Document Management

User Guide

Etz Support Team

June 2012

This guide shows how to set up your Document Management module and explains how to apply and manage documents through your Etz system.

Contents

Introduction

This guide explains how to make full use of the Document Management Module on Etz and shows you how to create various document types - including template documents - and details how to apply them to entities on your Etz system, such as Clients, Suppliers, Candidates and Assignments. It explains the notification options and how to use the reports to highlight which documents are outstanding and those which require action.

Firstly, there are three distinct stages to creating and applying a document on the system:

1. Create the document as a Document Type to represent it on the system
2. Apply the document to an entity on the system, for example Assignment, Client, Supplier or Candidate
3. Initiate the process by ‘sending’ the document to the recipient

Document types can consist of either ‘Signing’ or ‘Uploading’ documents; with documents requiring signature they can be sent from the system for signing in various ways and they return to the system following signature as signed document. With Uploading documents a request to upload a document is sent from the system, for example a VAT registration certificate for a limited company supplier, and the recipient then uploads the relevant document, ready for approval by the administrator.

Within Signing types of documents, templates can be creating using merge fields extracted from Etz, therefore upon applying the document to an entity the system will merge data from that entity into the document which can then be sent from the system for signature.

Notification options for Document Management include our Etzsign function where the recipient receives an email containing a coded link to the document where it can be signed electronically.

On-line notifications can also be sent via email requesting the recipient to log in to the portal to sign the document.

Documents can also be placed on the recipient’s portal, available for them to sign or upload next time they log in.

The Document Management module includes a facility to ‘chase’ recipients for outstanding documents where they receive an email or SMS from the system reminding them to action the outstanding document request.

Document Management reporting includes a status report allowing the user to focus on documents outstanding of a particular status, or all outstanding documents. Also included is the Document Expiring report which provides details on any documents about to expire, enabling the user to replace them if appropriate.

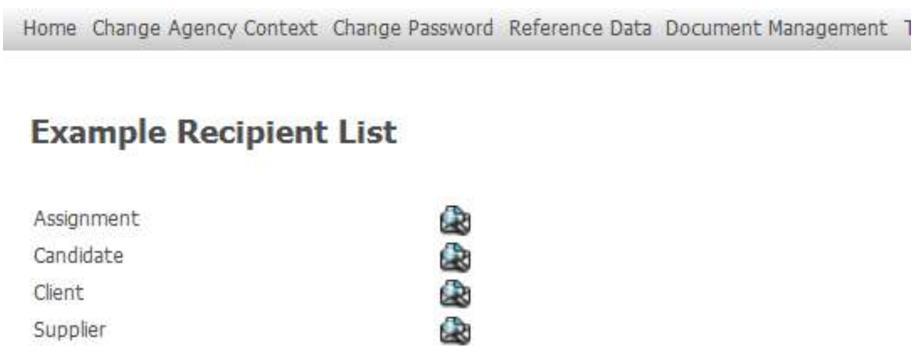
Setting up Document Management

Template Documents

Template Documents are created within MS Word and utilise the Mailmerge functionality, therefore the first step in creating this type of document for use on your Document Management module is to extract a 'recipient list' of merge fields for use in the template document.

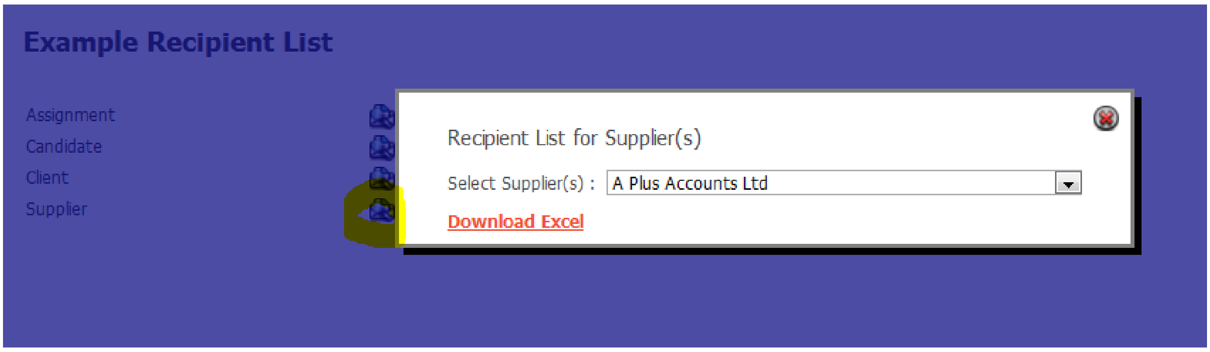
Example Recipient List

As documents must be attached on an entity on the system, you will need to decide which of these is relevant to the document template you wish to create:



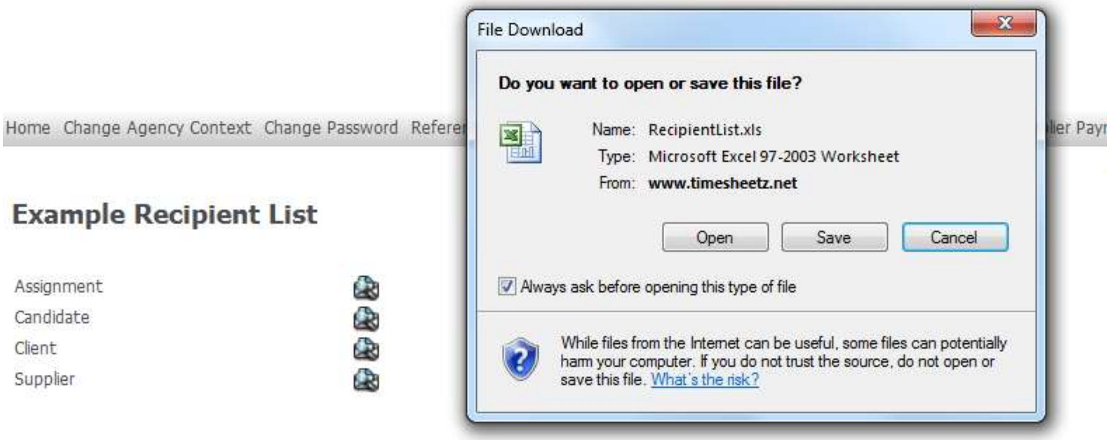
For example, if your document is assignment- specific then it would be most appropriate to use that recipient list and it should contain every variable you would need relating to the assignment. Alternatively if your document relates to suppliers then it would make sense to use those available fields from the supplier list.

To extract a recipient list, click on the select icon:

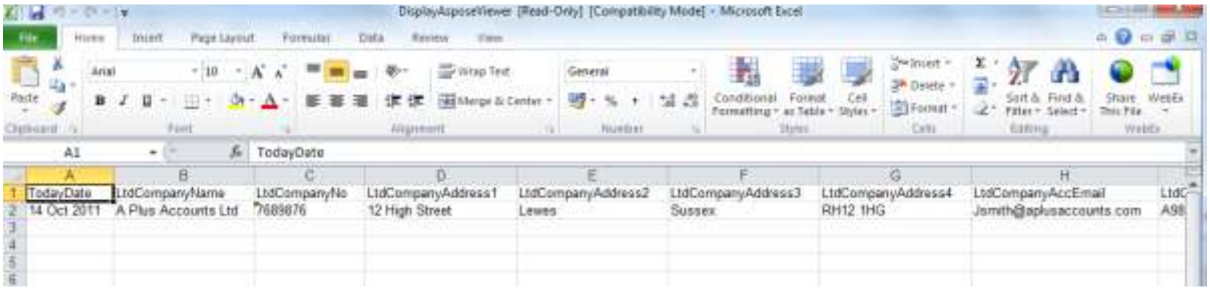


Next you must select an example from the entity and this is used to indicate what each field is used for and will assist you in applying the fields to your document template.

Click Download Excel and then choose either Open or Save (for the purpose for this example we will Open the list to Excel):



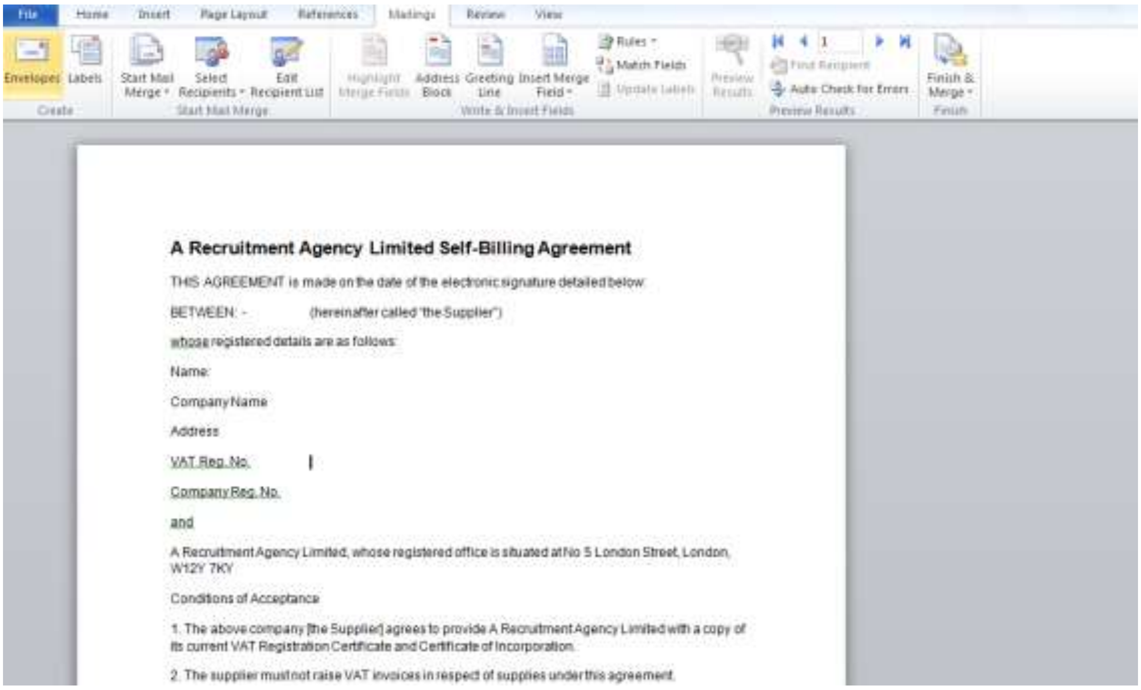
The fields contained within Row 1 on the Excel file are the merge fields we will use within your Template document:



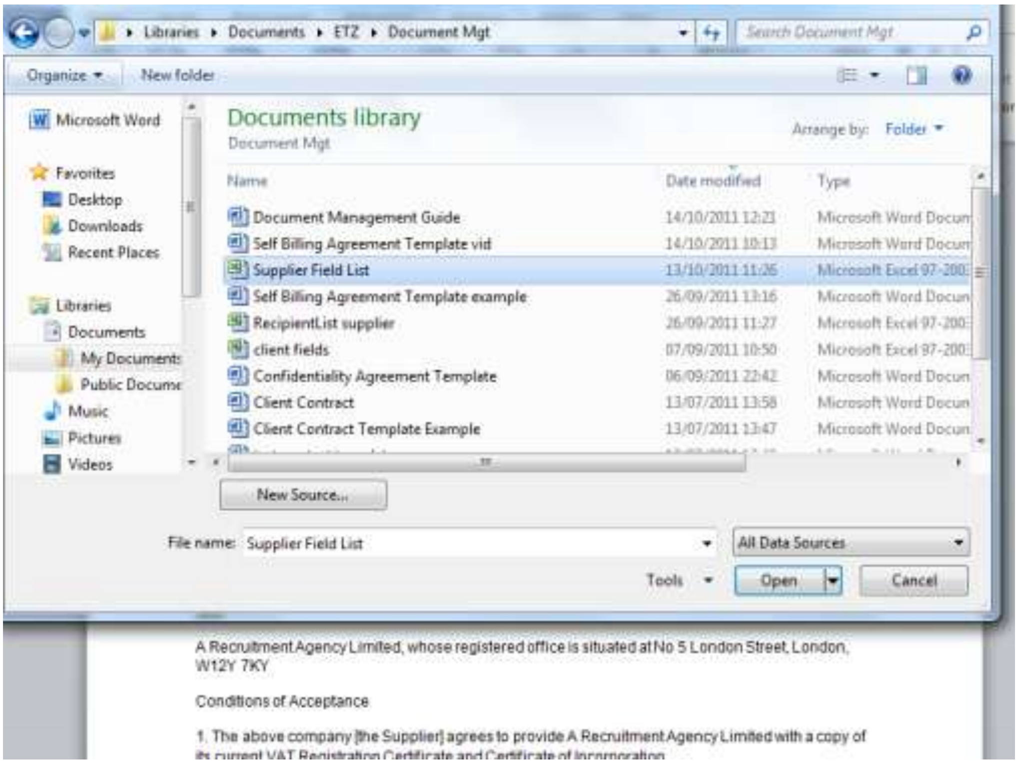
Save the recipient list of merge fields ready for use in your Word template document in the next stage of the process.

Creating a Template Document using MS Word

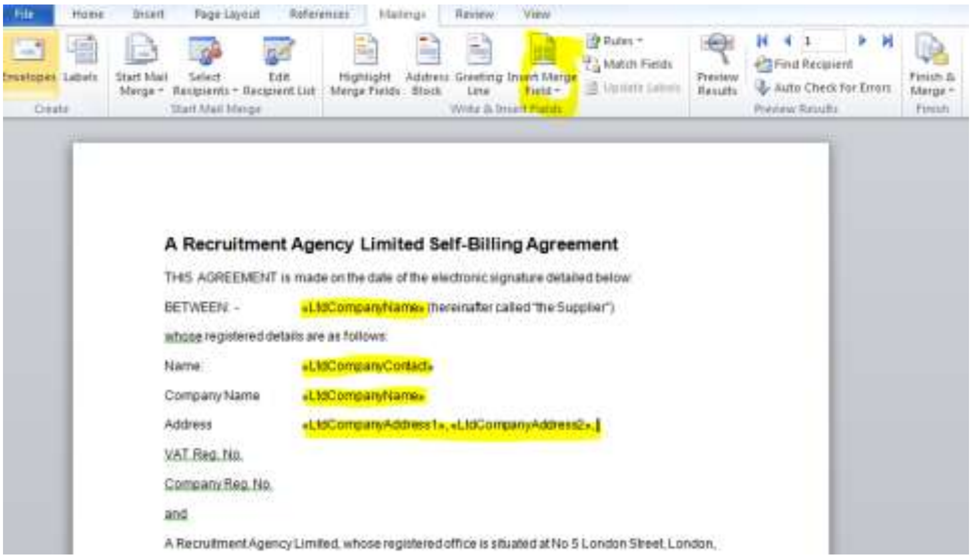
The next stage in creating a template is to open your document (or create one if you do not already have a suitable document) within Word and click the ‘Mailings’ tab:



Next click Select Recipients then select the option to ‘Use Existing List’ and browse to select the recipient list extracted from Etz:



Now you have attached your Word template document to the source field list you will be able to click ‘Insert Merge Field’ to select each field you wish to incorporate into the document:



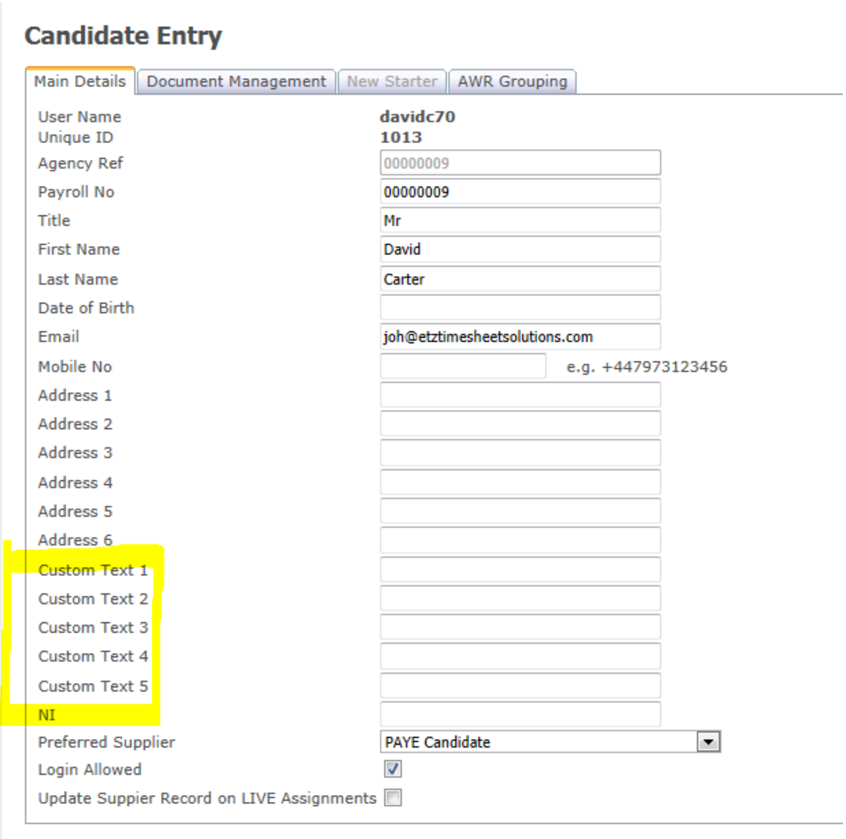
Continue inserting the merge fields until you have everything you need in the template document. Save this document in a secure place ready for the next stage of creating a suitable Document Type within Etz for this template (specifically for information on how to create template documents refer to the section on Signing Document Types).

Custom Fields

We have a number of 'Custom' fields that can be enabled on your site for use with Document Management. These fields are available in the following main entity areas:

- Client Entry
- Supplier Entry
- Candidate Entry
- Assignment Entry

If you wish to utilise these additional fields for use on your Document Templates please log a support ticket via the Support menu on your system and we will enable them for you.

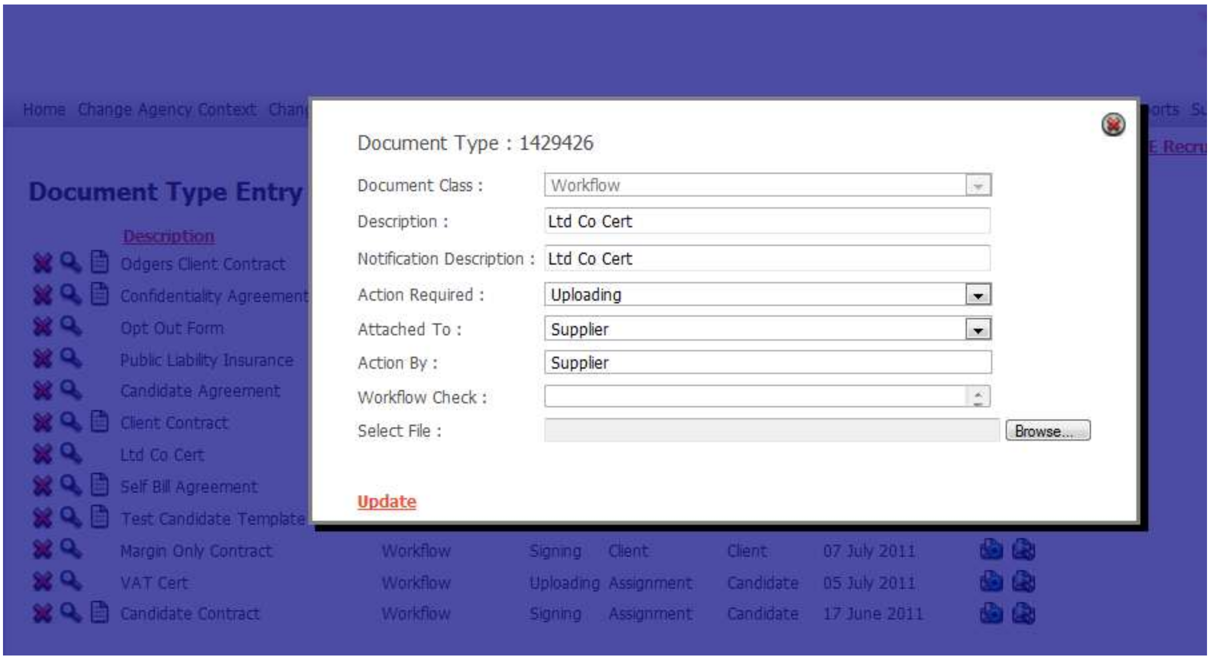


Document Types

There are two main types of documents – Uploading and Signing.

Uploading Document Types

For ‘Uploading’ documents suitable examples could be a VAT Certification or Incorporation Document that you are asking the Supplier to upload:



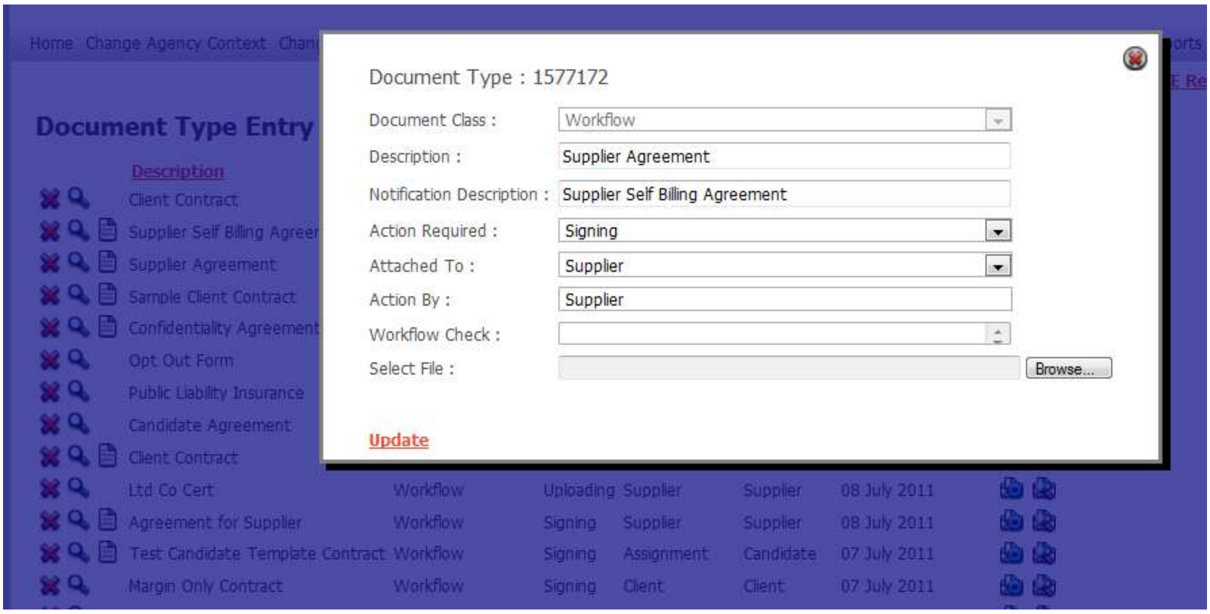
To create these as Document Types you simply follow the example above by setting the Action Required option to Uploading. Set the relevant entity on the Attached To option and Action By fields to suit your document type (but you could have a document that is Attached To Assignments but is to be Actioned By the Candidate or whatever combination suits the purpose).

It is not necessary to attach a file as you will be asking the recipient to upload a document (but the system will allow you to attach one which can be useful if you wish to present the recipient with a document for them to print off, sign manually, scan in then Upload).

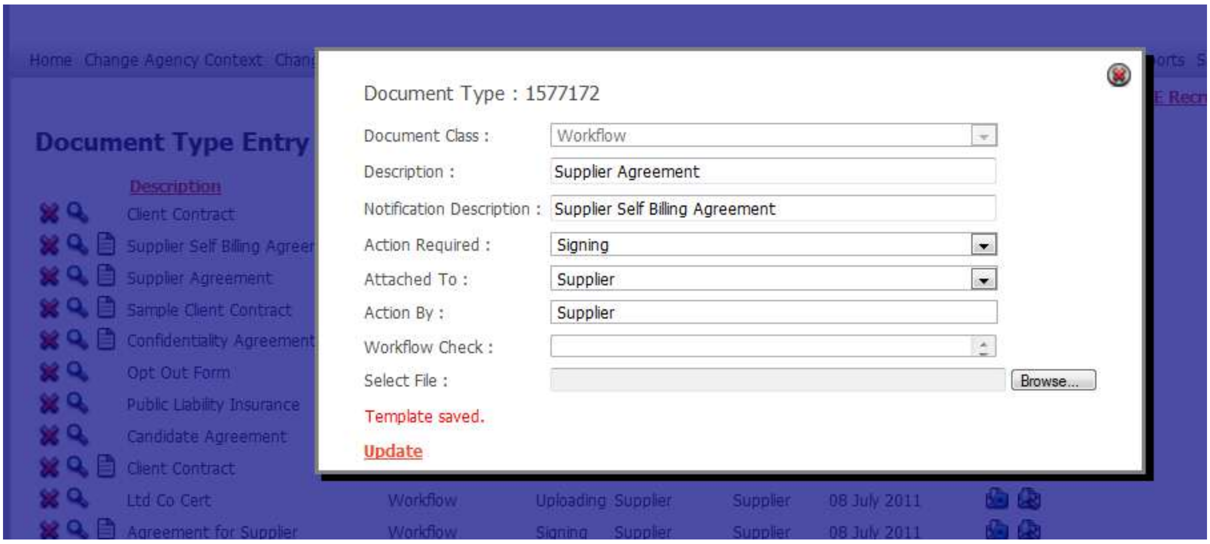
Click Update to save the document type and the system will confirm back that the item has been saved.

Signing Document Types

Documents requiring ‘Signing’ can be either template-based or complete documents (where the document has already been fully created outside of the system):

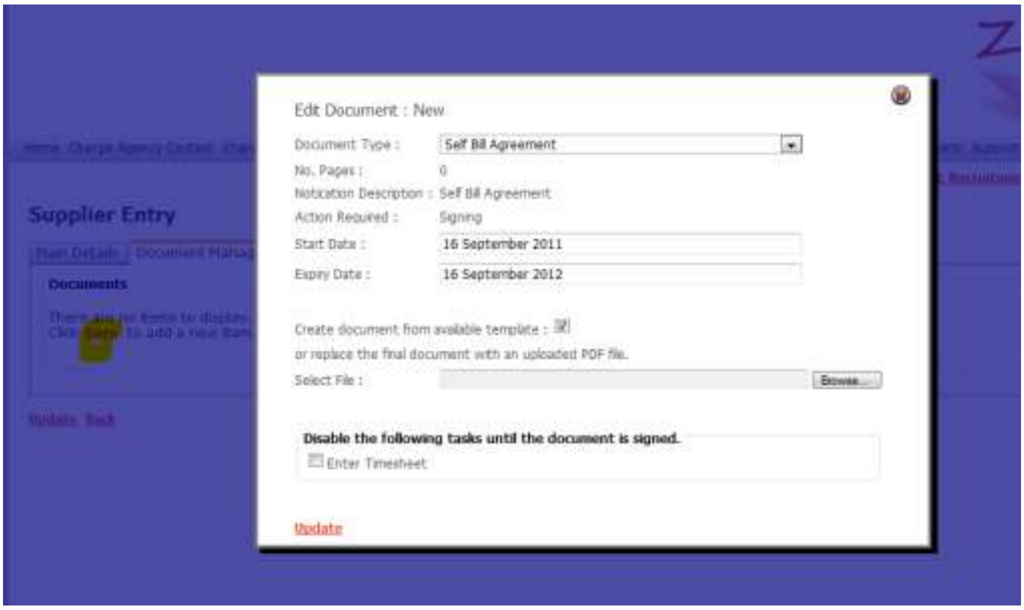


Browse to select the relevant document, either template or full document as appropriate and click Update to save. Please note the system will accept file types of .DOC, DOCX and .PDF. The system will confirm back that the item has been saved:



Applying your Document

After creating your Document Type, you are now ready to apply it to an entity on the system – you do this by clicking the link to add a document then selecting the relevant document type from the list (please note only document types belonging to the entity will be displayed):

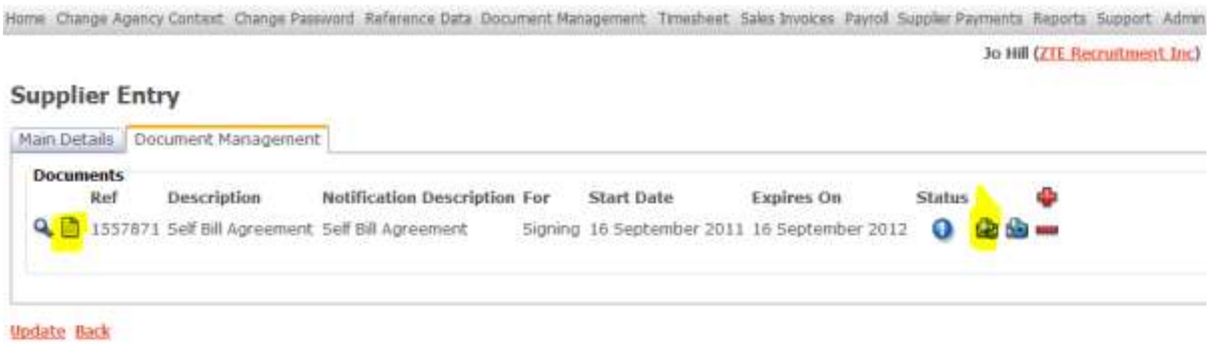


Set any dates as relevant (although if you are using a template document the dates may be picked up from the entity you are applying the document too, for example if the document relates to assignments the start and end date may reflect the assignment start and end dates) and attach a file if appropriate (again if using a template there will be no need as the system will create one for you).

Only tick the option to disable timesheet entry if relevant as this will block timesheets from being submitted until the document process has been completed.

Click Update to save the document and the system will confirm back to you with a relevant message. Click the red cross in the top right corner to close the window.

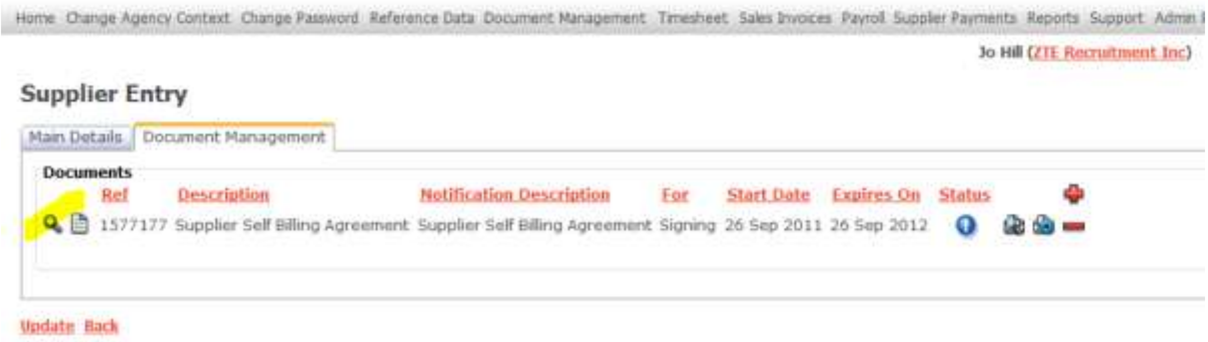
At this stage of the process the document will be flagged in blue (as in the example above) to indicate the document has been initialized. The document can be viewed and edited if necessary by clicking on the first icon highlighted below and can then be issued using the Manage Workflow icon:



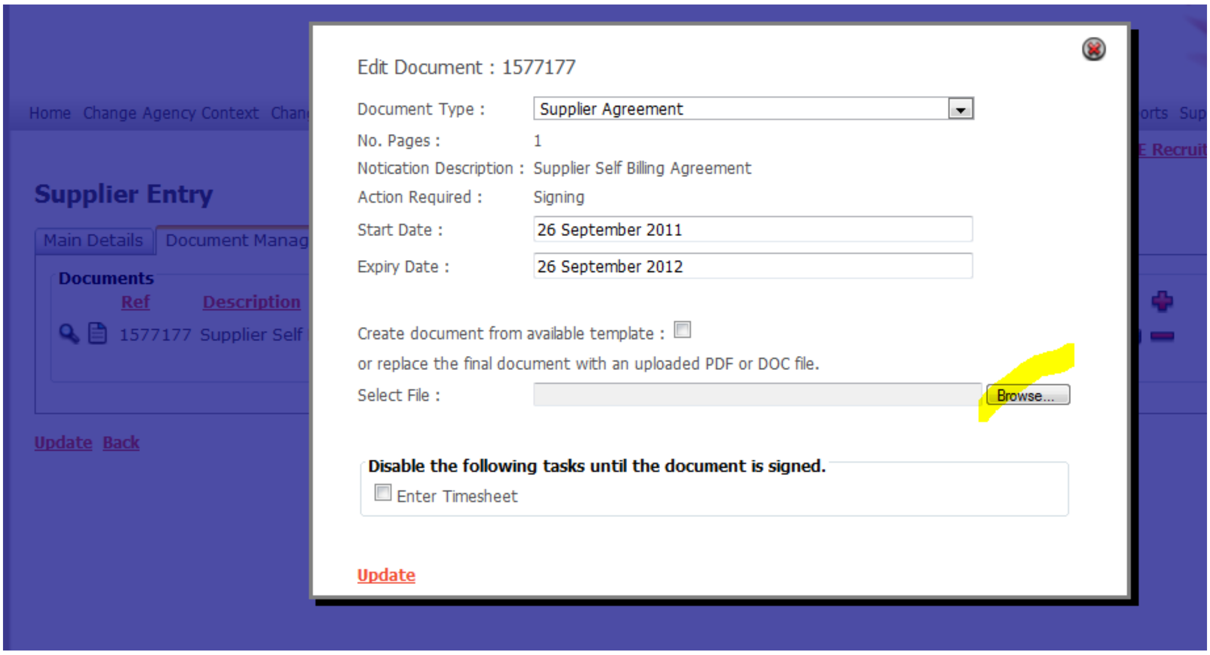
Editing the Document created from a Template

Documents derived from a template remain as a Word document where they can be amended at any stage prior to 'sending' from the system. At the point in which the document is sent it then converts to a .PDF document type where it cannot be amended.

If you wish to make an alteration to the merged document you firstly need to view it, where it will open as a Word document (as in the previous section). Make your changes and save it on your pc/network under a new document name. Next close the Word document and click the Select icon on the document item in Etz:



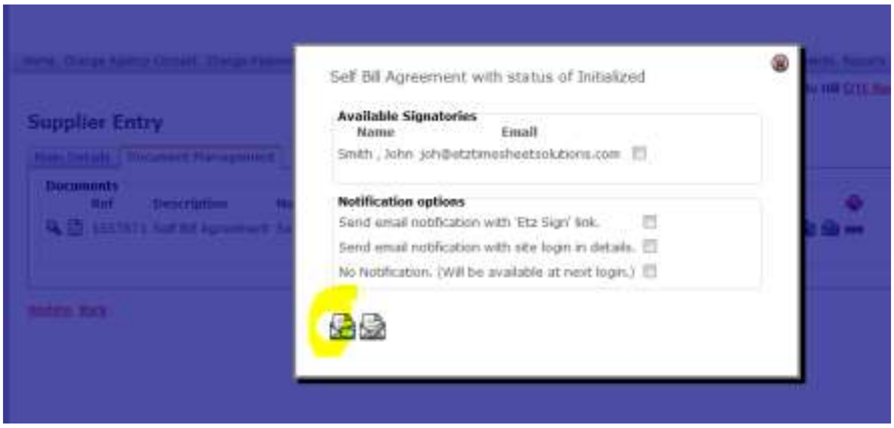
Here you will be able to browse and select the revised version of the document:



Click Update and the new document will be saved in place of the previous one derived from the template.

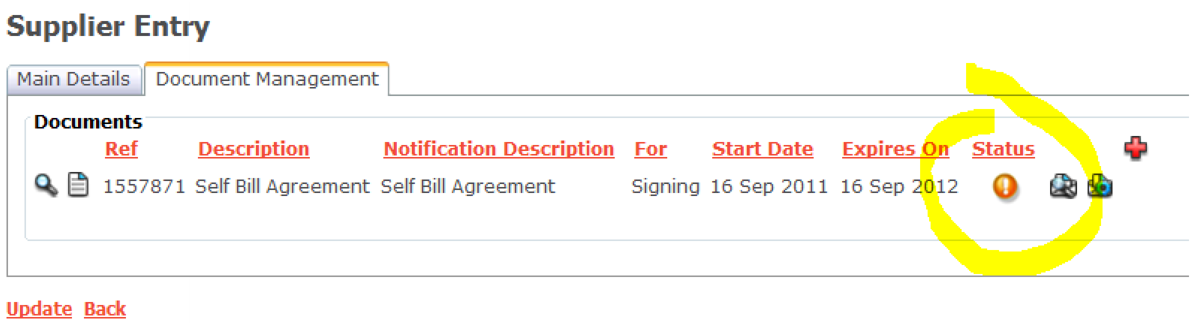
Issuing the Document

Here you will be able to select you who you wish to notify and how you wish to notify them (please note that in order to send a document to a Supplier or Client you must first ensure you have created the individual as a Client/Supplier User on the system):



When you are ready to send the document, click to initiate it. Depending on which notification option you have selected, the document will be either emailed as an EtzSign/online request or will be placed on their portal when it will be available next time they log in.

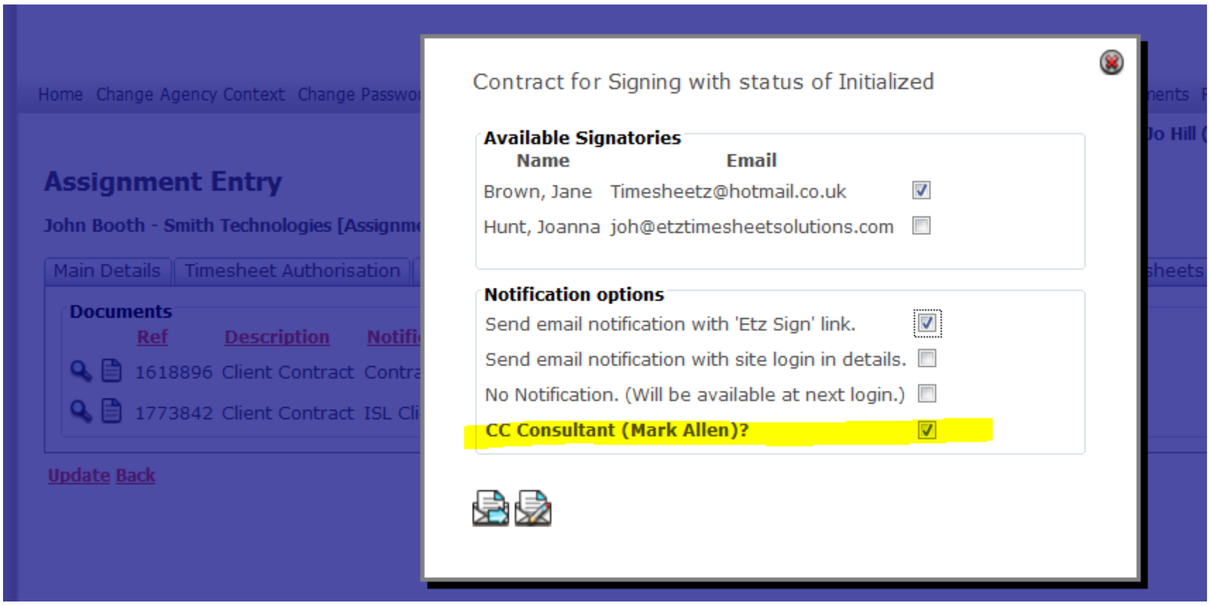
At this stage in the process the document will be flagged amber to indicate it has been issued but not yet signed/uploaded:



The next section of this guide provides examples of how the documents are issued to recipients.

Lead Consultant 'CC' Option

With documents attached to the Assignment area of the system, you will be offered the option to 'CC' the lead consultant on the assignment if you choose an email-based notification option:



Please note this will only be available if a consultant has been selected on the Categories page of the Assignment Entry.

Issuing a Document Request

Notification options for issuing documents for signature or upload requests include the following:

- Email containing an EtzSign link to sign a document (not appropriate for upload requests)
- Email asking the recipient to login to sign/upload
- No notification – place on portal

Dependent on the notification option select for the document, the recipient may receive an email containing a coded link to the document for their signature or they may receive an email asking them to log in to upload or sign the document. Alternatively the document may have been 'placed' on their portal available for them next time they log in.

EtzSign Notification

An EtzSign document email looks like this (please note the wording contained within the system email templates can be amended to suit your specific requirements):

A signature request from ZTE Recruitment Inc for a Self Bill Agreement

joh@etztimesheetsolutions.com

Sent: Fri 04/11/2011 15:37

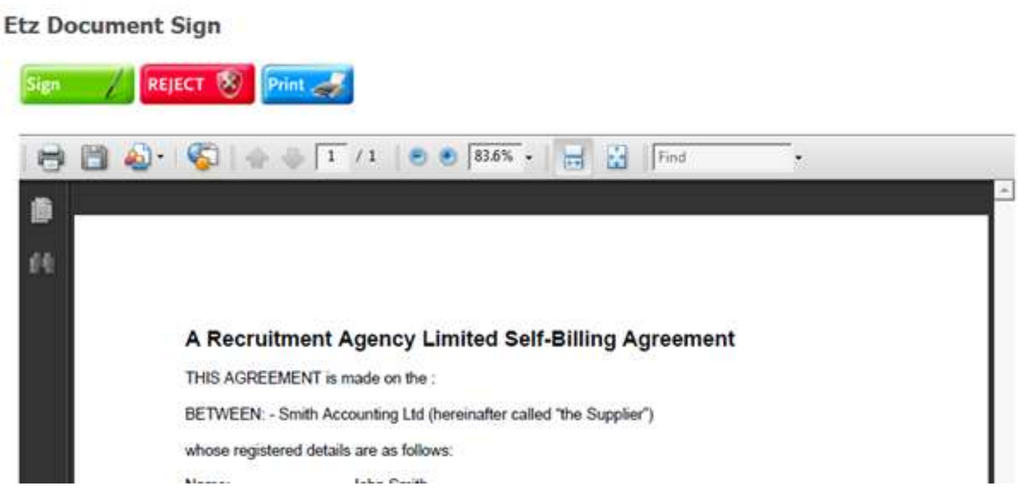
To: joh@etztimesheetsolutions.com

Dear John Smith ,

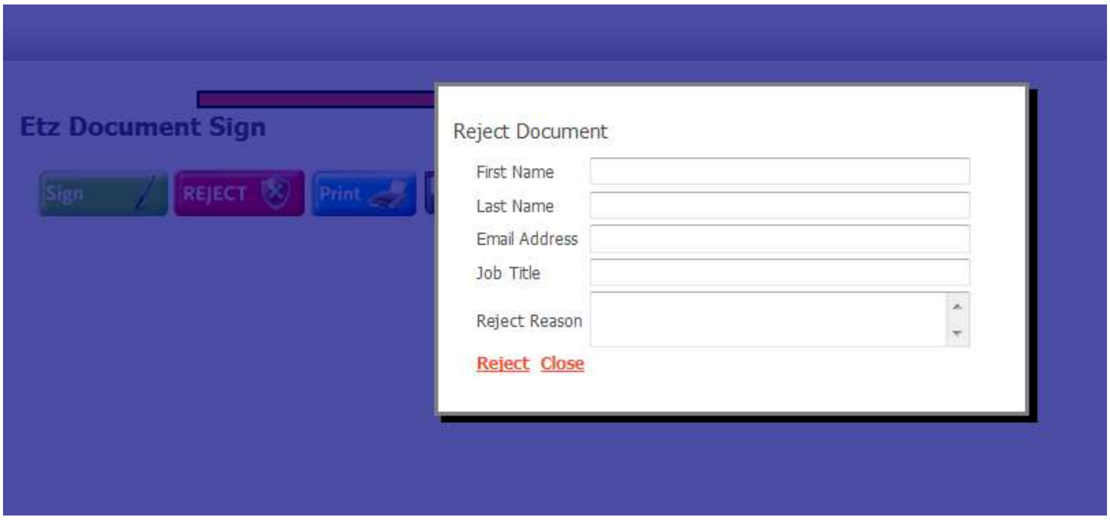
A Self Bill Agreement has been submitted by ZTE Recruitment Incfor your signature.
Can you please sign this Self Bill Agreement by clicking on the link
https://www.timesheetz.net/EtzWeb/EtzSign/Default.aspx?Signature=3e07cd22-4010-41d8-aca1-51baeef6b259&Hash=y9kWER4rjHLfrsbBppOuqA%3d%3d

Regards,
ZTE Recruitment Inc

The recipient clicks the coded link and the document will be displayed for their perusal:



If documents are rejected at this stage a reason must be entered:



Upon rejection the system will email the ‘Post’ email recipient as set in the Agency Details area of the system to notify them the document has been rejected.

Documents can be printed too if required.

To sign the document, the recipient must enter their details:

Notification to Log In

An email notification with site login request looks like the following example:

A document upload request from ZTE Recruitment Inc for a Ltd Co Cert

joh@etztimesheetsolutions.com

Extra line breaks in this message were removed.

Sent: Fri 04/11/2011 16:32

To: joh@etztimesheetsolutions.com

Dear John Smith ,

A Ltd Co Cert has been requested by ZTE Recruitment Inc for your upload.

Please login at http://www.timesheetz.net to upload this document.

If you have not yet received, or forgotten, your user id and/or password, just click on the link "send me my username and password" on the login page and then enter your email address.

Your user id and password will be emailed to you.

Regards,
ZTE Recruitment Inc

If you are asking a recipient to log in to sign or upload a document then you must ensure you have sent them their login details previously. These can be sent from the relevant entry list, so to send a supplier user their login details you would need to click the email icon from the User Entry list:

User Entry

Show ☑ Administrators ☑ Consultants ☑ Suppliers A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL

Agency Ref	User	User Name	Email	Roles
	Ellison , Mark	marke12	mark.ellison@etztime.com	AgencyBatchAuthoriser
	Brown , Marcus	marcusb8	joh@etztimesheetsolutions.com	AgencyManager
	Hughes , Chris	chrish46	joh@etztimesheetsolutions.com	AgencyOperator
	Smith, Joanne	joannes2	joanne.smith@etztimesheetsolutions.com	AgencyUser
	Entry User, Client	cliente2	joh@etztimesheetsolutions.com	AteUser
	Bishop , Nicola	nicolab2	nbishop@ztetraining.com	Consultant
	Claydon , Emma	emmac9	eclaydon@ztetraining.com	Consultant
	Hayden , James	jamesh30	jhayden@ztetraining.com	Consultant
	Young , Darren	darreny3	dyoung@ztetraining.com	Consultant
	Allen, Mark	marka30	joh@etztimesheetsolutions.com	Consultant,Supplier
	Winter, Rob	robw5	rwinter@ztetraining.com	ConsultantUser
	Hadley , Sue	sueh8	joh@etztimesheetsolutions.com	CreditController
	Myers, Gill	gillm3	gill.myers@etztimesheetsolutions.co	Supplier
	Smith , Mike	mikes14	mike.smith@etztimesheetsolutions.com	Supplier
	Smith , John	johns92	joh@etztimesheetsolutions.com	Supplier

New

Upon log in to the system the recipient will be presented with their document requests:

Home Change Password My Checklist Timesheet Supplier Payments Support

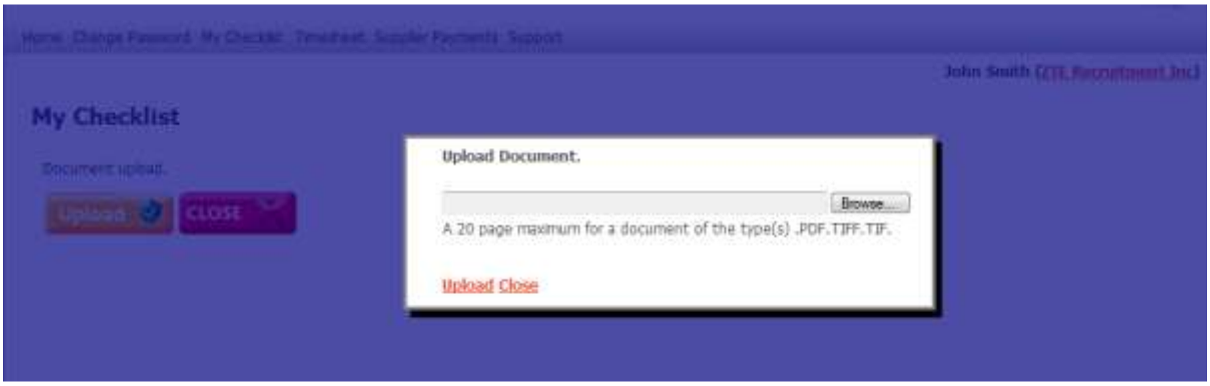
My Checklist

My Contract(s) & Other Document(s) Status

Document(s) To Action | Signed & Uploaded Document(s)

Ref	Type	Action	Created	Status
1697191	Ltd Co Cert	Uploading	04 November 2011	!
1557871	Self Bill Agreement	Signing	16 September 2011	!

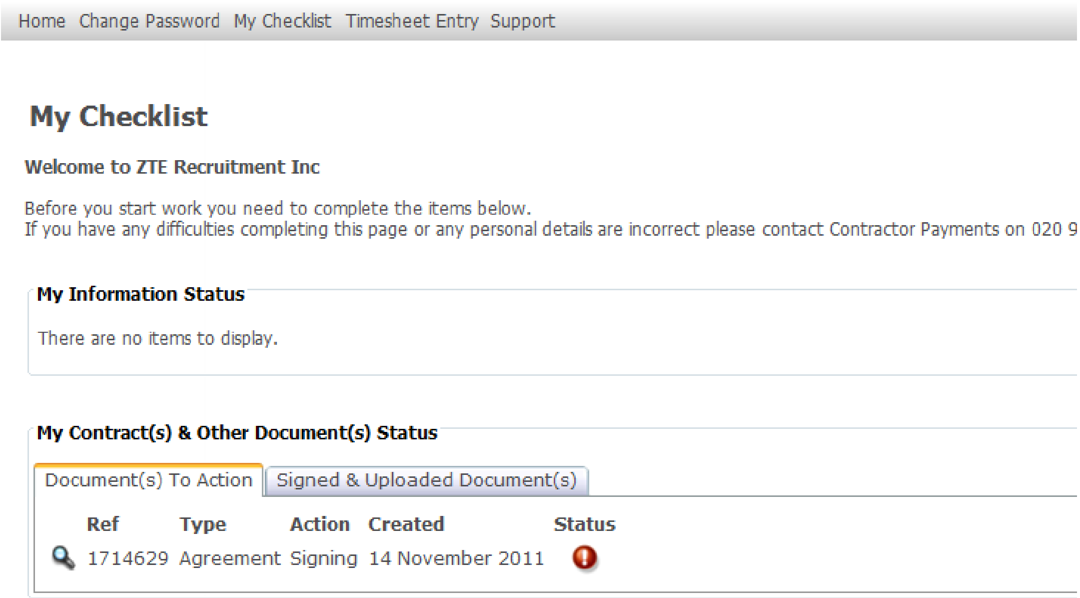
To action the request they simply click the magnifying glass to select the item then upload (documents must be of PDF, TIF or TIFF format):



Or of it is a signing request the simply enter their details, tick the agreement and submit:

No Notification (Placed on Portal)

Selecting this option will ensure the document(s) are placed on the recipient's portal where they will be visible next time they log in to Etz:



To action the document request they simply click the Select icon (magnifying glass) and sign or upload a document as required.

The document status indicator will change in line with its current status, for example Awaiting Approval if an uploaded document or Signed if successfully signed.

Document Management Reporting

There are several reporting options and features within the Document Management menu designed to assist with the management process:

Document Reminders

The 'Send Document Reminders' option will detail any documents where the process is not yet complete, for example documents that have been 'sent' to a recipient but not yet 'signed' or indeed 'signed' documents that have not yet been approved:

Home Change Agency Context Change Password Reference Data Document Management Timesheet Sales Invoices

Send Document Reminders

Candidate	Mobile	Email	Status	☐
Allen, Mark		joh@etztimesheetsolutions.com	Signed	☐
Back, Neil	+447970254172	JOH@etztimesheetsolutions.com	Signed	☐
Booth , John	+447739024895	timesheetz@hotmail.co.uk	Sent	☑
Brown, Jane		timesheetz@hotmail.co.uk	Signed	☐
Cooper, Mark	+447914402571	timesheetz@hotmail.co.uk	Sent	☑
Smith , John		joh@etztimesheetsolutions.com	Signed	☑
Smith , John		joh@etztimesheetsolutions.com	Downloaded For Fax Back	☐
Smith , Mike		mike.smith@etztimesheetsolutions.com	Sent	☐

Click here to send document reminders.

When sending document reminders a relevant email template will be used dependent on the type of document and notification option selected. The following example is relevant to a 'Signing' type of document with a notification option of Etzsign:

Document(s) Requiring Signing Reminder from ZTE Recruitment Inc

joh@etztimesheetsolutions.com

Sent: Mon 14/11/2011 13:36

To: joh@etztimesheetsolutions.com

Dear John Smith

Our records show that you have 1 document awaiting signing.

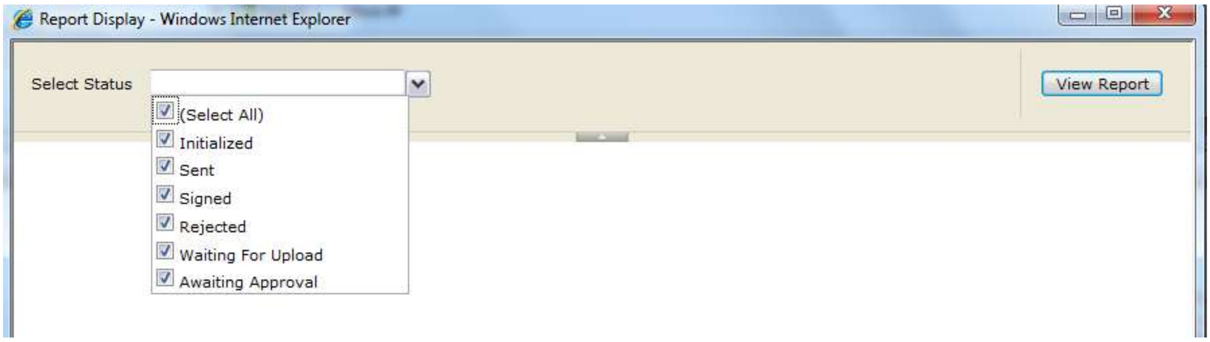
Please log on at Timesheet Manager or click on the link(s) below to sign your documents.
Self Bill Agreement - https://www.timesheetz.net/EtzWeb/EtzSign/Default.aspx?Signature=3e07cd22-4010-41d8-aca1-51baeef6b259&Hash=y9kWER4rjHLfrsbBppOuqA%3d%3d

Regards

ZTE Recruitment Inc

Document Status Report

The Document Status report details documents using the same criterion on the Document Reminders, therefore any documents where the process has not yet been completed will show on this report:



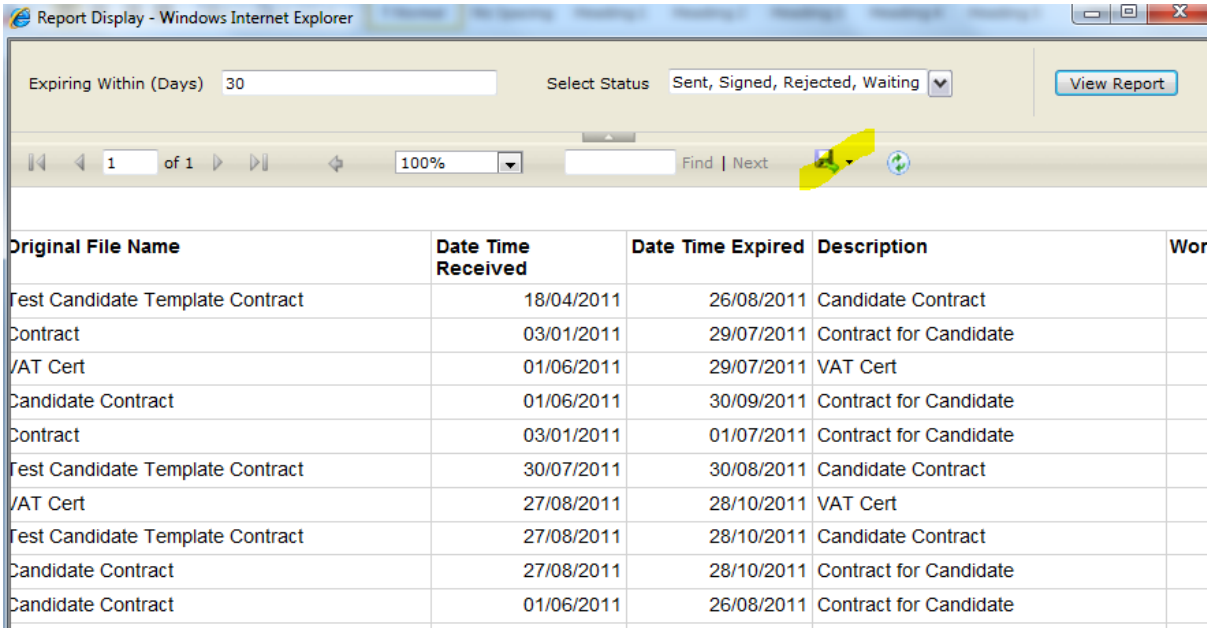
Here is a key of document statuses:

- Initialized – documents have been attached to an entity but not yet 'sent' to a recipient
- Sent – documents have been sent to a recipient but are outstanding
- Signed – the recipient has signed the document and it is awaiting your acceptance
- Rejected – the document has been rejected by the recipient
- Waiting for Upload – document upload requests have been issued to the recipient but no documents have yet ben uploaded
- Awaiting Approval – a document has been uploaded and is awaiting administrator approval

This report should be used regularly as part of the Document Management process to identify which documents are outstanding and which require attention. Using the data on the report the administrator can refer back to the relevant document entity to address any issues (documents can be resent and set as signed as required).

Documents Expiring Report

For those documents where expiry dates are relevant the Documents Expiring report will identify any documents where the expiry date is approaching or has been exceeded:



Original File Name	Date Time Received	Date Time Expired	Description	Wor
Test Candidate Template Contract	18/04/2011	26/08/2011	Candidate Contract	
Contract	03/01/2011	29/07/2011	Contract for Candidate	
VAT Cert	01/06/2011	29/07/2011	VAT Cert	
Candidate Contract	01/06/2011	30/09/2011	Contract for Candidate	
Contract	03/01/2011	01/07/2011	Contract for Candidate	
Test Candidate Template Contract	30/07/2011	30/08/2011	Candidate Contract	
VAT Cert	27/08/2011	28/10/2011	VAT Cert	
Test Candidate Template Contract	27/08/2011	28/10/2011	Candidate Contract	
Candidate Contract	27/08/2011	28/10/2011	Contract for Candidate	
Candidate Contract	01/06/2011	26/08/2011	Contract for Candidate	

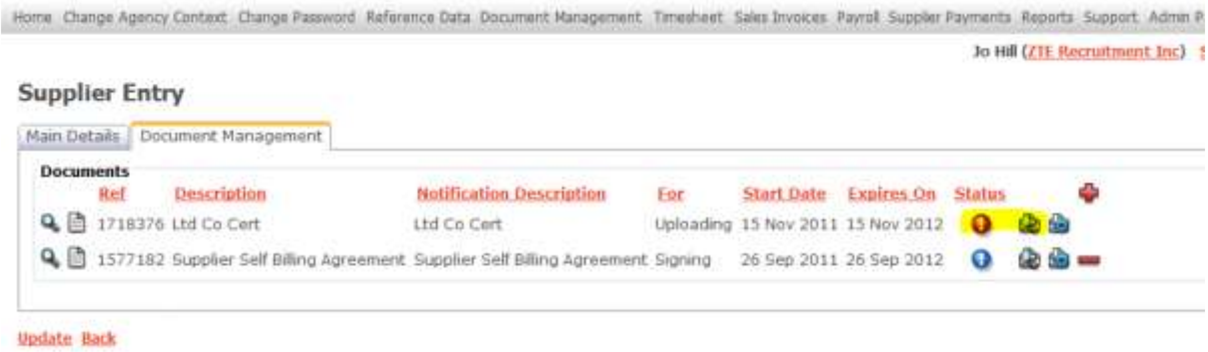
For any documents that need to be replaced due to expiry (such as Limited Company Self-Billing Agreements for example) a new document can be added and issued as relevant prior to the original documents actual expiry.

Completing the Document Management Process

Setting a Document as Signed

When a document has been uploaded by a recipient it will take on a status of 'Awaiting Approval' until it has been set as signed by the administrator.

The Document Status report should be used to identify which documents are awaiting approval and these documents must be set as signed from the entity they are attached to – this example shows a document that is attached to the Supplier entity that has been uploaded by the recipient:



The status indicator is red to show the document requires attention and the hover-over help when you point at the indicator will state that a document has been uploaded.

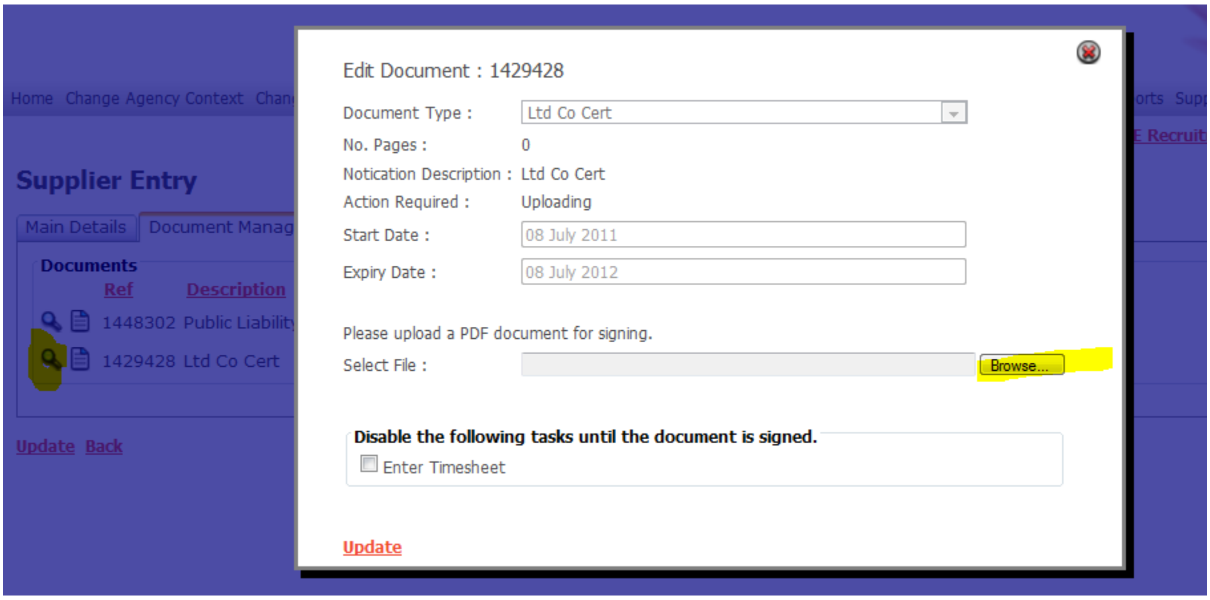
To approve the document, click on the Manage Workflow icon and click the Set as Signed icon as follows:

The status indicator will then change to green to show the document has been signed:

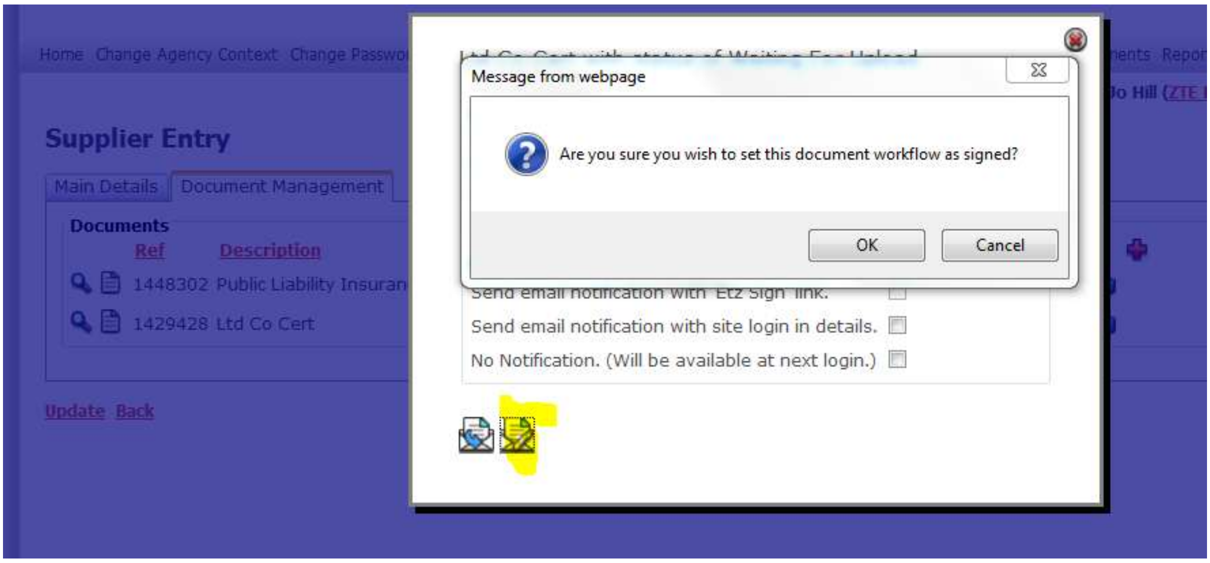
Overriding the Signing Process

Documents can be set as signed and approved before the process is completed, for example when a recipient has manually signed a document and returned it to you via the post.

Before setting a document as signed in this instance you may wish to overwrite the original document with a later version of the actual document that has been returned to you and we do this by clicking the Select icon as follows and uploading the new document:



The document can then be set as signed by clicking the Manage Workflow icon:

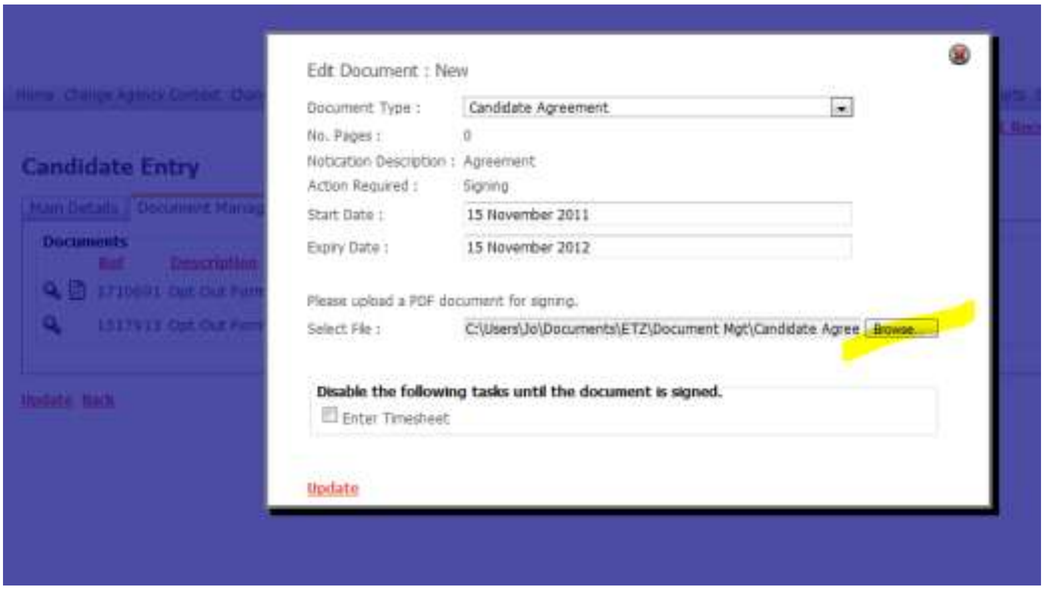


Please note that once a document has been set as Signed it cannot be updated.

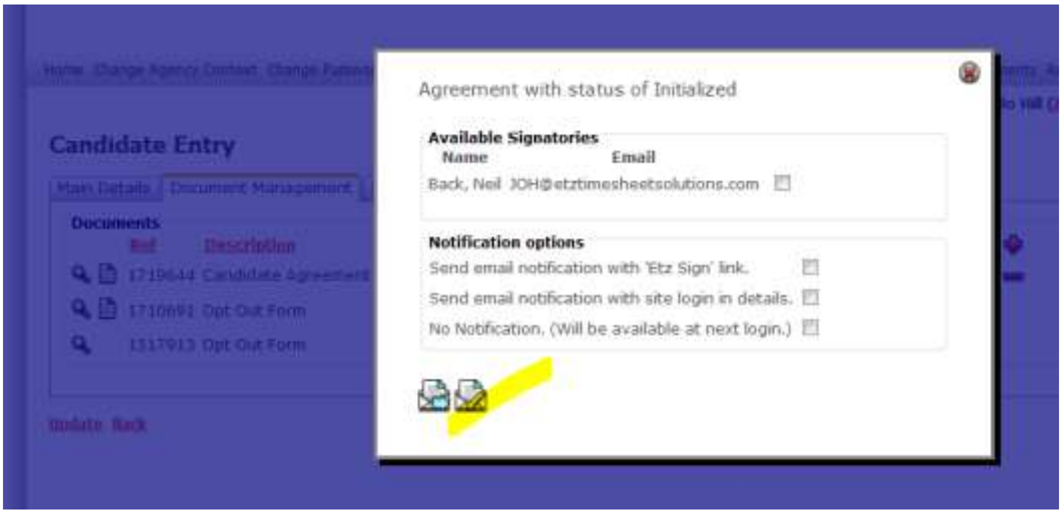
Attaching Documents Retrospectively

You may choose to manage some or all of your documents outside of the system and only attach them to entities within Etz when they have been finalised and signed.

To use the system in this way you must still go through the process of creating Document Types to represent the items you wish to attach, but when applying them to an entity on the system you simply attach the document you wish to attach:



Then set the document as signed instead at that stage instead of actually issuing it to a recipient:

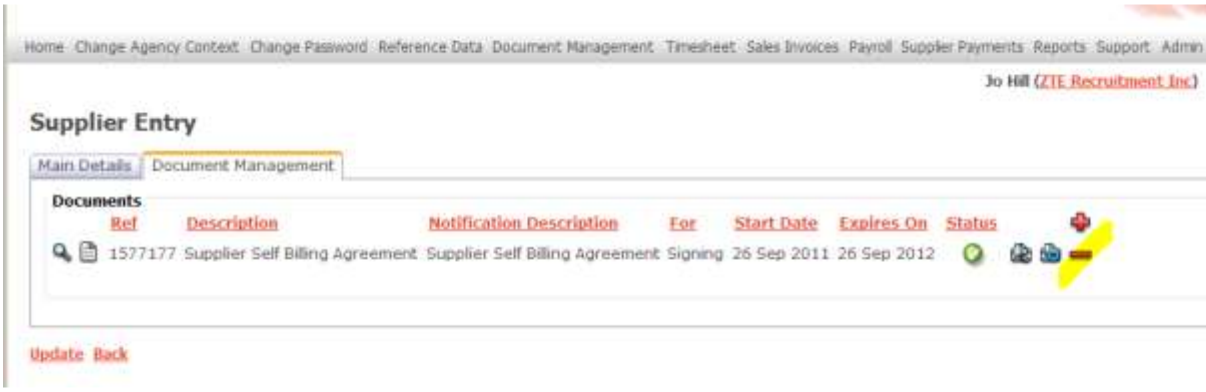


This way all your documents can be stored in Etz as a central repository.

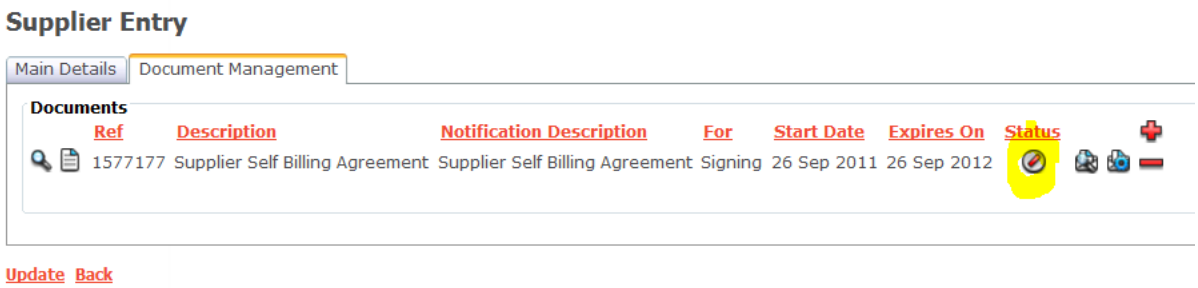
Overriding the Document Process

Voiding a Document

Documents can be removed from the recipient's portal by clicking the minus sign on the document item from within the entity to which it is attached:

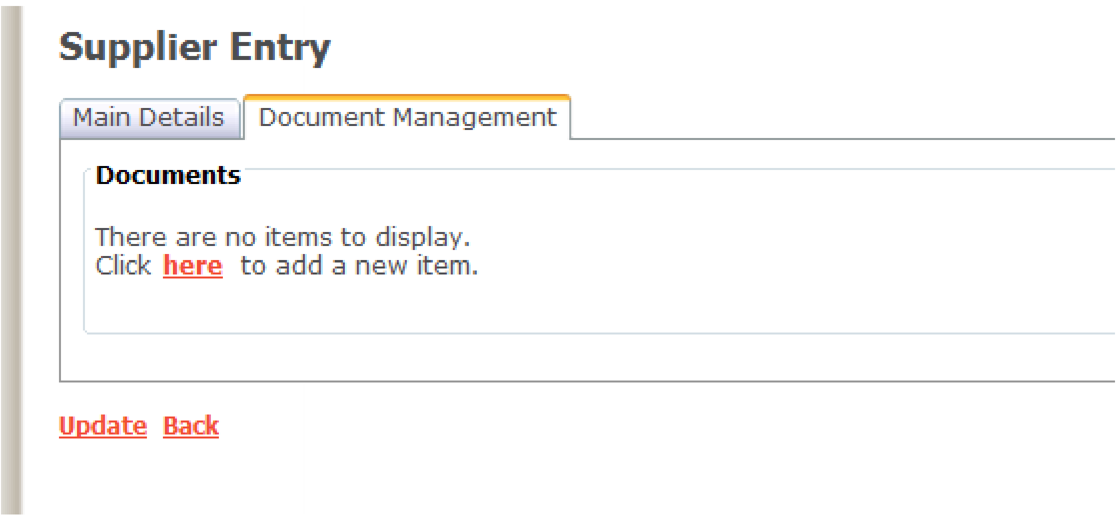


The status indicator changes to show the document has been voided, but will remain on the entity's record for the administrator to see:



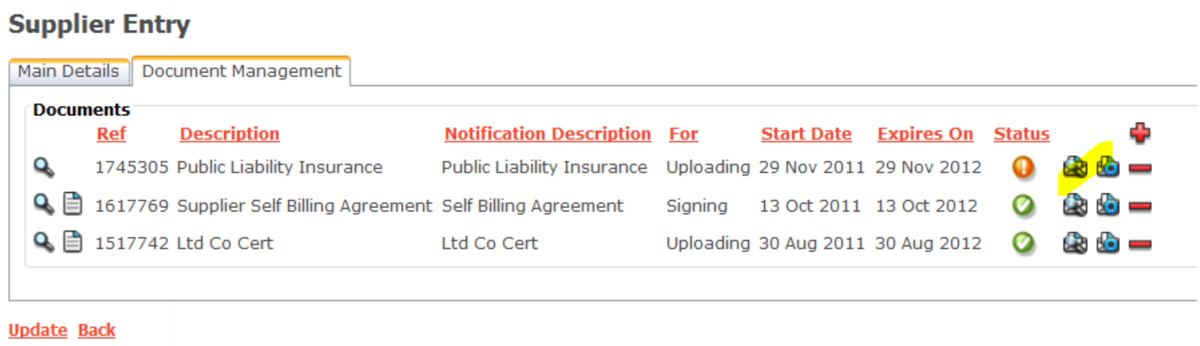
Removing a Document

Documents that have been voided can be removed completely by clicking the minus sign again:

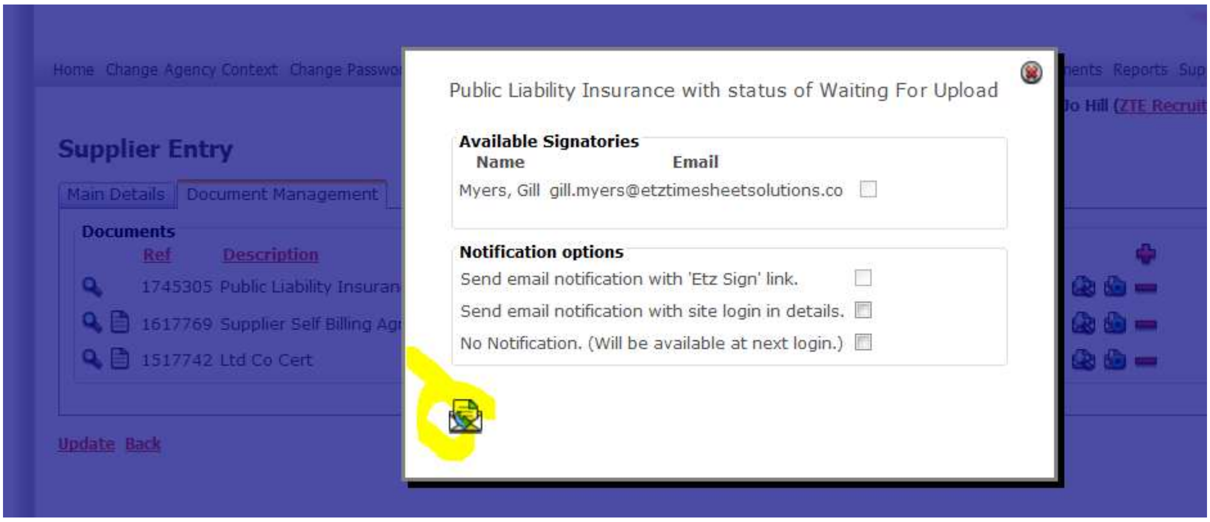


Re-opening Workflow

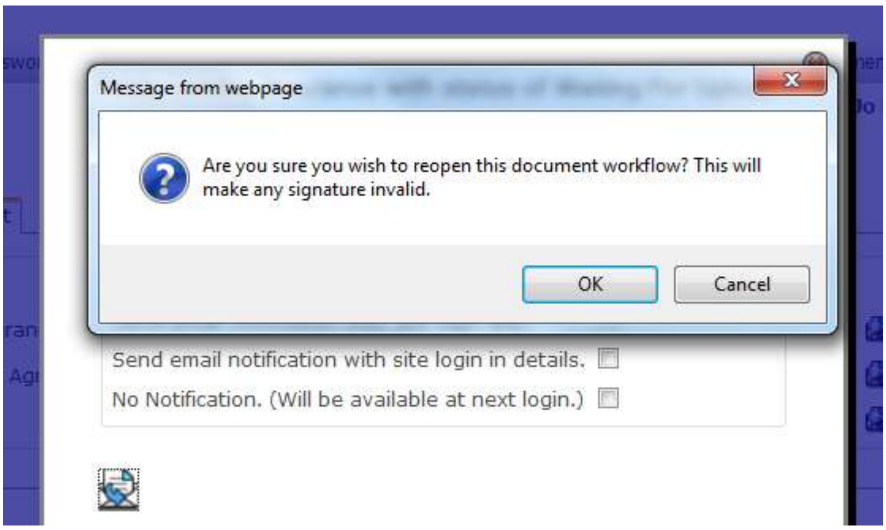
The Workflow on Documents can be re-opened at any stage prior to signing/setting as signed. To Re-open Workflow, firstly click the Manage Workflow icon:



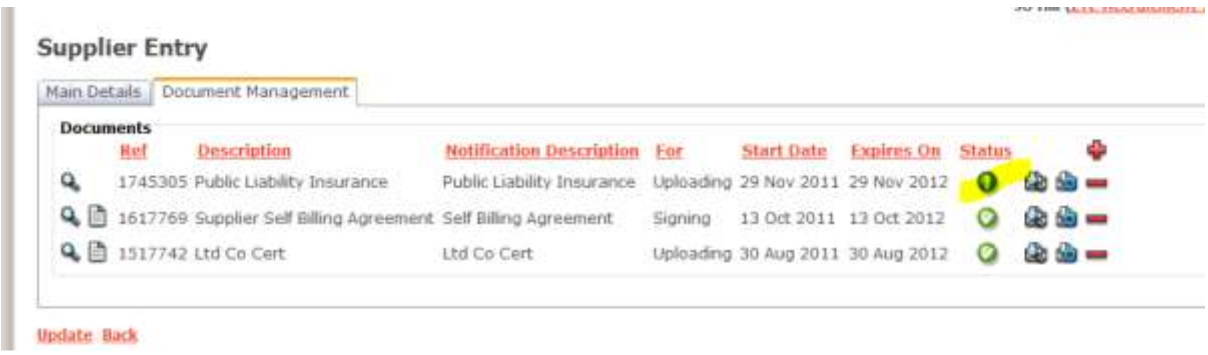
Then click the Workflow icon as follows to Re-Open the process:



The following confirmation box will then appear:

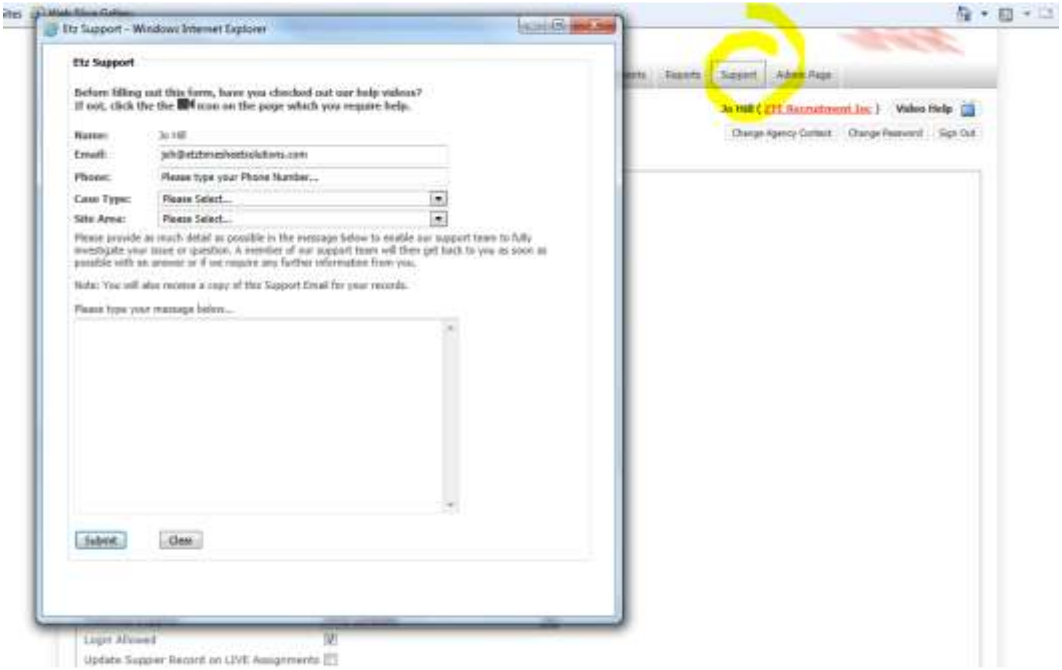


Once re-opened, the document the document's status will revert to 'initialized', ready to be 'sent' again from the system:



Contact Us

If you should require any further assistance at all please contact the Etz Support team via logging a Support Ticket through the 'Support' menu on your system:



Alternatively contact us on the following:

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