iTrent Electronic Signatures Guide

Version: 1.3

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Classification: Company Confidential

Document Control

Issue	Published	Software version	Comments
1.3	March 2021	10.39.00	8. *Electronic signatures and Onboarding* updated (clarification on correspondence history added)
1.2	November 2020	10.38.00	4.2 *Review merged correspondence* updated 4.3 *Pre-publish editing* new section added 6.5.1 *Acknowledge* updated 6.5.2 *Sign* updated 6.5.3 *Reject* updated 10.1 *E-signature Correspondence Summary report* updated
1.1	August 2020	10.37.00	Section 1 updated 2.2 added 3.1 updated 3.1.3 added 4.1 updated 4.2 updated 6.4 added 6.5 updated 6.5.3 added Section 7 added 9.1 updated 9.2 updated Section 10 added
1.0	May 2020	10.36.00	New Guide.

Document Classification

This document is **Company Confidential**. It may be disclosed within MHR. It may be disclosed externally when necessary under controlled and restricted conditions.

Contents

1. Introduction

The electronic signature correspondence functionality allows for the creation of electronic signature capable correspondence within iTrent, which can then be published to self service, to be acknowledged, electronically signed or rejected.

This functionality has been built into iTrent to provide better security as the data will be held only within iTrent and not pushed externally.

MHR have enhanced the current correspondence functionality to allow a template to be specified for electronic signature with the ability to publish correspondence for signature in ESS. This will scale to both standard self service and the Onboarding process.

A workflow can be set up to notify a person that they have a document to sign and notification once the document has been signed.

This is a licensed module.

The module can be used with Business Objects and Insight Builder for reporting purposes. There is also a standard report available within the Management Information report area of iTrent to assist with correspondence tracking.

In iTrent release 10.37, the My Correspondence repository has been introduced into self service to allow for;

- Previously actioned correspondence to be reviewed
- Previously actioned correspondence to be printed
- Pending correspondence to be actioned

This repository will only display correspondence generated as electronic signature capable correspondence.

2. Activating electronic signatures

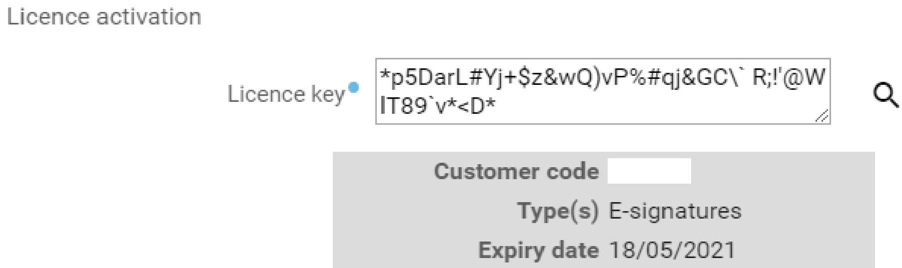
The electronic signatures module will require a licence key from MHR. Once obtained, the license key will need to be activated in both iTrent Test and Live environments by entering the key provided into the Licence manager page.

Navigate to Licence manager through find iTrent pages or alternatively using the following navigation pathway:

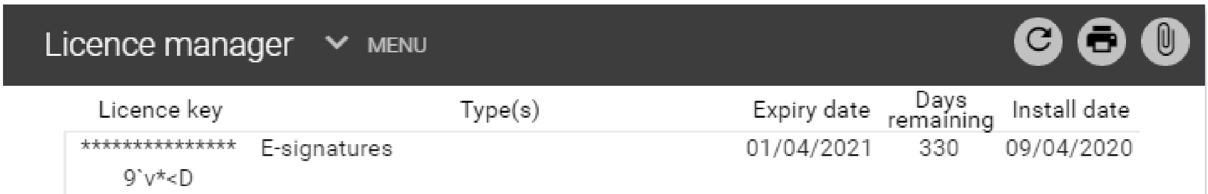
Organisation > System administration > Licence manager

The key will be a random string of letters, numbers and other characters.

At the bottom of the page, enter the key, search and then click the activate button:



Once activated, the key will show in the licence manager view:



2.1 Add electronic signature to navigation security

When a new release is installed, only the system administrator will have access to all the new navigation options. The navigation security for each function access will need to be reviewed and then recompiled to enable access to the new functionality. Users who have multiple Function accesses will also need to have their Access Assignments recompiled.

Batch processes are available to perform the recompilations.

Navigate to Navigation security through find iTrent pages or alternatively using the following navigation pathway:

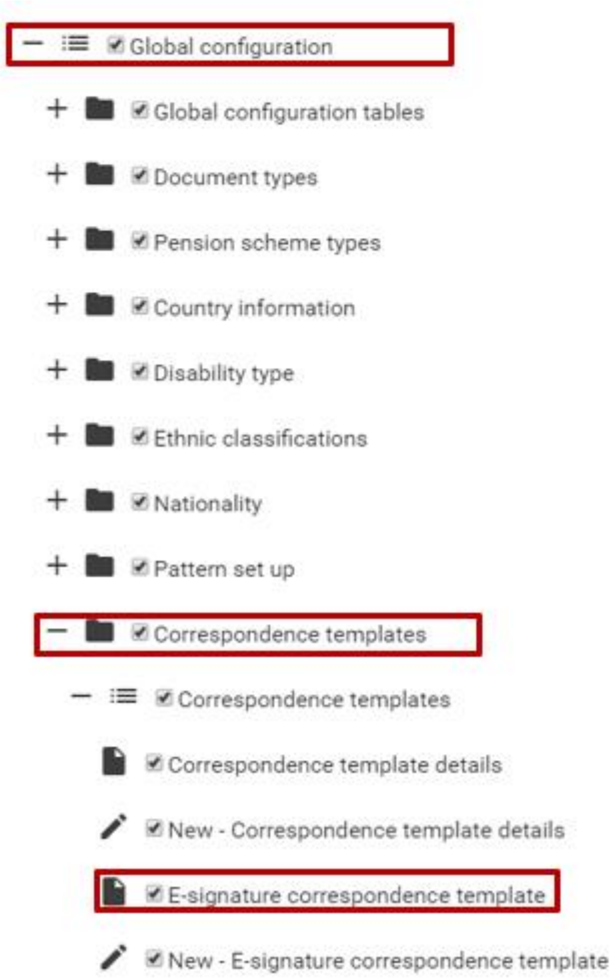
Organisation > Security > Function access > Navigation security

This page displays a checklist of all the iTrent modules contained in your organisation, with their sub-nodes (click ⊞ to expand the view) and the current status of access permissions.

Items that are ticked are available to users that use the selected Function access (following recompilation).

Items that are not ticked are not available to users that use the selected Function access (following recompilation).

For example:



Un-ticking any of the boxes will disable access to the individual node or the whole module can be disabled by un-ticking the top level box. Unchecked items will not be available for users with the selected Function access.

When the Compile button has been clicked on the Navigation security page the compilation will run as a background process. When the compilation process completes, users can log in and access the new functionality.

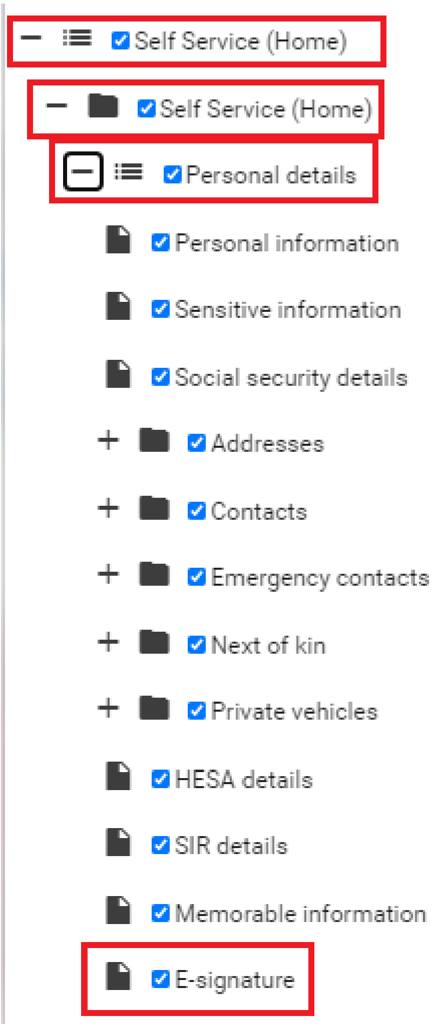
2.2 Navigation security updates for self service

2.2.1 Update stored e-signature

Navigate to Navigation security through find iTrent pages or alternatively using the following navigation pathway:

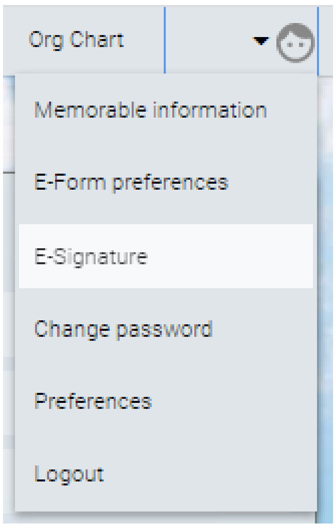
Organisation > Security > Function access > Navigation security

Under the Self Service (Home) branch, expand Personal details and tick the option for E-signature. Save and recompile the access.



Save and recompile the access.

Anyone with this function access will now see the ‘E-signature’ option in the preferences menu in self service.

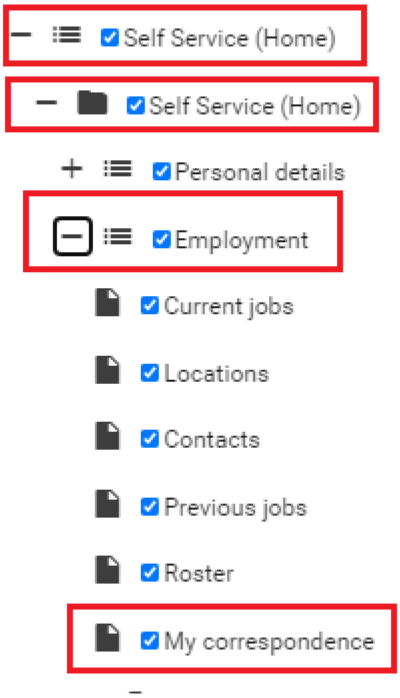


2.2.2 View My Correspondence

Navigate to Navigation security through find iTrent pages or alternatively using the following navigation pathway:

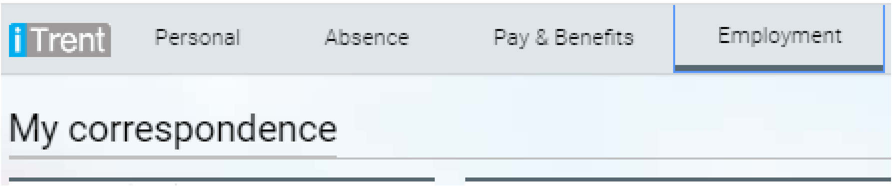
Organisation > Security > Function access > Navigation security

Under the Self Service (Home) branch, expand Employment and tick the option for My Correspondence.



Save and recompile the access.

Anyone with this function access will now see My correspondence at the bottom of the Employment page within self service.



3. Electronic signature correspondence template

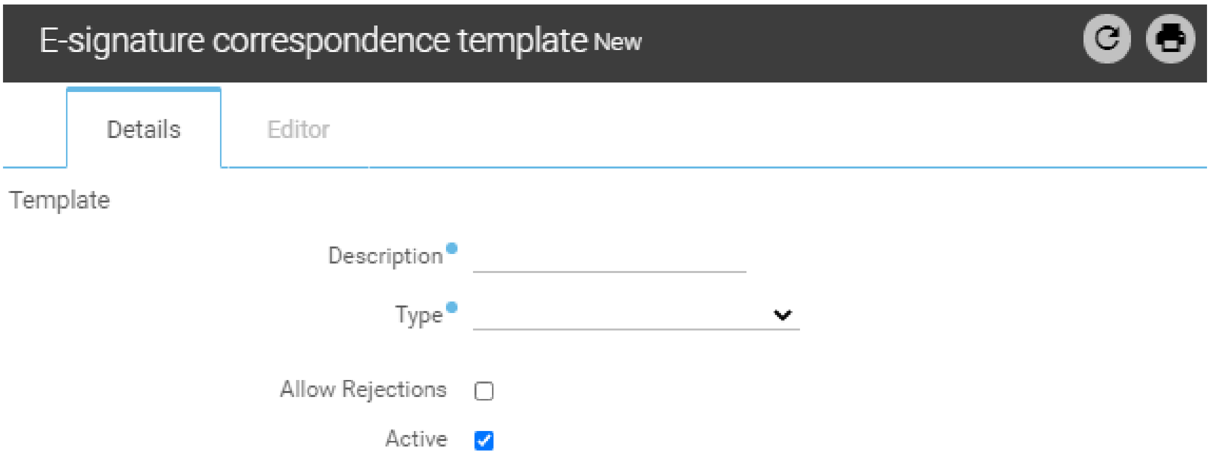
The electronic signature correspondence functionality allows for the creation of electronic signature capable correspondence. This correspondence can then be published to self service to be acknowledged, rejected or electronically signed.

3.1 Create electronic signature capable correspondence template

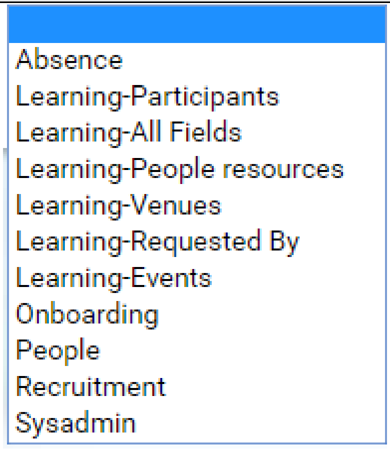
Navigate to the E-signature correspondence template page through find iTrent pages or alternatively using the following navigation pathway:

Global Configuration > Correspondence templates > E-signature correspondence template

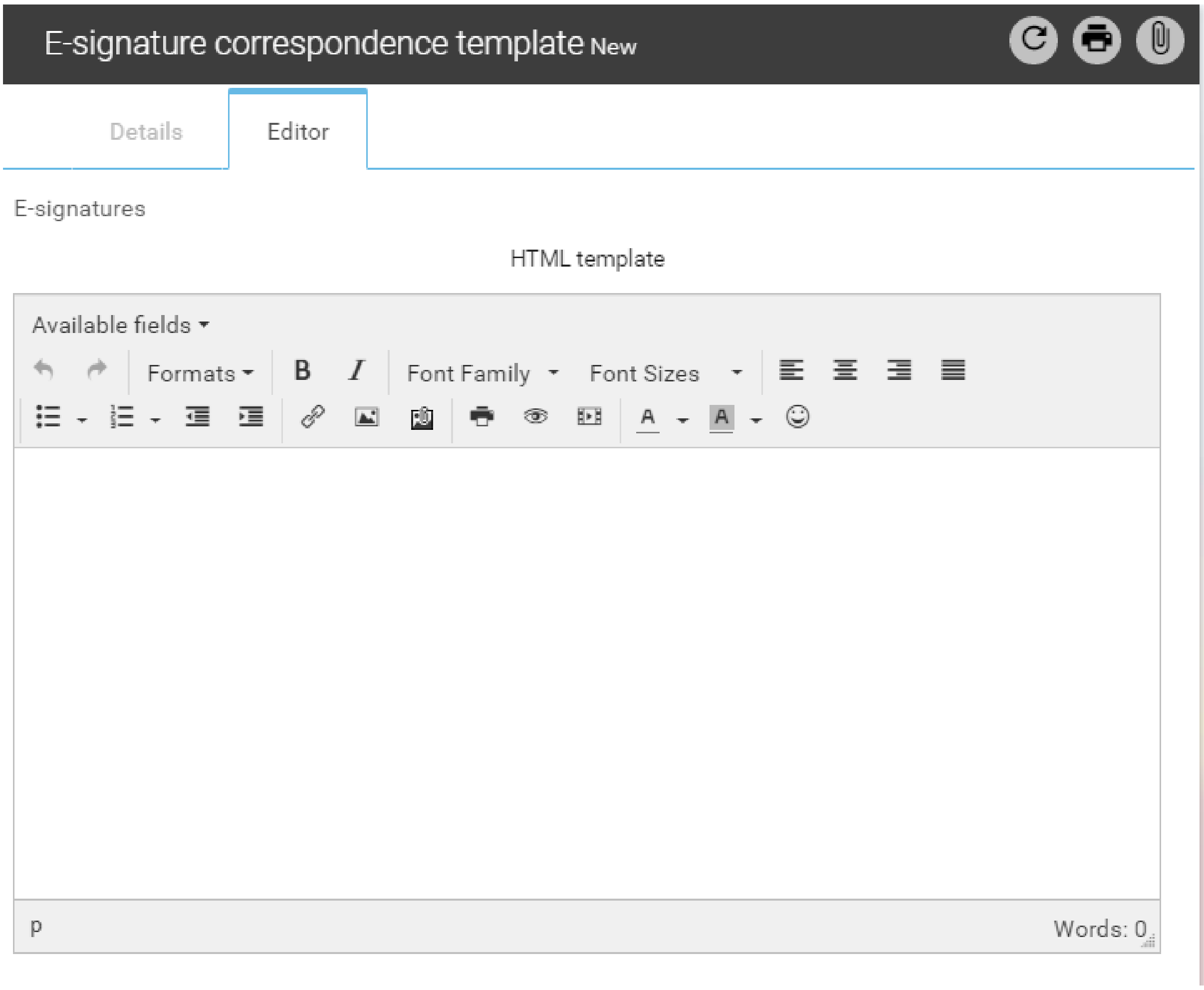
The E-signature correspondence template page will open to the Details tab where a description, template type and active status can be set. There is a check box where it can be specified whether rejections are allowed for the template.



E-signature correspondence template	
Field	**Description**
Description	Enter the template description i.e. template name.
Type	Select the template type from the drop-down menu:

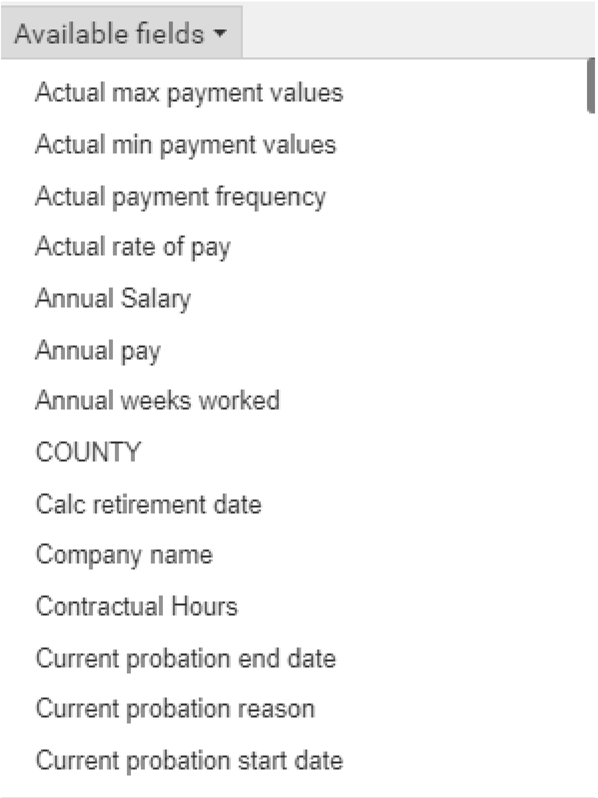
E-signature correspondence template	
Field	**Description**
	 The type chosen will determine the fields available for merge in the HTML Editor.
Allow Rejections	This check box will default to being unticked. When this is ticked, the template will allow rejections when presented to a person in self service.
Active	This check box will default to being ticked so that the template is set to Active. It can be unticked to allow the template to be inactive until required.

The correspondence itself will be drafted in the Editor tab.



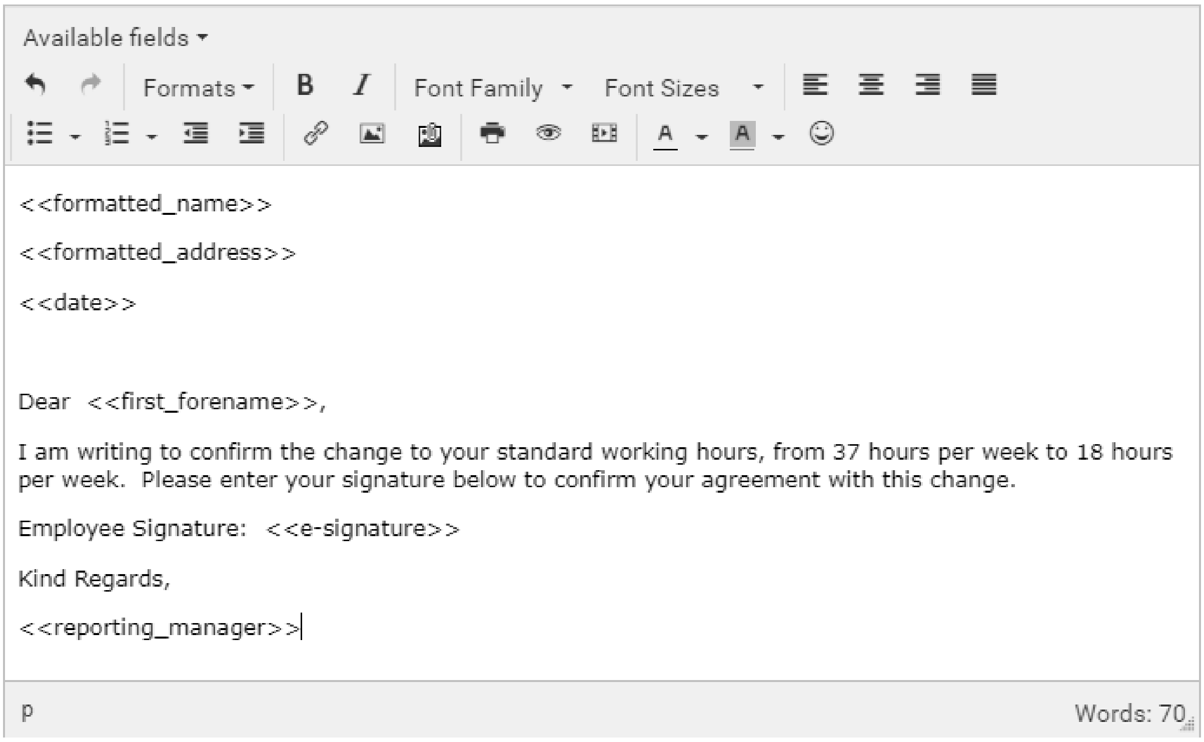
Enter the content for the correspondence template in the HTML template text box.

When needing to insert a merge field, select this from the Available fields drop down menu. This is a conditional field and will display available fields determined by the type of template selected on the Details tab.



If a template type has not been selected on the Details tab, the Available fields menu will not be visible.

Example template:



When the template is complete, SAVE the template.

3.1.1 Electronic signature

Where an electronic document requires a signature field, ensure that the <<e-signature>> field is included in the HTML template.

The <<e-signature>> field can be formatted so it is easier to see on the final signed document e.g. formatting as bold/italics and/or in a different colour.

Employee Signature: ***<<e-signature>>***

When the <<e-signature>> field is inserted into the template, the recipient of the correspondence (once merged and published) will be prompted to enter an electronic signature into the document in the same location as indicated on the template.

3.1.2 Acknowledge

When a template does not contain an <<e-signature>> field, the recipient will be able to acknowledge the document but there will be no field for them to leave an electronic signature when published in self service.

3.1.3 Reject

When the allow rejections check box is ticked against the e-signature correspondence template in iTrent, any pending correspondence for that template will show a Reject button when viewed in self service.

Allow Rejections ☑

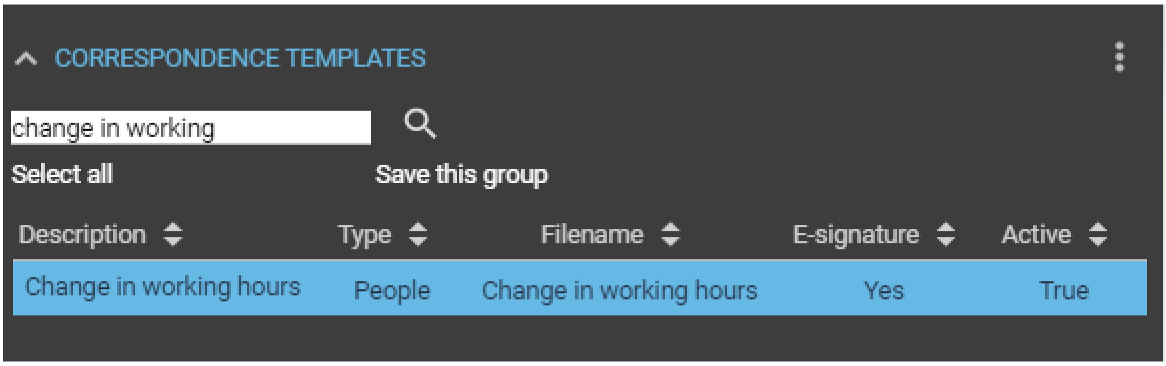
This is effective in real time, for example, when creating the template, it is set to allow rejections, the template is then merged and published to self service. If the template in iTrent is then updated to no longer allow rejections, and the correspondence is viewed in self service after the change, the reject button will not be present.

3.2 View Electronic signature capable correspondence template details

Navigate to the E-signature correspondence template page through find iTrent pages or alternatively using the following navigation pathway:

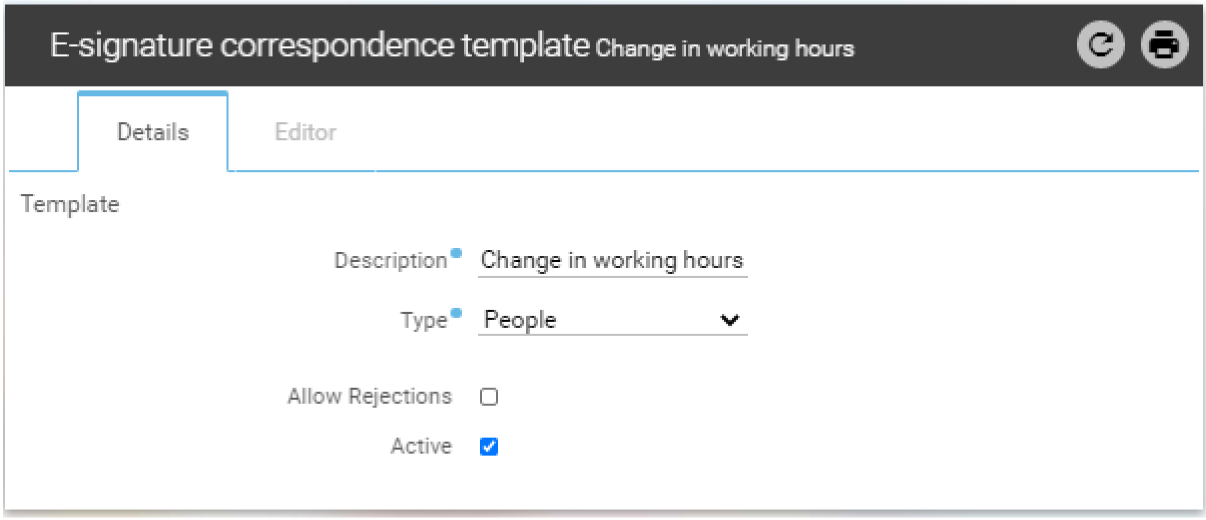
Global Configuration > Correspondence templates > E-signature correspondence template

In the object pane, search for the template to be viewed/edited.

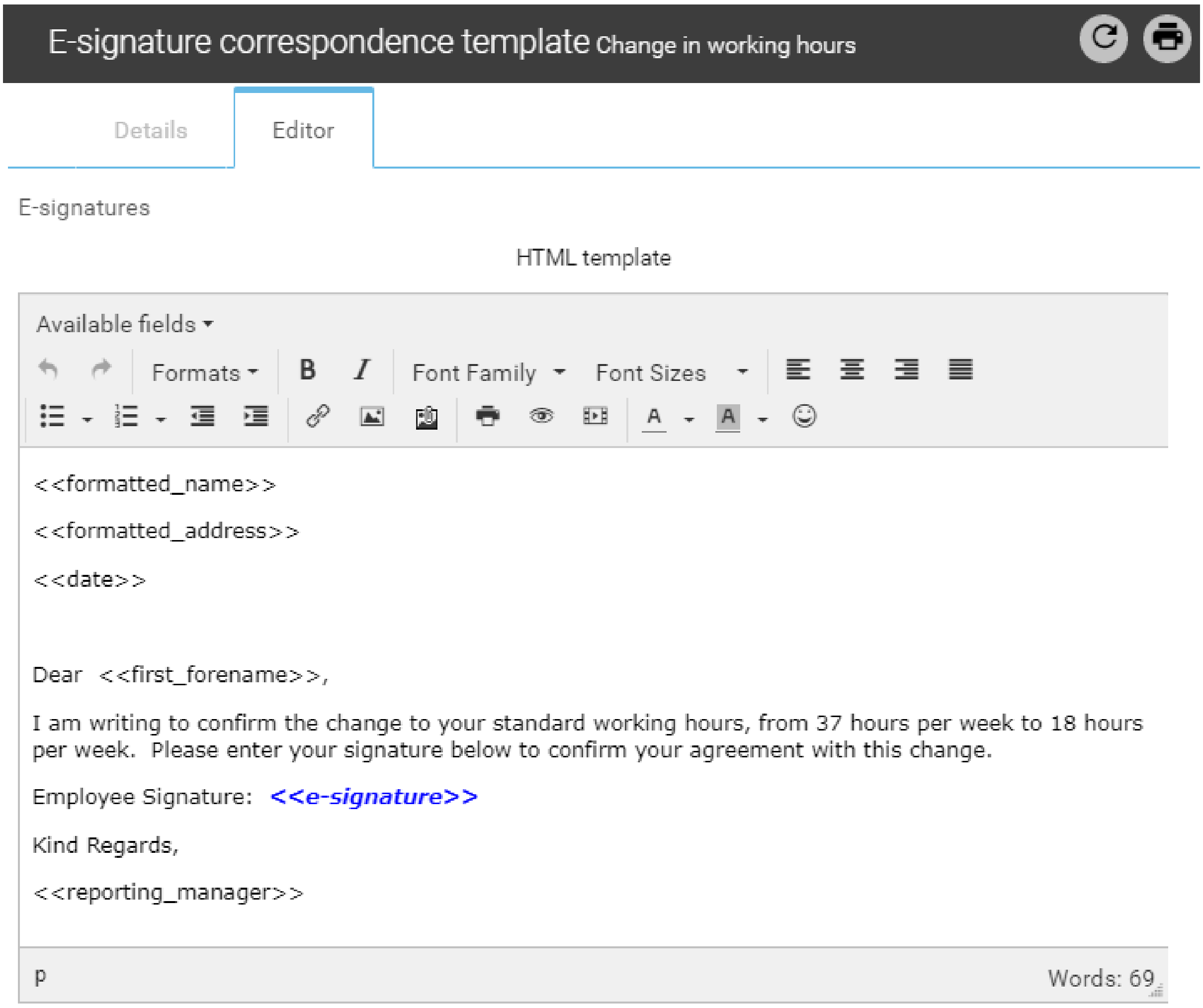


If searching for an inactive template, an advanced search will be necessary.

View template details:



View HTML template details by selecting the Editor tab:

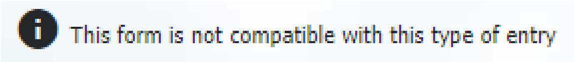


The template can be edited in this page if required, followed by SAVE

If necessary, the template can be deleted from this page by selecting DELETE.

Electronic signature templates cannot be accessed or deleted from the Correspondence maintenance page. When searching for correspondence templates on the Correspondence maintenance page, found at the following navigation, System Administration > Correspondence maintenance, no electronic signature templates will be returned in the search. This will only return standard correspondence templates.

Electronic signature correspondence templates cannot be viewed within the Correspondence template details page. Conversely, a standard correspondence template cannot be viewed within the E-signature correspondence template details page. Doing either will return the following error message:



4. Document merge and publishing for a person

4.1 Run document merge

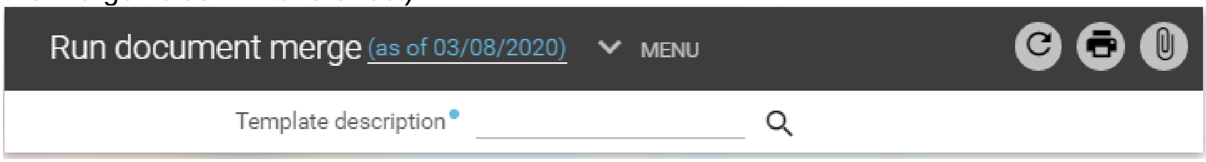
Navigate to the relevant Run document merge page through find iTrent pages or alternatively using the appropriate navigation pathway for the type of template to be merged. For example:

People template: Organisation structure > People > Run document merge

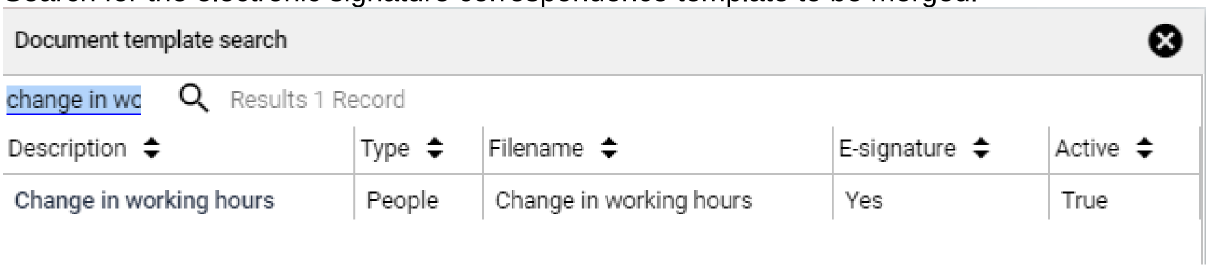
Absence template: Organisation structure > People > All absences list > Run document merge (All absences)

Recruitment template: Recruitment > Applicants > Requisitions > Run document merge (Requisitions)

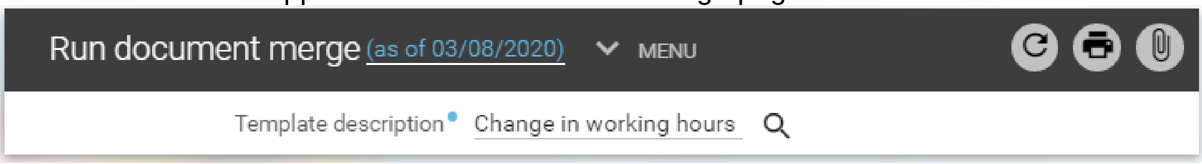
When the Run document merge page opens, set the effective date (which will be the date the merge fields will take effect).



Search for the electronic signature correspondence template to be merged.



Once selected it will appear in the Run document merge page.



Once the correct templated has been selected, run the document merge.

Upon completion of the document merge process, the HTML is generated with appropriate fields merged.

4.2 Review merged correspondence

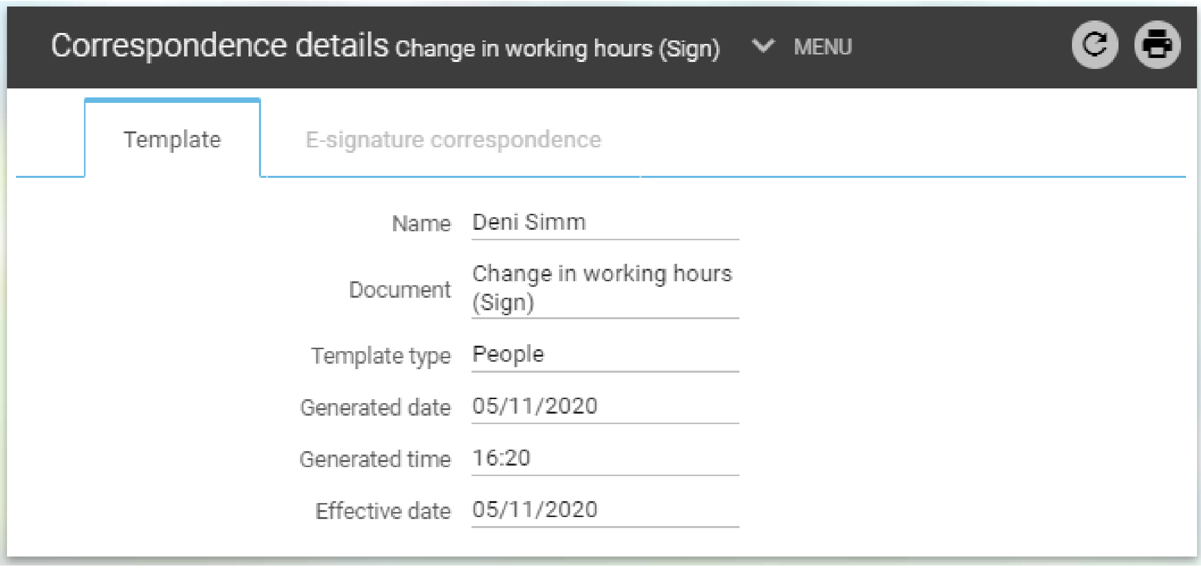
After the correspondence has been generated via the document merge, it can be reviewed, before being published.

Navigate to the Correspondence details page through find iTrent pages or alternatively using the following navigation pathway:

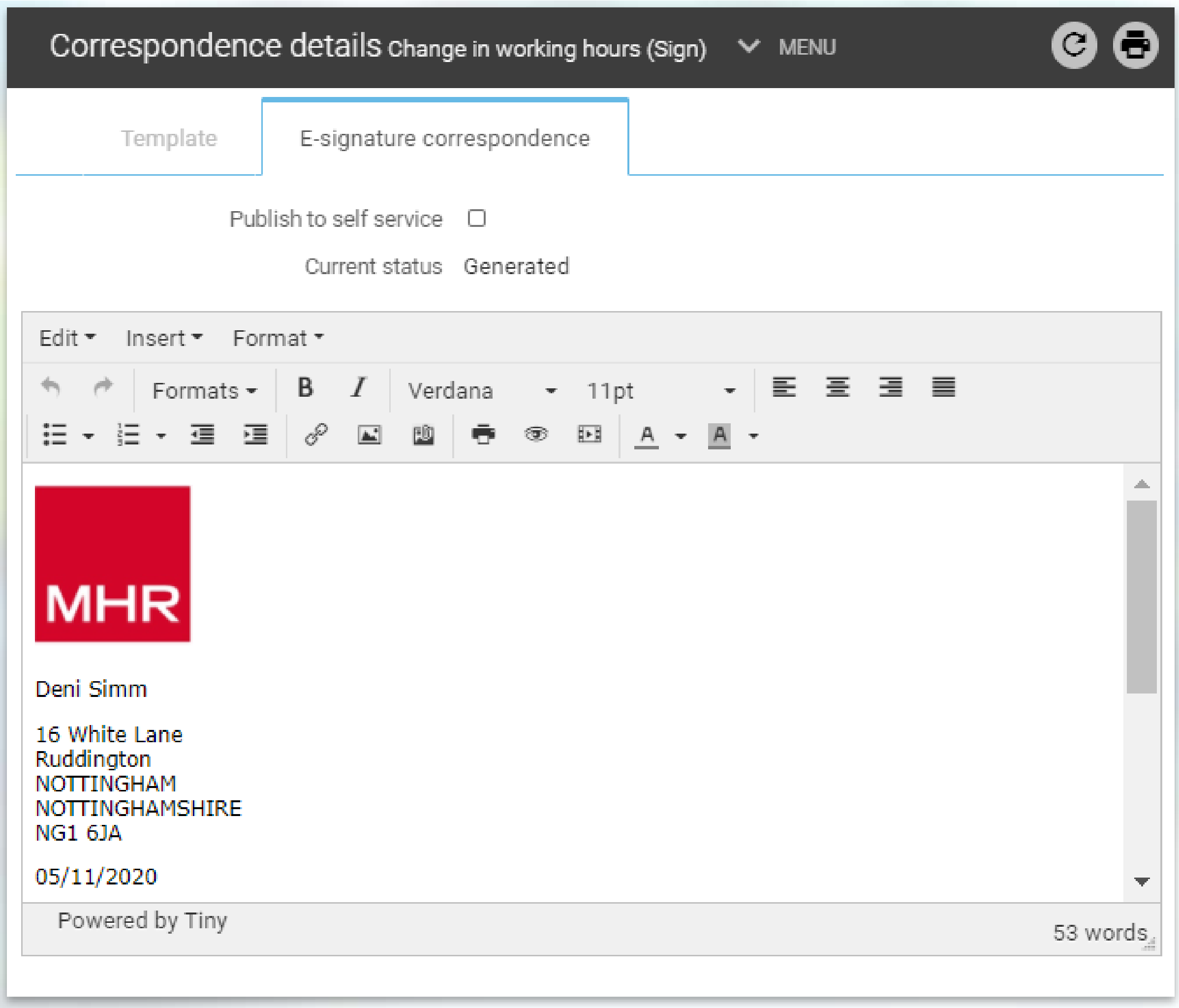
Organisation structure > People > Correspondence log > Correspondence details

The page is comprised of two tabs:

- Template
- E-signature correspondence



Correspondence details	
Template	
Field	**Description**
Name	Displays the name of the person the document has been merged against.
Document	Displays the template description entered when creating the correspondence template.
Template type	Displays the template type chosen when creating the correspondence template.
Generated date	Date stamp for when the correspondence was generated.
Generated time	Time stamp for when the correspondence was generated.
Effective date	Effective date for the correspondence.

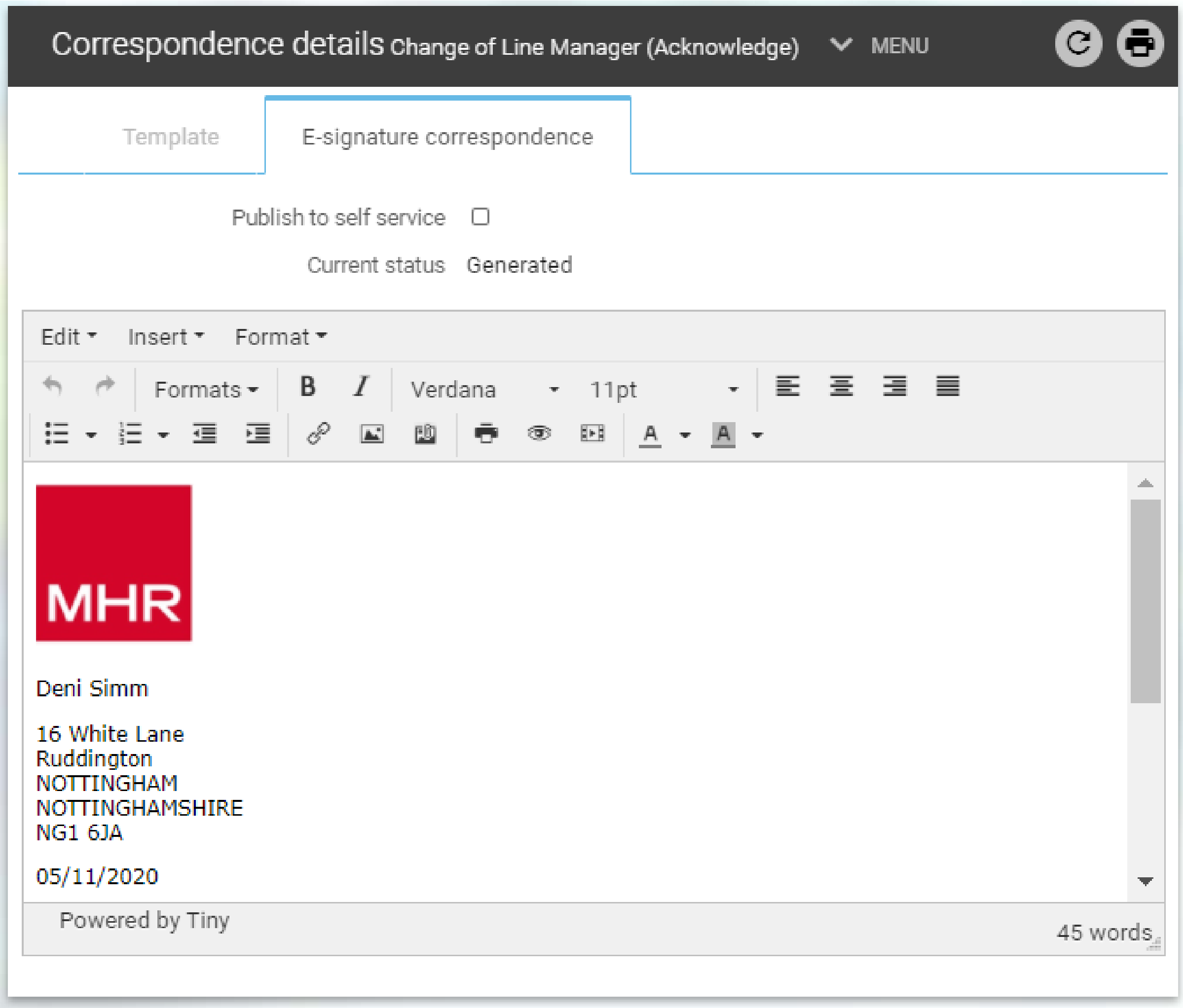


Correspondence details	
E-signature correspondence	
Field	**Description**
Publish to self service	This field will only be visible when the status is Generated or Pending. Ticking the signature tick box changes the status from Generated to Pending. If the current status is Pending, an unticking of the tick box changes the status back to Generated.
Current status	This is a read-only field which indicates the current status of the correspondence. This will show Generated following the document merge. Status Definitions: Generated (G) – run document merge completed and correspondence has been generated Pending (P) – the correspondence has been published to self service and is pending action

Correspondence details	
E-signature correspondence	
Field	**Description**
	Signed (S) – the correspondence has been signed in self service Acknowledged (A) – the correspondence has been acknowledged in self service Rejected (R) – the correspondence has been rejected in self service
HTML viewer	This is a read-only text box which will preview the contents of the merged correspondence. Where the status is generated or pending, the <<e-signature>> field will be shown within the correspondence. Where the status is signed, the <<e-signature>> field will be replaced by the persons electronic signature along with the date and time signed.

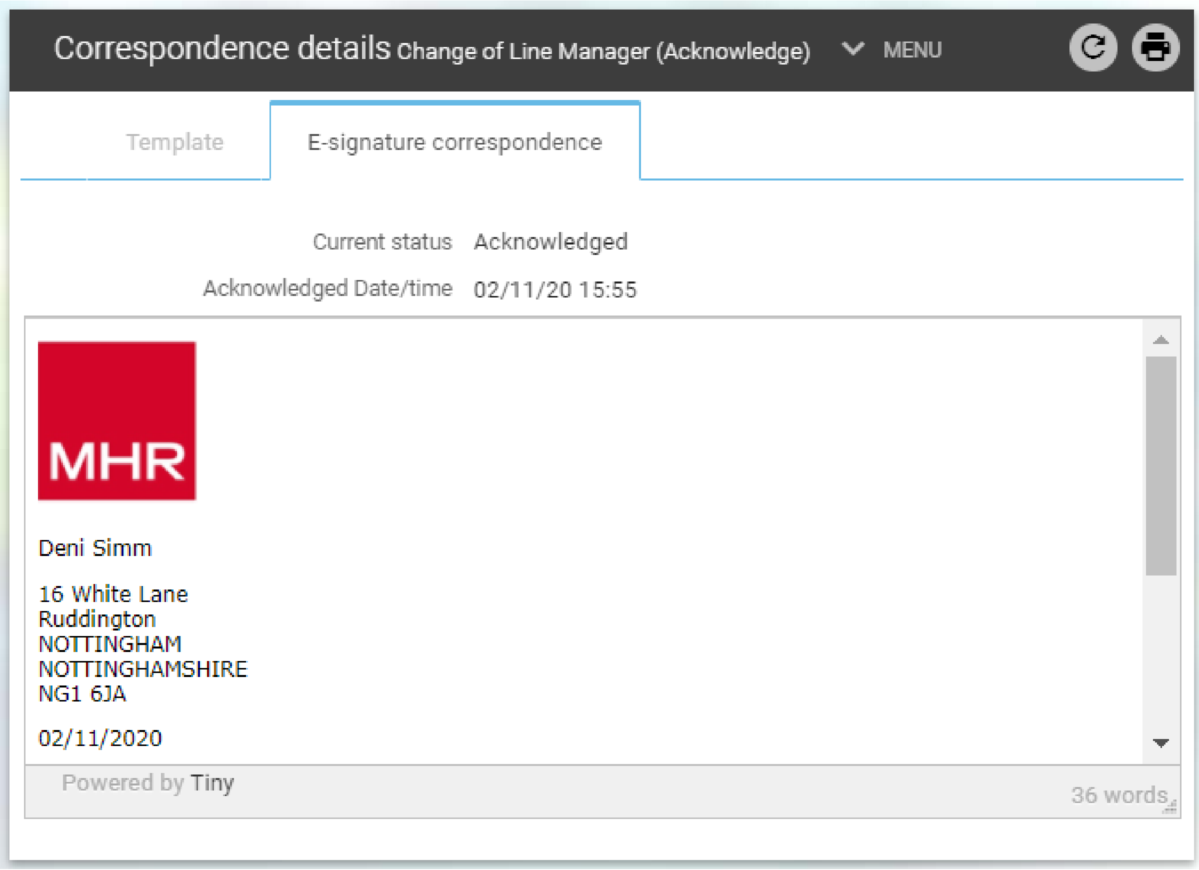
4.3 Pre-publish editing

If viewing the Correspondence details page for a piece of correspondence that is at the current status of ‘Generated’, the correspondence will appear within an HTML editor window.



From here, the correspondence can be edited as necessary (make changes and save the page) prior to being published to self service.

If viewing the Correspondence Details page for a piece of correspondence that is not at the current status of 'Generated', the correspondence can only be viewed.



4.4 Publish to self service

Navigate to Correspondence details through find iTrent pages or alternatively using the following navigation pathway:

Organisation structure > People > Correspondence log > Correspondence details

Once the details have been reviewed, and it has been decided that the correspondence can now be published to self service, the Publish to self service tick box will need to be ticked and the page saved.

The status will update to show that the correspondence is now Pending action.

The correspondence will be available to the person the next time they log in to their self service account.

4.4.1 Unpublishing merged correspondence

After correspondence has been published to self service, it may be determined the correspondence was sent in error and needs to be removed from the person's view.

If the current status is Pending, unticking the tick box changes the status back to Generated. The person will no longer see this correspondence when they log in to self service.

If the current status is Signed the checkbox cannot be changed.

4.4.2 Deleting merged correspondence

After correspondence has been published to self service, it may be determined the correspondence was created in error and needs to be deleted from iTrent.

If the current status is Generated or Pending, the correspondence can be deleted by pressing the DELETE button when the appropriate correspondence is selected.

If the current status is Signed the correspondence cannot be deleted.

5. Document merge and publishing for a group

5.1 Running document merge for a group

Correspondence can be generated for a group of people and published to self service in bulk.

Navigate to the relevant Run document merge page through find iTrent pages or alternatively using the appropriate navigation pathway for the type of template to be merged.

In the left hand search pane, select a group of people by clicking CTRL+ selecting people from the results returned, or by selecting a smart group.

Enter the effective date for the merge, and search for the template to be merged for the people selected.

Once selected, and the page has refreshed, the run document merge page will display the "Publish to self service" tick box. This will default to being unticked. The merge can be run without having this ticked. A notification will be returned once the merge is complete.

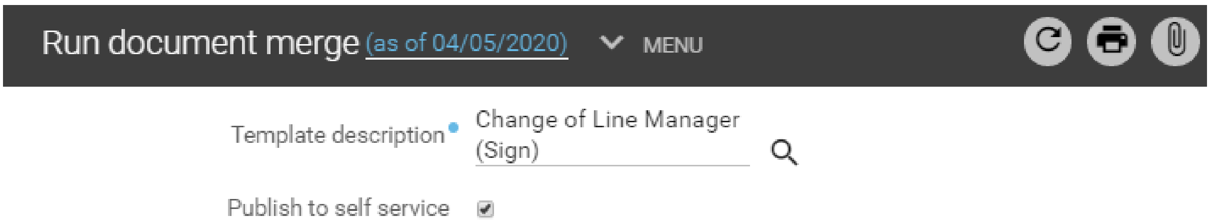
5.2 Reviewing merged correspondence for a group

When correspondence is merged on bulk, it cannot be previewed at this stage. Instead, if wishing to preview before publishing, this will need to be done on a person by person basis, through the Correspondence details page. See section on Reviewing merged correspondence for a person.

5.3 Publishing correspondence for a group

When choosing to merge correspondence against a group of people, there are two methods for publishing the correspondence.

This can be done in bulk, at the time the merge is run, by ticking the Publish to self service tick box before selecting the Run button.



If the correspondence for a group is not published at the time of merge, it will need to be published for each person individually, through the Correspondence details page. See section on Publishing merged correspondence for a person.

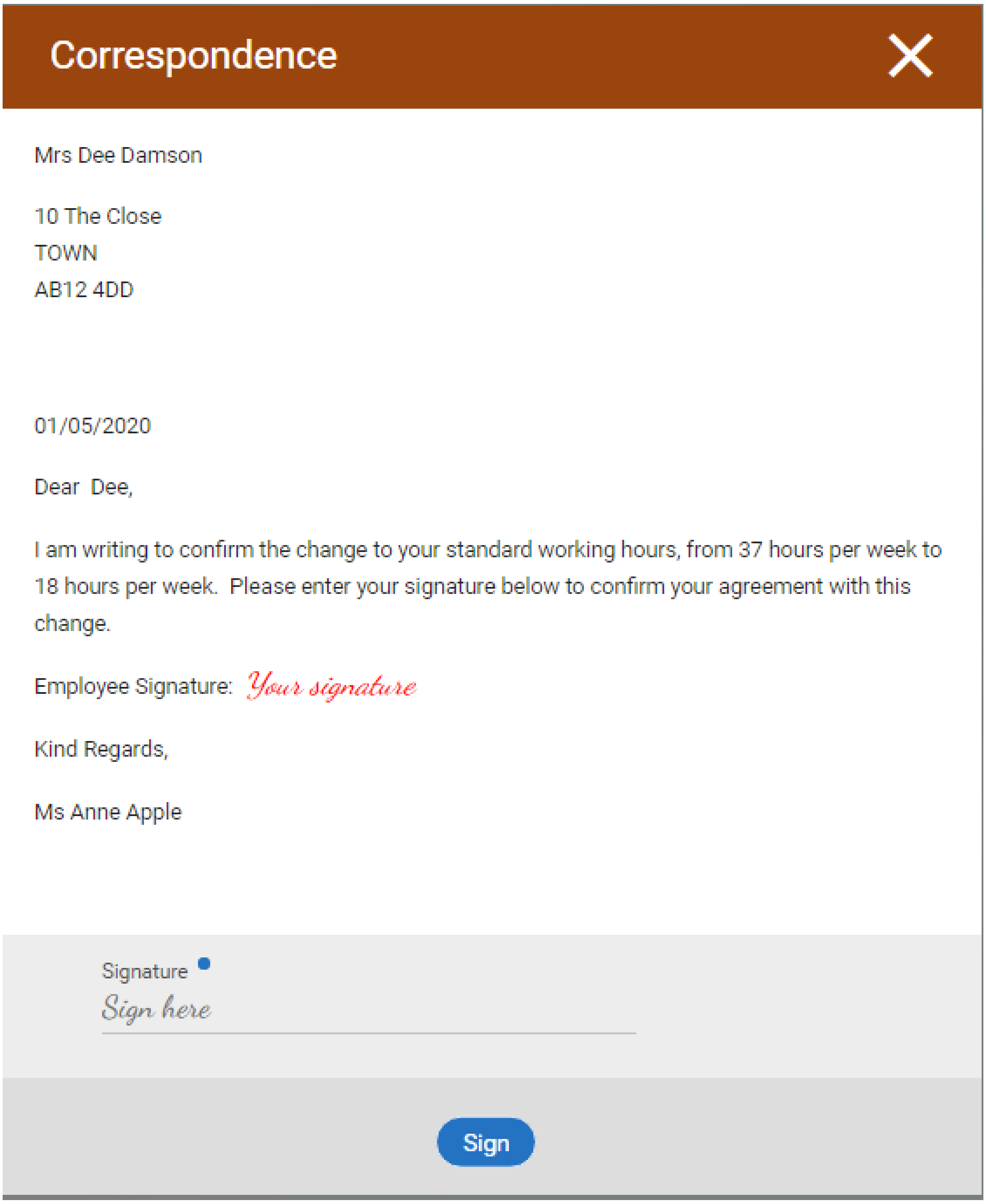
5.3.1 Unpublishing / Deleting merged correspondence

After correspondence has been published to self service, it may be determined the correspondence was sent in error and needs to be removed from the person's view.

When correspondence has been merged as a group, the correspondence cannot be unpublished or deleted as a group. This would need to be done on a person by person basis. See section on Publishing merged correspondence for a person.

6. Person actions correspondence in ESS

When an electronic signature capable document has been published to self service, it will be presented to the person in a pop-up when they next log on.



Where the person has multiple documents to action, they will be presented with the oldest showing first in the pop up, and the most recent document appearing last (this is based on Generated Date).

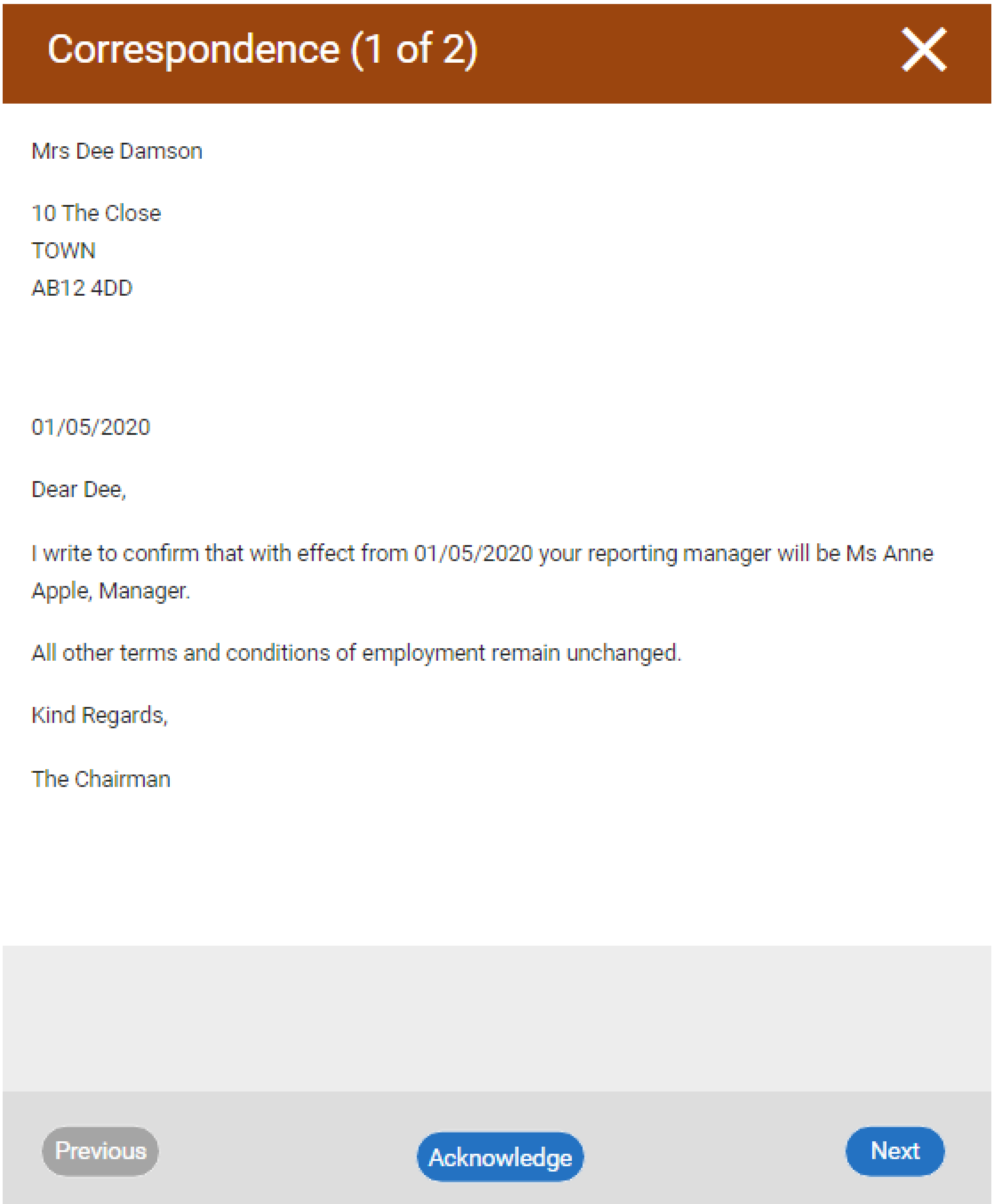
Where there are multiple documents to action, the pop-up heading will display page numbers (e.g. 1 of 2).

6.1 Navigation

Button	Description
	Closes the pop-up modal. If there is correspondence in the pop up which has not been actioned, and still requires action, it will be presented to the person in self service at the next log on.
	Navigates to the previous document in the pop-up modal.
	Navigates to the next document in the pop-up modal.

6.2 Acknowledge

When a person has been sent correspondence to be acknowledged, it will present in the pop-up and an Acknowledge button will be visible.



Mrs Dee Damson

10 The Close
TOWN
AB12 4DD

01/05/2020

Dear Dee,

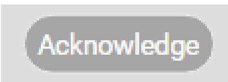
I write to confirm that with effect from 01/05/2020 your reporting manager will be Ms Anne Apple, Manager.

All other terms and conditions of employment remain unchanged.

Kind Regards,

The Chairman

To acknowledge correspondence, press the Acknowledge button. The button will now be greyed out and is now disabled for the page of correspondence being viewed. This action cannot be reversed.

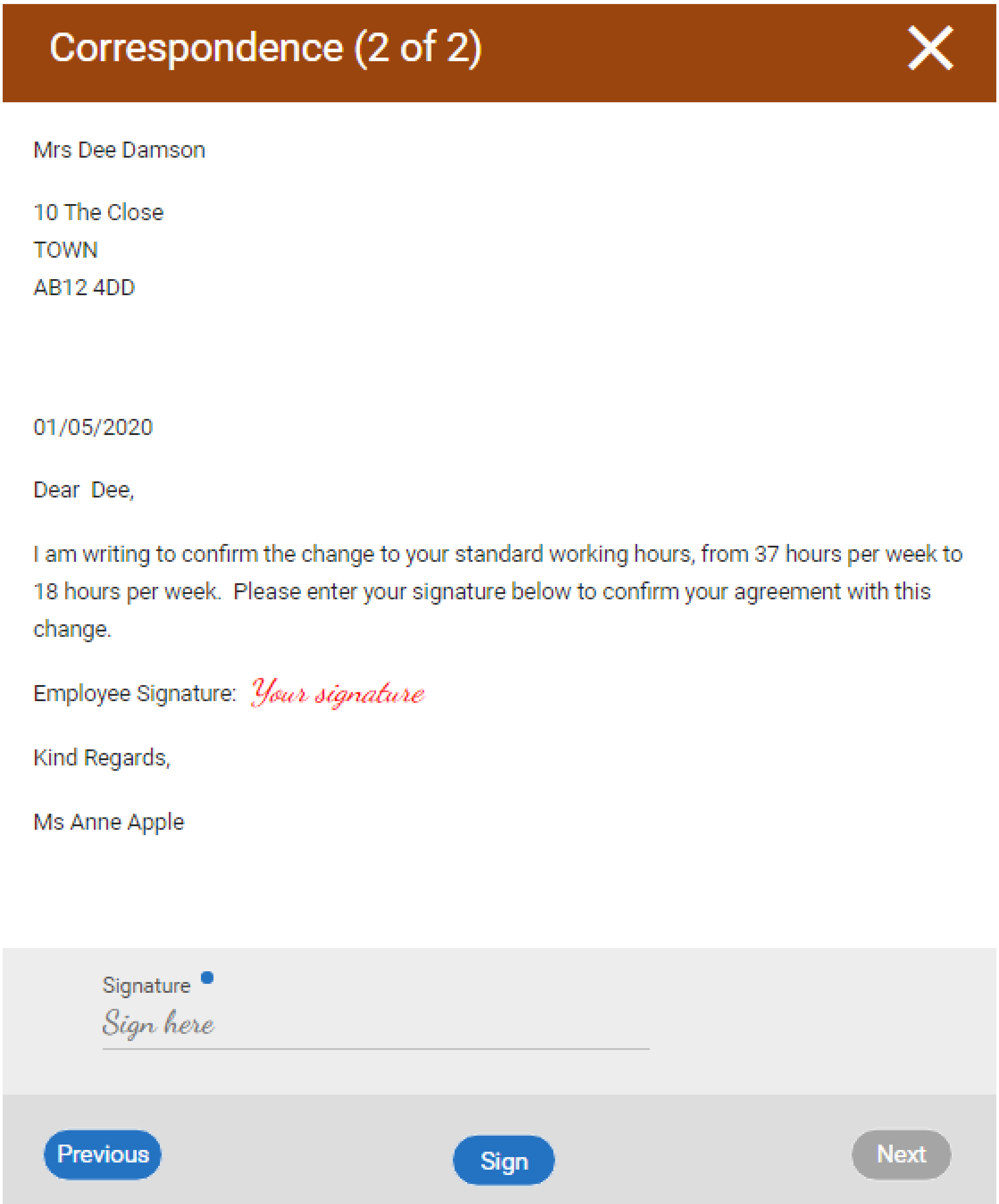


If there is only one piece of correspondence to action, the person can close the pop up by clicking the X in the top right corner. Where there are multiples, the person can click the Next button to move to the next piece of correspondence requiring action.

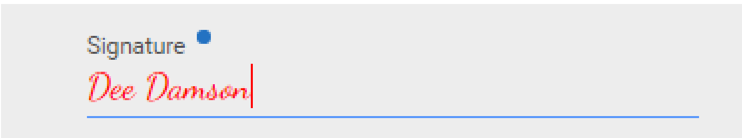
If the pop up is closed before all correspondence has been actioned, the person will be presented with the correspondence the next time they log on.

6.3 Sign

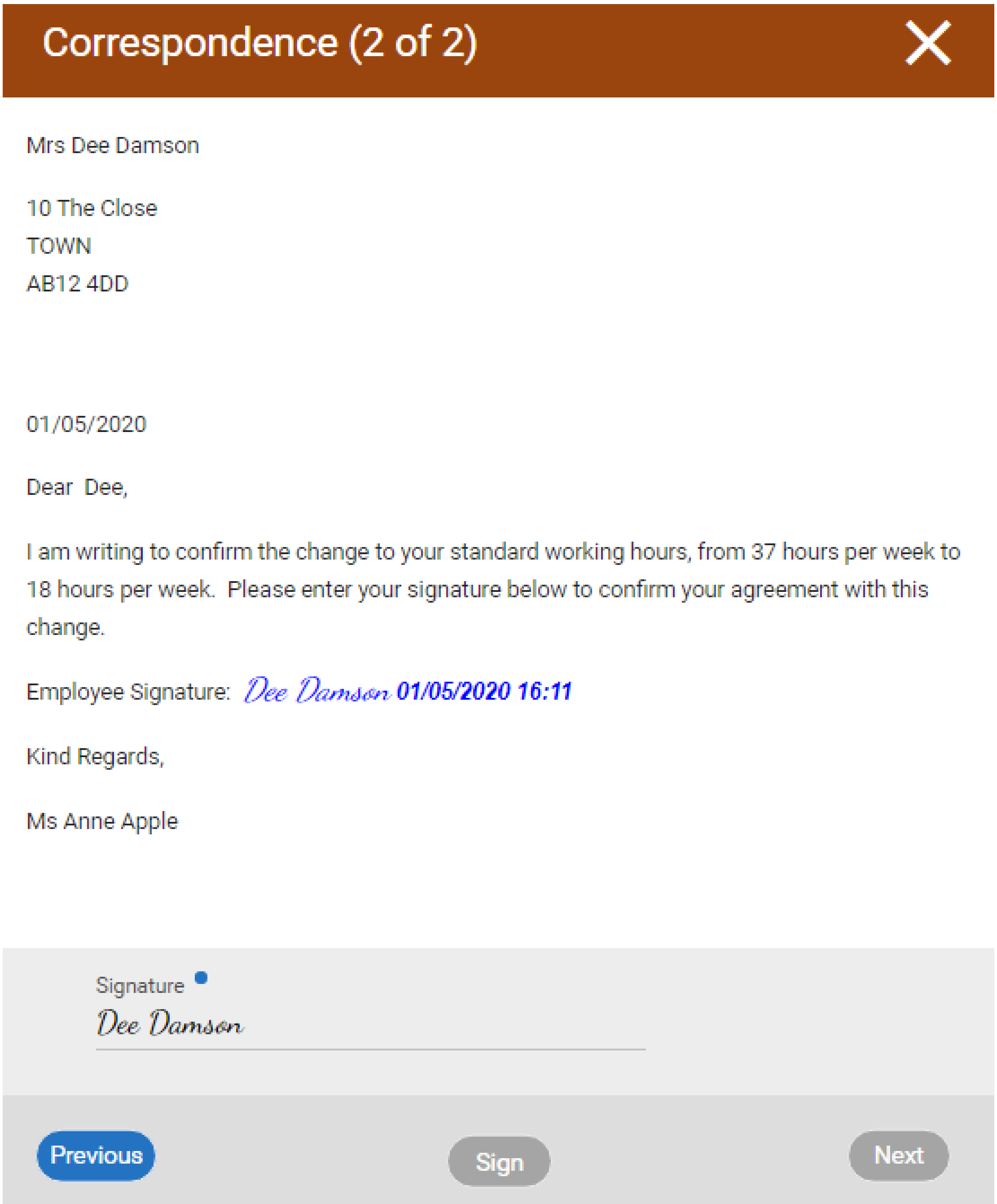
When a person has been sent correspondence to be signed, it will present in the pop-up and a Sign button will be visible.



To sign correspondence, enter a signature into the mandatory Signature field.



Press the Sign button which will insert the signature, along with a date and time stamp, into the correspondence display.


Correspondence (2 of 2)

Mrs Dee Damson

10 The Close
TOWN
AB12 4DD

01/05/2020

Dear Dee,

I am writing to confirm the change to your standard working hours, from 37 hours per week to 18 hours per week. Please enter your signature below to confirm your agreement with this change.

Employee Signature: Dee Damson **01/05/2020 16:11**

Kind Regards,

Ms Anne Apple

Signature
Dee Damson

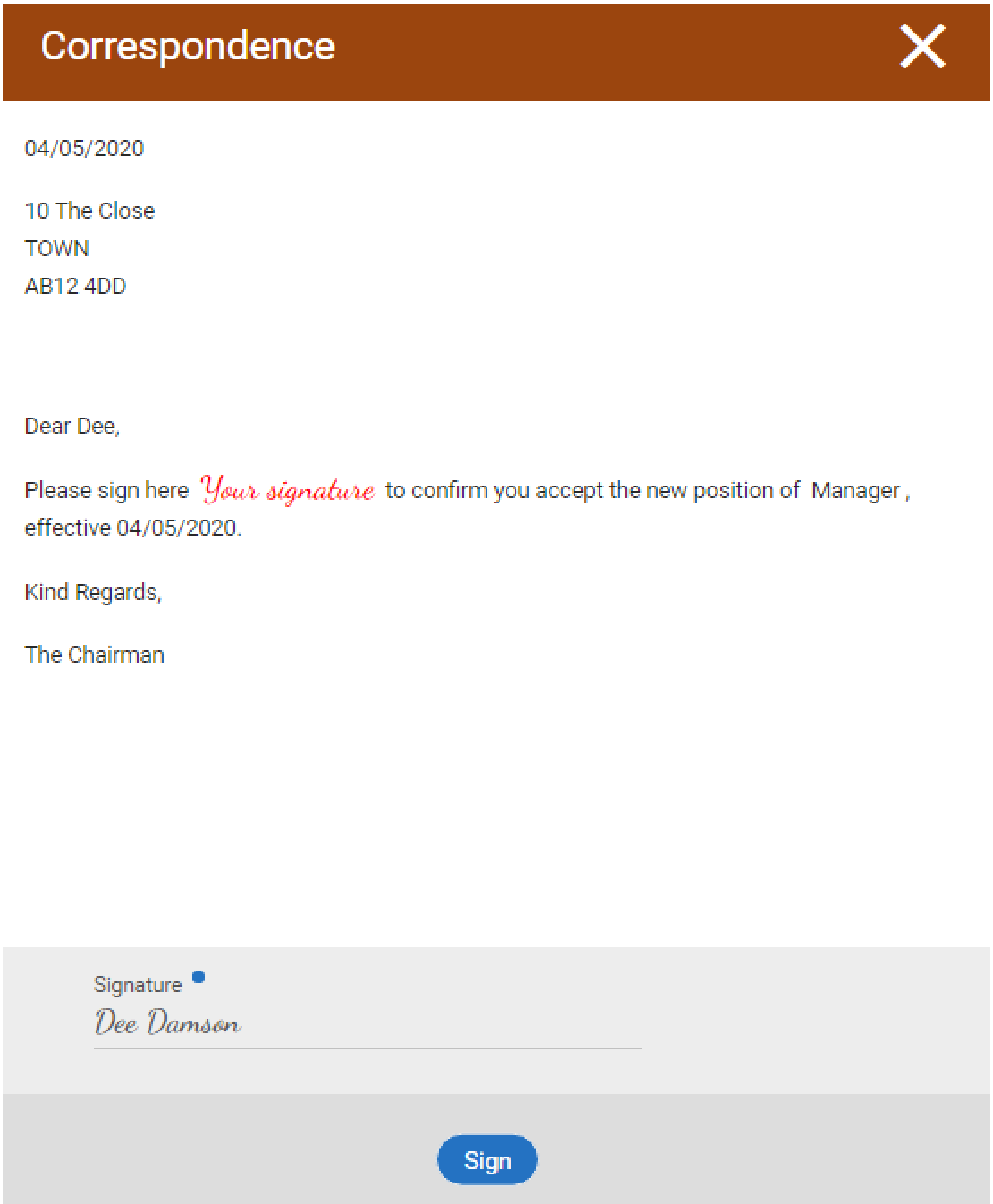
Previous Sign Next

Once the correspondence has been signed, the Sign button will show as grey and is now disabled for the page of correspondence being viewed. This action cannot be reversed.

If there is only one piece of correspondence to action, the person can close the pop up by clicking the X in the top right corner. Where there are multiples, the person can click the Next button to move to the next correspondence.

If the pop up is closed before all correspondence has been actioned, the person will be presented with the correspondence the next time they log on.

The person will only need to type their signature into the Signature field the first time they are presented with correspondence to sign. The signature will be stored in self service and will be seen in this field, ready to use, when the person receives another piece of correspondence requiring signature. This is now a read-only field.


Correspondence

04/05/2020

10 The Close
TOWN
AB12 4DD

Dear Dee,

Please sign here *Your signature* to confirm you accept the new position of Manager , effective 04/05/2020.

Kind Regards,

The Chairman

Signature

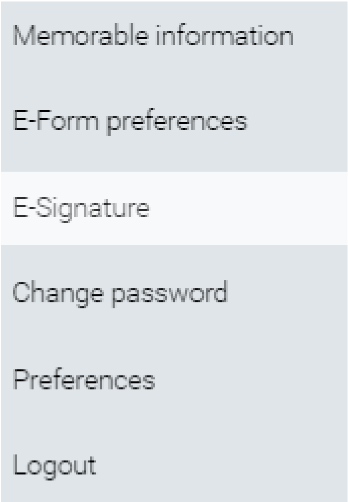
Dee Damson

Sign

6.3.1 Updating your stored electronic signature

After entering your electronic signature in self service for the first time, the text will be stored against the persons self service profile, so it will not need to be re-entered the next time an electronic signature is required.

To update a stored electronic signature, once logged in to self service, navigate to the preferences menu and select the E-signature option.

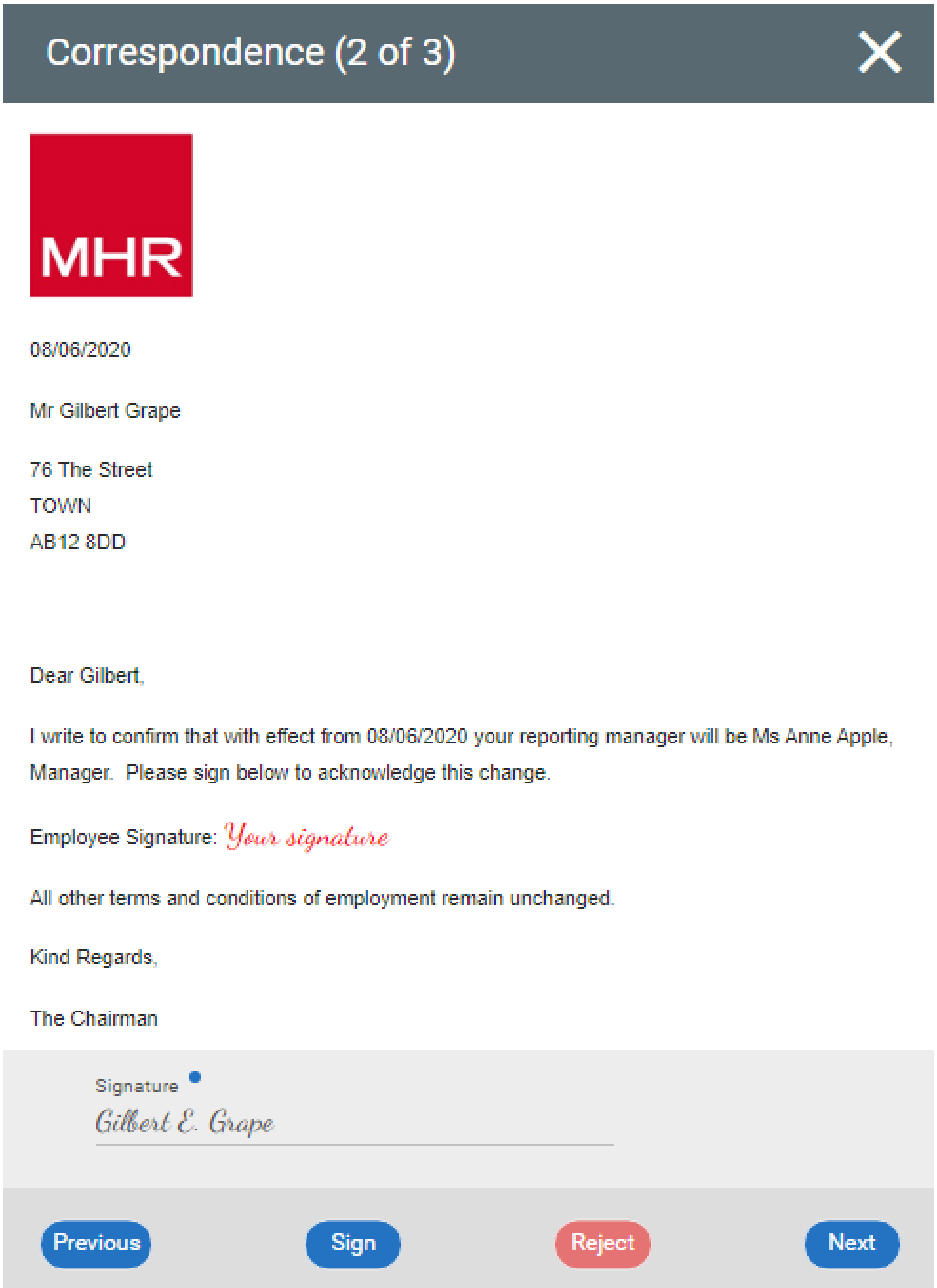


A pop up modal will open allowing for the stored electronic signature to be edited as necessary and the changes saved.

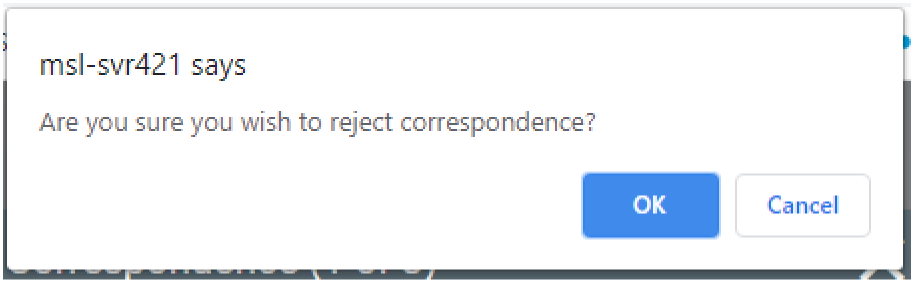
6.4 Reject

Where an e-signature correspondence template has been set up to Allow rejections, there will be a Reject button visible when the correspondence is presented in self service.

The button will display in red and will appear to the right of the other action button (whether it be for Sign or Acknowledge).



On selecting the Reject button, a pop up message will appear, to confirm whether the correspondence should be rejected.

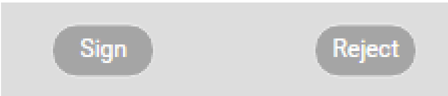


Selecting Cancel will close this message and will return to displaying the correspondence in the pop up modal.

Selecting OK will reject the correspondence and will return to displaying the correspondence in the pop up modal.

If this is the first piece of correspondence presented to a person in self service, and therefore there is no electronic signature stored for them as yet, and the person chooses to reject the correspondence, the mandatory ‘Sign here’ field will be ignored.

Once the correspondence has been rejected, the Reject button will show as grey and is now disabled for the page of correspondence being viewed. This action cannot be reversed. If the correspondence was rejected in error, an administrator will need to re-generate the correspondence.



The other action (sign or acknowledge) button will also now show as grey and be disabled.

6.5 Review correspondence details in iTrent once actioned

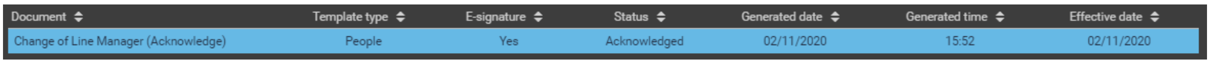
Once a person has actioned correspondence in self service, the status of the correspondence will update in iTrent to reflect the action taken.

6.5.1 Acknowledge

When correspondence has been acknowledged, the status will change from pending to acknowledged and the details can be seen in summary within the correspondence log (left hand pane) and also on the correspondence details page.

6.5.1.1 Correspondence log

Organisation structure > People > Correspondence log



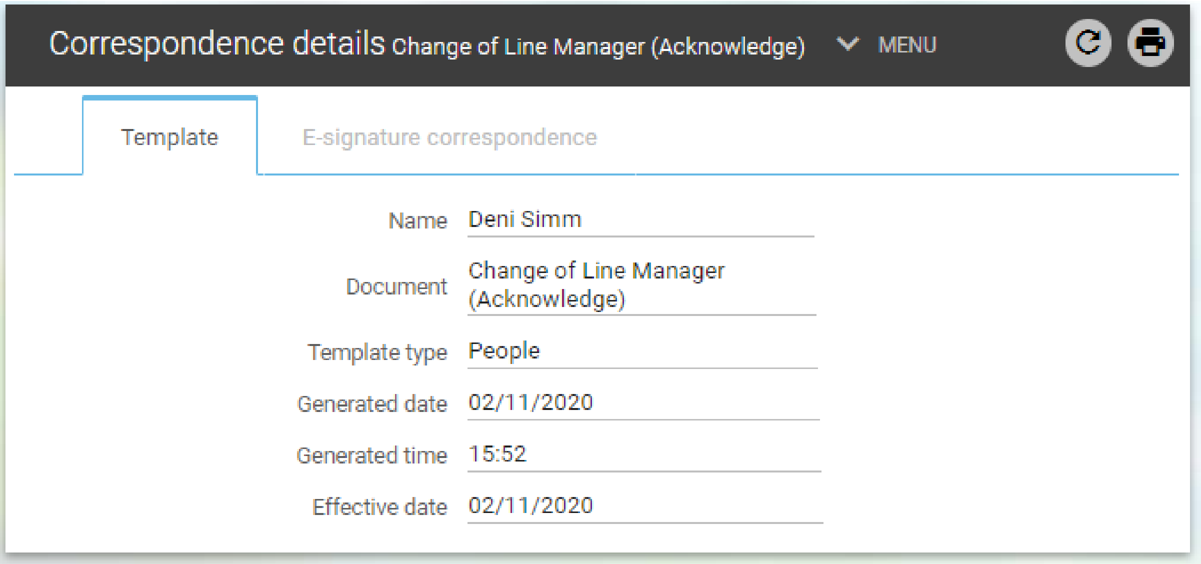
The correspondence log returned in the left hand pane will show a high level summary of the correspondence details.

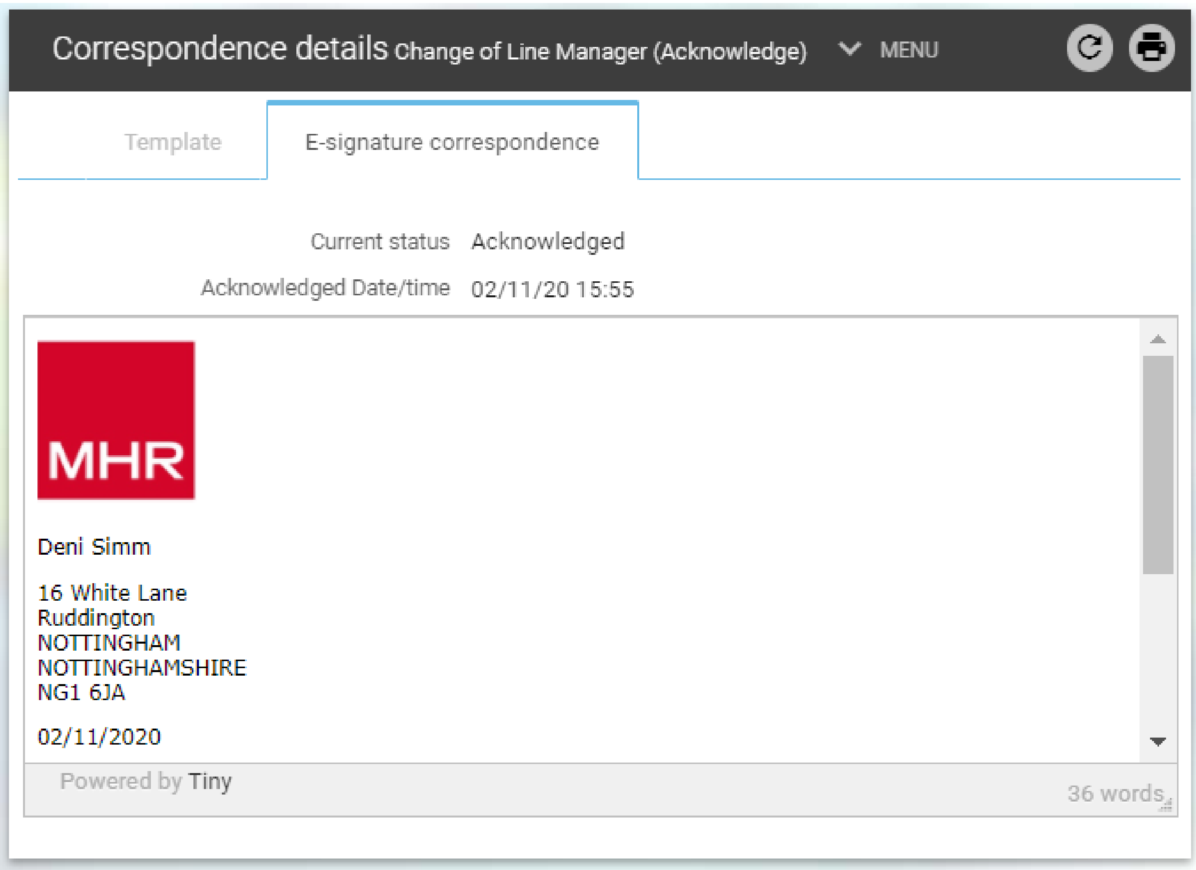
Correspondence details	
Field	**Description**
Document	Displays the template description entered when creating the correspondence template.
Template type	Displays the template type chosen when creating the correspondence template.
E-signature	This will display yes or no dependant on whether the template was created as an electronic signature correspondence template or a standard correspondence template.
Status	This will display the current status of the correspondence; Generated, Pending, Signed, Acknowledged, Rejected
Generated date	Date stamp for when the correspondence was generated.
Generated time	Time stamp for when the correspondence was generated.

Correspondence details	
Field	**Description**
Effective date	Effective date for the correspondence.

6.5.1.2 Correspondence details

Organisation structure > People > Correspondence log > Correspondence details





6.5.2 Sign

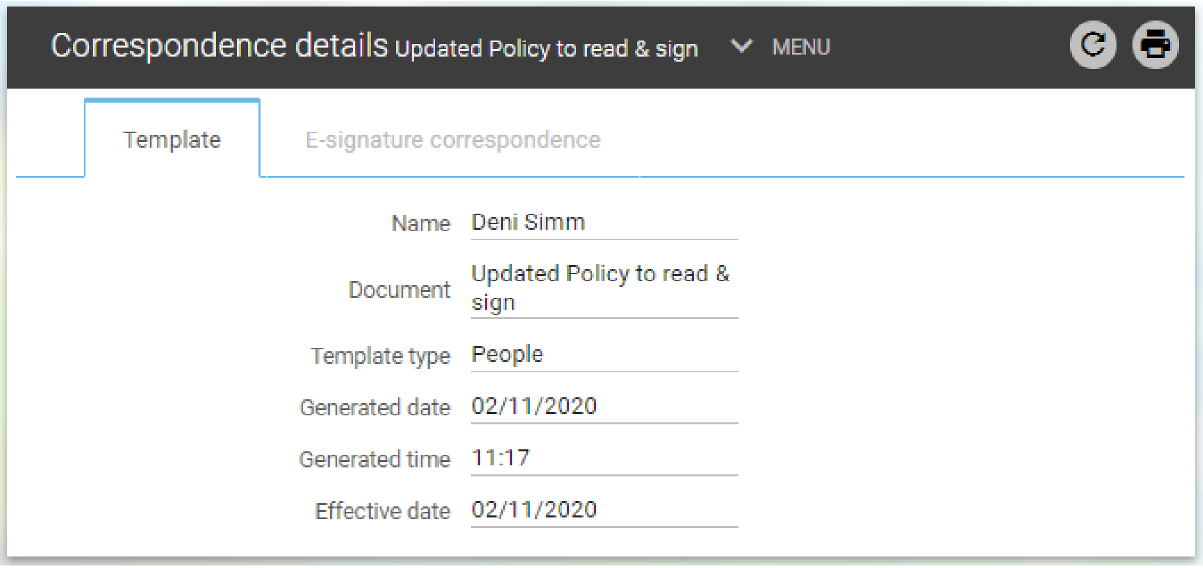
When correspondence has been signed, the status will change from pending to signed and the details can be seen in summary within the correspondence log (left hand pane) and also on the correspondence details page.

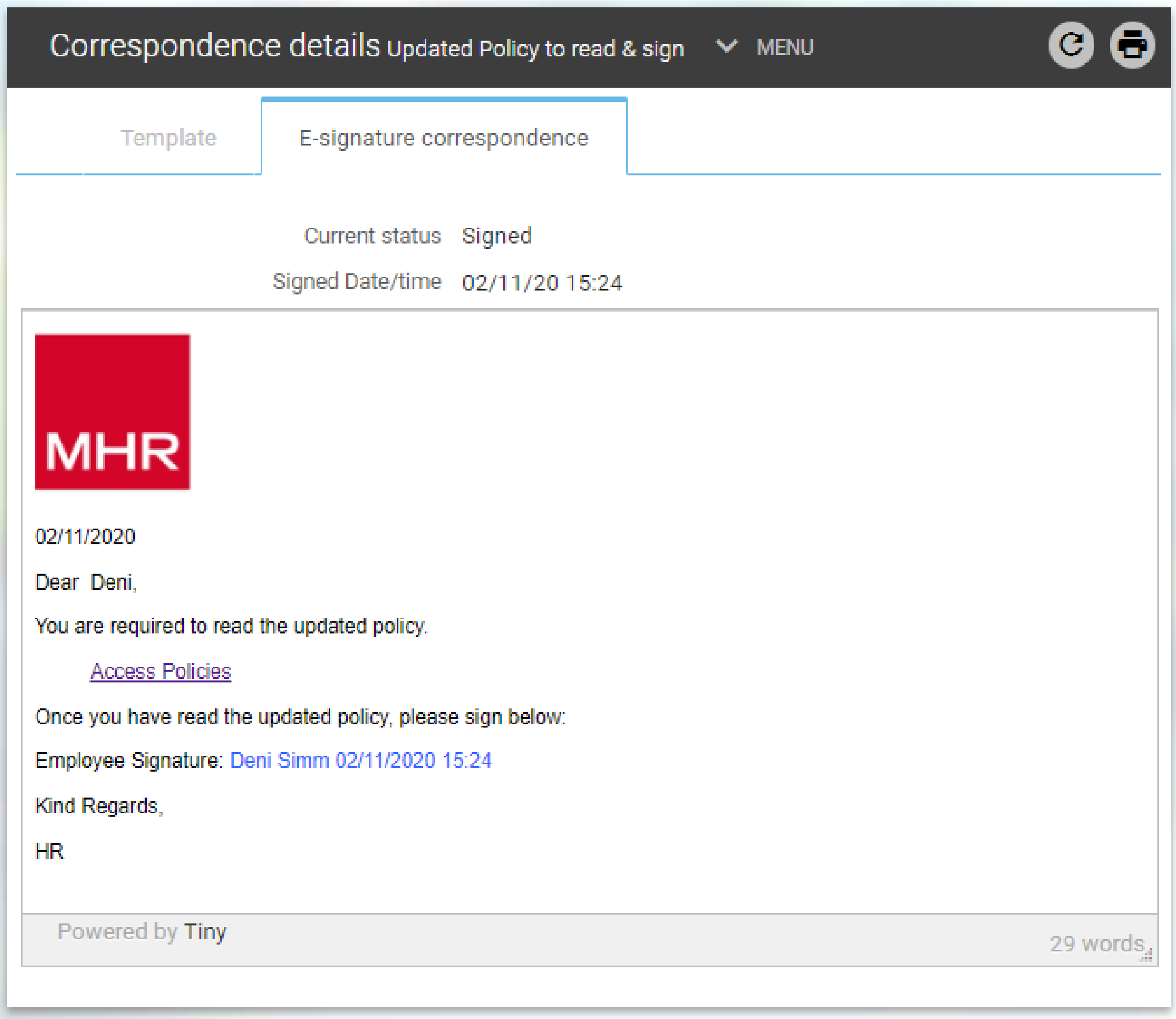
6.5.2.1 Correspondence log

Organisation structure > People > Correspondence log

6.5.2.2 Correspondence details

Organisation structure > People > Correspondence log > Correspondence details





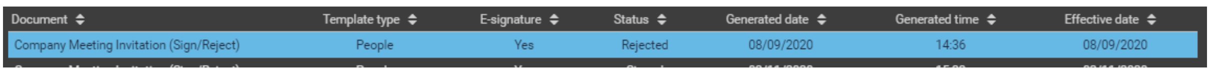
Where the status is Signed, the signature, along with date and time stamp, as seen in self service, will be seen within the HTML content viewer.

6.5.3 Reject

When correspondence has been rejected, the status will change from pending to rejected and the details can be seen in summary within the correspondence log (left hand pane) and also on the correspondence details page.

6.5.3.1 Correspondence Log

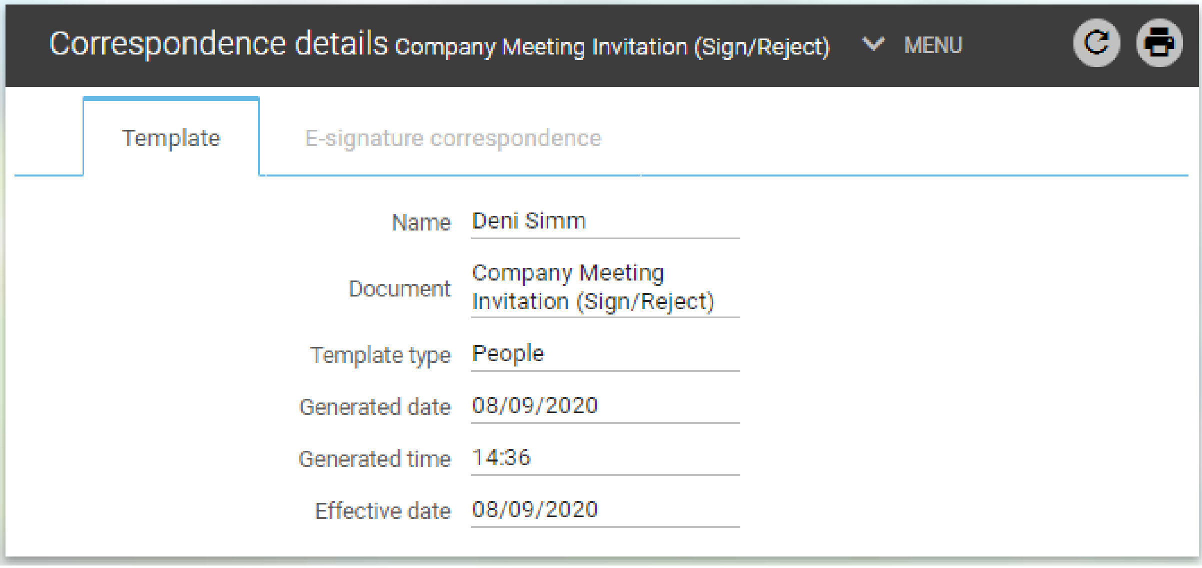
Organisation structure > People > Correspondence log

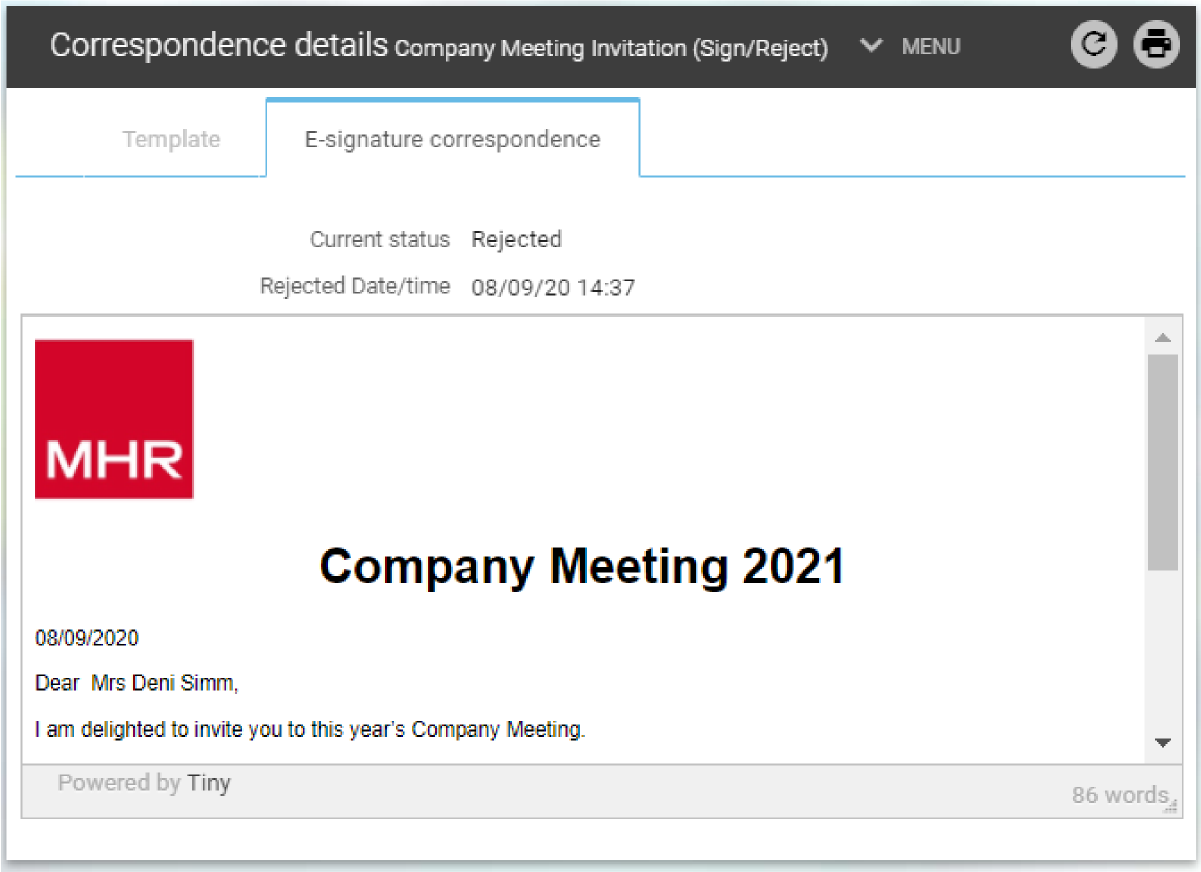


Document	Template type	E-signature	Status	Generated date	Generated time	Effective date
Company Meeting Invitation (Sign/Reject)	People	Yes	Rejected	08/09/2020	14:36	08/09/2020

6.5.3.2 Correspondence details

Organisation structure > People > Correspondence log > Correspondence details


Correspondence details Company Meeting Invitation (Sign/Reject)
MENU
Template
E-signature correspondence
Name Deni Simm
Document Company Meeting Invitation (Sign/Reject)
Template type People
Generated date 08/09/2020
Generated time 14:36
Effective date 08/09/2020

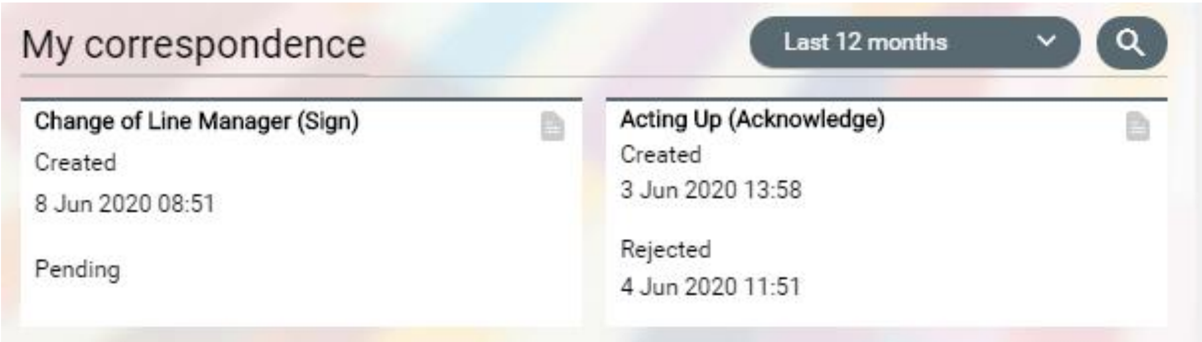

Correspondence details Company Meeting Invitation (Sign/Reject)
MENU
Template
E-signature correspondence
Current status Rejected
Rejected Date/time 08/09/20 14:37
MHR
Company Meeting 2021
08/09/2020
Dear Mrs Deni Simm,
I am delighted to invite you to this year's Company Meeting.
Powered by Tiny
86 words

7. ‘My Correspondence’ library

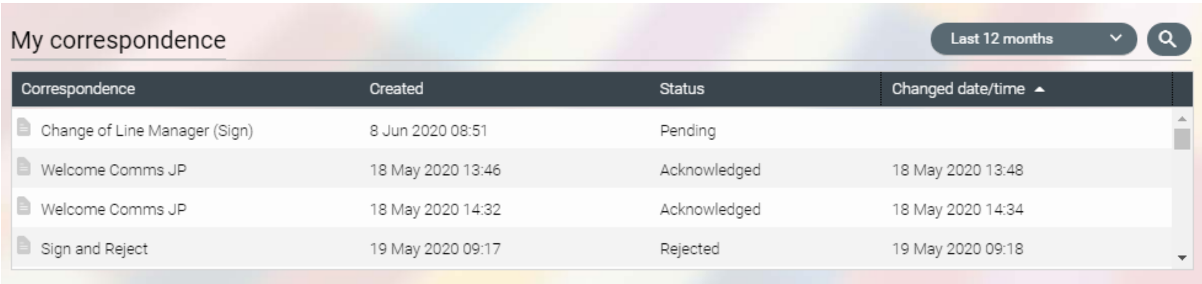
After logging in to self service, navigate to the Employment tab.

Scroll to the bottom of the Employment tab to view ‘My correspondence’. This is a repository for all electronic signature correspondence published to self service for the specific individual.

Each piece of correspondence will display as an individual card within this section when viewing in accessibility mode or where there are less than 5 cards.



Where there is more correspondence assigned to the individual, it will display in grid view.

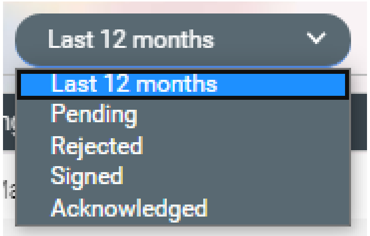


My Correspondence	
Field	**Description**
Correspondence	Displays the template description entered when creating the correspondence template i.e. document name
Created	Displays the date and time the correspondence was created i.e. date the correspondence was generated in iTrent
Status	This will display the current status of the correspondence; Pending, Signed, Acknowledged, Rejected
Changed date/time	Displays the date and time of the most recent correspondence status change i.e. date/time when the status changed from pending to signed

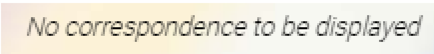
When viewing the My correspondence repository, correspondence created within the last 12 months will display initially. Where older correspondence needs to be viewed, it can be accessed using the filter or search functions.

7.1 Filter

There is a filter available to allow easy access to correspondence grouped by status:



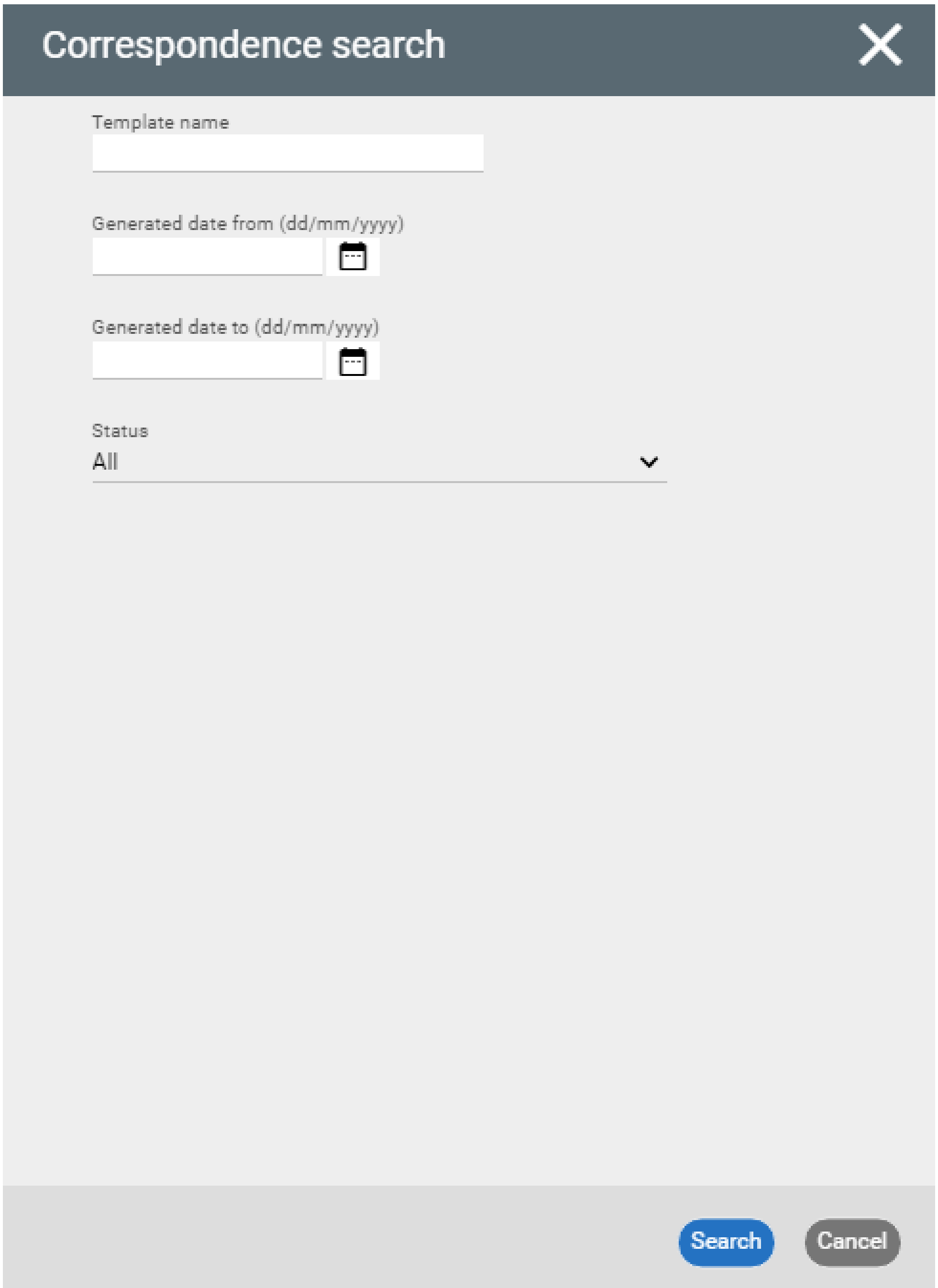
Where a filter has been applied and no results have been returned, the following message is displayed:



7.2 Search

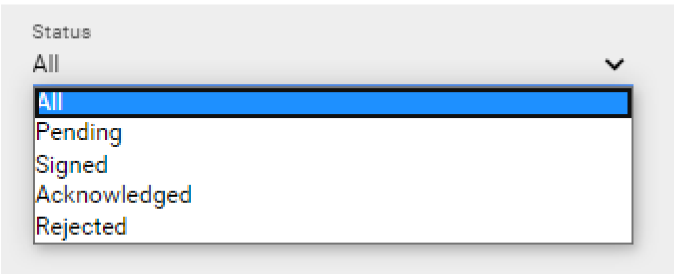
Search capabilities can be accessed by clicking the search icon: 

A pop up modal will be displayed where the template name, generated from/to dates and status' can be searched to return the required correspondence.

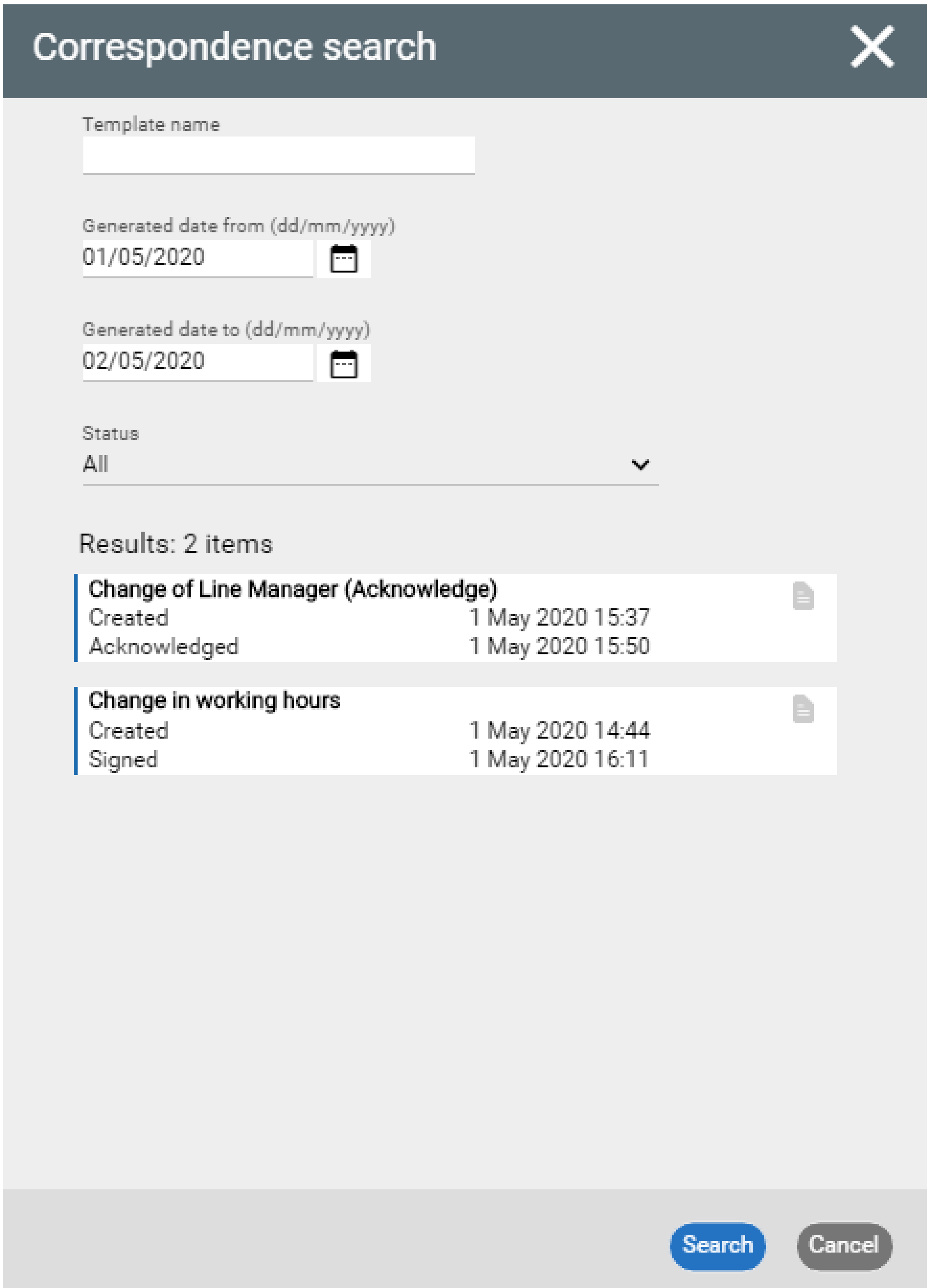


Template name here reflects the template description entered when creating the template in iTrent, otherwise referenced as correspondence.

The status can be selected from a drop down list.



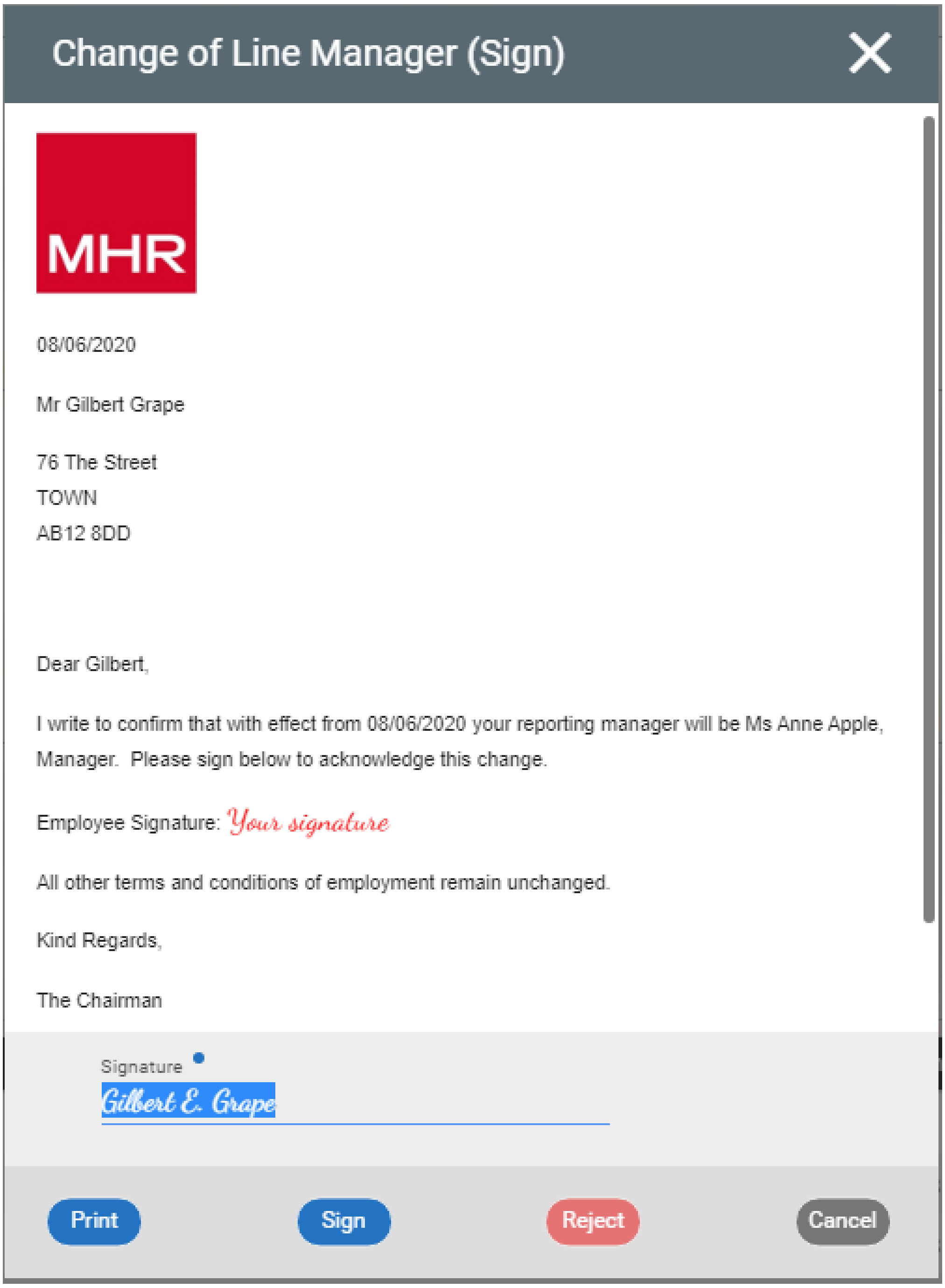
Once the search criteria has been entered and the search run, results will be displayed in the pop up modal.



When a piece of correspondence is selected, it will display within the pop up modal, where it can be reviewed and/or printed.

7.3 Action pending correspondence

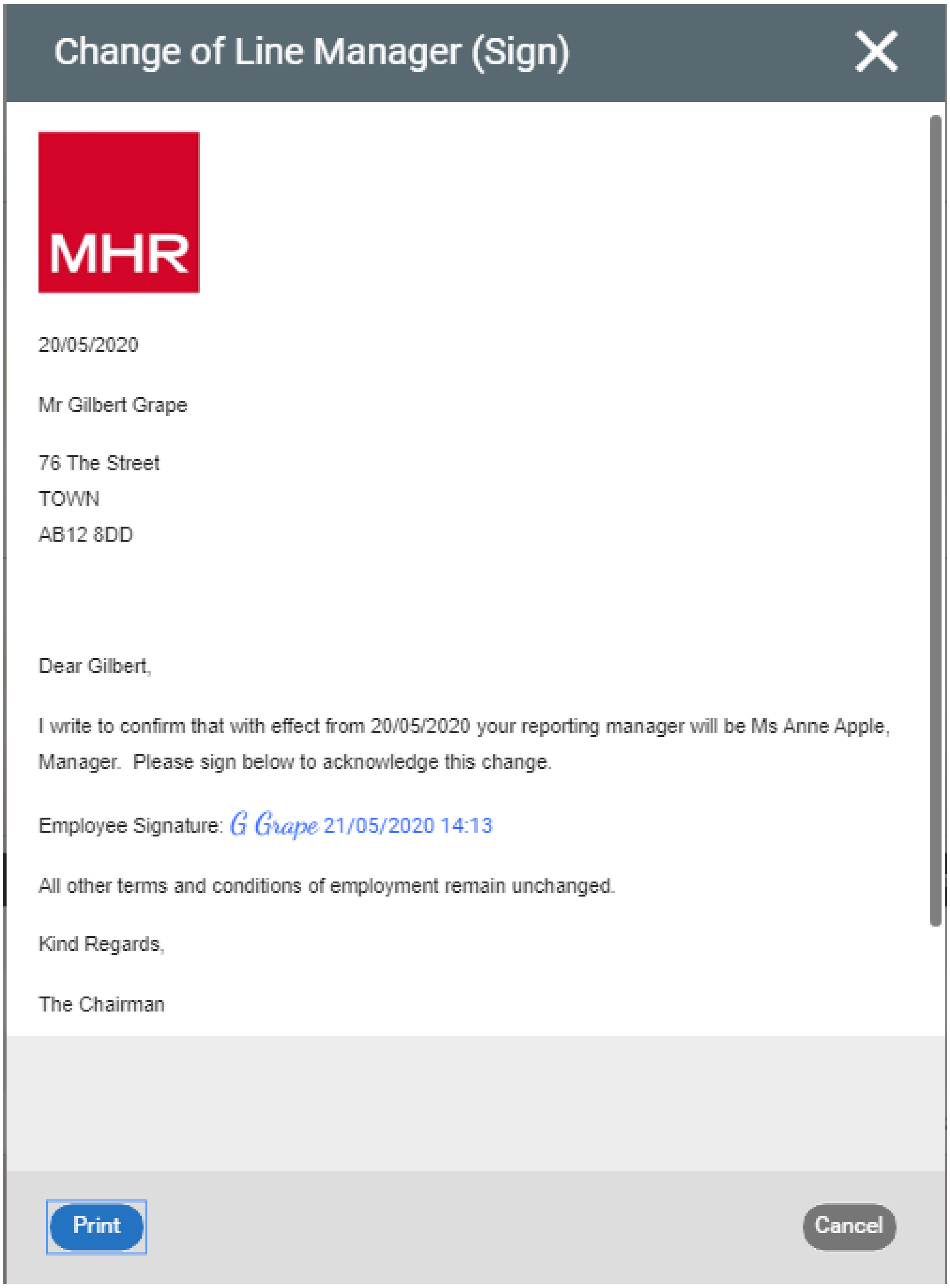
When a piece of correspondence is at a pending status, it can be selected, which will open a pop up modal, displaying the correspondence. Along the bottom of the pop up modal, the relevant action buttons related to the correspondence e.g. sign, acknowledge, reject, will be present.



When the correspondence has been actioned, the pop up will close and the correspondence status along with the Changed date/time will be updated within the My Correspondence log.

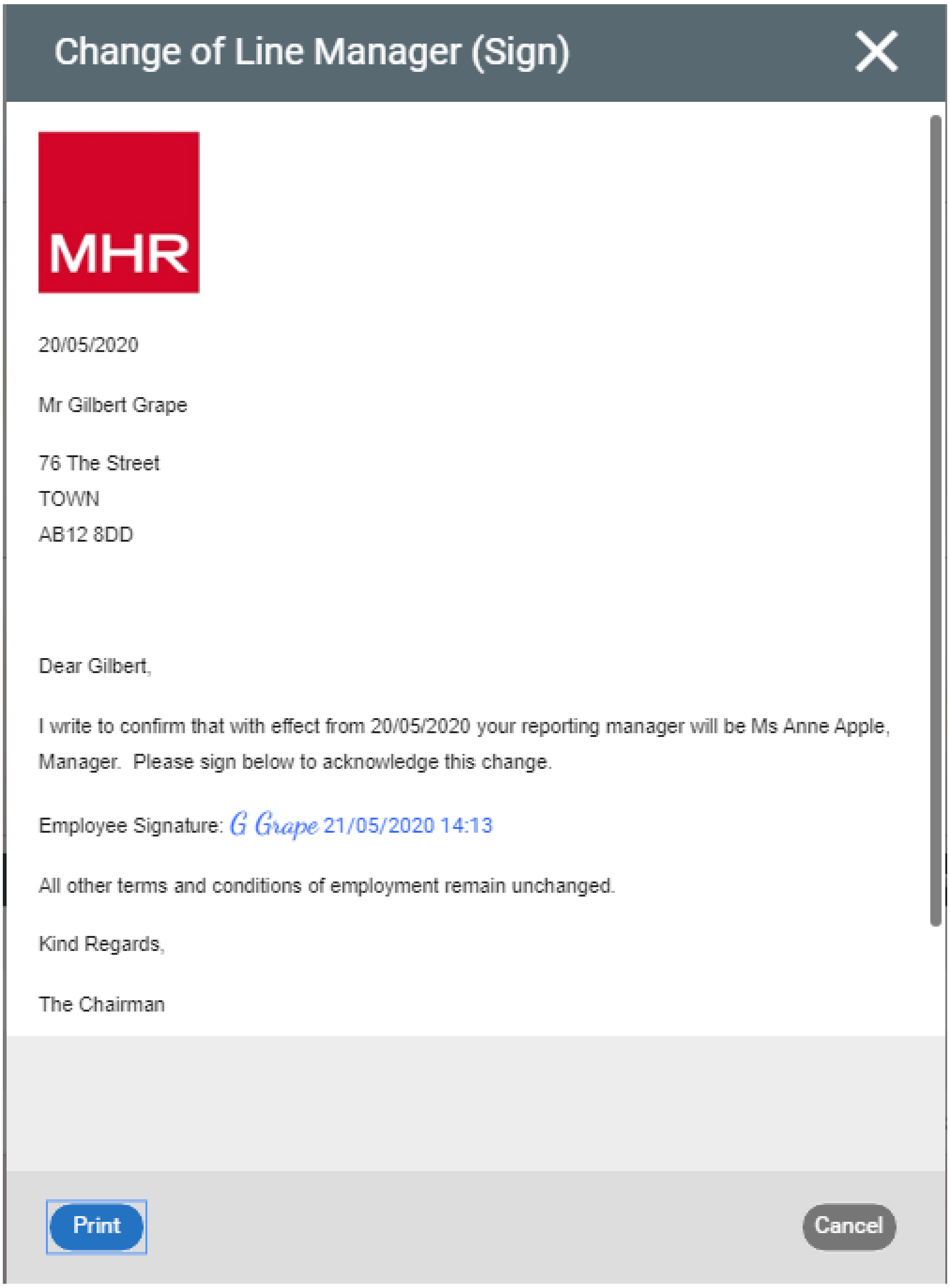
7.4 View actioned correspondence

When a piece of correspondence is selected, it will display within the pop up modal, where it can be reviewed. Where the correspondence has been signed, the electronic signature and the date/time stamp will be visible within the correspondence.



7.5 Print correspondence

When viewing correspondence from My Correspondence, it opens a pop up modal where a button to print is visible in the bottom left corner.


Change of Line Manager (Sign)

20/05/2020

Mr Gilbert Grape

76 The Street
TOWN
AB12 8DD

Dear Gilbert,

I write to confirm that with effect from 20/05/2020 your reporting manager will be Ms Anne Apple, Manager. Please sign below to acknowledge this change.

Employee Signature: G Grape 21/05/2020 14:13

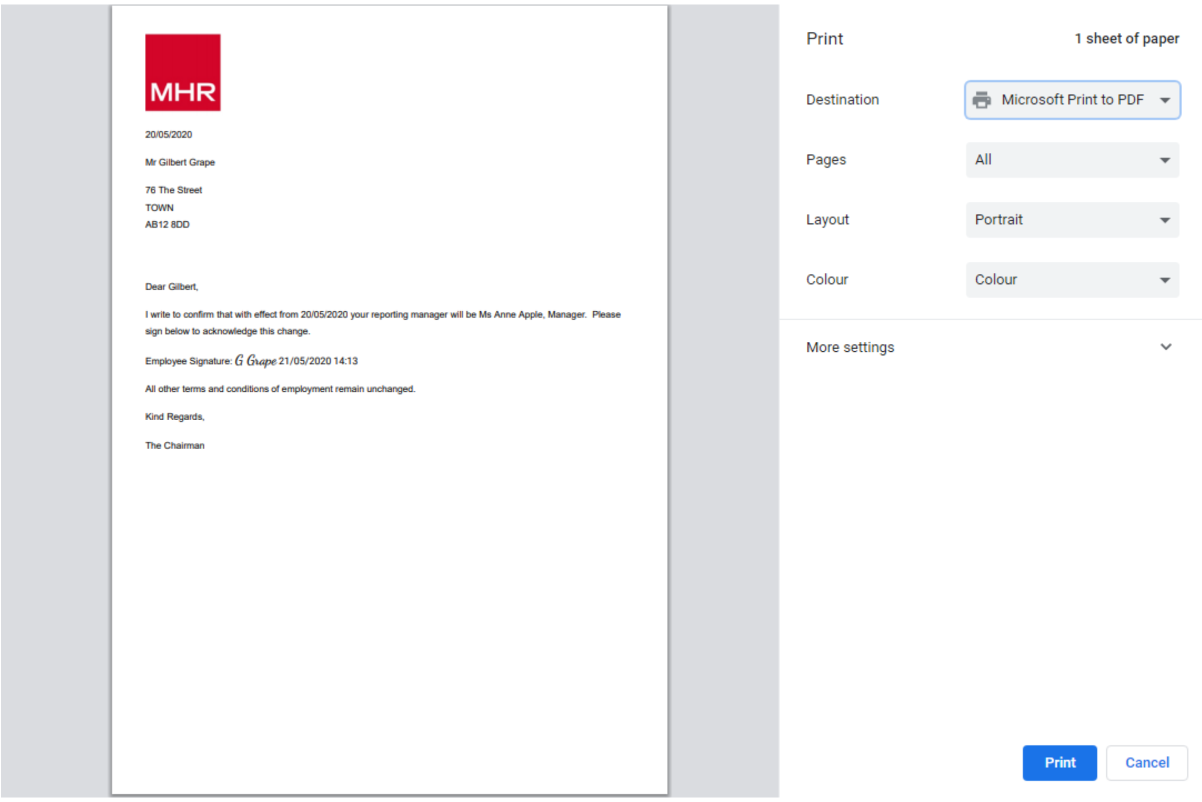
All other terms and conditions of employment remain unchanged.

Kind Regards,

The Chairman

Print Cancel

When the print button is selected, it allows correspondence to be sent to a printer (physical printer or to allow print to pdf for saving a copy electronically).


MHR
20/05/2020
Mr Gilbert Grape
76 The Street
TOWN
AB12 8DD
Dear Gilbert,
I write to confirm that with effect from 20/05/2020 your reporting manager will be Ms Anne Apple, Manager. Please sign below to acknowledge this change.
Employee Signature: G Grape 21/05/2020 14:13
All other terms and conditions of employment remain unchanged.
Kind Regards,
The Chairman
Print
1 sheet of paper
Destination
Microsoft Print to PDF
Pages
All
Layout
Portrait
Colour
Colour
More settings
Print
Cancel

8. Electronic signatures and Onboarding

Electronic signature functionality can be used with recruitment and onboarding processes. When publishing electronic signature capable correspondence to a person in self service, they will be presented with correspondence in the following order:

- Privacy Notice will be displayed for any person the first time they access self service
- If there is electronic signature correspondence as well as onboarding documentation to be published to a person, the onboarding modal will be presented first
- Onboarding modal will be presented with Accept/Reject options
    - If accept is selected, the Correspondence modal will display next
    - If reject is selected, the person will be logged out of onboarding and the rejection/log out message is displayed

When a user changes from an onboarding user to an iTrent employee, their correspondence will go with them providing the same person record is used as E-signature correspondence history follows the person record.

9. Workflow

Workflows can be set up to allow for the following notifications:

- Notify a person when they have correspondence to sign in self service
- Notify a manager when their employee has actioned correspondence

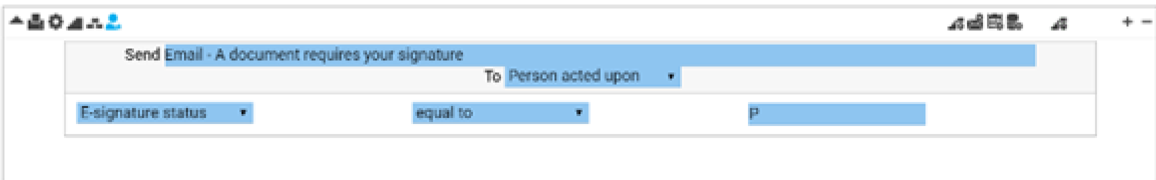
Navigate to workflow process through find iTrent pages or alternatively using the following navigation pathway:

Organisation > Workflow > Workflow process > New – workflow process

9.1 Notification a document requires signature

Create a new workflow with the action “Correspondence details”.

Create the workflow as necessary e.g. add e-mail template and set recipient rules.

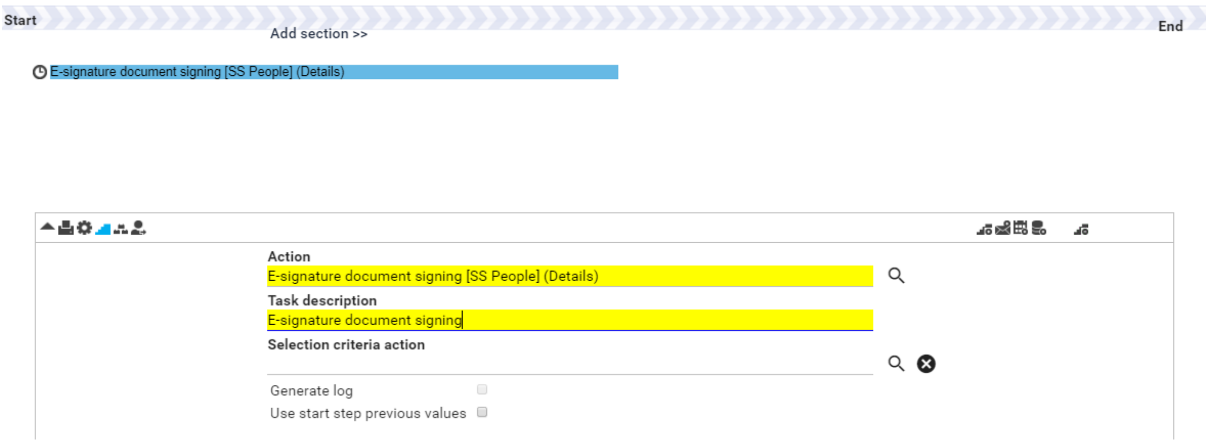


E-signature status = P (pending)

This results in an email being sent to the correspondence recipient (“person acted upon”) when the status is set to pending in the correspondence details page.

9.2 Notification a document has been signed/acknowledged

Create a new workflow with the action “E-signature document signing”.



Create the workflow as necessary e.g. add e-mail template and set recipient rules.

E-signature status = A (Acknowledged)

E-signature status = S (Signed)

E-signature status = R (Rejected)

This results in an email being sent to the correspondence recipient's reporting manager when the correspondence has been actioned (signed, acknowledged, rejected).

10. Reporting

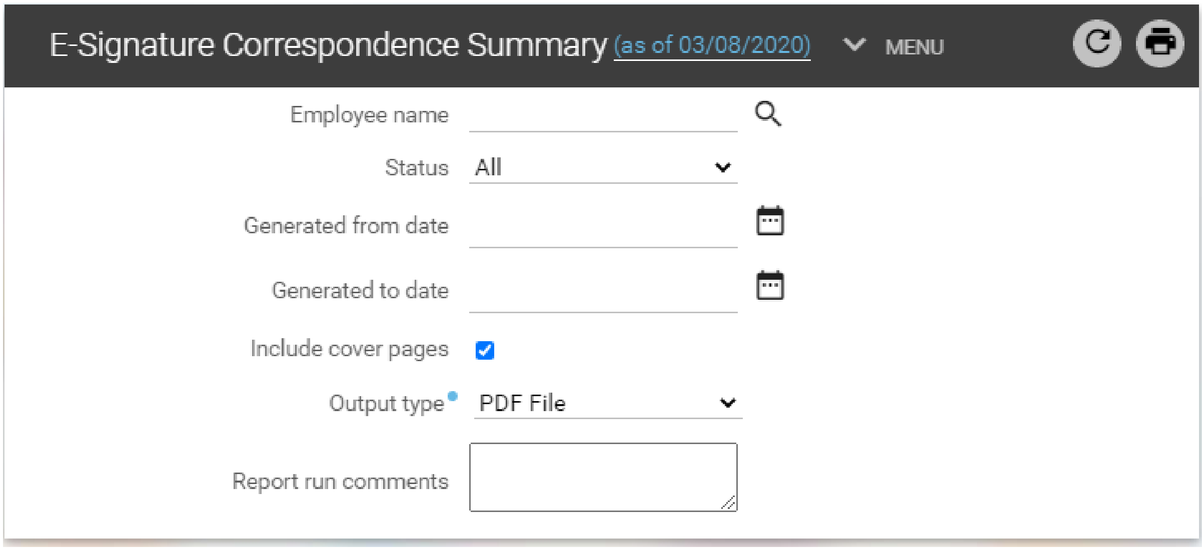
The module can be used with Business Objects and Insight Builder for reporting purposes. There is also a new standard report available within the Management Information report area of iTrent to assist with correspondence tracking.

10.1 E-Signature Correspondence Summary

This report is subject to report security; if a user with a People Manager function access runs the report it will only include data for the people or organisation structure they are the manager of, so that confidentiality is not compromised.

10.1.1 Run Report

Management Information > People reports > Run report



E-signature correspondence summary – run report	
Field	**Description**
Employee name	Search for a specific employee or leave field blank to search for all
Status	From the drop down list, select the status (Generated, Pending, Signed, Acknowledged, Rejected) or leave set to All
Generated from date	Enter a generated from date for the start of the search. Or leave blank to return all date ranges
Generated to date	Enter a generated to date for the end of the search. Or leave blank to return all date ranges
Include cover pages	Untick this box if not wishing to include cover pages within the report.
Output type	Select PDF or CSV from drop down list

10.1.2 Download Output

Management Information > People reports > Download output

There are three sections to the report output as pdf: Correspondence Summary, Status Summary, Pending Summary

10.1.2.1 Correspondence summary

The first data set in the report reflects all electronic signature capable correspondence generated within the date range set, for the selected employee or all employees and for the selected status or all status'.

When running the report in CSV, this is what will be shown on the CSV file output.

Trent JPP Org1

E-Signature Correspondence Summary

Employee Name: All
Status: All
Generated Date: 08/06/2020 To: 03/08/2020

Surname	Forename	Template Description	Template Type	Generated Date	Effective Date	Status	Status Last Changed
Damson	Dee	Acting Up (Sign)	People	03/08/2020	03/08/2020	Pending	03/08/2020 14:50
Damson	Dee	Change in working hours	People	03/08/2020	03/08/2020	Rejected	03/08/2020 14:24
Damson	Dee	Change of Line Manager (Sign)	People	23/06/2020	23/06/2020	Signed	07/07/2020 09:13
Damson	Dee	Sign and Reject	People	19/06/2020	19/06/2020	Rejected	19/06/2020 11:15
Grape	Gilbert	Acting Up (Sign)	People	08/06/2020	08/06/2020	Rejected	22/06/2020 10:00
Grape	Gilbert	Change of Line Manager (Sign)	People	08/06/2020	08/06/2020	Rejected	22/06/2020 10:47
Grape	Gilbert	Change of Line Manager (Sign)	People	08/06/2020	08/06/2020	Rejected	22/06/2020 10:47
Grape	Gilbert	Change of Line Manager (Sign)	People	08/06/2020	08/06/2020	Signed	08/06/2020 13:55
Grape	Gilbert	Pre-sales	People	23/06/2020	23/06/2020	Generated	23/06/2020 16:23
Grape	Gilbert	Pre-sales	People	23/06/2020	23/06/2020	Acknowledged	23/06/2020 16:42
Grape	Gilbert	Pre-sales	People	23/06/2020	23/06/2020	Signed	03/08/2020 14:13
Mango	Mandy	Company Meeting Invitation JP	People	30/07/2020	30/07/2020	Rejected	30/07/2020 10:57

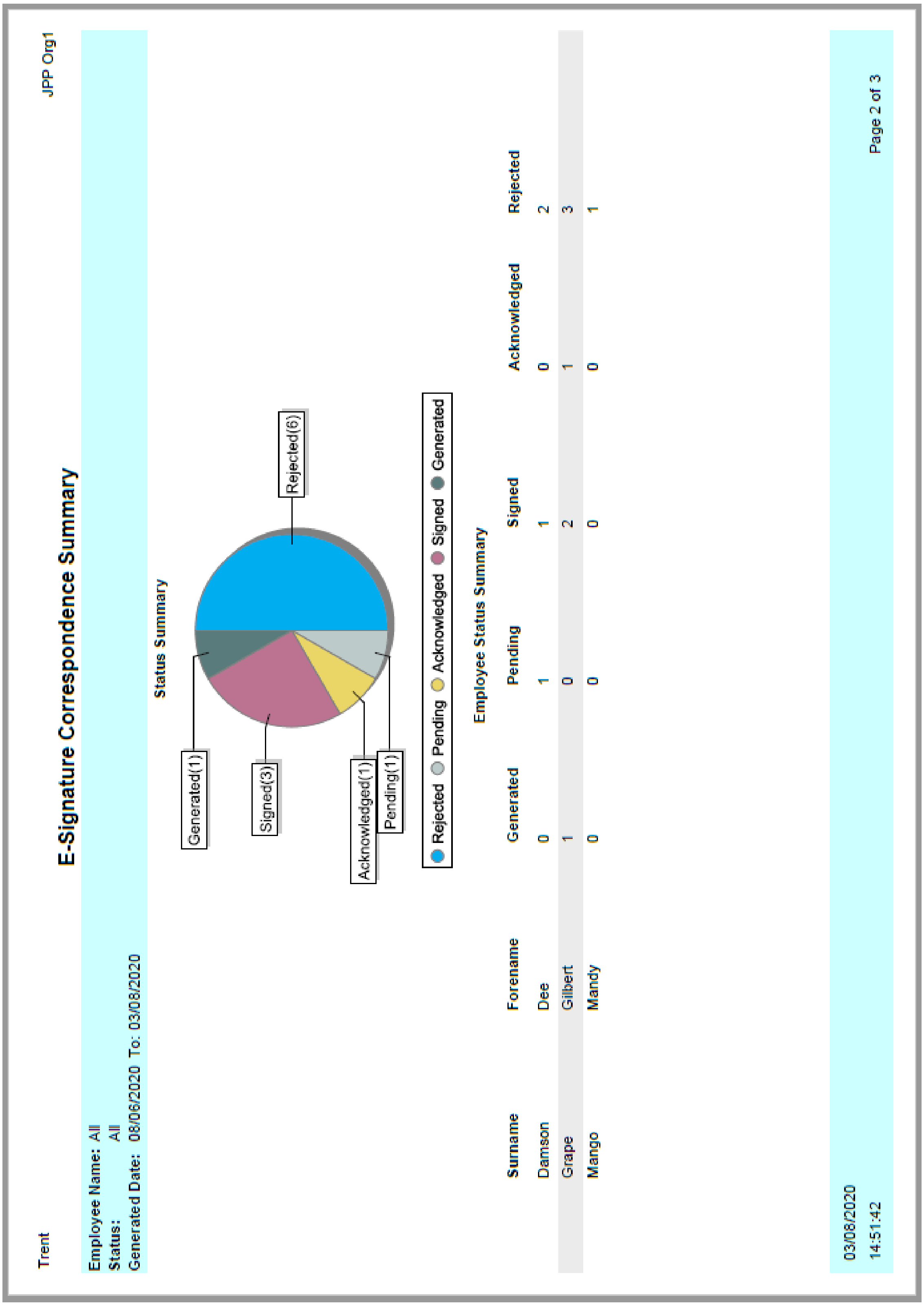
03/08/2020
14:51:42

Page 1 of 3

10.1.2.2 Status summary

The second data set in the report reflects status counts for all electronic signature capable correspondence generated within the date range set, for the selected employee or all employees and for the selected status or all status'.

There is a pie chart showing the split of status' in total. There is also a listing of the counts of each status against employee.


Trent

JPP Org1

E-Signature Correspondence Summary

Employee Name: All
Status: All
Generated Date: 08/06/2020 To: 03/08/2020

Status Summary

Employee Status Summary

Surname	Forename	Generated	Pending	Signed	Acknowledged	Rejected
Damson	Dee	0	1	1	0	2
Grape	Gilbert	1	0	2	1	3
Mango	Mandy	0	0	0	0	1

03/08/2020
14:51:42

Page 2 of 3

10.1.2.3 Pending summary

The third data set in the report reflects any electronic signature capable correspondence currently at the pending stage, generated within the date range set, for the selected employee or all employees and for the selected status or all status'.

The data is split between time periods for which the correspondence has been pending; less than 3 days, 3-7 days, 8-30 days, and more than 30 days.

There is a pie chart showing the distribution across each time period. There is also a listing of the counts for each time period against employee.

10.2 Insight Builder

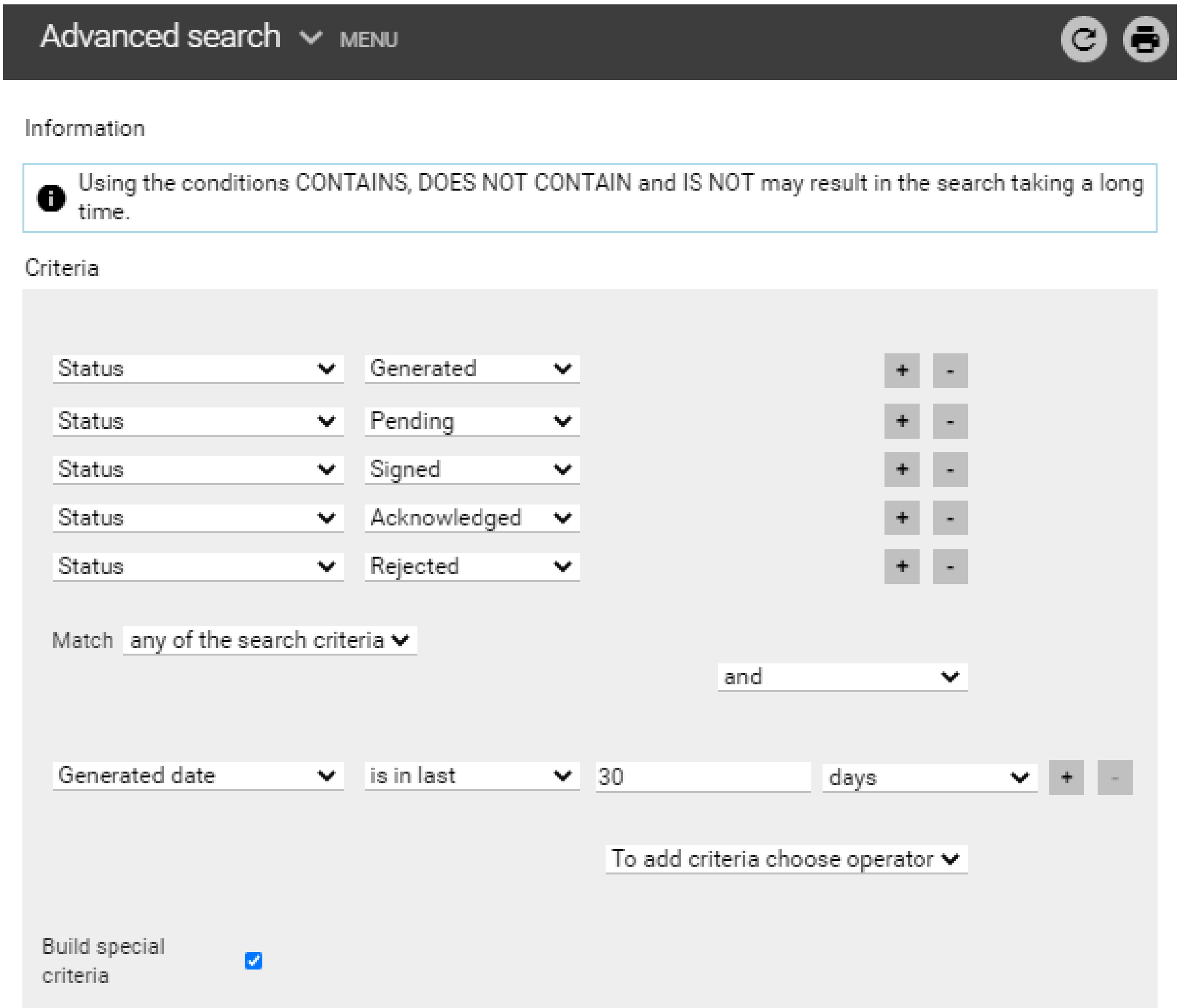
Insight Builder can be used to report on electronic signature correspondence.

Please refer to the *iTrent Insight Builder Guide* for full details on using this module.

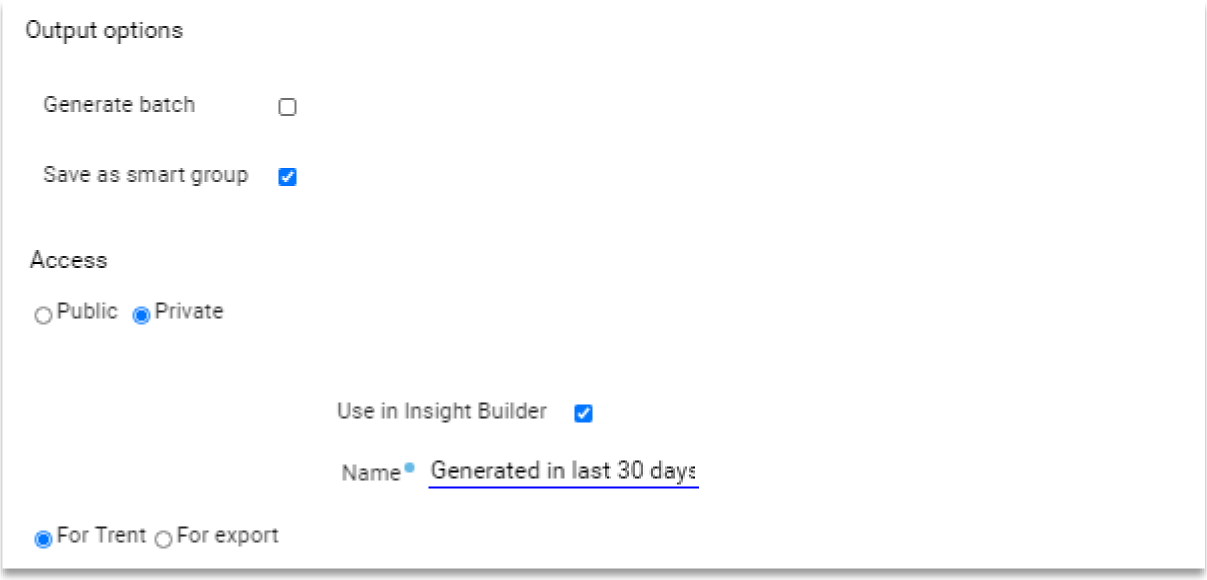
10.2.1 Creating smart groups

Insights work using smart groups. When creating a smart group for this purpose, it should be created ensuring the smart group type will be correspondence. This can be achieved by creating the group within an organisation level correspondence page. For example, when navigated to the following area, Organisation structure > Correspondence log > Correspondence details, select the option to run an Advanced Search from the three dot menu located in the left hand pane.

Create the advanced search as necessary, for example, the following advanced search will create a smart group returning results for correspondence at any status, and that has a generated date which is in the last 30 days.



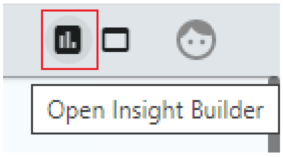
Once the search criteria has been entered, tick the option to 'Save as smart group' and indicate that it is for 'Use in Insight Builder'.



Once the smart group has been saved, the saved details will refresh at the top of the page.

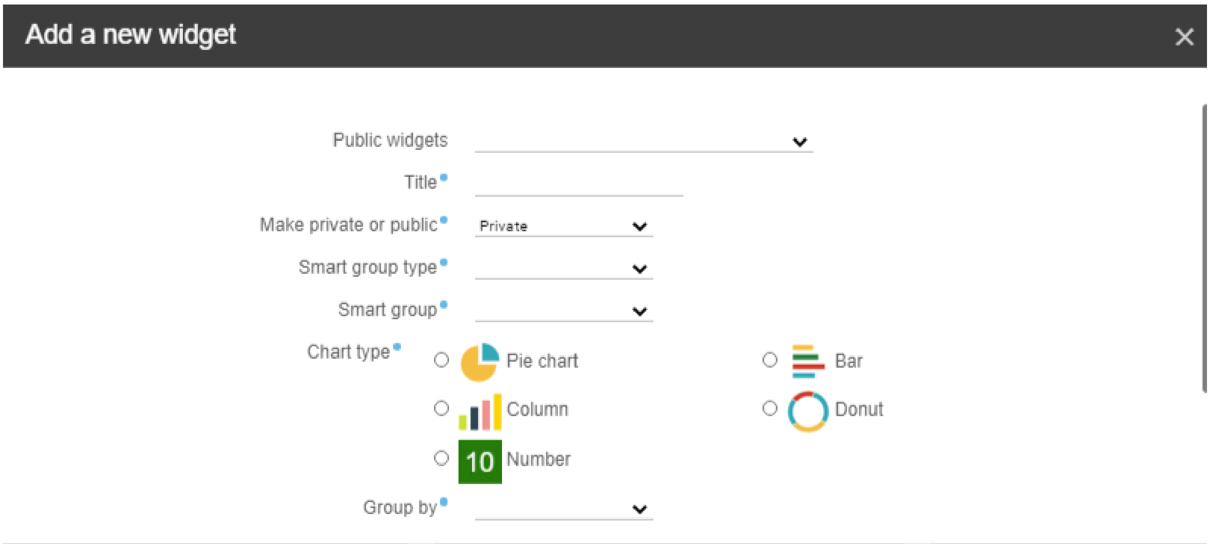
10.2.2 Building Insights

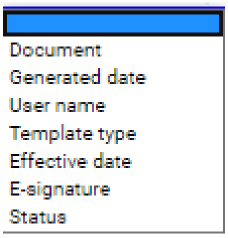
To access Insight Builder and view charts, select the icon in the top right corner of iTrent.

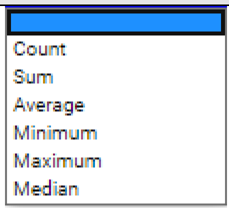


The Insight Builder page will open where widgets can be created to capture the necessary electronic signature correspondence insights.

After selecting the option to + ADD WIDGET the following pop up will open where the widget details can be entered.



Add a new widget	
Field	**Description**
Public widgets	Displays a drop down list of any publicly available widgets. Selecting a widget from this list will reload the pop up and display details of the public widget.
Title	Enter a title for the chart being created
Make private or public	Select from drop down whether the widget being created will be public or private
Smart group type	Select the smart group type from the drop down menu. Choose ‘correspondence’ from the list to create a chart using correspondence data.
Smart group	Once the smart group type has been selected, the smart group drop down list will refresh to display all correspondence type smart groups available
Chart type	Select the required chart type for how the data will be displayed
Group by	From the drop down, select how the data will be grouped 
Aggregation type	From the drop down, select the aggregation type

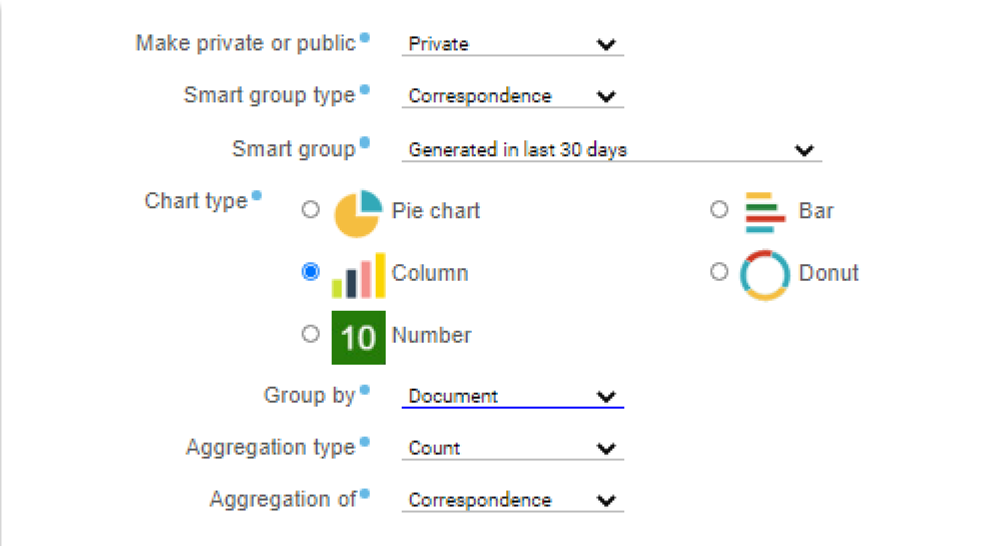
<table>
<tr><th colspan="2">Add a new widget</th></tr>
<tr><th>Field</th><th>Description</th></tr>
<tr><td></td><td>
</td></tr>
<tr><td>Aggregation of</td><td>Select correspondence from the drop down (this will be the only ‘aggregation of’ option displayed when creating correspondence charts)</td></tr>
</table>

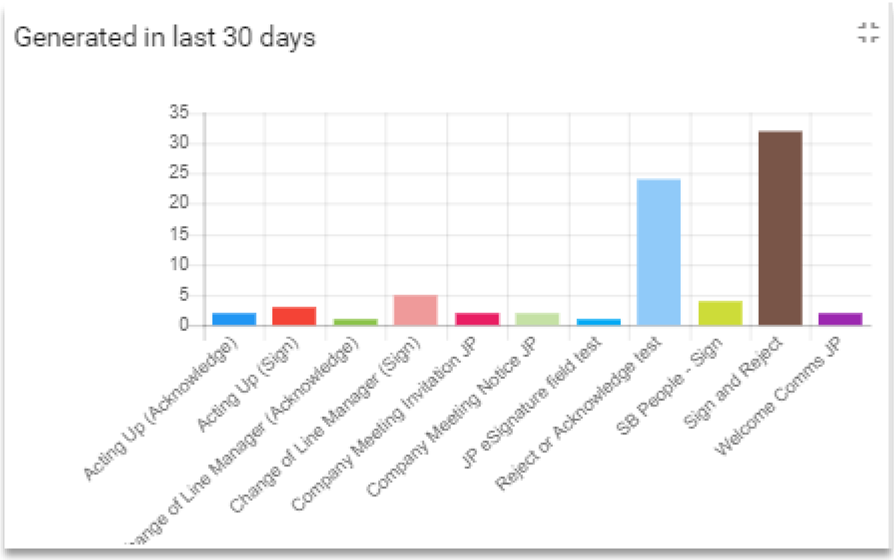
Once the widget details have been saved, the insight tab will refresh to display the new chart.

Clicking into the details within a chart will provide an opportunity to drill down into the data detail and when a record is selected, the page will refresh to open the relevant record within iTrent at the following navigation; People > Correspondence log > Correspondence details page

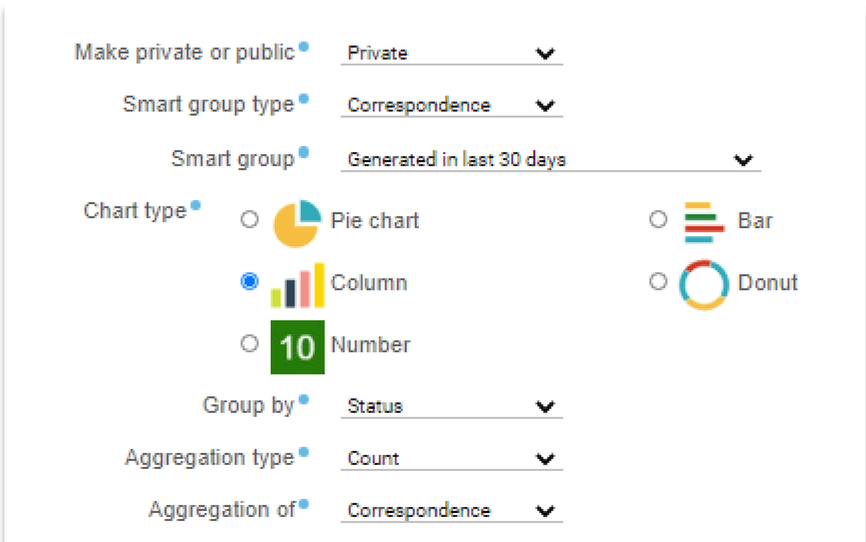
10.2.2.1 Example Insights

Using the smart group created previously, we can create a chart showing the counts of each template used to generate correspondence in the last 30 days by grouping the data by ‘Document’.

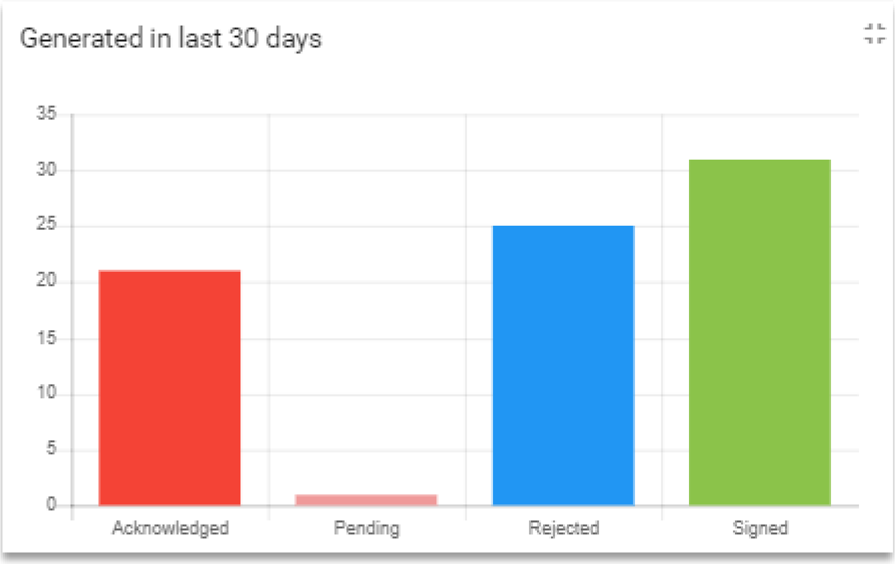




Using the same criteria but changing the group by option to ‘Status’, will provide a chart showing the count of correspondence generated in the last 30 days, but sorted according to current status.



 Company Confidential


Generated in last 30 days
35
30
25
20
15
10
5
0
Acknowledged
Pending
Rejected
Signed

Readers' Comments

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