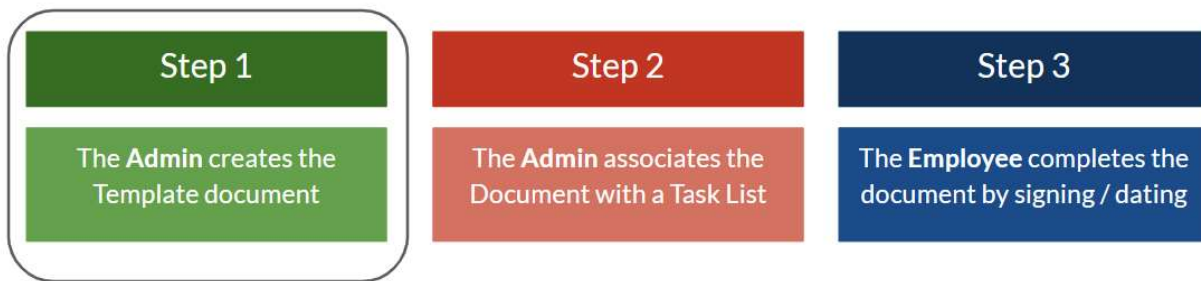


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## Creating an E-Signature Document Template in AHR 2.0

The first part of the E-Signature process is to create templates for your frequently-used documents. Admins add a new E-Signature document template to a company and fill it with designated fields in order to indicate to an employee where they need to sign, initial, date, check off or fill in items on the document. High-level steps of the process are shown in the following graphic.

### The E-Signature verification process:



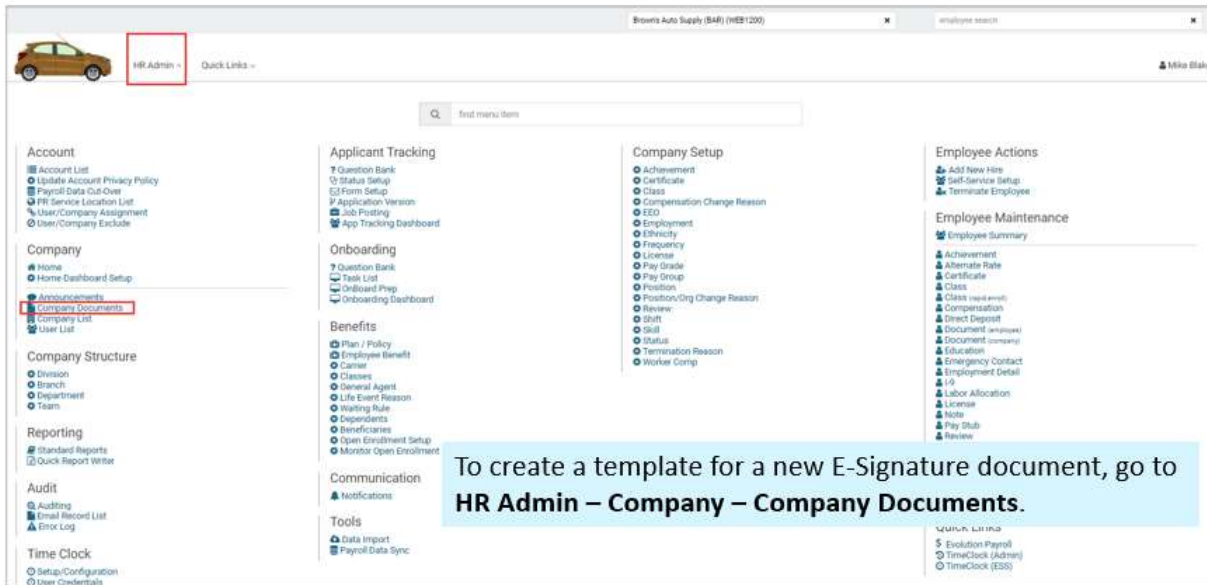
This section describes Step 1: Creating a Template Document. To create a template for a new E-Signature document do the following. You will be uploading a document (to HelloSign) and tagging the areas within it where you want the employee to perform an action such as signing or dating.

1. Go to **HR Admin – Company – Company Documents**.

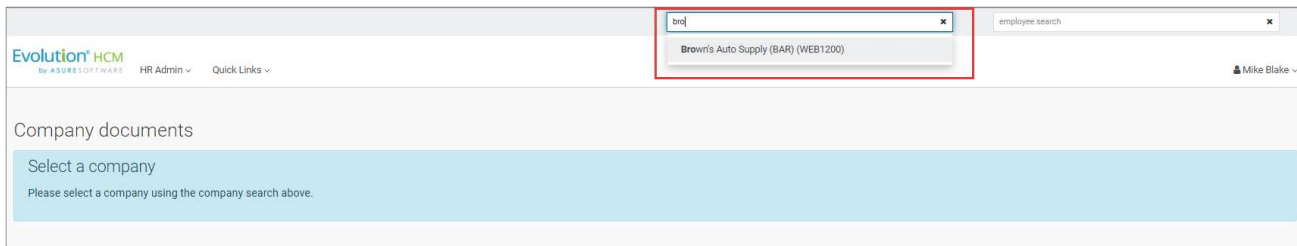
---

**Note:** You must be an Admin, Super Admin, or SB Admin role to create an E-Signature document template.

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- The system will ask you to **select a company** if not already selected. You can start typing the first few letters of the company name and the system will list matching company names for you to select. Note that the list of companies that the system displays is restricted by the user's security role and which specific companies the user has been granted access to.



- The system displays the **Company Documents** screen.

Company documents

[ADD DOCUMENT](#)

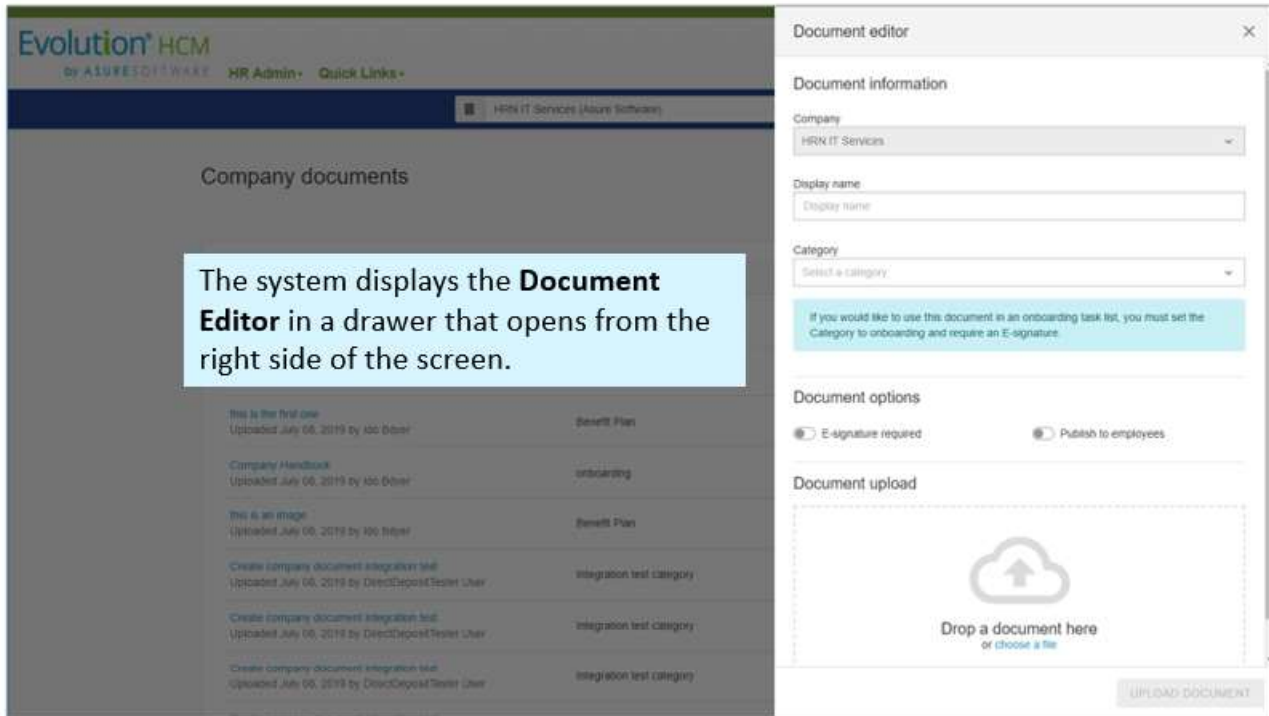
Document	Category	E-signature required	Published to Employee
Privacy Policy Uploaded August 27, 2019 by Mike Blake	onboarding	No	Yes
Employee handbook 2020 Uploaded August 19, 2019	onboarding	Yes	No
2019 Employee Handbook Uploaded August 19, 2019	onboarding	Yes	No

The screen displays a list of all the company documents for the selected company, the **Category** of the document (for example, Onboarding), if the document requires an **E-Signature**, and if the document is **Published to Employees**. Published to Employee means that the document has been made available to the **Employee Documents** screen for ALL employees of this company.

- To create a new Document Template, click on the **+ Add Document** button



Result: The **Document Editor** screen (the new interface) opens in a drawer that appears from the right side of the screen.



You should already be locked into a company; it will be populated here. If not, then **Select a company** from the **Company** dropdown.

5. Enter a name for the document template in the **Display Name** field. The Display Name appears on the Documents screen; it can be different than the document's file name.
6. Select a **Category** from the dropdown for the document, such as **Onboarding**.

Admins and above roles can create a new, custom document Category name, if wanted. To create a new Category name value for this field, enter the new Category name in the **Category** field. The result is the system displays a **“Create “\_\_\_\_\_”** option with the new Category name you enter in the field. Click this option to create the new Category name.



Note that this is a quick “on the fly” method of creating a new field value. The advantage of this method is that there is no need to go somewhere else in the interface to create a new value and then return here to use it.

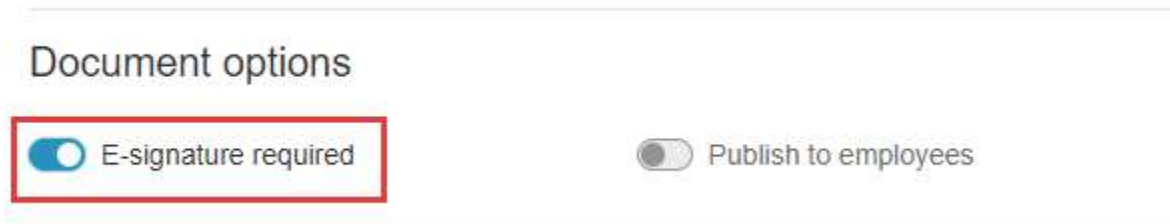
There is no standard list of the Category field values provided by default. Do note however, that the Categories

used in the previous Documents interface for your Service bureau will still be available.

7. In the **Document Options** section of the screen, indicate if the document you are creating will require an E-Signature.



If the document requires an E-Signature, set the **E-Signature Required** toggle to **On**, as shown below.



By default, the **E-Signature Required** toggle is set to **Off**, as in the first screenshot shown above.

8. Documents that are to be E-Signed by the employee are not intended to be Published to all employees. Therefore, in the **Document Options** section, if the **E-signature required** toggle is set to **On**, then the **Publish to employees** toggle is disabled and set to **Off** by default.



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**Note:** Documents that do not have to be E-Signed by the employee (Non-Signature documents) can be published to All employees and they will have the **Publish to employees** toggle set to **On**.

---

9. In the **Document Upload** section, use the drag and drop interface to drag over a PDF or other document you want to use for the template to the **Document Editor** screen (in the **Drop a document here** section). You can also click on the **Choose a File** link and browse to the document if you prefer.

Enter a name for the document (**Display name**).

Select a **Category** for the document.

Set the **E-signature required** toggle to On if the document will require an E-Signature.

E-signature required

Set the **Publish to employees** toggle to On if the document is to be made available to all employees of the company.

Publish to employees

Drag and drop the document onto the **Document Editor** or you can click the **choose a file** link and browse to the document. You can use a PDF, .doc, .docx, or any image file.

### Completing the Document Editor

- Click the **Prepare Document** button at the lower right



For example, the following is a sample completed **Document Editor** screen for a Privacy Policy Acknowledgement Form that is to be E-Signed by the end user; it cannot be published to all employees.

## Document editor



### Document information

Company

HRN IT Services



Display name

Privacy Policy Form

Category

onboarding



If you would like to use this document in an onboarding task list, you must set the Category to onboarding and require an E-signature.

### Document options



E-signature required



Publish to employees

### Document upload

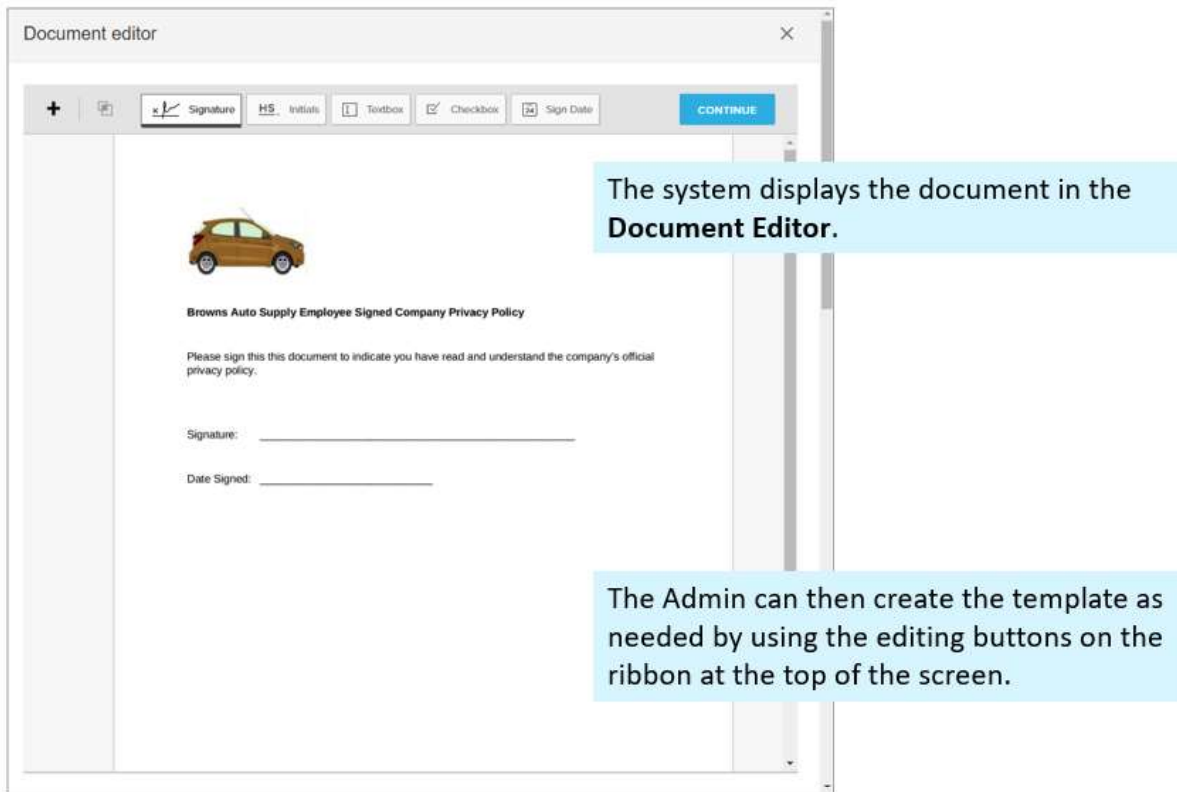


Browns Auto Supply Privacy Policy Sample  
Document.docx

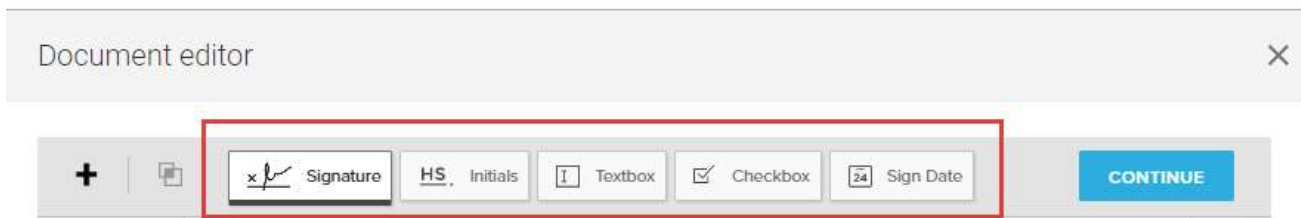
PREPARE DOCUMENT

**Result:** After the user clicks the **Prepare Document** button, Advanced HR then interfaces with the HelloSign application and will start preparing this document for this Service Bureau, for this company, etc., in HelloSign.

11. The system then displays the document in the **Document Editor** (for example, a sample Company Privacy Policy acknowledgement document shown below).



12. Use the **Document Editor** buttons on the ribbon bar at the top of the screen to set up the various fields on the document for employee end users to complete.



- Signature
- Initials
- Textbox
- Checkbox
- Sign Date

Note that currently, if you want to use a document in an onboarding task list, in the **Document options** section of the screen, in the **Category** dropdown you must select **Onboarding**, and the **E-Signature required** option must be set to **On**.

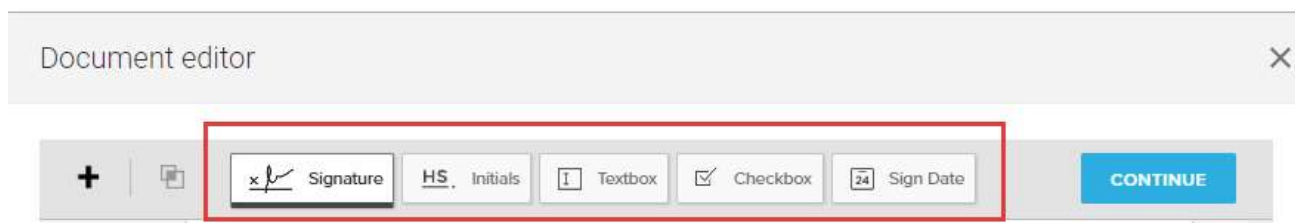
Category  
onboarding

If you would like to use this document in an onboarding task list, you must set the Category to onboarding and require an E-signature.



Document options


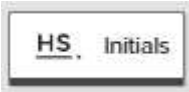




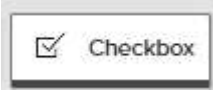



E-signature required  Publish to employees

The following table describes how Admins use the buttons on the ribbon bar at the top of the E-Signature **Document Editor** in order to prepare template documents for E-Signature.

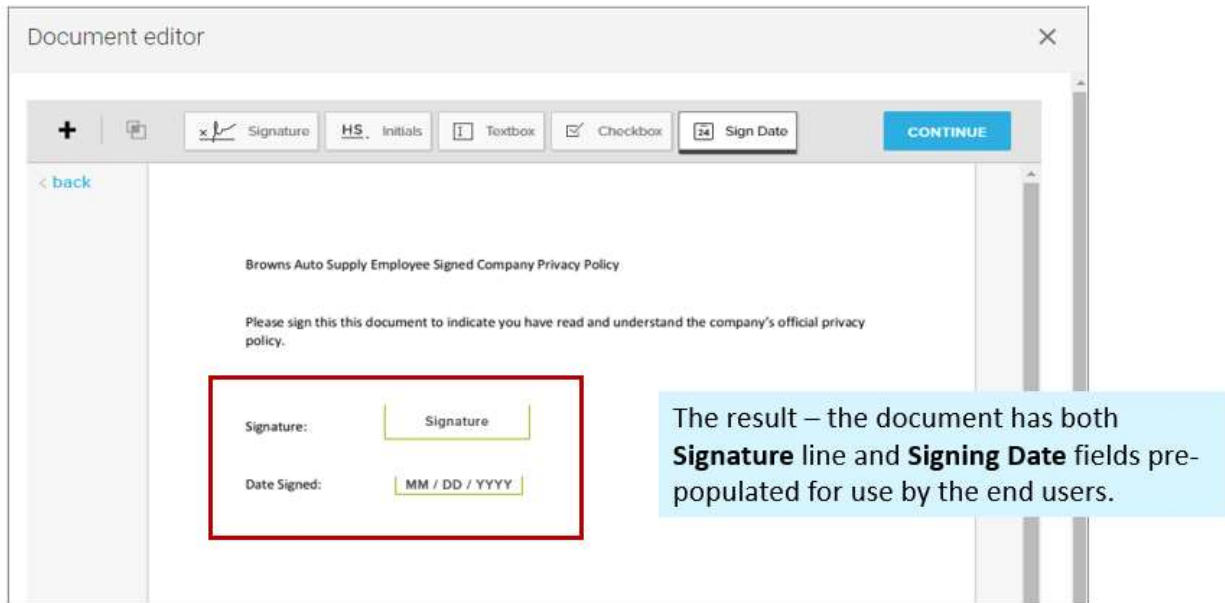


**The Ribbon Bar at the top of the Document Editor**

Name	Button	Description	Example on Page
Signature		Click and drag this button to a location in the document where you want the user to enter their signature.  You can make the field a required field by clicking the Required check box.	

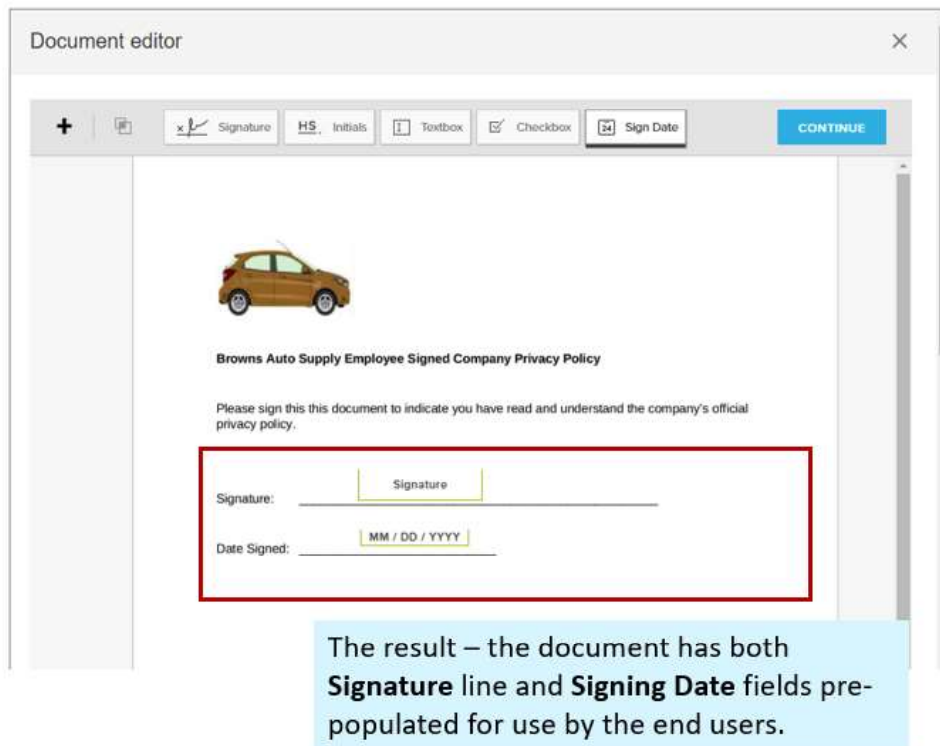
			
<b>Initials</b>		Click and drag this button to a location in the document where you want the user to enter their initials.	
<b>Textbox</b>	 The Textbox is useful if you want the employee to type their name, in addition to signing the document.	Click and drag this button to a location in the document where you want the user to enter some text.  You can choose the <b>Text Size</b> to display. 	
<b>Checkbox</b>		Click and drag this button to a location in the document where you want to have a checkbox that the user can select.	
<b>Sign Date</b>		Click and drag this button to a location in the document where you want to have the system auto-populate the date field. The user does not have to actually enter the date.	

Here is a sample document that has been pre-populated by the Admin for the End Users:



13. Once you have all the fields designated on the document, click the **Continue** button at the upper right on the ribbon bar





The drawer then closes.

14. Click the **Create Template** button



15. The system saves the document template and returns you to the **Company Documents** screen. A “Template Created” message displays at the top of the screen and the template is now saved and appears on the dashboard.

Company documents

[ADD DOCUMENT](#)

Document	Category	E-signature required	Published to Employee
Privacy Policy Uploaded August 27, 2019 by Mike Blake	onboarding	No	Yes
Employee handbook 2020 Uploaded August 19, 2019	onboarding	Yes	No
2019 Employee Handbook Uploaded August 19, 2019	onboarding	Yes	No

Because we set the Document option **E-Signature Required** to On when creating this document template, on the **Company Documents** dashboard, this document row shows these options in the following column fields:

- E-Signature Required – **Yes**
- Published to Employee - **No**

The Admin has now created the document template and added it to HelloSign®.