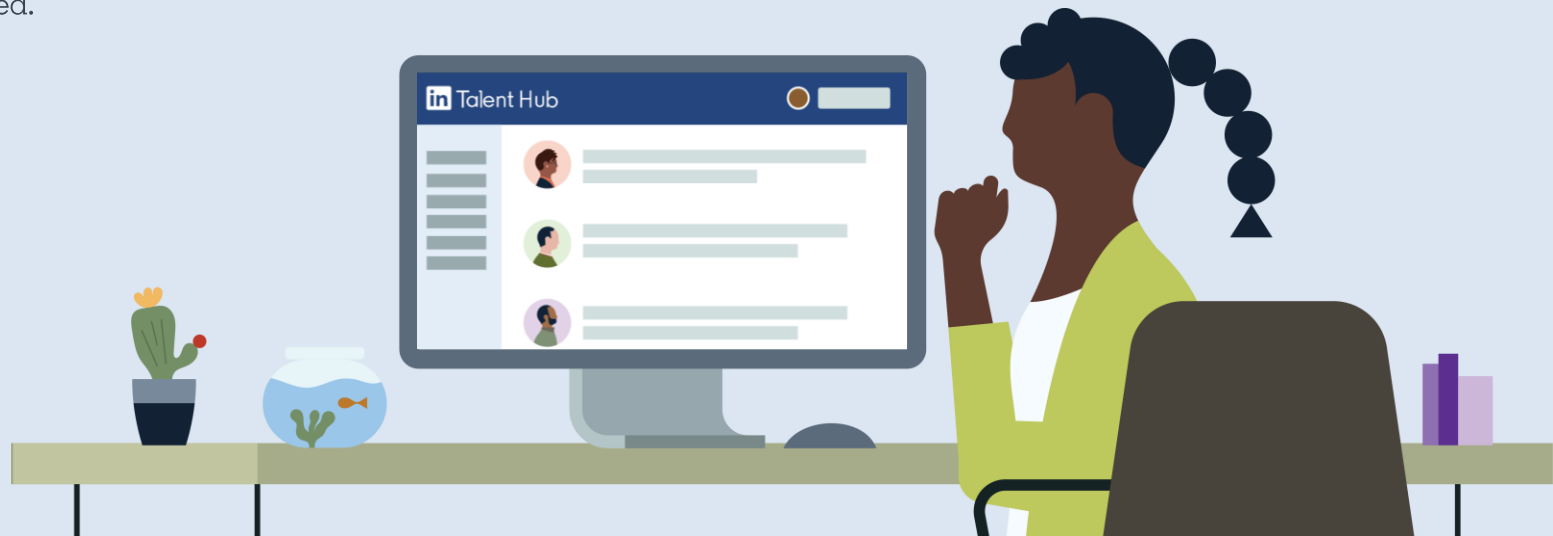


# Easily get the e-signatures you need with DocuSign.

Now you can send documents to internal recipients and candidates, as well as obtain signed documents, all within LinkedIn Talent Hub. This powerful integration simplifies your workflow by enabling native e-signature functionality from a candidate's profile. And all historical documents sent via DocuSign to candidates can be found in Talent Hub, helping to keep your hiring teams organized.

## Talent Hub Integrations

Talent Hub is the only applicant tracking system (ATS) that allows you to source, manage, and hire on a single platform. And our partner integrations make the process even easier, consolidating your workflow and giving you more time to focus on building winning teams.



# DocuSign integration at a glance

By seamlessly integrating with DocuSign, you'll be able to get the e-signatures you need without leaving Talent Hub.

Connecting to DocuSign and starting the integration flow is simple and seamless. And once DocuSign integration is enabled in Talent Hub, you can:

## Upload documents directly to LinkedIn Talent Hub.

Please note that DocuSign integration does not support document generation within Talent Hub. You'll need to upload an external document to begin.

## Send documents in any stage of the hiring process.

These documents can include, but are not limited to: offer letters, non-disclosure agreements, employment agreements, benefit statements, etc.

## Securely view document status.

All documents uploaded are stored under a candidate's profile and are only accessible to users with full project access. When sending out documents, you can designate Approvers and Signatures.

### Things to be aware of

#### Fees

There are currently no fees for integration.

#### Promotions

DocuSign offers a free [30-day trial](#) to Talent Hub customers.

#### Limitations of licenses

A Pro Edition (Business or Enterprise) license is required to enable DocuSign integration. Only users with the "Hiring Project Owner" or "Hiring Collaborator" license can enable the integration for their own account.

Users with either of these license types will need full project permission when assigned to a project in order to submit documents through DocuSign.

### Get started

[Contact or enable DocuSign](#)

# We'll help you get started.



1

## Enable DocuSign.

You can do this from the Talent Hub integrations page.



3

## Add approvers and signatories.

Make sure key stakeholders are able to review.



5

## Approve and sign.

Receive email alerts when it's time to review, approve, or sign.



2

## Upload documents.

Attach important hiring documents directly to candidate profiles.



4

## Review and send.

Distribute documents with just a few clicks.



6

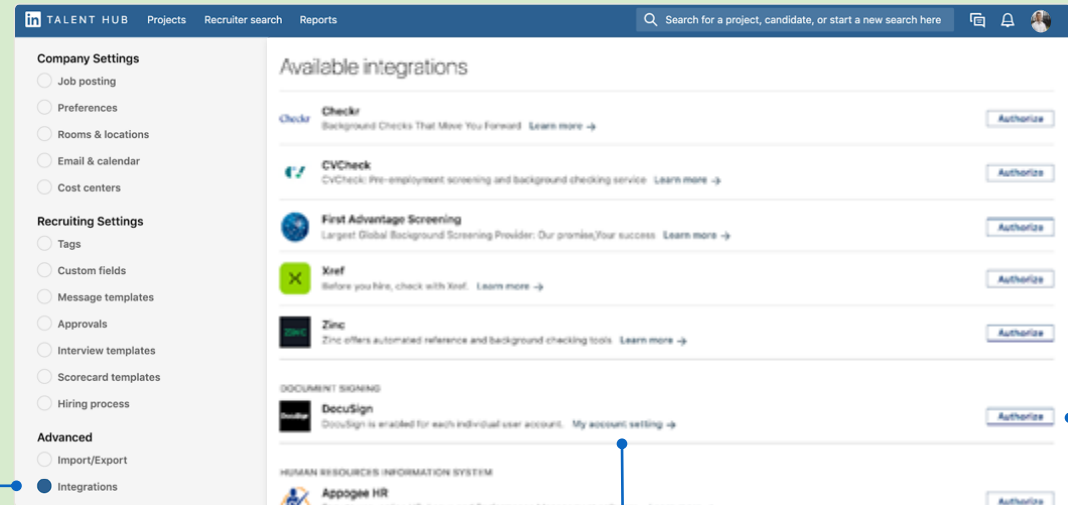
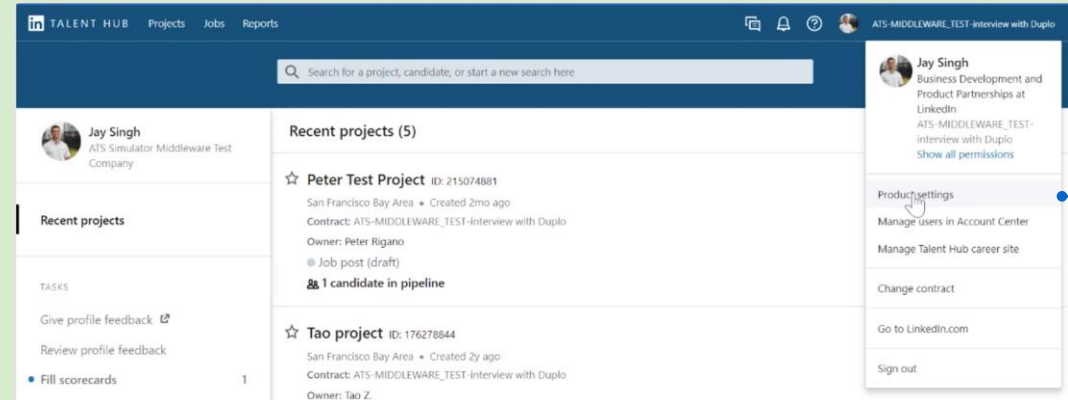
## Track progress.

View completion status and DocuSign activity right from the candidate's profile.

## Find DocuSign in Talent Hub

Each user assigned as a Talent Hub Hiring Project Creator or Collaborator will need to enable the integration individually.

1. Click your picture in the upper right-hand corner and select “Product Settings” from the drop-down menu.
2. On the Product Settings page, click “Integrations” under “Advanced.”
3. Find DocuSign under “Available integrations” and click the “Authorize” button.
4. You can also access individual account settings directly from this page by clicking “My account setting” next to the DocuSign logo.

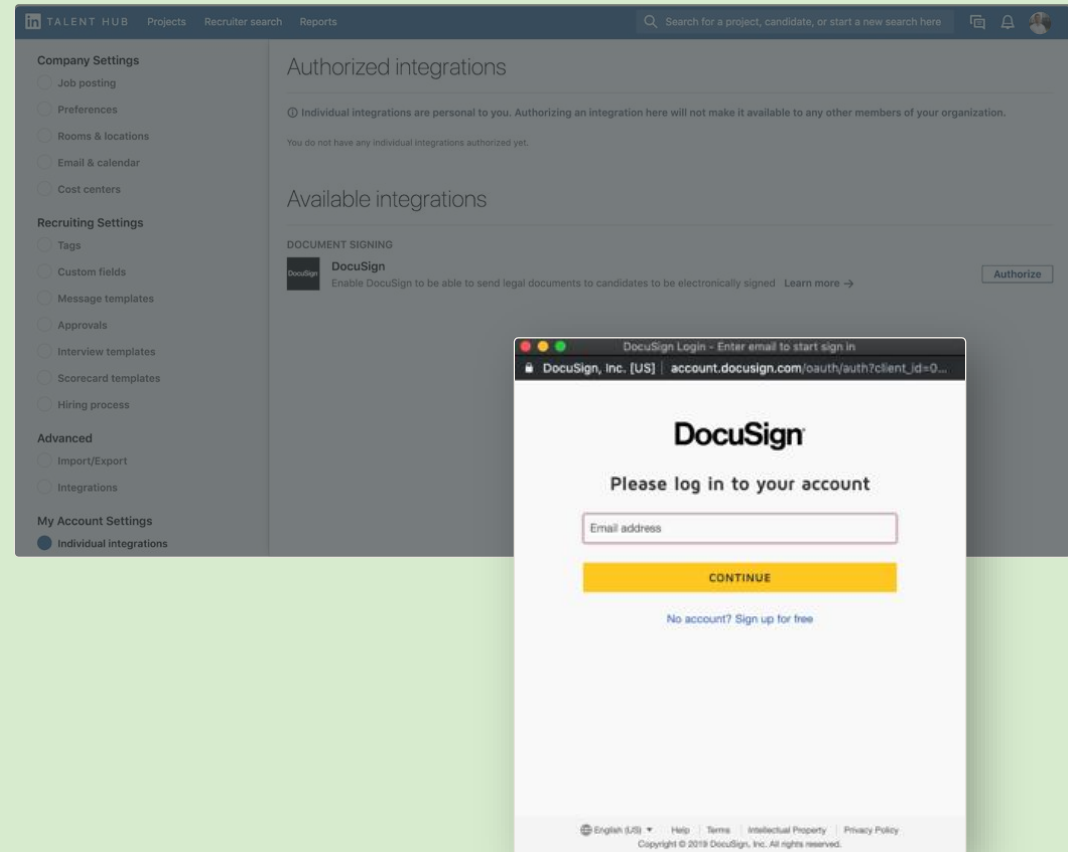


## Enable integration

# Complete the process

Users will be prompted to enter their DocuSign credentials to continue. Each user will need to use their own DocuSign account to enable the integration.

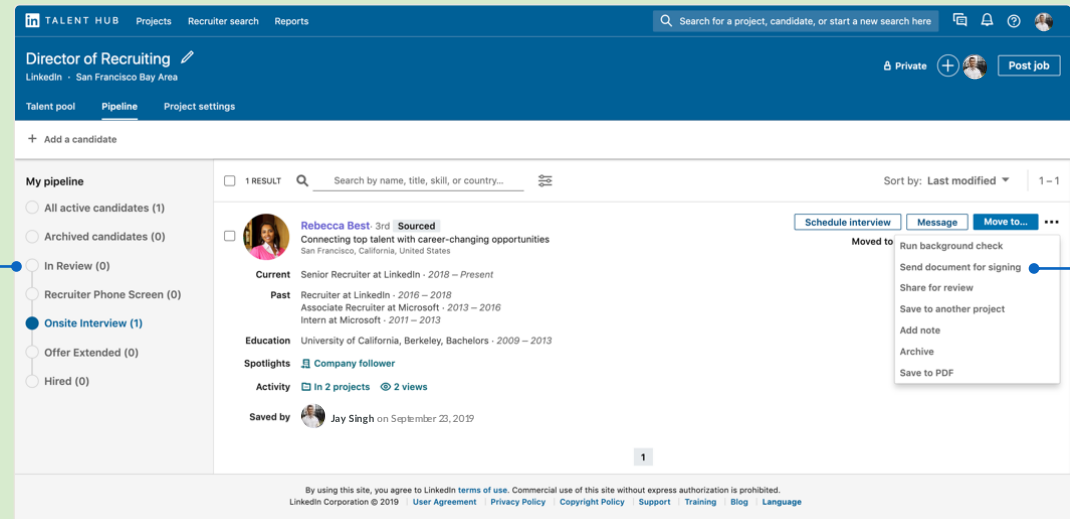
Once authorized, a user with the right permissions will be able to send documents for candidate signature and acceptance.



## Locate the action

Once DocuSign integration is enabled, the “Send document for signing” option becomes available on candidate profiles that have moved past the “In Review” stage.

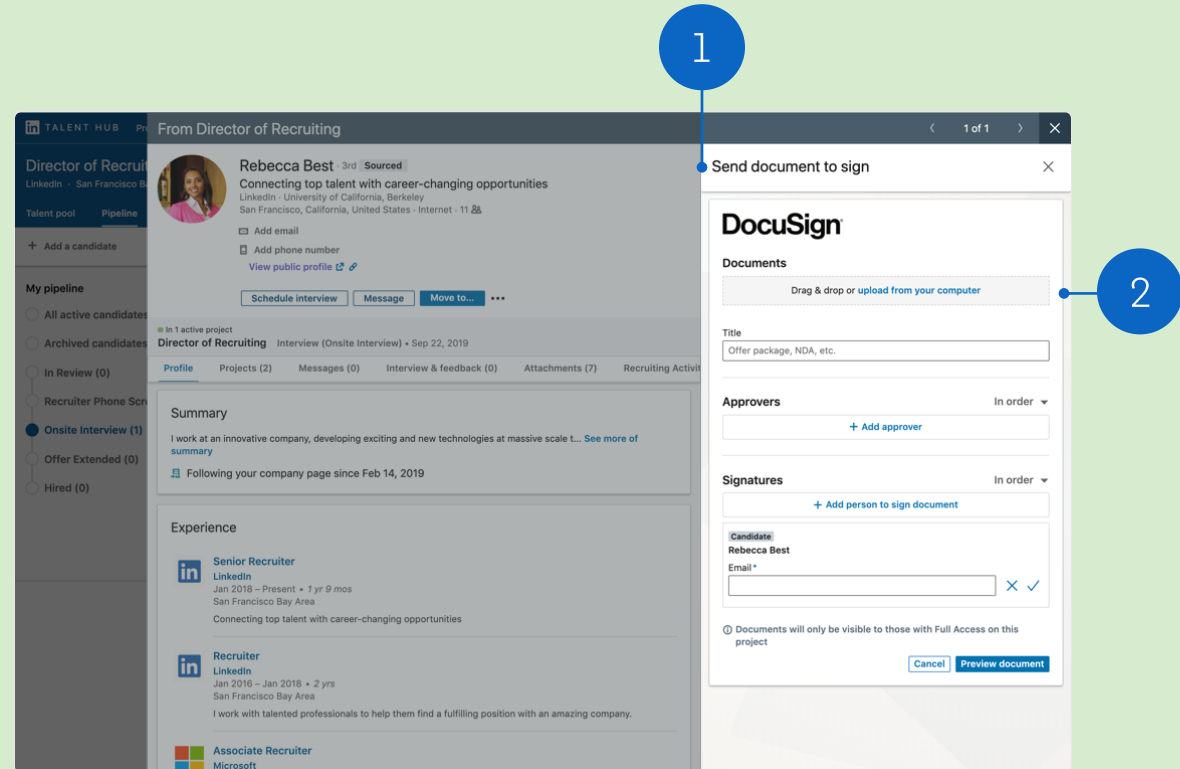
1. Click the ellipses next to a candidate and select this option from the drop-down menu.
2. If you don't see this option, make sure the candidate has been moved past this stage in your Pipeline.



## Attach documents

Now you can upload important hiring documents without leaving Talent Hub.

1. Open the “Send document to sign” section on a candidate’s profile.
2. Drag and drop documents or upload them from your computer.



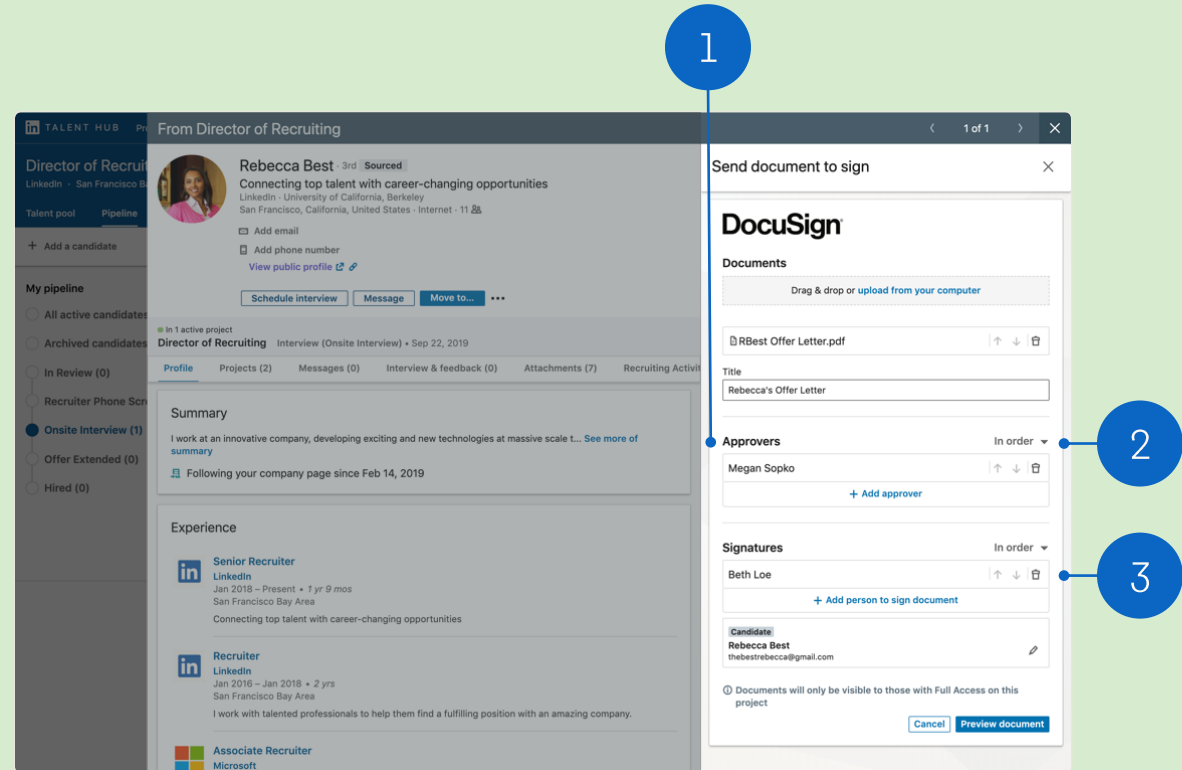


## Add stakeholders

While our integration with DocuSign is primarily intended to make it easier to get e-signatures, you can also show documents to approvers who aren't required to sign.

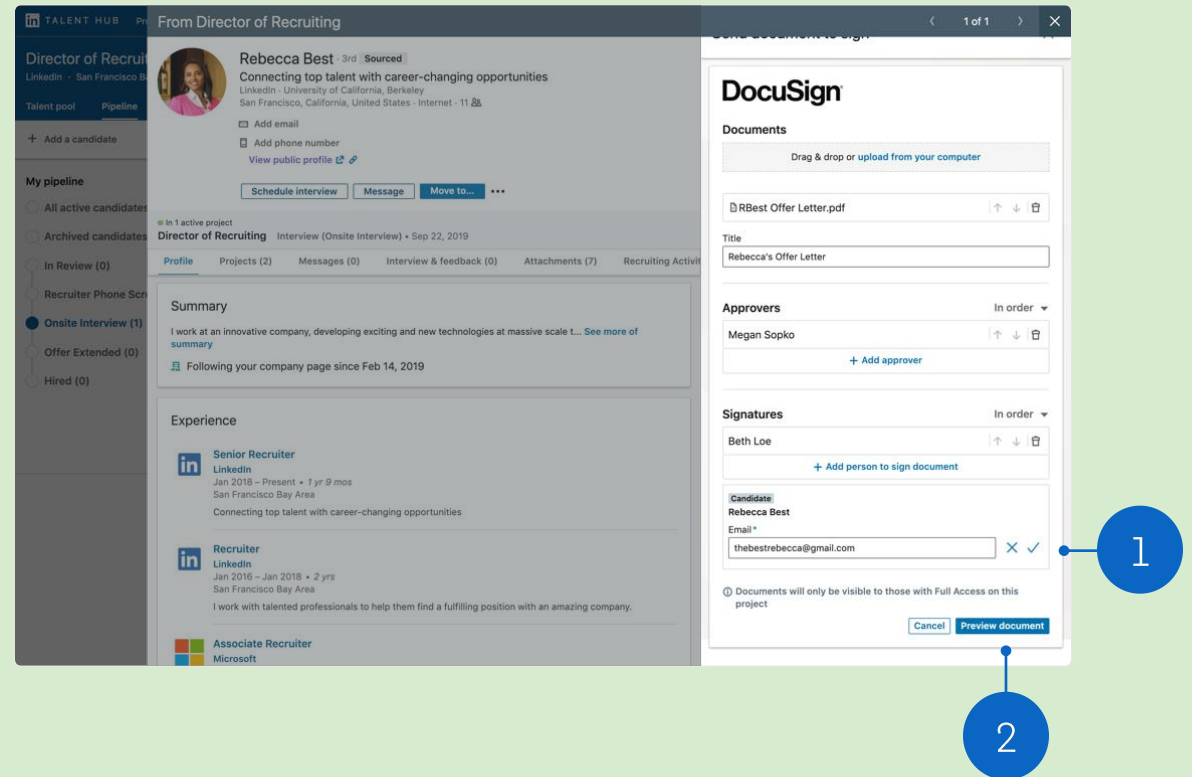
1. You have the option to add approvers to any document before it is sent to signatories.
2. You can easily control the order in which the document must be approved and signed. Or select "No order" to share the document with all approvers or signatories at the same time.
3. All approvers must approve the document before any of the signatories can sign the document.

Once all approvers have finished, the document will be sent to the inputted signatories.



## View status

1. Once documents have been uploaded, and approvers and signatories have been selected, you'll need to approve the final documents and confirm whether they need to follow a signing order.
2. After selecting "Preview document," you'll be routed to DocuSign to review final document details.



## Review final details

1. Once you're in DocuSign, you can review final document details.
2. Click "Set signing order" to make sure your document follows the chain of command.
3. Identify where each user will sign or approve the document.
4. Click "Next."

Please DocuSign: RBest Offer Letter.pdf

ACTIONS RECIPIENT PREVIEW NEXT

### Add Documents to the Envelope

Upload

USE A TEMPLATE

GET FROM CLOUD

### Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

ADD FROM CONTACTS SIGNING ORDER

☒ Set signing order

1

Name \* Megan Sopko

Email \* msopko@linkedin.com

NEEDS TO SIGN MORE

2

Name \* Beth Loe

Email \* bloe@linkedin.com

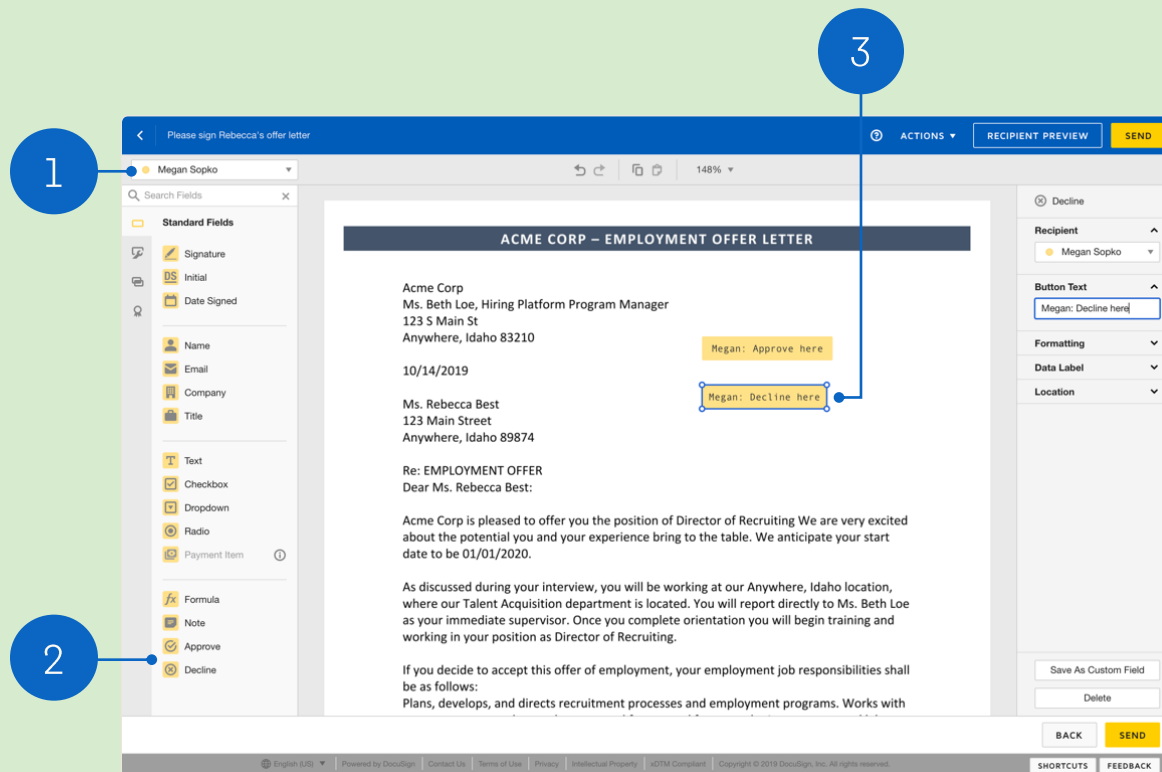
NEEDS TO SIGN MORE

SEND NOW NEXT

## Identify approval locations

Before sending a document, Talent Hub users have to identify where approvers and signatories will need to take action.

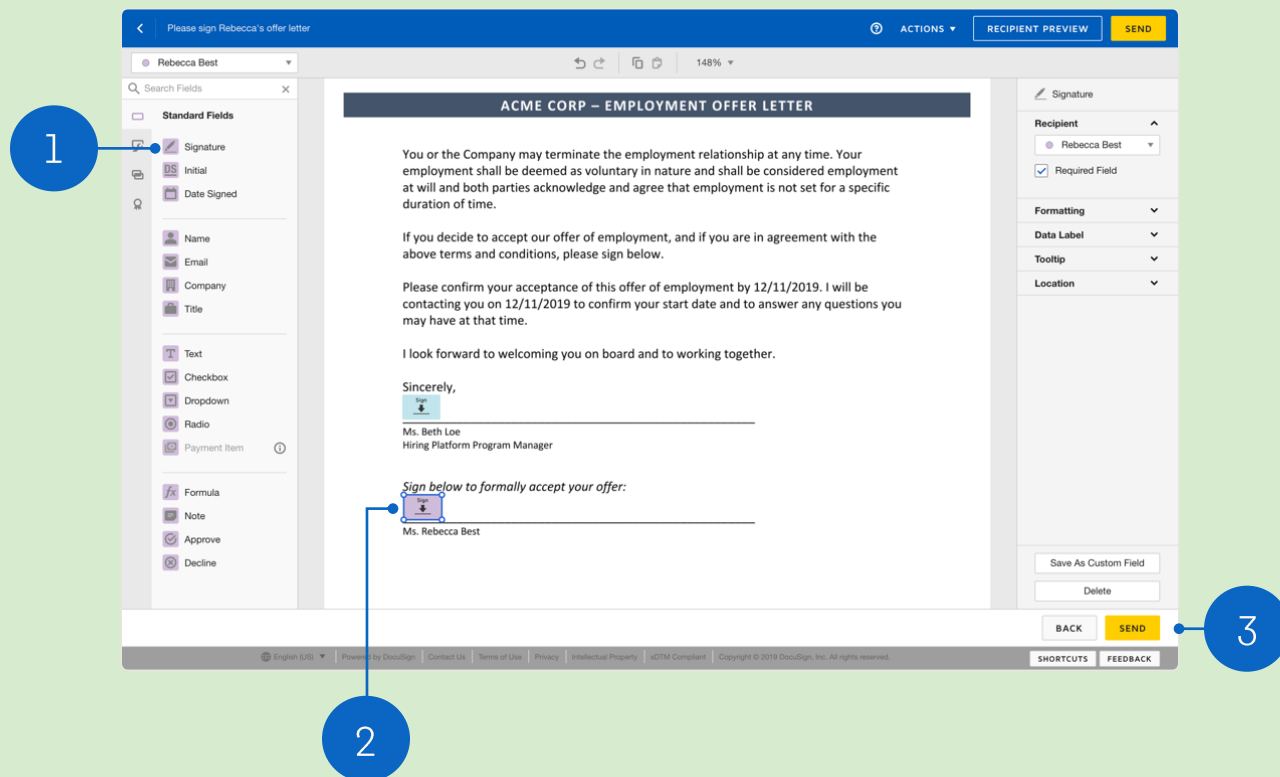
1. In DocuSign, filter by user to identify where to sign or approve.
2. While signatures will appear on the final document, any “Approve” or “Decline” tags are used to progress the document along to stakeholders, and will not be visible to the candidate.
3. You can place these tags anywhere on the document to prompt approvers who don’t need to sign.



## Identify signature locations

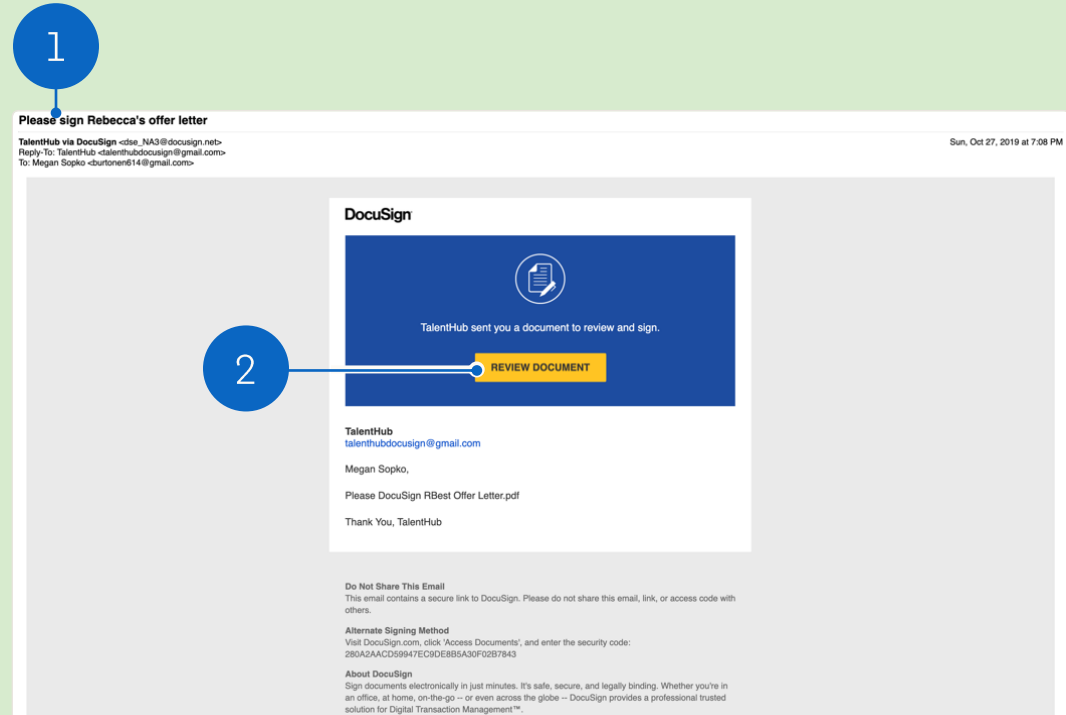
Before sending a document, Talent Hub users have to identify where approvers and signatories will need to take action.

1. Click “Signature” under “Standard Fields” to activate signatures.
2. Place anywhere on the document to prompt where signatures will be needed.
3. Continue until all signatories have a location identified. Then click “Send.”



## Get approvals and signatures

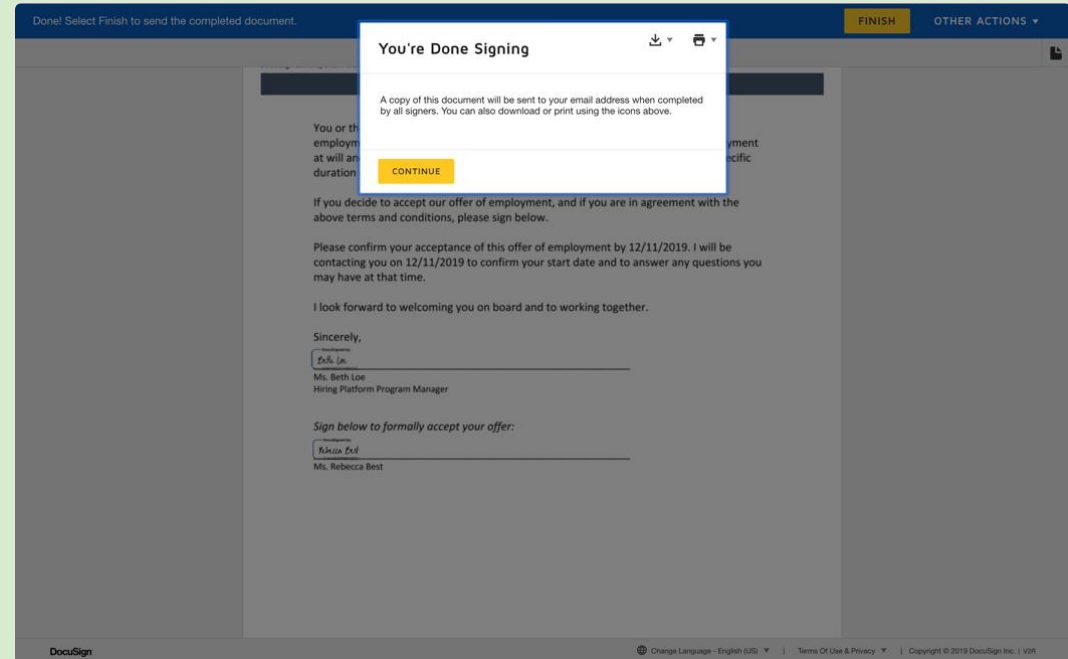
1. All assigned approvers and signatories will receive an email prompting them to complete their task in the document.
2. If you set an approval or signing order, the document will not move on to the next stakeholder until those identified ahead of them either complete their tasks or decline the document.



Approve and sign

## Complete the process

Both approvers and signatories will be notified when the process is finished, and they'll receive a final copy once all signatures are obtained.

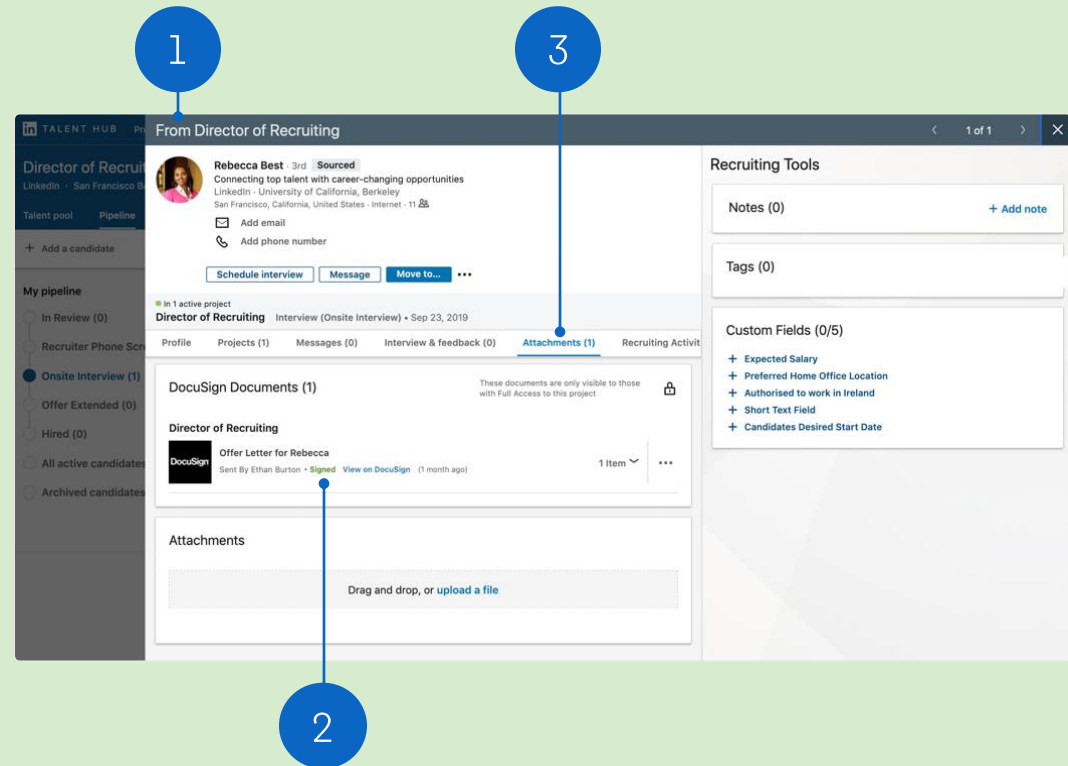


## View status and history

You can access all DocuSign activity directly from Talent Hub.

1. Talent Hub shows document status in the candidate's profile so you can track progress in real time. It also generates a link to the details of the request in DocuSign.
2. Status definitions include "Created," "Pending," "Declined," and "Signed."
3. Previously signed or sent documents can always be found under the "Attachments" tab in the candidate's profile.

Users with the right permissions can access these historical documents from the candidate profile at any time.





# FAQ



## 1. Can existing DocuSign customers enable the integration from Talent Hub?

Yes, with a valid Pro Edition (Business or Enterprise) license, existing DocuSign customers who are Talent Hub Administrators can enable DocuSign through the [“Product Settings”](#) page in Talent Hub.

## 2. How do I get the DocuSign integration from Talent Hub?

You’ll need to purchase a license from DocuSign. DocuSign offers a free [30-day trial](#) to Talent Hub users.

## 3. Does this integration allow customers to generate offer letters in Talent Hub?

No, customers will need to upload a document to Talent Hub before starting to collect e signatures.

## 4. Does LinkedIn send any personal or sensitive information to DocuSign?

LinkedIn does not handle or transfer to DocuSign any personal identifiable information (PII) or sensitive recipient information other than the recipient’s email address.

## 5. What permissions/licenses are required to use DocuSign?

A Pro Edition (Business or Enterprise) license is required to enable DocuSign integration. Only users with the “Hiring Project Owner” or “Hiring Collaborator” license can enable the integration for their own account. Users with either of these license types will need full project permission when assigned to a project in order to submit documents through DocuSign.

## 6. What is the standard flow for this integration?

- For each document that's sent out for signatures, LinkedIn Talent Hub sends all required recipient and candidate information to DocuSign to initiate a signing request.
- DocuSign then notifies the recipients and candidate via email to execute signatures and approvals.
- Once a document or package is fully signed and executed, it will be visible under the candidate's profile in Talent Hub.
- You can view document status under the candidate's profile (e.g., "Created," "Pending," "Signed") for tracking, as well as a link to the details of the request in DocuSign.

## 7. How do I revoke access to my DocuSign account?

- You can revoke access to your DocuSign account by going to the DocuSign webapp
- After logging in, navigate to the user icon in the upper right corner, select manage profile
- Select Connected Apps and revoke the application's access
- Please find a detailed explanation of this process on their help center ([link](#))

## 8. Can you use templates created in DocuSign?

Yes. To begin this process, you will first need to upload a hiring document to Talent Hub. Once you've connected Talent Hub to DocuSign, there will be an option to upload additional documents using a template.

# Questions?

We're here to help you master integrations in Talent Hub.

You'll find more answers in the [Help Center](#) — and your LinkedIn Support team is always available for additional support.

Thank you.

