

Documents guide

What kind of documents can I have in my Webonboarding?

Exchange document.

A document which you send to the Onboarder to complete and return. E.g. Confidential medical questionnaire, HMRC checklist.

OR

A document which you want the Onboarder to provide you with. E.g. Copy of driving licence, copy of Passport, copy of Birth Certificate.

Reading list item.

A document which you provide to the Onboarder to read as part of their induction or on pre-joining. E.g. A policy document or some other document which is a requirement of the Onboarder by the company.

Offer letter.

The formal offer of employment which usually follows a verbal offer and which accompanies the contract of employment. The letter will be signed by the organisation. There is usually no requirement for the Onboarder to sign this, they will sign the contract.

Contract.

The contract of employment which is issued to all employees regardless of employment status. Some organisations will have a different contract for managers or directors than for employees. The contract will be signed by the hiring organisation and by the Onboarder.

Signed documents.

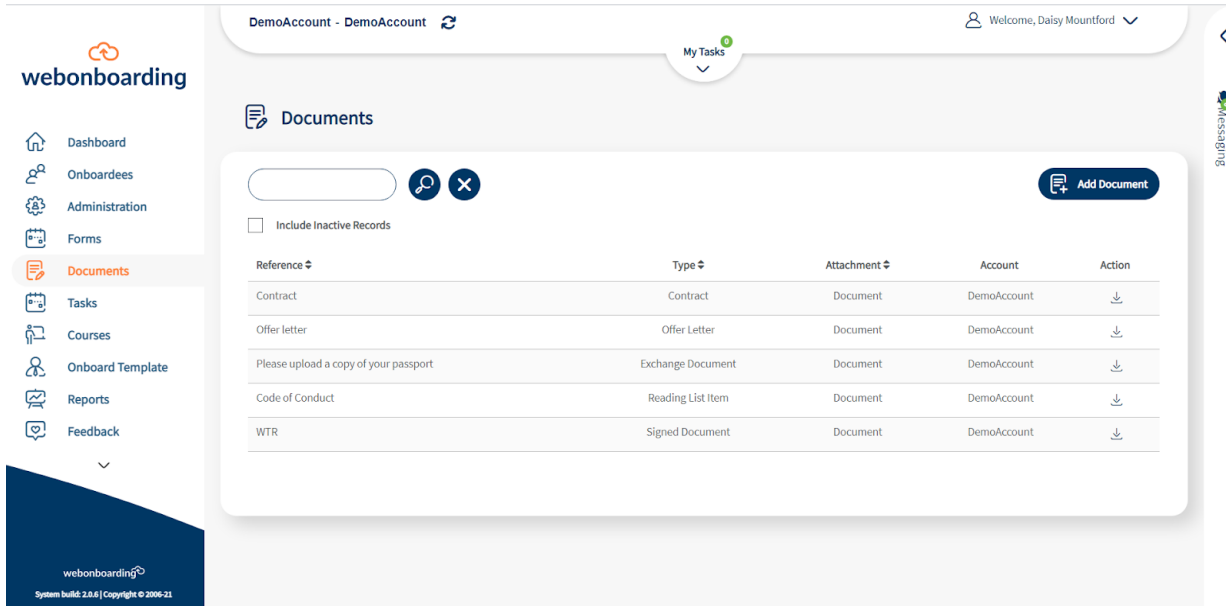
A signed document is a statement/policy you want the onboarder to digitally sign. You can add these in addition to the signed contract.

How to upload contracts, offer letters and additional signed documents.

This should already be completed by your implementation consultant, however, should you need to upload any contracts you can do so.

Click documents on left-hand side of the screen.

Documents guide



The screenshot shows the Webonboarding interface. On the left is a sidebar with navigation links: Dashboard, Onboardees, Administration, Forms, Documents (highlighted), Tasks, Courses, Onboard Template, Reports, and Feedback. The main content area is titled 'Documents' and features a search bar with a magnifying glass and a close button. Below the search bar is a checkbox labeled 'Include Inactive Records'. A table displays a list of documents with columns for Reference, Type, Attachment, Account, and Action. The 'Add Document' button is located in the top right corner of the document list area.


Reference	Type	Attachment	Account	Action
Contract	Contract	Document	DemoAccount	Download
Offer letter	Offer Letter	Document	DemoAccount	Download
Please upload a copy of your passport	Exchange Document	Document	DemoAccount	Download
Code of Conduct	Reading List Item	Document	DemoAccount	Download
WTR	Signed Document	Document	DemoAccount	Download

You can then click “add document”.



First you must prep the document outside of Webonboarding using microsoft word, add the unique text (this is what Docusign will use to find where to add the signature) and enter any merge fields. The merge field dictionary can be found underneath the “document type” drop down.

Documents guide

 Documents > New


[< Back](#) [↶ Undo](#) [Save](#)

[General](#) [Companies](#)

General

Reference *

Contract of Employment



Description *

Contract of Employment

Document Type *

Contract

▼

[Show Merge Field Dictionary](#)

Attachment

Attachment Type

Document


▼

You can add a signature field anywhere on the contract document as the system will pick up unique text for example “signed:” / “signature:”.

You can also add an initials field and date signed field with the same principle.

Documents guide

Digital Signing Fields

 Digital signing fields allow the signing portal to position the user input fields on the contract. Each signing field has a search term shown in blue. On each instance of the search word within the contract the relative input will be required. As a minimum each contract document requires a signature field. How to set the signing fields in edit mode:

1. Click on the blue text within the digital signing field.
2. Edit the search term to match the text at the location in the document.
3. Drag and drop the signing field placeholder (yellow box) to the desired position relative to the search term.


Signature



Signed: 

1. X: 46
2. Y: 0

[Add signature field](#)

 As well as the signature fields, the date signed and signer initials can be captured.

[Add Initials Field](#)[Add Date Signed Field](#)

Once the document is ready to upload select the file and upload.

Ensure that the Active box is ticked, this ensures that the new document is available for use.

Status

Active

Inactive

Active

You can assign the contacts and offer letters to specific companies using the companies tab.

Click Save.

Documents guide

How to upload other documents.

If “Exchange Document” or “Reading List” is selected as the “Document Type” , then the screen will change

GeneralCompanies

General

Reference *

Code of Conduct

Description *

Code of Conduct

Document Type *

Reading List Item

Mandatory

☐

Attachment

Attachment Type *

Document

File

Choose file

Remove file

Documents guide

[< Back](#) [+ Add](#) [✎ Edit](#)

General

Companies

General

Reference *

Please upload a copy of your passport

Description *

Please upload a copy of your passport

Document Type *

Exchange Document

Upload Only ☒

Mandatory ☐

Attachment

Attachment Type

Document

You can indicate if the document is to be Upload only (the onbordee importing an item into the system) and/or Mandatory.

If it is not an Upload only document, then you can choose whether this is a Document or a Web-Link under “Document Type”.

If you select Document from the drop down menu, then click, Choose File and navigate to the relevant document and double click to select and upload.

Attachment

Attachment Type

Document

File

[Download](#)

If Web-Link is selected, then enter the URL of the document into the field provided.

Documents guide

Attachment

Attachment Type

Web-link



Web Link



Ensure that the Active box is ticked, this ensures that the new document is available for use.

Status

Active

Inactive

Active

The field labelled System Account Name will populate with your Organisation Account name once the record has been saved.

Before being able to save you must select the Companies tab and assign the document to the relevant companies.

Click Save.