eformsign

User Guide

eformsign Service

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目次

.... xiii

Chapter 1. Overview 1

1.1. Product Introduction 1
1.2. Basic Terms 3
1.3. eformsign Usage Flow 6
1.3.1. Using Web Form Designer 6
1.3.2. Using Form Builder 6
1.3.3. Minimum System Requirements 7
1.4. Use Cases 7
1.4.1. Contract Forms 8
1.4.2. Agreement Forms 8
1.4.3. Application Forms 9

Chapter 2. Basic Info 11

2.1. Dashboard 11
2.1.1. Menu 11
2.1.2. Dashboard 13
2.2. View and Change Basic Information 16
2.2.1. My Profile 17
2.2.2. Edit and Add Company Information 19
2.2.3. Company Brand 22
2.3. Permissions 25
2.3.1. Company Administrator 26
2.3.2. Company Manager 28
2.3.3. Template Manager Permission 29
2.3.4. Template Usage (Document Creation) and Document Management Permissions .. 30
2.4. Manage Groups and Members 32
2.4.1. Manage Members 32
2.4.2. Manage Groups 34
2.5. My Signature 35

Chapter 3. Introduction to Form Builder 41

3.1. Form Builder Overview 41
3.1.1. Download Form Builder 41
3.1.2. Install Form Builder 43
3.1.3. Form Builder Menu Layout 44
3.2. Overview of Components 45
3.2.1. Component Types 45
3.2.2. Accessing Component Properties 46
3.2.3. How to Add Components 47
3.2.4. How to Delete Components 51

3.3. How to Use Each Component Type ... 51
3.3.1. Check ... 52
3.3.2. Radio ... 53
3.3.3. Combo ... 55
3.3.4. Text and Multiline ... 57
3.3.5. Datetime ... 58
3.3.6. Numeric ... 60
3.3.7. Toggle ... 61
3.3.8. Signature ... 63
3.3.9. Camera ... 66
3.3.10. Voice ... 67
3.3.11. Attachment ... 69
3.3.12. User ... 70
3.3.13. Document ... 72
3.3.14. Date ... 73
3.3.15. Label ... 74
3.4. Upload Form File ... 75
3.5. Configuring Template Settings ... 77
Chapter 4. Introduction to Web Form Designer ... 79
4.1. Web Form Designer Overview ... 79
4.1.1. Web Form Designer Menu Layout ... 81
4.2. Overview of Components ... 82
4.2.1. Component Types ... 82
4.3. Setting Properties for Each Component Type ... 83
4.3.1. Text and Multiline ... 84
4.3.2. Signature ... 85
4.3.3. Check ... 87
4.3.4. Radio ... 88
4.3.5. Label ... 90
4.3.6. Combo ... 90
4.3.7. Datetime ... 91
4.3.8. Numeric ... 93
4.3.9. Toggle ... 94
4.3.10. Camera ... 95
4.3.11. Voice ... 97
4.3.12. Attachment ... 98
4.3.13. Document ... 99
4.4. Configuring Template Settings ... 100
Chapter 5. Templates - Web Form Designer ... 103
5.1. About Templates ... 103
5.1.1. Template Overview ... 103
5.1.2. Workflow Overview ... 106

5.2. Template Settings 107
5.2.1. General 108
5.2.2. General > Setting the Document Naming Rule 111
5.2.3. General > Generating and Viewing a Document Number 114
5.2.4. Set Permissions 119
5.2.5. Workflow Settings 120
5.2.6. Field 127
5.2.7. Notification Settings 129
5.3. Menus for Each Template 132
5.4. Search Templates 134

Chapter 6. Template - Form Builder 135
6.1. About Templates 135
6.1.1. Template Overview 135
6.1.2. Workflow Overview 136
6.2. Template Settings 138
6.2.1. General 139
6.2.2. General > Setting the Document Naming Rule 142
6.2.3. General > Generating and Viewing a Document Number 145
6.2.4. Set Permissions 149
6.2.5. Workflow Settings 150
6.2.6. Field 158
6.2.7. Notification Settings 160
6.3. Menus for Each Template 163
6.4. Search Templates 165

Chapter 7. Documents 167
7.1. Documents 167
7.1.1. Template Category Combo Box, Document Status Filter Combo Box, and Search Box 170
7.1.2. Actions that Can Be Performed in the Document List by Documents Menu 174
7.1.3. Document Status and History 175
7.1.4. Document Download 176
7.1.5. Deleting Documents 177
7.1.6. Document Menu Column Selection 177
7.2. Creating New Documents 178
7.3. Send in Bulk 179

Chapter 8. Customizing eformsign 183
8.1. Manage Custom Fields 183
8.2. Notification Template Management 185

Chapter 9. Connecting with External Services 189
9.1. How to Connect with External Cloud Storages 189
9.2. Analytics and Reporting 192

索引 197

図目次

[Figure 1.1] Key Features 2
[Figure 1.2] eformsign Dashboard Screen 4
[Figure 1.3] Workflow Steps 5
[Figure 1.4] Usage Flow of eformsign Using Web Form Designer 6
[Figure 1.5] Usage Flow of eformsign Using Form Builder 7
[Figure 1.6] E-Contract Process 8
[Figure 1.7] E-Agreement Process 9
[Figure 1.8] Example Workflow of an Application Form 9
[Figure 1.9] E-Application Process 10
[Figure 2.1] eformsign Menus 11
[Figure 2.2] eformsign Dashboard Screen 13
[Figure 2.3] Location of the Menu Icon for Accessing Personal and Company Info 16
[Figure 2.4] View and Edit My Profile 16
[Figure 2.5] My Profile > Personal 17
[Figure 2.6] My Profile > Company 18
[Figure 2.7] Manage Company > Company profile 20
[Figure 2.8] Company Profile 21
[Figure 2.9] Company Profile > Brand image 23
[Figure 2.10] Pop-up Screen for Image Upload 24
[Figure 2.11] Dashboard with the Logo Changed 25
[Figure 2.12] Delegate Company Administrator Role 27
[Figure 2.13] Delegate Role Pop-up 27
[Figure 2.14] Company Manager 28
[Figure 2.15] Template Manager Permission 30
[Figure 2.16] Template Settings Icon 31
[Figure 2.17] Template Settings > Set Permissions 31
[Figure 2.18] Manage Company > Manage Groups/Members 32
[Figure 2.19] Manage Company > Manage Members 33
[Figure 2.20] Manage Company > Manage Groups 34
[Figure 2.21] My Signature Page 36
[Figure 2.22] Register Signature 37
[Figure 2.23] Register Stamp 38
[Figure 2.24] My signature > Register Stamp Pop-up 39
[Figure 3.1] OZ in Office Usage Flow 41
[Figure 3.2] Location of the Download eformsign form builder button 42
[Figure 3.3] eformsign Form Builder Download Page 42
[Figure 3.4] Form Builder Installation Screen (1) 43
[Figure 3.5] Form Builder Installation Screen (2) 43
[Figure 3.6] Form Builder Installation Screen (3) 44
[Figure 3.7] OZ in Word Ribbon Menu 44

[Figure 3.8] Microsoft Office OZ in Office Ribbon Menu ... 44
[Figure 3.9] Component Types ... 45
[Figure 3.10] Accessing Component Properties ... 46
[Figure 3.11] Adding Components in Excel (1) ... 47
[Figure 3.12] Adding Components in Excel (2) ... 47
[Figure 3.13] Adding Components in Excel (3) ... 48
[Figure 3.14] Method 1: Adding Components by Clicking a Component Type in Word or PowerPoint (1) ... 48
[Figure 3.15] Method 1: Adding Components by Clicking a Component Type in Word or PowerPoint (2) ... 49
[Figure 3.16] Method 1: Adding Components by Clicking a Component Type in Word or PowerPoint (2) ... 49
[Figure 3.17] Method 2: Adding Components by Drawing a Component in Word or PowerPoint (1) .. 50
[Figure 3.18] Method 2: Adding Components by Drawing a Component in Word or PowerPoint (2) .. 51
[Figure 3.19] Setting Check Component Properties ... 53
[Figure 3.20] Setting Radio Component Properties ... 54
[Figure 3.21] Example of Setting a Radio Component ... 54
[Figure 3.22] Setting Combo Component Properties ... 56
[Figure 3.23] Setting Text and Multiline Component Properties ... 57
[Figure 3.24] Setting Datetime Component Properties ... 58
[Figure 3.25] Setting Numeric Component Properties ... 60
[Figure 3.26] Toggle Component Properties ... 62
[Figure 3.27] Setting Signature Component Properties ... 64
[Figure 3.28] Setting Camera Component Properties ... 67
[Figure 3.29] Setting Voice Component Properties ... 68
[Figure 3.30] Setting Attachment Component Properties ... 69
[Figure 3.31] Setting User Component Properties ... 70
[Figure 3.32] Setting Document Component Properties ... 72
[Figure 3.33] Setting Date Component Properties ... 73
[Figure 3.34] Setting Label Component Properties ... 75
[Figure 3.35] Login Page ... 75
[Figure 3.36] Preview Form File ... 76
[Figure 3.37] Template List Screen ... 76
[Figure 3.38] Create Template Screen ... 76
[Figure 4.1] Web Form Designer Screen ... 80
[Figure 4.2] Web Form Designer Screen ... 80
[Figure 4.3] Web Form Designer Screen ... 81
[Figure 4.4] Web Form Designer Menu Layout ... 81
[Figure 4.5] Adding a component in Web Form Designer ... 82
[Figure 4.6] Setting Text and Multiline Component Properties ... 84
[Figure 4.7] Setting Signature Component Properties ... 86
[Figure 4.8] Setting Check Component Properties ... 88
[Figure 4.9] Setting Radio Component Properties ... 89

[Figure 4.10] Example of Setting a Radio Component 89
[Figure 4.11] Setting Label Component Properties 90
[Figure 4.12] Setting Combo Component Properties 91
[Figure 4.13] Setting Datetime Component Properties 92
[Figure 4.14] Setting Numeric Component Properties 93
[Figure 4.15] Toggle Component Properties 95
[Figure 4.16] Setting Camera Component Properties 96
[Figure 4.17] Setting Voice Component Properties 98
[Figure 4.18] Setting Attachment Component Properties 99
[Figure 4.19] Setting Document Component Properties 99
[Figure 4.20] The 5 Configuration Tabs in Template Settings 101
[Figure 5.1] Manage Templates > Uploading a File (1) 104
[Figure 5.2] Manage Templates > Uploading a File (2) 104
[Figure 5.3] Dragging a Component 105
[Figure 5.4] Workflow Steps 106
[Figure 5.5] Template Settings > General 108
[Figure 5.6] Template Name 109
[Figure 5.7] Template Abbreviation 109
[Figure 5.8] Manage Documents > Documents List 111
[Figure 5.9] Template Settings > Setting the Document Naming Rule 112
[Figure 5.10] Setting Document Naming Rules Using Reserved Words 112
[Figure 5.11] Checking the Allow Document Name Change Option 114
[Figure 5.12] Setting a Document Number 115
[Figure 5.13] Selecting a Document Numbering Rule 115
[Figure 5.14] Completed - Document List 117
[Figure 5.15] Completed - Document List - Document Number 118
[Figure 5.16] Template Settings > Set Permissions 119
[Figure 5.17] Template Settings > Workflow 120
[Figure 5.18] Template Settings > Field 128
[Figure 5.19] Notification Methods 129
[Figure 6.1] Workflow steps 137
[Figure 6.2] Template Settings > General 139
[Figure 6.3] Template Name 140
[Figure 6.4] Template Abbreviation 140
[Figure 6.5] Manage Documents > Documents List 142
[Figure 6.6] Template Settings > Setting the Document Naming Rule 143
[Figure 6.7] Setting Document Naming Rules Using Reserved Words 144
[Figure 6.8] Checking the Allow Document Name Change Option 145
[Figure 6.9] Setting a Document Number 146
[Figure 6.10] Selecting a Document Numbering Rule 146
[Figure 6.11] Completed - Document List 148
[Figure 6.12] Completed - Document List - Document Number 148
[Figure 6.13] Template Settings > Set Permissions 150

[Figure 6.14] Template Settings > Workflow 151
[Figure 6.15] Template Settings > Field 159
[Figure 6.16] Notification Methods 160
[Figure 7.1] Location of the Documents Menus and the Manage Documents Menu 168
[Figure 7.2] Documents Menus Layout 169
[Figure 7.3] Template category combo box 171
[Figure 7.4] Custom filter 172
[Figure 7.5] Document status tab 175
[Figure 7.6] History tab 176
[Figure 7.7] Document download pop-up 177
[Figure 7.8] Document column selection icon 178
[Figure 7.9] New document list 179
[Figure 7.10] Send in bulk icon 180
[Figure 7.11] Send in bulk screen 180
[Figure 8.1] Manage company > Manage custom fields 184
[Figure 8.2] Manage company > Notification template management 186
[Figure 9.1] Cloud Storage Screen 189
[Figure 9.2] Connecting and Disconnecting File Storage Accounts 190
[Figure 9.3] Setting the Complete Step of the Workflow 191
[Figure 9.4] The Backup Completed Documents in External Cloud Storages Checkbox 191
[Figure 9.5] Analytics and Reporting Menu Screen (1) 192
[Figure 9.6] Analytics and Reporting Menu Screen (2) 193
[Figure 9.7] Manage Data Connections Screen (1) 193
[Figure 9.8] Manage Data Connections Screen (2) 194
[Figure 9.9] Manage data connections Screen (3) 194
[Figure 9.10] Manage Data Connections Screen (4) 195
[Figure 9.11] Manage Data Connections Screen (5) 196
[Figure 9.12] Manage Data Connections Screen (6) 196

表目次

[Table 7.1] List of filter types 172
[Table 8.1] Template Types and Status 186

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Chapter 1. Overview

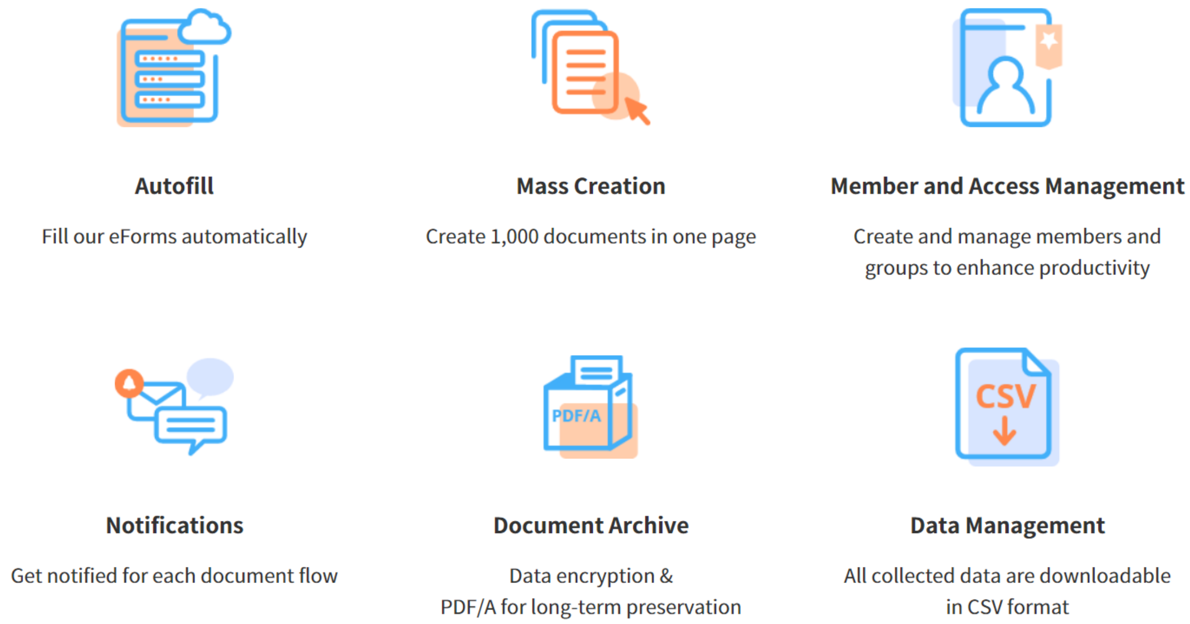
1.1. Product Introduction

eformsign is an electronic document solution that allows anyone to easily create electronic documents from paper documents and utilize various data stored in electronic documents. You can easily create electronic documents by uploading your PDF files onto eformsign and converting the files to electronic forms via eformsign's Web Form Designer feature. You can also create electronic forms by using eformsign's add-in feature embedded in Microsoft Office (named **Form builder** or **OZ in Office**). The Form builder feature allows anyone who knows how to use the Microsoft Office Suite to easily convert existing documents to electronic forms.

eformsign allows you to create a workflow for each template according to your company's business process. You can flexibly set a document signing process for internal documents requiring approvals as well as for external documents such as contracts, agreements, and applications. Furthermore, detailed configurations such as notifications and required input fields can be set for each workflow step or recipient, and the progress status of documents is logged as history. Moreover, an audit trail certificate is provided for the prevention of document forgery and falsification.

eformsign also provides a bulk send feature, by which users can create and send multiple documents at once and can minimize repetitive input with auto-fill feature. Also, by adding and configuring custom fields, fields in documents such as company information, group and member information, recent input value, and date can be automatically filled in. Furthermore, eformsign allows users to easily manage companies' members and their permissions, configure detailed notifications settings for documents, and manage and utilize data entered in documents by extracting input data.

[Figure 1.1] Key Features



The eformsign solution also provides a digital signature feature which allows you to sign e-signatures on electronic documents.

A digital signature is a signature in electronic form that replaces the traditional wet-ink signature. Just as when signing a signature on paper, you need to prove that the signer is you and this is done by going through an identity verification step. Personal information such as email, social security number, password, phone number, certificate, etc. can be used to verify identity.

Digital signatures have been legally binding in phases in the vast majority of countries around the world.

eformsign's e-signatures are legally binding for individual-individual and corporation-individual matters. As well, it provides various additional features for non-repudiation.

Note

The following describes the legal effect of digital signatures of some regions.

- South Korea: Digital signatures based on PKI standards have a strong legal status, and their legality is not discriminated against the wet-ink signatures. According to Section 3.3 of the Digital Signature Act, a digital signature other than a certified digital signature shall have such an effect of a signature, signature and seal, or name and seal, as is agreed between the parties concerned.

- USA: Under the "technologically neutral" principle, any preference to more sophisticated or more secure technologies such as PKI is not given. There are many cases of increasing the reliability of digital signatures through identity verification or authentication services.

- EU: Digital signatures are categorized into Qualified Electronic Signatures (QES), Advanced Electronic Signatures (AdES), and general Electronic signatures, and their legal status is applied accordingly, corresponding to the characteristics of each type of document.

- Japan: With the existence of a Specified Authentication Services, a stronger legal effect is given to the digital signature authorized by the secretary of the state.

1.2. Basic Terms

The following are some basic terms you should be familiar with before using eformsign.

- **Web Form Designer**

  Web form designer is a tool for quickly and easily creating electronic forms by uploading existing document files onto eformsign. You can create templates by adding components such as signature, text box, and check box to documents such as agreements, applications, and contracts in the PDF format. You can then create documents from templates and send them to recipients to be reviewed and signed.

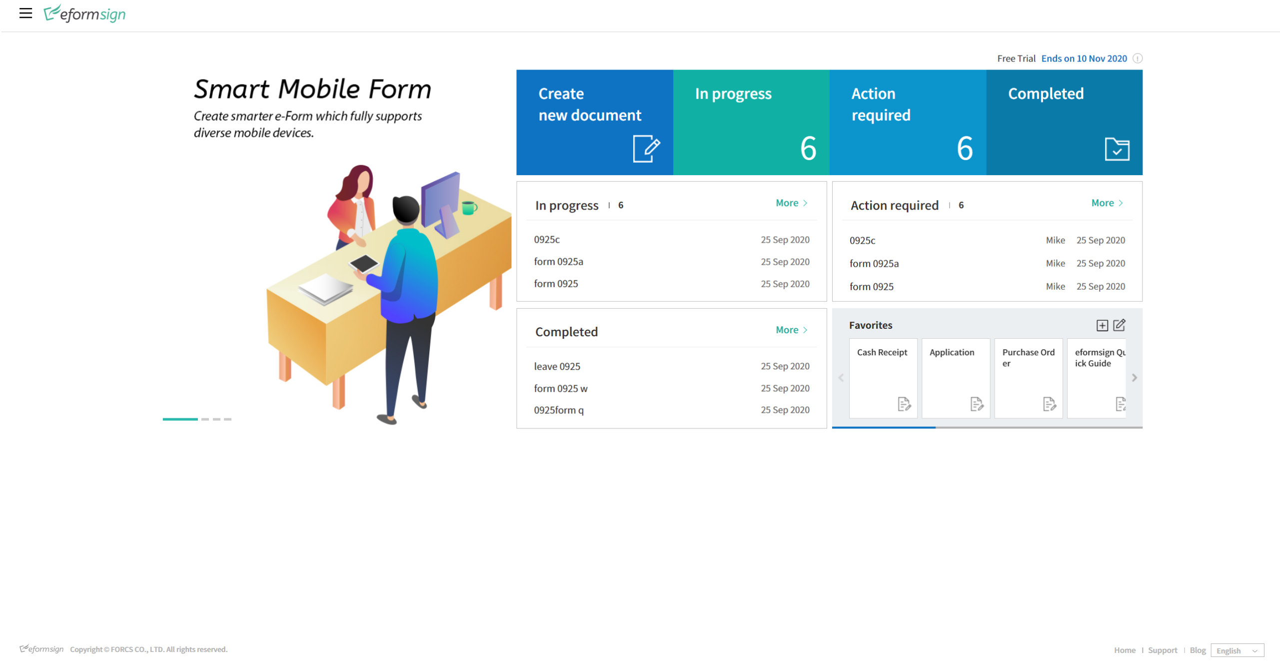
- **Form Builder**

  Form builder is a tool used to create electronic forms by converting Microsoft Office files such as applications, contracts, and agreements into electronic forms that contain components such as signature and text box. Form builder also uploads the converted electronic forms onto eformsign. Form builder is an Microsoft Office add-in, and it is shown as a ribbon menu which is called **OZ in Office**.

- **Dashboard**

  This is the main screen shown when logging into eformsign. You can access the sidebar menu by clicking the menu icon(☰) on the left side of the screen. Each menu may appear differently depending on the permissions you have. (The Company administrator can access all the menus.)

[Figure 1.2] eformsign Dashboard Screen



- **Templates**

This is an electronic form that serves as a starting point for a new document. With a template, you can create many documents from it. You can create templates by converting existing Microsoft Office files using Form builder or by uploading PDF files directly onto eformsign.

- **New document**

New documents can be created by using templates in the **New document** menu. The number of documents created in eformsign refers to the documents created here.

- **Documents**

This is a cloud space for storing and viewing documents. It consists of the following three spaces according to the document status:

– **In progress:** Shows the list of documents you have created or processed but are incomplete.

– **Action required:** Shows the list of documents you have temporarily saved or documents that other members have requested to you to sign or approve.

– **Completed:** Shows the list of all the completed documents you have created or participated in.

- **Workflow**

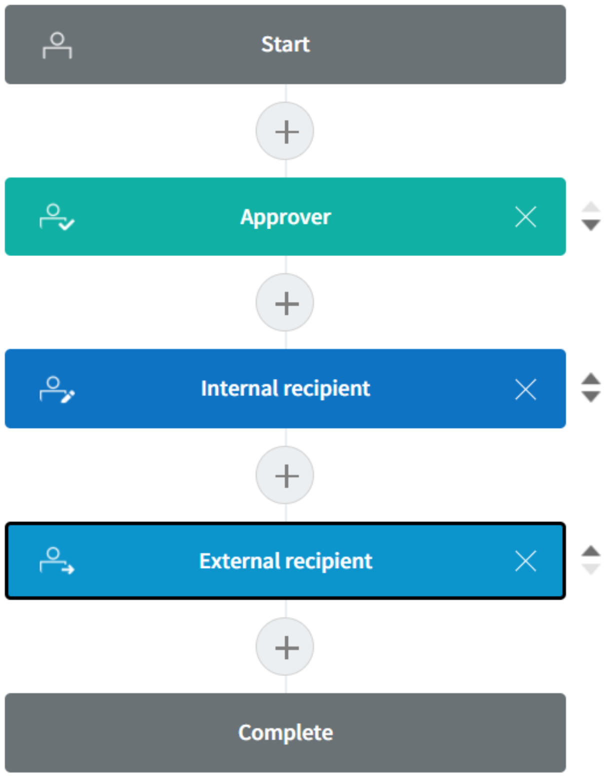
A workflow refers to the entire document process from when a document is created to when it is completed. Template managers can create the workflow steps for each template. All workflows have two default steps, **Start – Complete**, and can add three more types of steps as shown below:

– **Approver:** Step in which an approver can approve the document sent by the document creator.

– **Internal recipient:** Step in which an internal recipient, a member of the company, can review and sign the document sent by the document creator.

– **External recipient:** Step in which a user who is not a member of the company can review and sign the document sent by the document creator (or the internal recipient).

[Figure 1.3] Workflow Steps



- **Company Administrator**

  The representative of a company and has full permission to use eformsign.

- **Template Management Permission**

  With this permission, a member can access the **Manage templates** menu and can manage templates. Managing templates includes creating, deploying, editing, and deleting the eformsign templates.

- **Document Management Permission**

With this permission, a member can access the **Manage documents** menu to view the documents created from each template, approve documents requested to be voided, or permanently remove documents from the system. Note that the document management permission can be set for each separate template.

1.3. eformsign Usage Flow

To use eformsign, you can either upload a PDF file onto eformsign and create an electronic form online, or create a form using Microsoft Word, Excel, or PowerPoint and then upload it to eformsign.

Note

Currently, the method of upload files and creating forms online only supports PDF files. Microsoft Office files, and image files such as JPG and PNG are planned to be supported in the near future.

1.3.1. Using Web Form Designer

You can create a template by uploading a document file(in the PDF format) on eformsign and then adding the components you want such as text, signature, and date onto the document. After adding components to the uploaded document, configure the template settings and deploy the template. You can configure the detailed template settings by going to the **Manage templates** menu > selecting the template you want > setting the **General**, **Set permissions**, **Workflow**, **Field**, and **Notification settings** tabs > deploying the template. You can then go to the **New document** menu to create a document from a template you deployed and send it to recipients.

[Figure 1.4] Usage Flow of eformsign Using Web Form Designer

1.3.2. Using Form Builder

You can create a template by creating or opening a document file in Microsoft Office (Word, Excel, and PowerPoint), and then using the ribbon menu (named **OZ in Office**) to add the components you want such as text, signature, and date onto the document. Then, you can upload the template you created onto eformsign by clicking the **Upload** button in the ribbon menu. After uploading the template, set the template settings and deploy the template. You can set the template settings by logging into the eformsign website, going to the **Manage templates** menu > selecting the template you want > setting the **General**, **Set permissions**, **Workflow**, **Field**, and **Notification settings** tabs > deploying the template. You can then go to the **New document** menu to create a document from a template deployed and send it to recipients.

[Figure 1.5] Usage Flow of eformsign Using Form Builder

1.3.3. Minimum System Requirements

The minimum system requirements for Form builder and eformsign are as follows:

- **Form builder (OZ in Office)**
  - **OS:** Windows 7 and later
  - **MS Office:** Microsoft Office 2010 and later

- **eformsign and Web form designer**
  - **OS:** Windows 7 and later, OS X Mavericks and later
  - **Browser:** Internet Explorer 11 and later, Chrome 49 and later, Safari 9 and later
  - **Mobile OS:** iOS: 6.1.6 and later, Android: 5.0 (Lollipop) and later

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Note

Installing the mobile eformsign app is not a mandatory requirement to use eformsign.

1.4. Use Cases

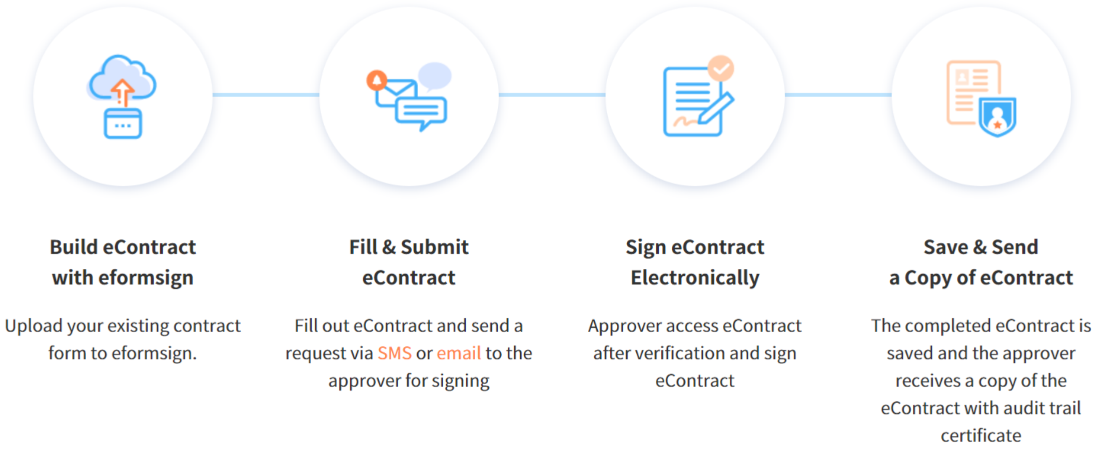
eformsign can be used for many different cases, including creating contract, agreement, and application forms. All documents are encrypted (AES-256 method) and stored in the PDF/A format, which is the international standard for long-term storage of documents.

1.4.1. Contract Forms

Electronic documents can be used to sign various types of contracts including employment contracts, purchase/rental contracts, maintenance contracts, and franchising contracts. By using eformsign, you can record the history of contract processes, prevent the forgery of documents through audit trail certificates, and sign hundreds of contracts without meeting face-to-face with customers or contracting parties.

The e-contract process using eformsign is as follows:

[Figure 1.6] E-Contract Process



1.4.2. Agreement Forms

Electronic documents can be used to sign various types of agreements including privacy policy and consent forms, medical informed consent forms, parental consent forms, and sublease agreement forms. You can use various types of devices including smartphones, tablets, and computers to create and send thousands of agreement forms to recipients at once.

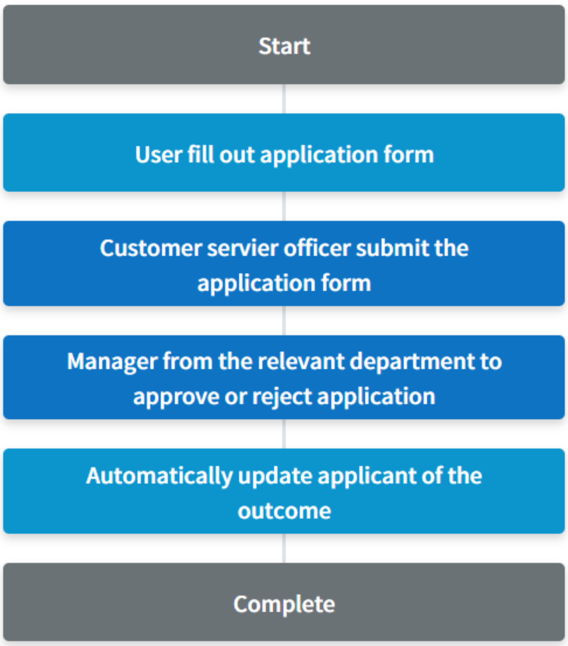
The e-agreement process using eformsign is as follows:

[Figure 1.7] E-Agreement Process

1.4.3. Application Forms

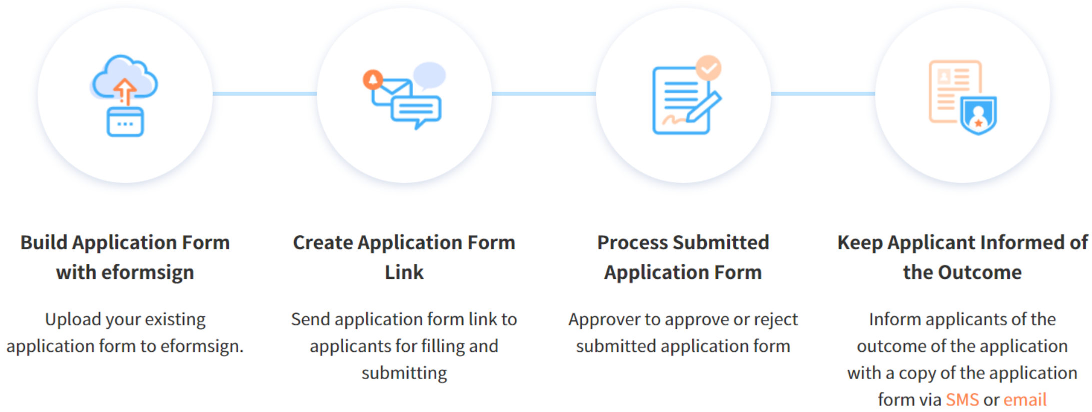
Electronic documents can be used to sign various types of applications including application forms for registrations, quotations, medical treatments, and purchases. eformsign's workflow feature allows you to easily send application forms even when an application needs going through multiple departments in an organization as well as forwarding the document to the correct department. You can also send the copy of a completed document to the parties involved immediately after the document is completed.

[Figure 1.8] Example Workflow of an Application Form



The e-application process using eformsign is as follows:

[Figure 1.9] E-Application Process



Chapter 2. Basic Info

2.1. Dashboard

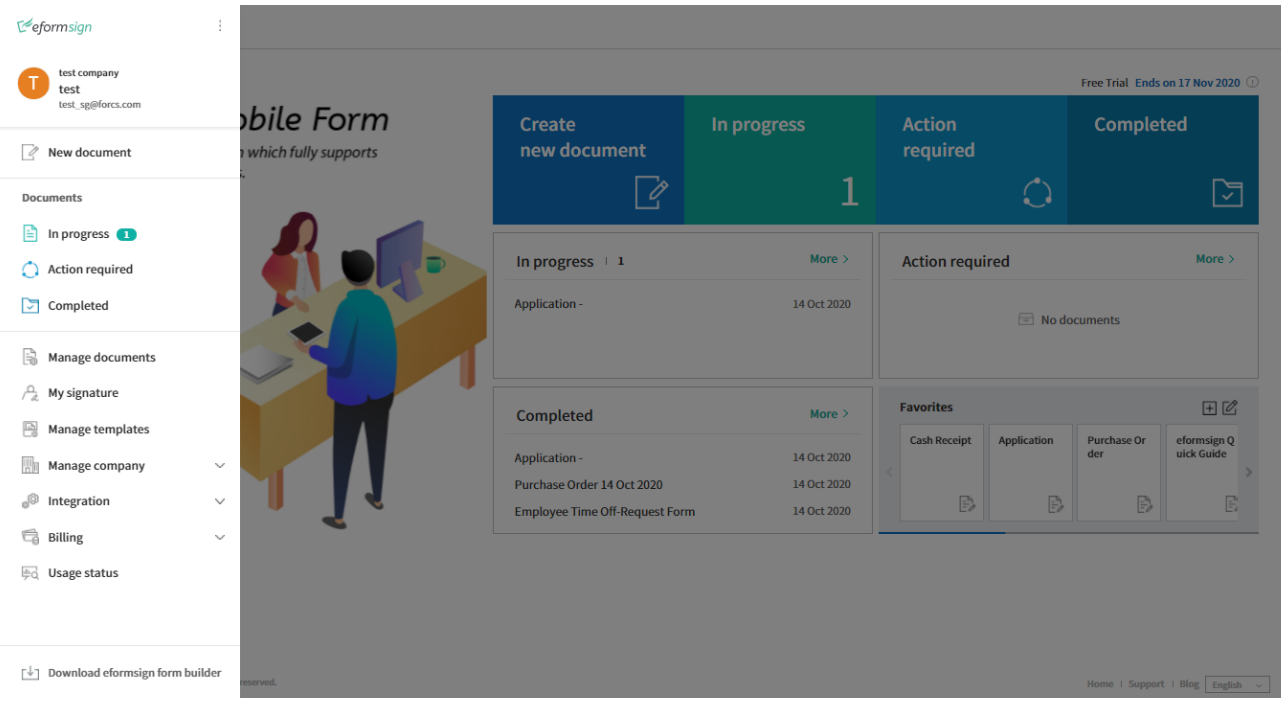
2.1.1. Menu

After logging into the eformsign dashboard, click the menu icon (☰) at the top left corner of the screen. The sidebar menu will be displayed as shown below.

Note

Each menu may appear differently depending on the permissions you have. The company administrator can access all the menus and have all the permissions.

[Figure 2.1] eformsign Menus



The description of each menu is as follows:

- **New document:** Shows the list of templates users can choose to start creating documents.

- **Documents:** This is is a cloud space for storing and viewing documents. It consists of the following three spaces according to the document status:
  - **In progress:** Shows the list of documents you have created or participated in but are incomplete.
  - **Action required:** Shows the list of documents you have temporarily saved or other members have requested you to sign or approve.
  - **Completed:** Shows the list of all completed documents.
- **Manage documents:** Only document managers can access this menu. Document managers can view all documents created from a template that they have permission to access. The company administrator can view and manage all documents.
- **My signature:** You can create and register your signature to be used when signing a document.
- **Manage templates:** Only template managers can access this menu. You can view the template list and configure the template settings.
- **Manage company:** Only company managers can access this menu. You can view and edit company information.
  - **Company profile:** You can view and edit company information.
  - **Manage groups:** You can create groups or edit group information.
  - **Manage members:** You can invite members or edit member information.
  - **Manage custom fields:** You can add and configure custom fields such as company, group, and member information.
  - **Notification template management:** You can view and edit email and SMS notification templates.
- **Integration:** Only the company administrator can access this menu. You can connect eformsign with external services.
  - **Cloud storage:** You can connect your Dropbox, Google Drive, or Box accounts to store completed documents in external cloud storages.
  - **Analytics & reporting:** You can connect sheets in Google Sheets or Microsoft Office 365's Excel with eformsign to store the data entered in eformsign documents to the sheets.
  - **API / Webhook:** You can create, edit, or delete API and webhook keys to use the eformsign API.

- **Billing:** You can view your plan and payment history, change your plan, or change the payment method.

- **Usage status:** You can monitor weekly, monthly, and annual service usage status.

- **Download eformsign Form Builder:** You can download the Form Builder executable file. By using the Form Builder add-in feature, you can create electronic forms using Microsoft Office files.

2.1.2. Dashboard

The dashboard is the main page displayed when logging into eformsign. In the dashboard, you can view documents that are in progress, require your action, etc., and use shortcuts to go to the main menus including the **New document** page.

[Figure 2.2] eformsign Dashboard Screen

① **Create new document**

Provides a shortcut to the **New document** page where you can create new documents from existing templates.

② **In progress**

Provides a shortcut to the **In progress** page where you can view the number of documents that are in progress. Click the **In progress** box to go to the **In progress** page.

③ **Action required**

Provides a shortcut to the **Action required** page where you can view the number of documents that require your action. Click the **Action required** box to go to the **Action required** page.

④ **Completed**

Provides a shortcut to the **Completed** document page where you can view all completed documents.

⑤ **In progress**

Displays the list of the three most recent documents in progress and the number of documents in progress. You can click on the name of a document in the list to open the document. Also, you can click 'More' to go to the **In progress** page.

⑥ **Action required**

Displays the list of the three most recent documents that require your action and the number of documents requiring your action. You can click on the name of a document in the list to open the document. Also, you can click 'More' to go to the **Action required** page.

⑦ **Completed**

Displays the list of the three most recent completed documents. You can click on the name of a document in the list to open the document. Also, you can click 'More' to go to the **Completed** document page.

⑧ **Favorites**

Displays the templates you added as your Favorites. If you click a template in the Favorites list, you can go to the page where you can create a new document using that template. You can add a template to your Favorites by clicking the Add icon (⊞). You can delete a template from the Favorites list by clicking the Edit icon ().

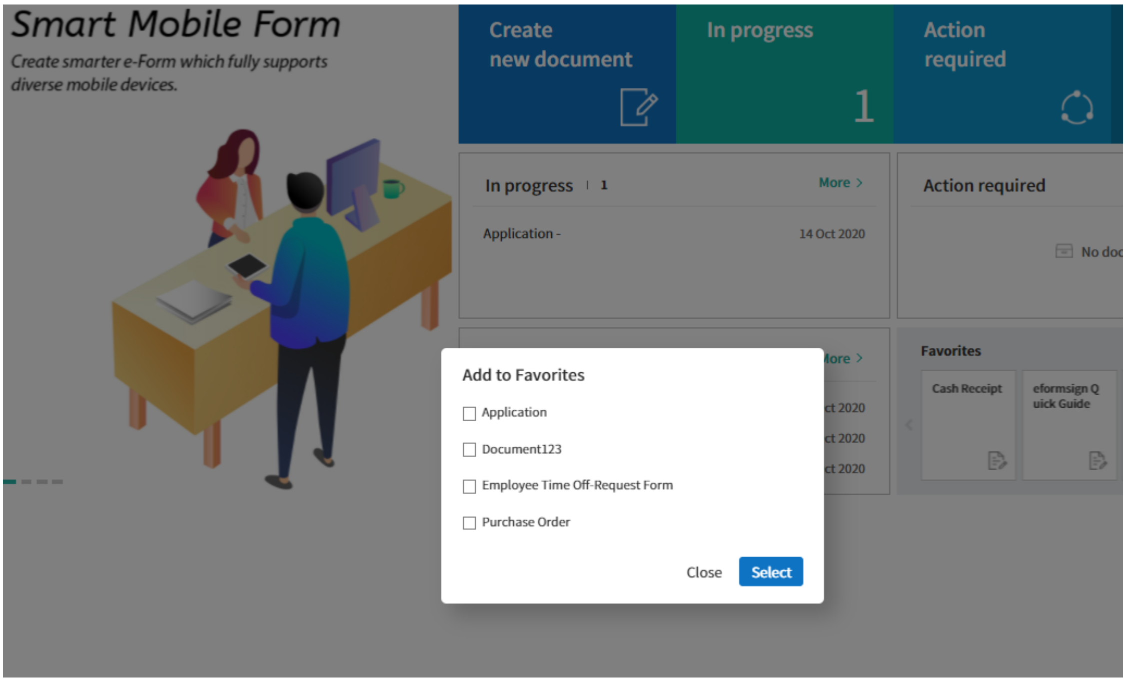
Tip

Adding templates to Favorites!

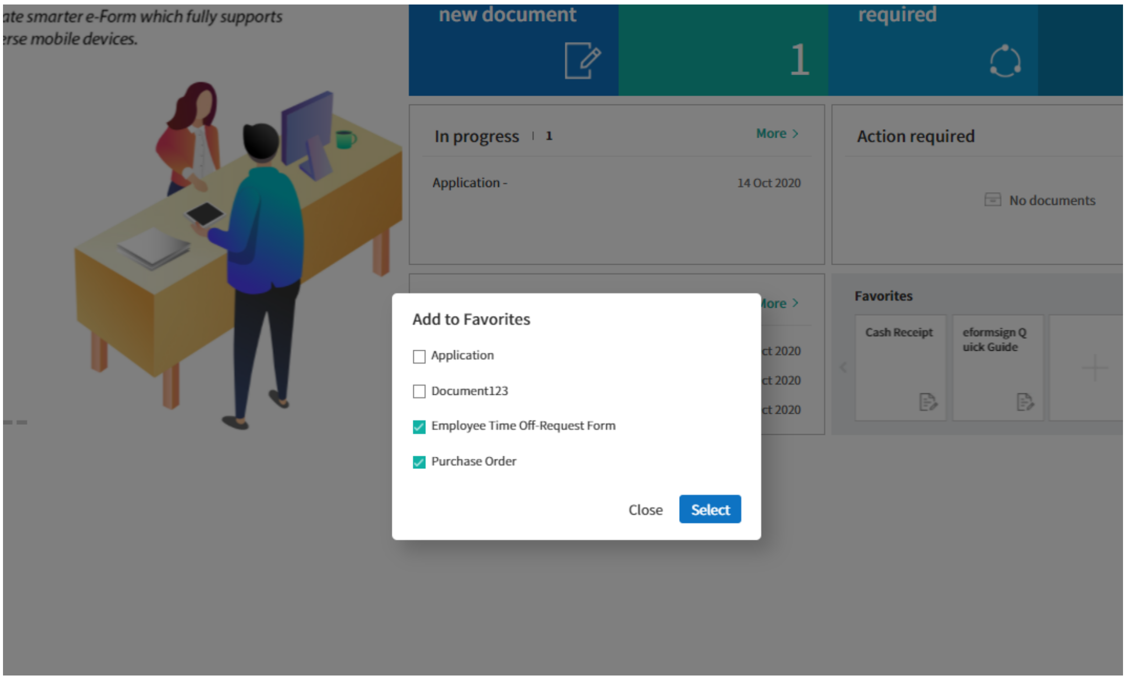
You can add a template you use frequently to the Favorites list to create documents easily using that template. You can add your favorite ones on the dashboard.

1. Click the Add icon (⊞) in the Favorites list on the dashboard.

2. The list of templates that are not added to your Favorites will be displayed in the pop-up window.



3. Tick the checkboxes of the templates you want to add to the Favorites.

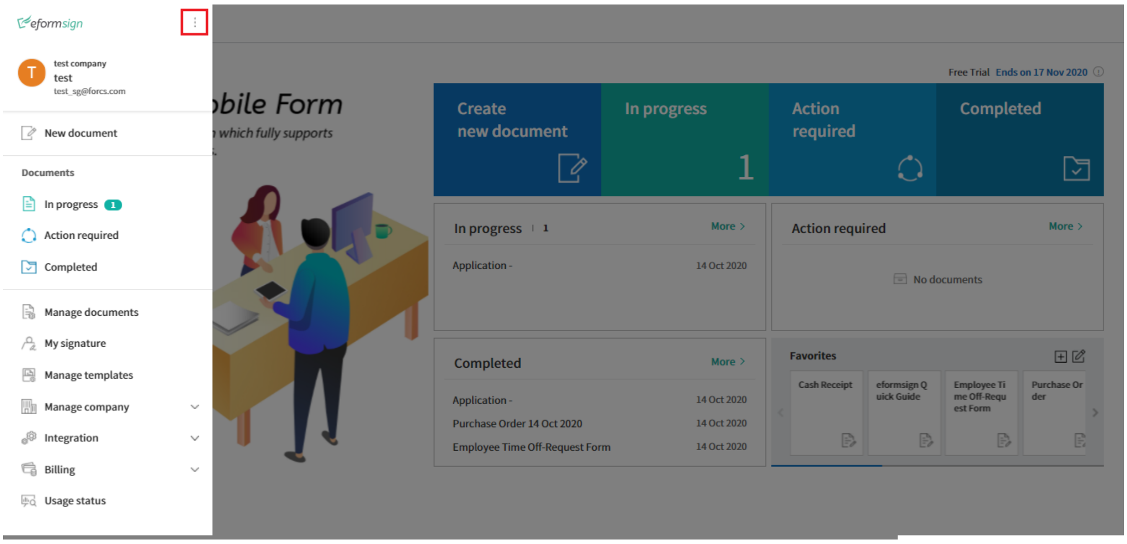


4. Click the **Select** button to save the templates as your Favorites.

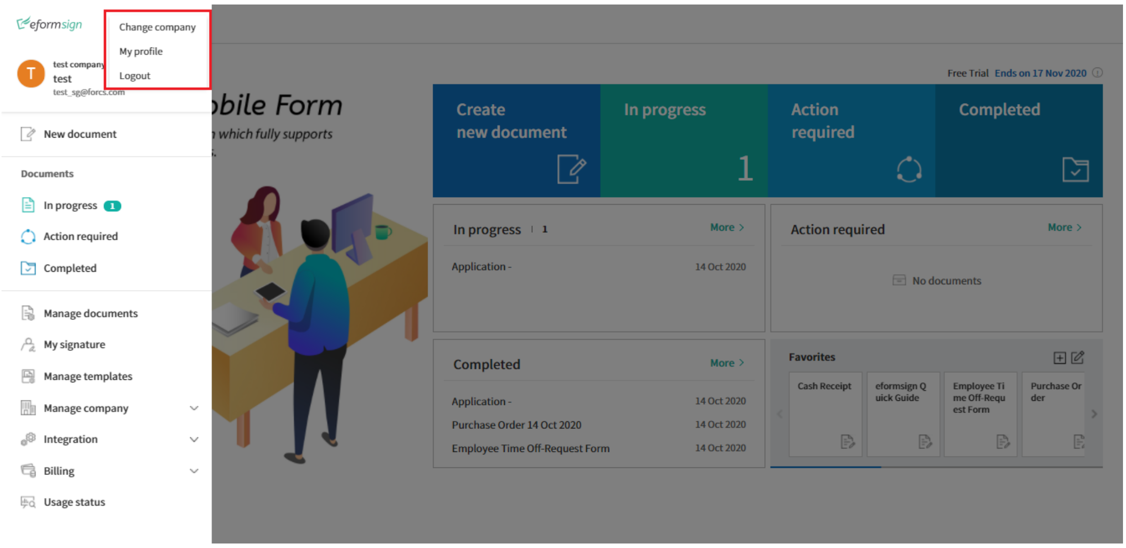
2.2. View and Change Basic Information

To view your personal information you entered when signing up for the eformsign service and the company information, click the see more icon (⋮) at the top right corner of the sidebar menu.

[Figure 2.3] Location of the Menu Icon for Accessing Personal and Company Info



[Figure 2.4] View and Edit My Profile



- **Change company:** If you are a member of multiple companies, click the **Change company** menu to view the list of your companies and select a company to switch to.

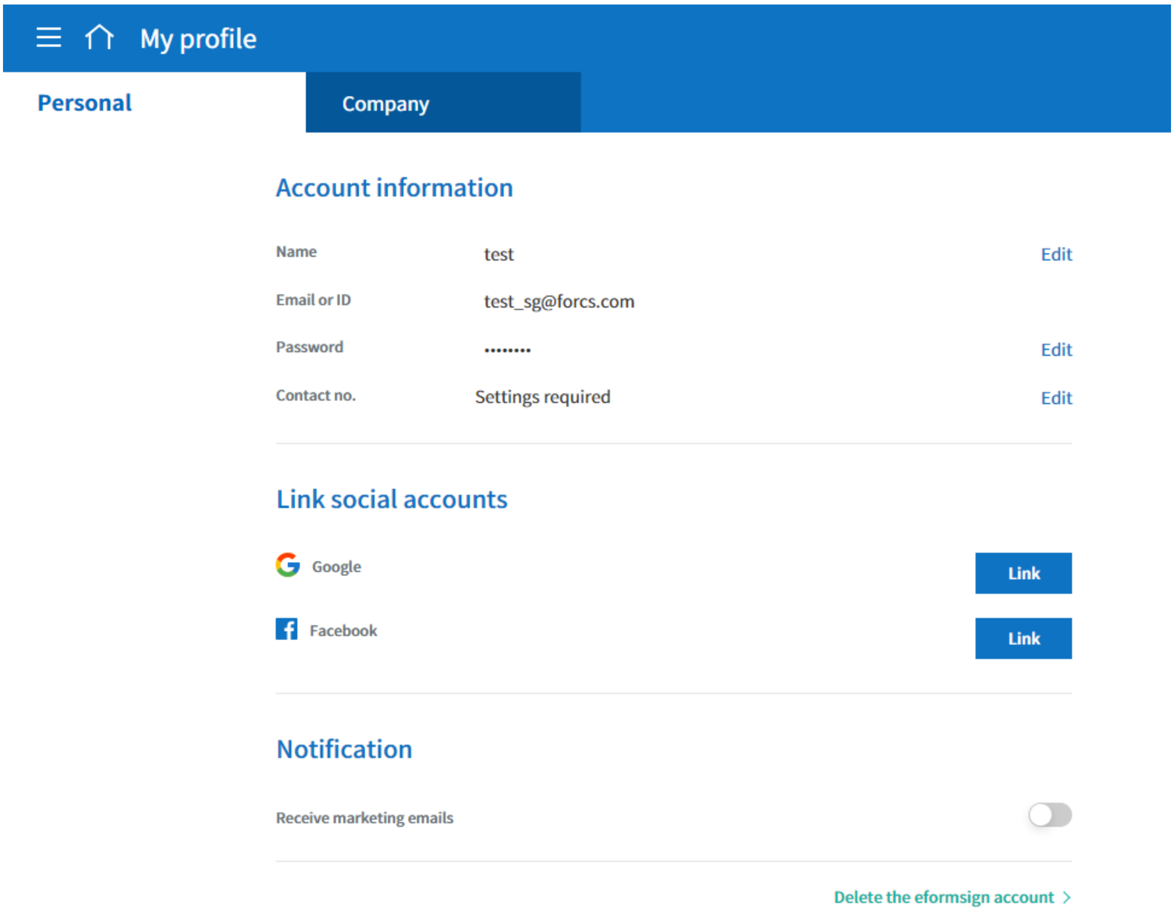
- **My profile:** You can view and edit your personal information you entered when signing up for the eformsign service. You can also view the information of the company you are a member of.

- **Logout:** You can log out of the eformsign service.

2.2.1. My Profile

My profile > Personal

[Figure 2.5] My Profile > Personal



Account information

You can view and edit the name, email or ID, password, and contact number of your eformsign account.

Link social accounts

You can link or unlink your Google and Facebook social accounts.

Notification

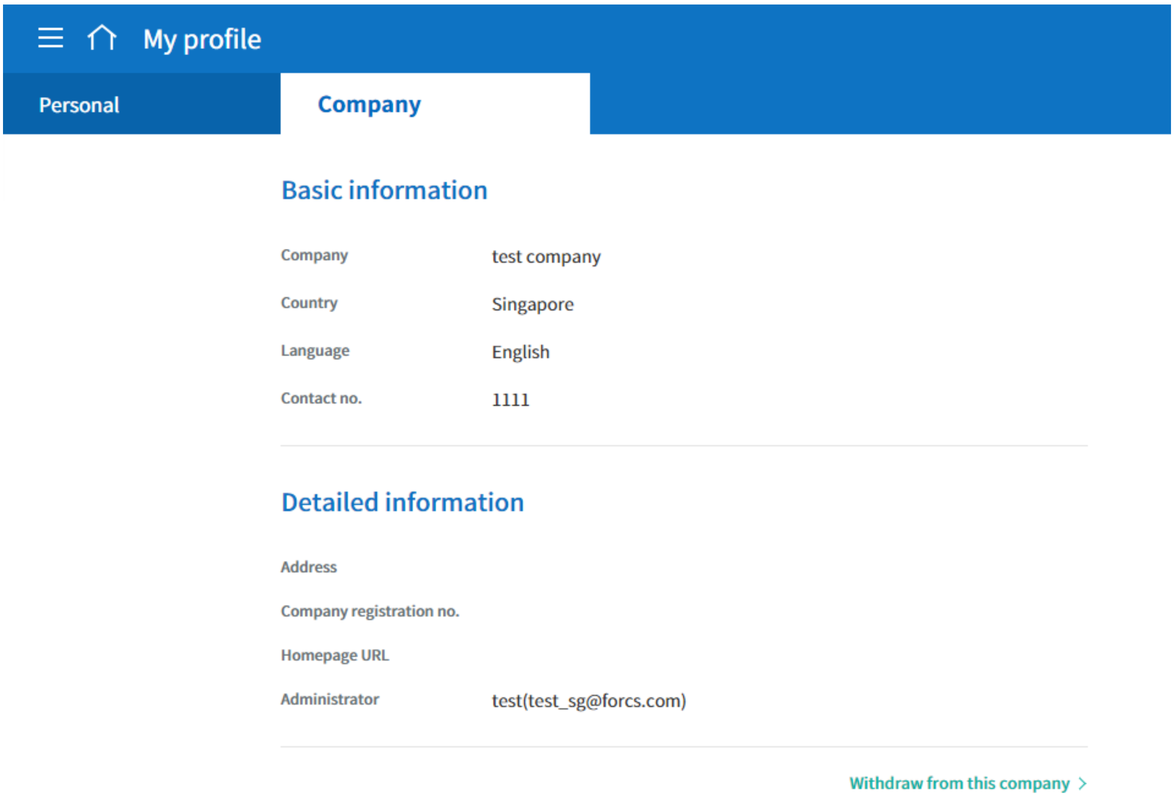
You can view whether you agreed to receive marketing emails. You can also change your selection.

Delete the eformsign account

You can delete your eformsign account by clicking the **Delete the eformsign account** button.

My profile > Company

[Figure 2.6] My Profile > Company



Basic information

You can view basic information about your company including the company name, country, language, and contact number.

Detailed information

You can view detailed information about your company including the company address, company registration number, homepage URL, and company administrator's email.

Note

You can only view company information in this page. If you want to edit the information, go to the **Manage company > Company profile** menu. Only the company administrator or company managers can edit company information.

Withdraw from this company

If you want to withdraw from the company, click the **Withdraw from this company** button. Then, the list of companies that you are a member of will be displayed and you can select a company that you want to withdraw from.

Important

Even if a member withdraws from a company, the member can still use the eformsign account and join another company or create a new company.

However, if the company administrator withdraws from the company, the company will also be deleted. If the administrator wants to withdraw from the company without deleting the company, then the administrator needs to delegate permission to another member, and then withdraw from the company.

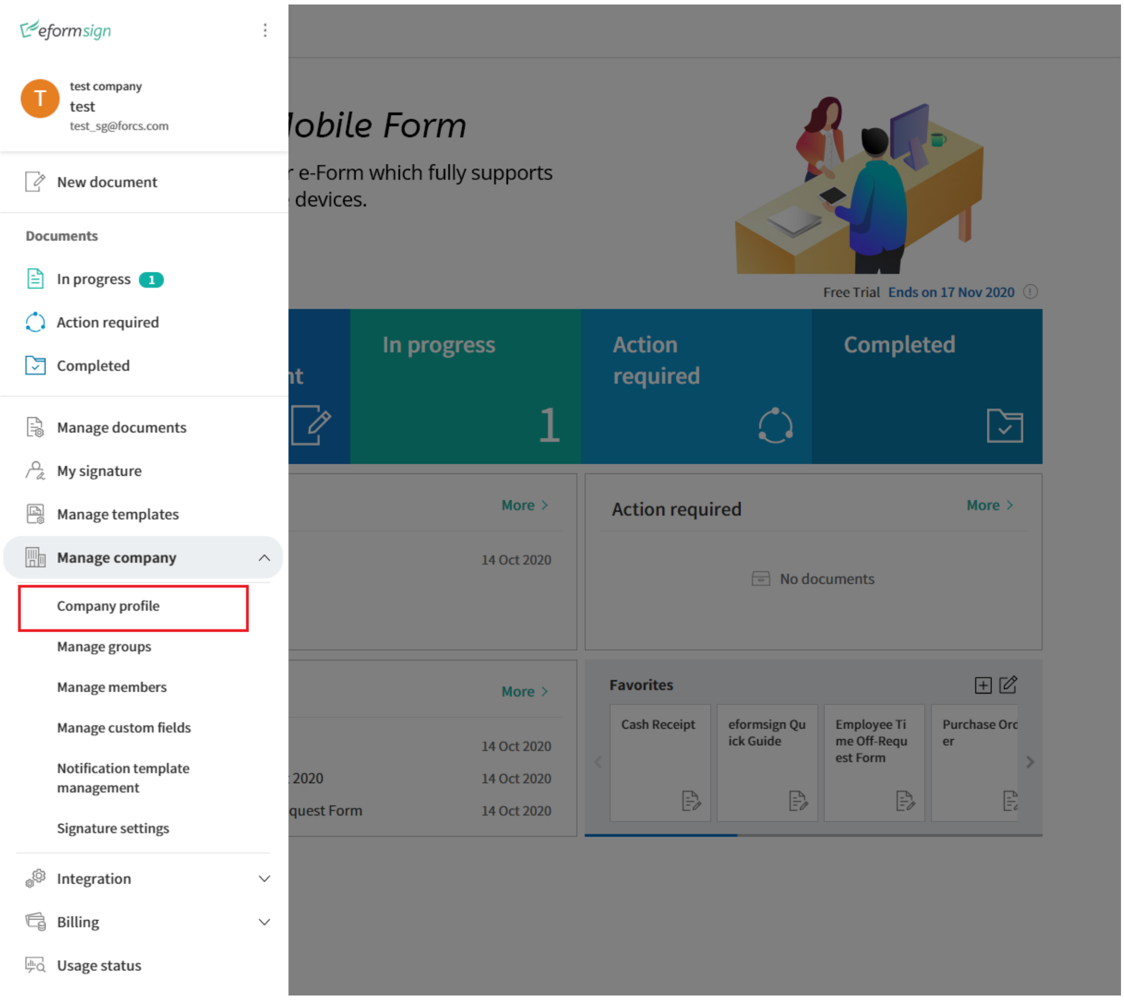
2.2.2. Edit and Add Company Information

The company information displayed in the **My profile > company** menu can be edited in the **Manage company > Company profile** menu.

Note

You need to have either the company administrator or company manager permission to perform this action.

[Figure 2.7] Manage Company > Company profile



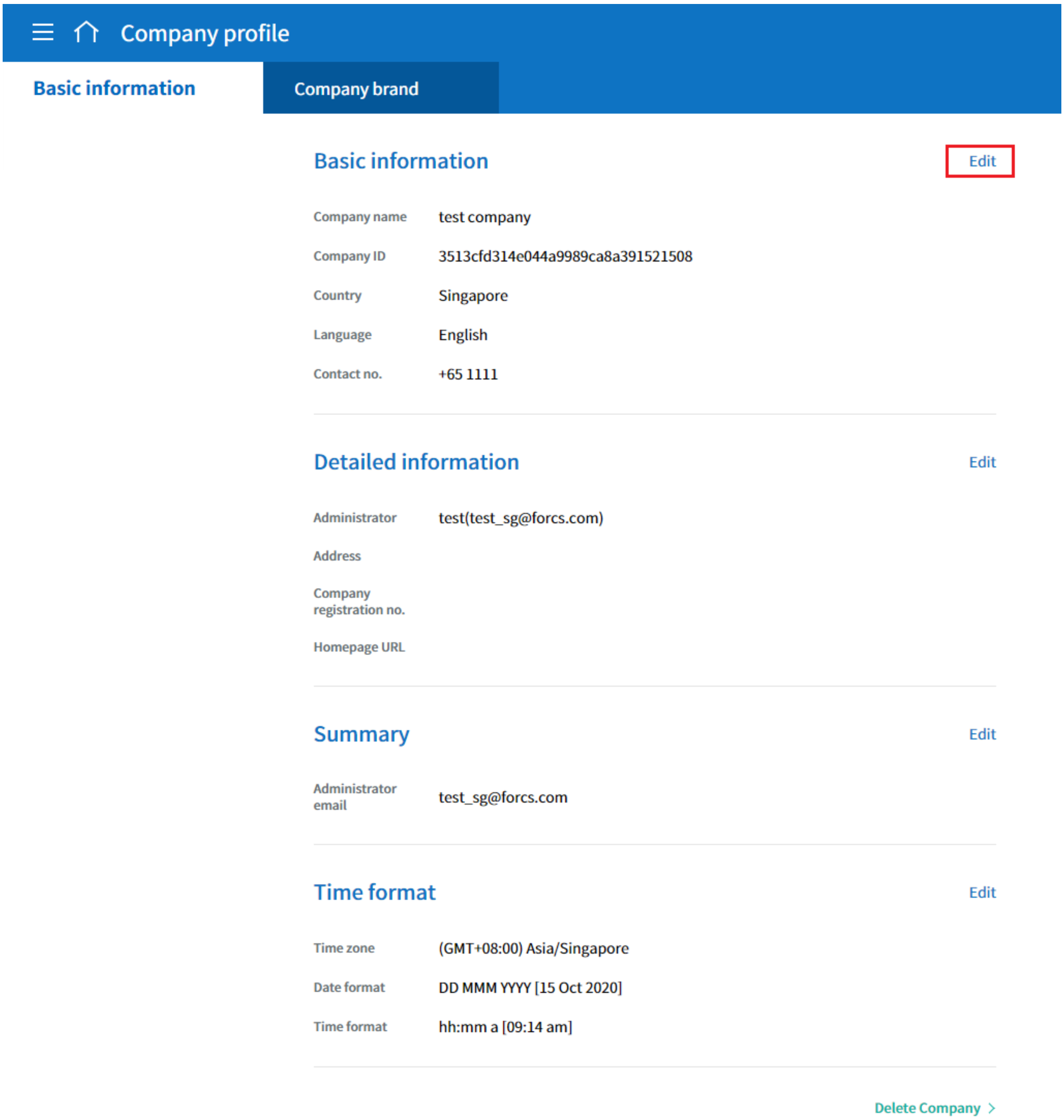
Editing Company Profile

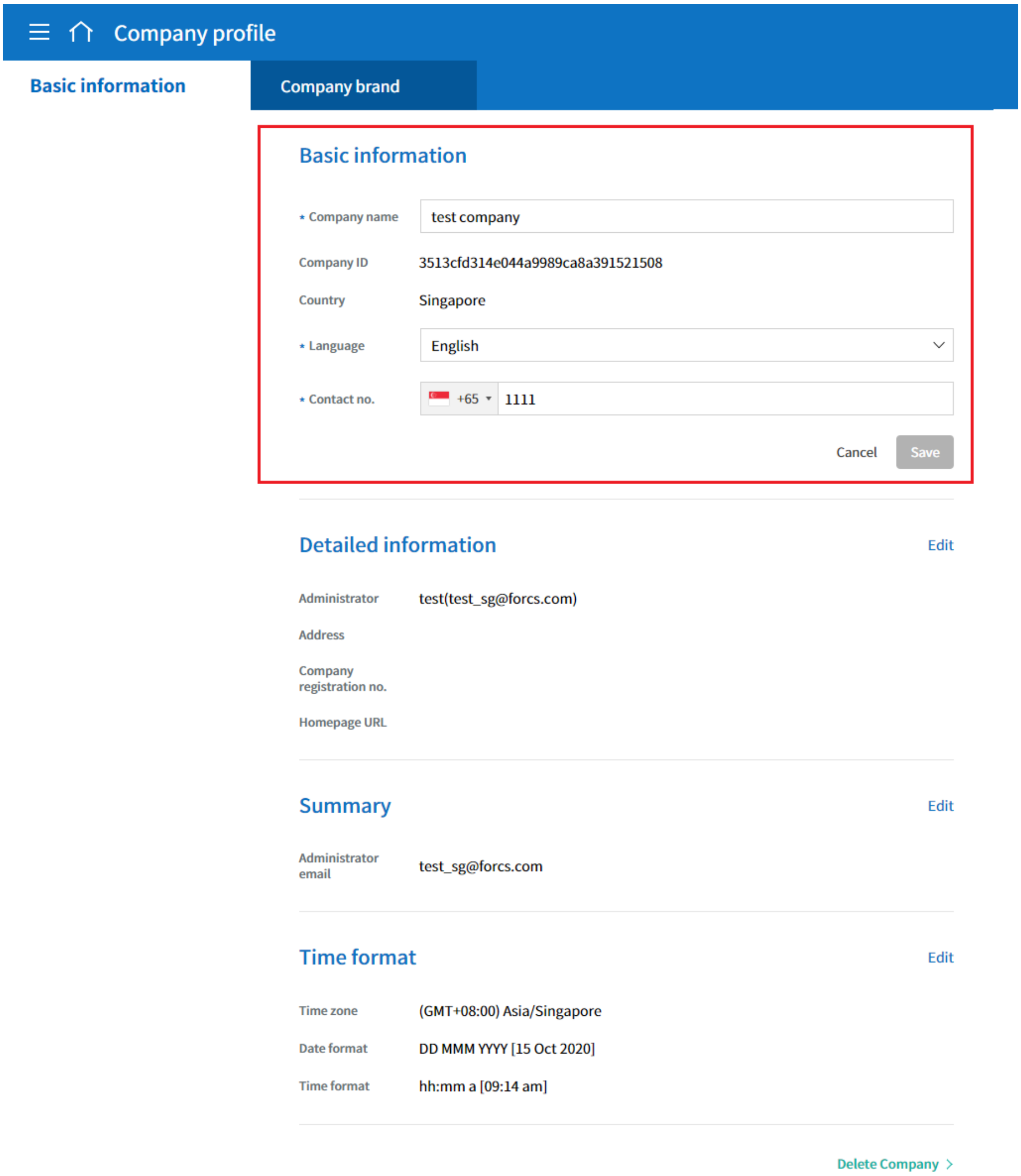
1. Click the sidebar menu icon, and go to the **Manage company > Company profile** menu.

2. Edit the information you want to change in the **Company profile > Basic information** tab.

3. Save the edited information by clicking the **Save** button.

[Figure 2.8] Company Profile





2.2.3. Company Brand

You can replace the eformsign logo and symbol with your company logo and symbol by registering them in the **Company profile > Company brand** tab.

Note

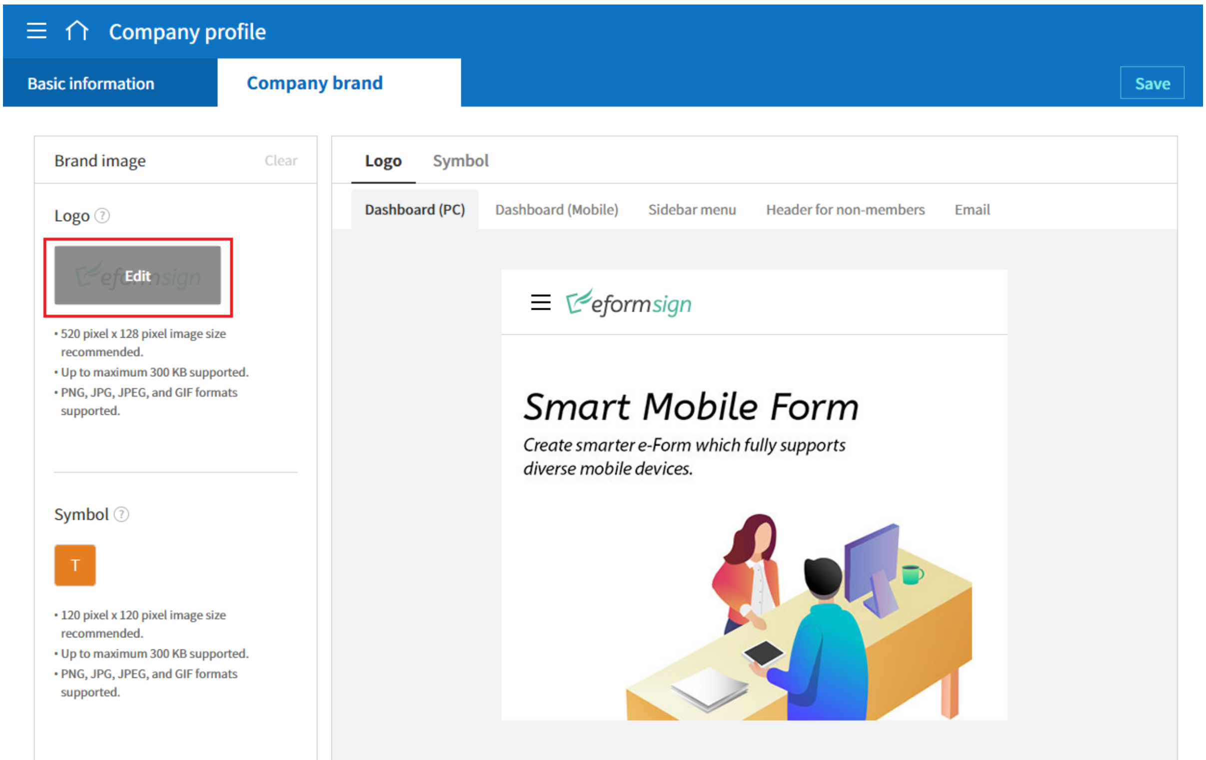
The difference between a logo and symbol

Both a logo and symbol are representative images of a company. Usually, a logo has a long horizontal format that includes its brand name and a symbol only has a square image.

On eformsign, a 512 pixel X 128 pixel horizontal image size is recommended for logos, and a 120 pixel X 120 pixel square image size is recommended for symbols.

Registering the Company Logo and Symbol

[Figure 2.9] Company Profile > Brand image



1. Click the sidebar menu icon, and go to the **Manage company > Company profile** menu.

2. Click the **Company brand** tab.

3. Click the image in the **Brand image > Logo** box.

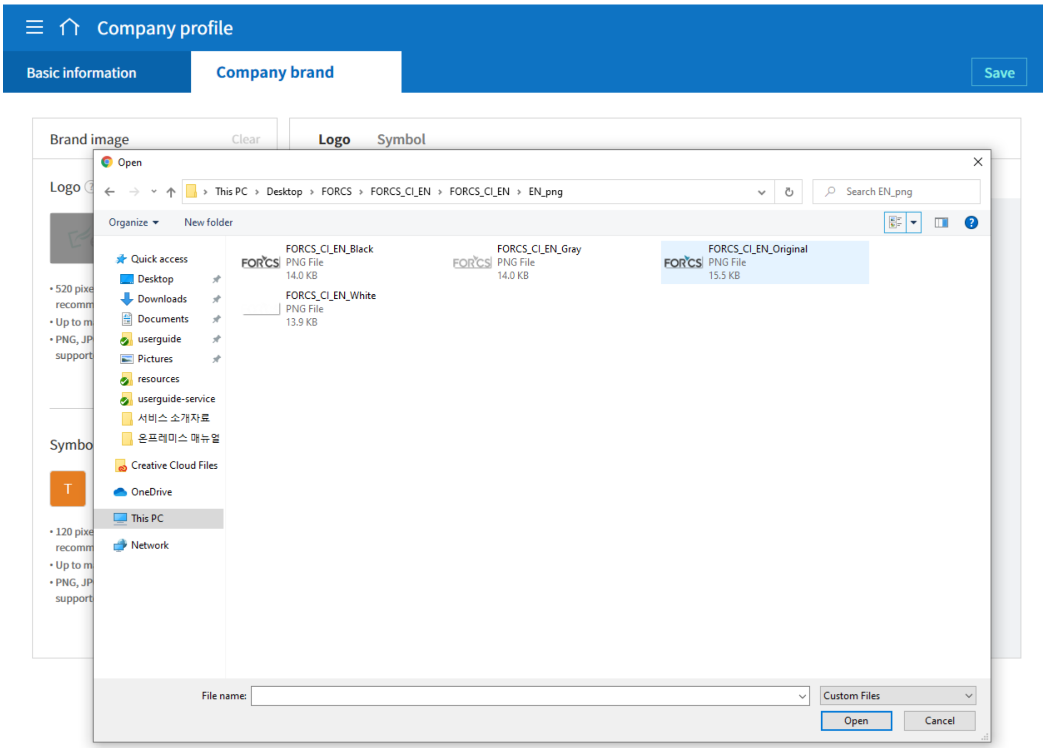
4. Select and upload a logo image file from your PC.

   - Image size: A 512 pixel x 128 pixel image size recommended

   - File size: Up to a maximum 300 KB

   - File format: PNG, JPG, JPEG, and GIF

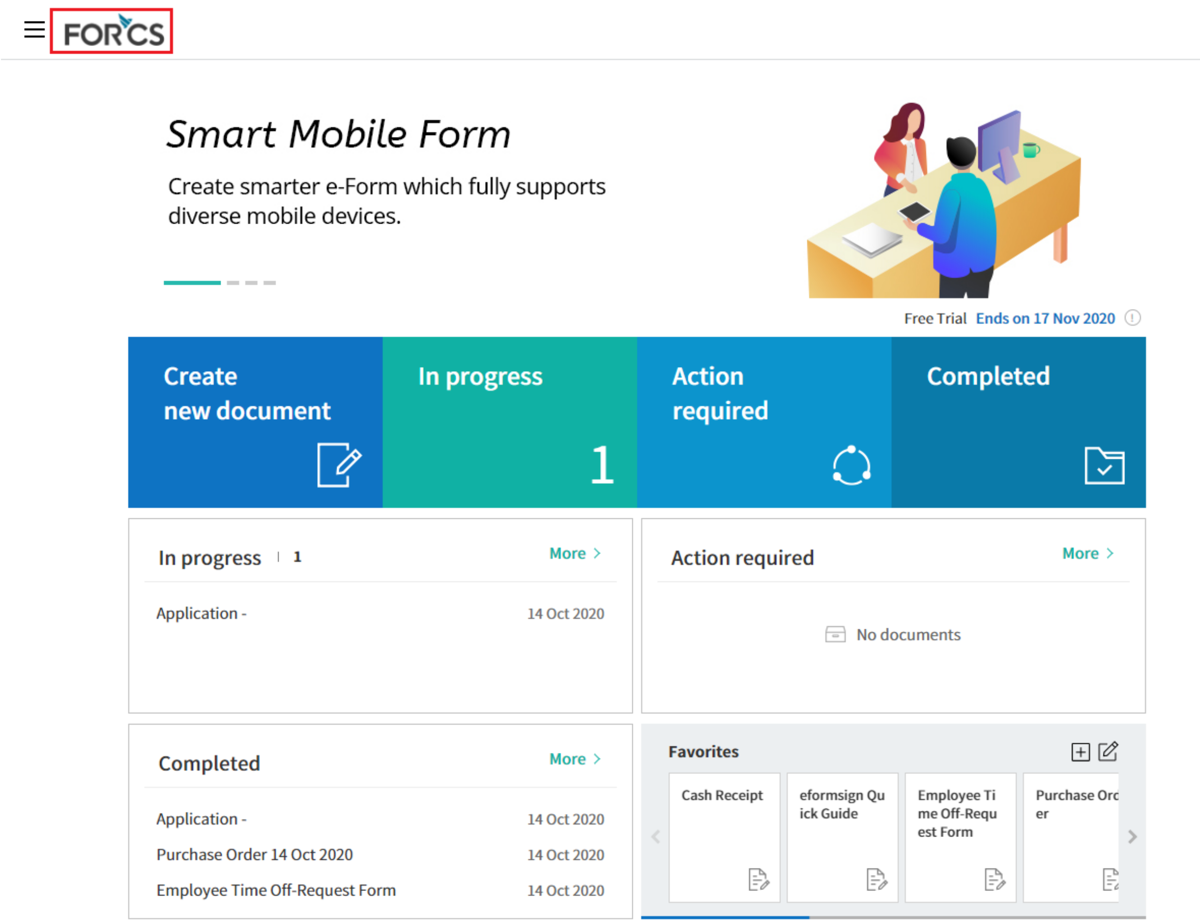
[Figure 2.10] Pop-up Screen for Image Upload



5. Apply your changes by clicking the **Save** button.

6. Check whether the new logo was applied to the dashboard.

[Figure 2.11] Dashboard with the Logo Changed



2.3. Permissions

eformsign provides the following five types of roles that can be granted to members based on the permissions they have.

- **Company administrator**

  The company administrator is the representative of the company and has all permissions for using the eformsign service.

- **Company manager**

  Company managers have the permission to access the **Manage company** menu. Company managers can view and edit company, group, and member information and grant permissions to members.

- **Template manager**

Template managers have the permission to access the **Manage template** menu. Template managers can create new templates by using Form Builder or Web Form Designer, and can also edit, deploy, and delete templates.

- **Document manager**

  Document managers have the permission to access the **Manage document** menu to view and download documents created from each template. Document managers can be selected for each separate template.

- **Document creation**

  Template usage (document creation) permission can be granted to members for each template. Only members with the template usage permission can create documents from that template.

2.3.1. Company Administrator

The user who created a company is the company administrator by default, and the company administrator is a super administrator having all the permissions to use the eformsign service.

The company administrator

- Has access to all the menus.
- Can create, edit, delete, and manage templates.
- Can create, view, and manage all documents.
- Can delegate its role to another member when the company administrator needs to be changed.

When the company administrator deletes her/his eformsign account, the company will also be deleted. If the administrator wants to delete only the account, then she/he can delegate the administrator permission to another member, and then delete the account.

Delegating the Company Administrator Permission

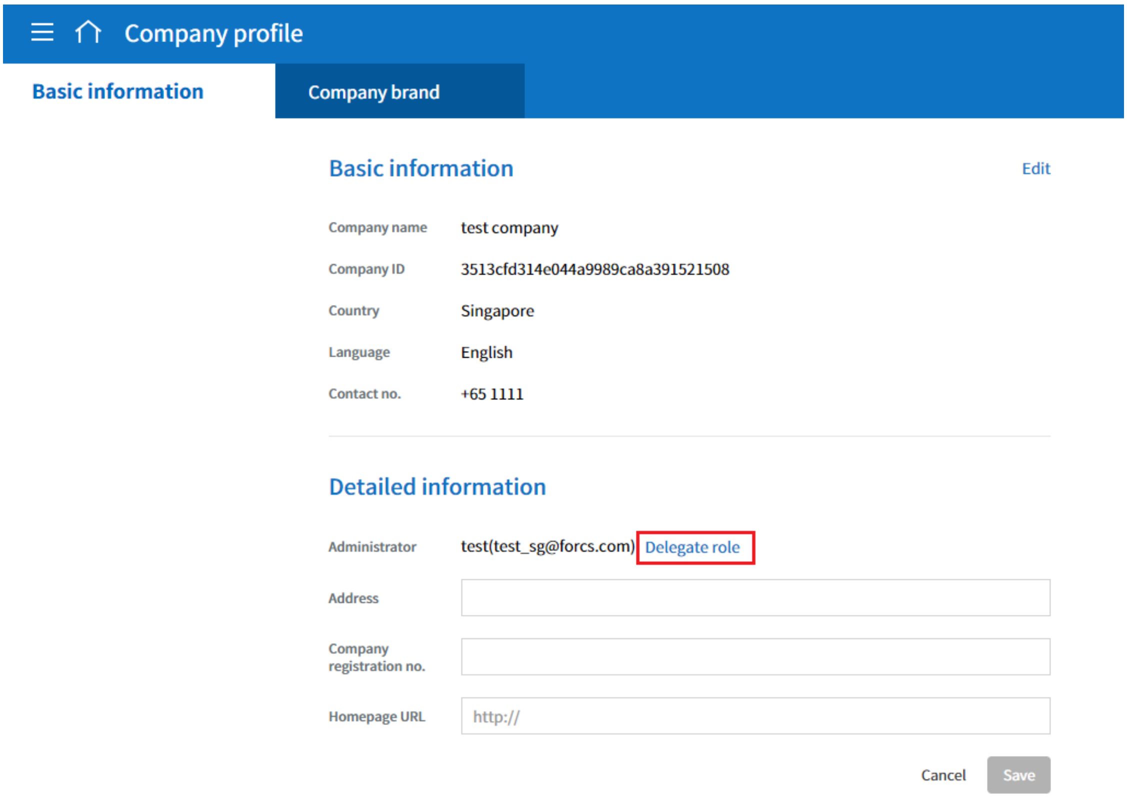
Note

You need to have the company administrator permission to perform this action.

---

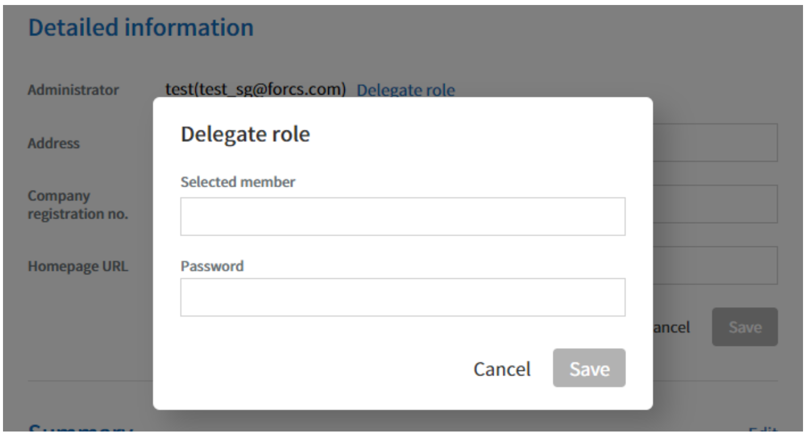
1. Click the sidebar menu icon, and go to the **Manage company > Company profile** menu.
2. Click the **Edit** button in the **Detailed information** section, and then click the **Delegate role** button on the right side of the **Administrator** item.

[Figure 2.12] Delegate Company Administrator Role



3. Select a member to delegate the company administrator role in the **Delegate role** pop-up window.

[Figure 2.13] Delegate Role Pop-up



4. Enter the password of the company administrator.

5. Click the **Save** button to save the changes.

2.3.2. Company Manager

Company managers can access the **Manage company** menu and can view, edit, and delete information regarding the company and groups/members.

Note

The company administrator or company managers can grant the company manager permission to members.

Granting the Company Manager Permission

Note

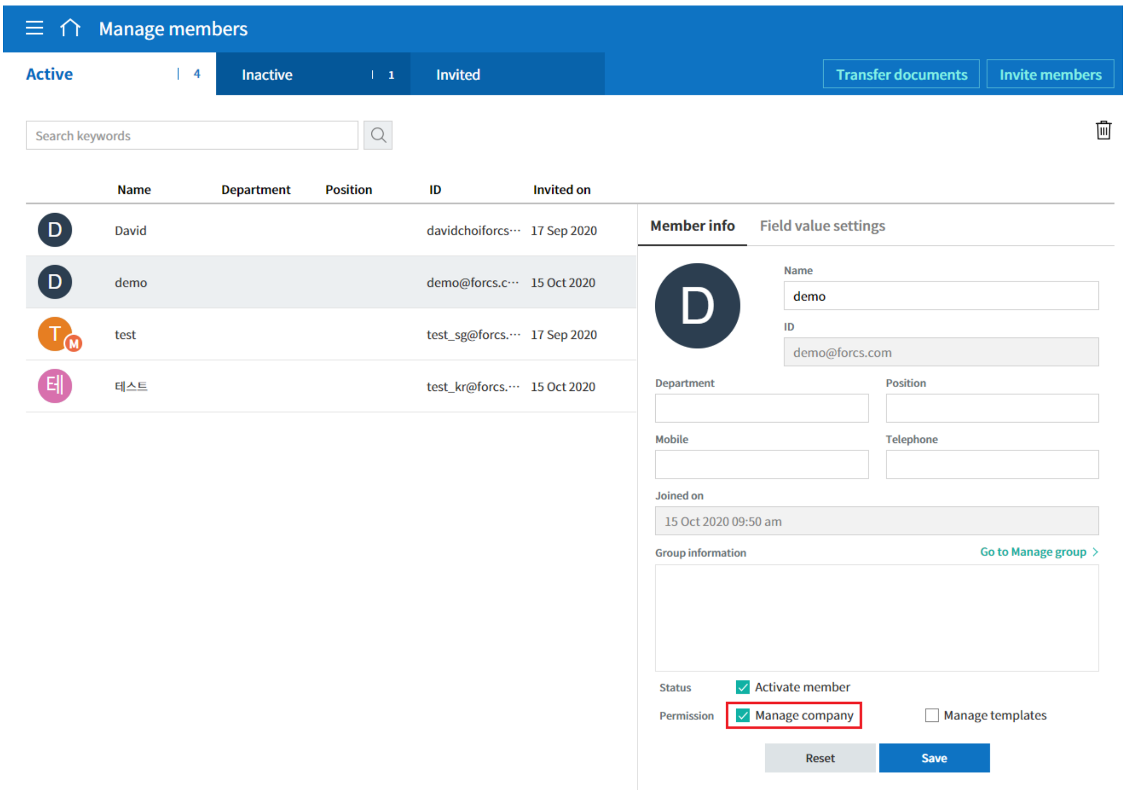
You need to have either the company administrator or template manager permission to perform this action.

1. Click the sidebar menu icon, and go to the **Manage company > Manage members** menu.

2. Select the member in the member list you want to grant the permission.

3. Tick the **Manage company** checkbox in the Permission item displayed at the bottom of the Member info tab located to the right of the member list.

[Figure 2.14] Company Manager



4. Click the **Save** button.

2.3.3. Template Manager Permission

Template managers can access the **Manage template** menu, and can create, edit, deploy, and delete templates.

The template manager who created a template is the template owner of that template by default.

However, if multiple template managers exist in a company, a template manager may not necessarily be the template owner of a template.

If the template manager is not the template owner, the template manager can only view the template settings and duplicate the template.

Granting the Template Manager Permission

Note

You need to have either the company administrator or template manager permission to perform this action.

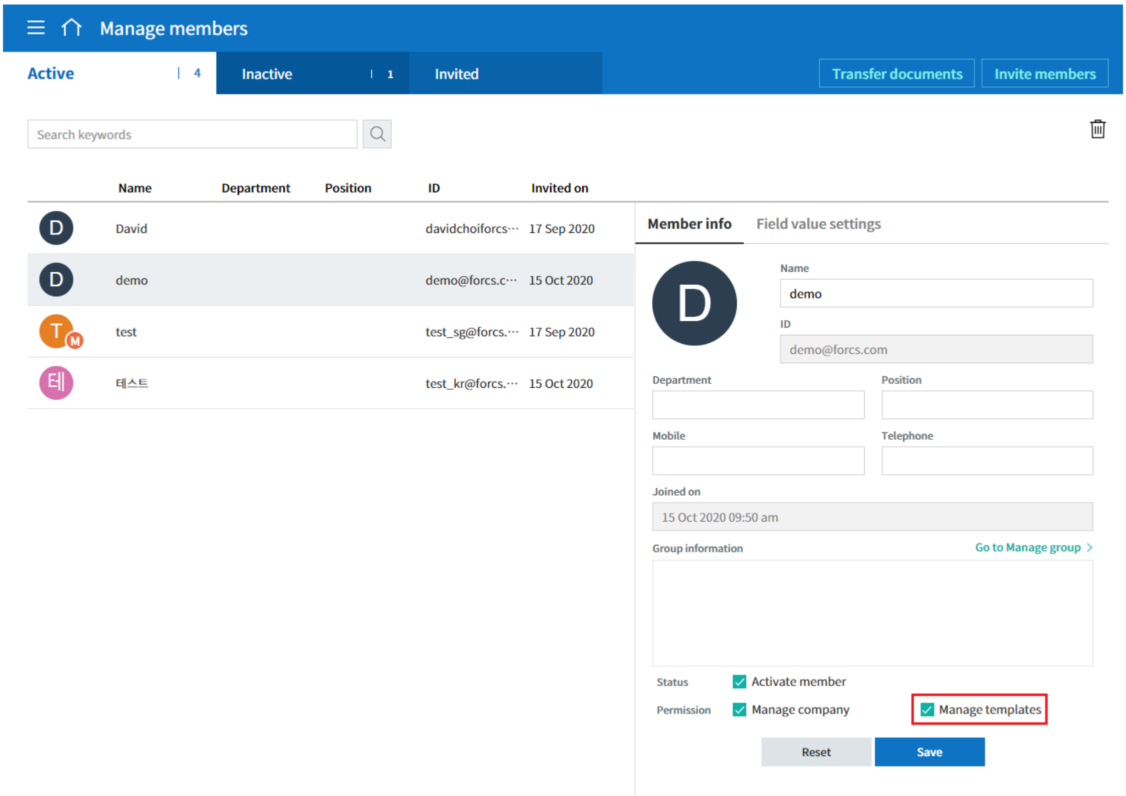
---

1. Click the sidebar menu icon, and go to the **Manage company > Manage members** menu.

2. Select the member in the member list you want to grant the permission.

3. Tick the **Manage company** checkbox in the Permission item displayed at the bottom of the Member info tab to the right of the member list.

[Figure 2.15] Template Manager Permission



4. Click the **Save** button.

2.3.4. Template Usage (Document Creation) and Document Management Permissions

The template usage permission allows users to create documents from a template, and document management permission allows users to manage documents created from a template and their data.

Members with the template usage permission for a template can create documents using that template in the **New document** page.

Members with the document management permission for a template can view, delete, and download documents created from that template in the **Manage documents** page.

Granting Template Usage and Document Management Permissions

Note

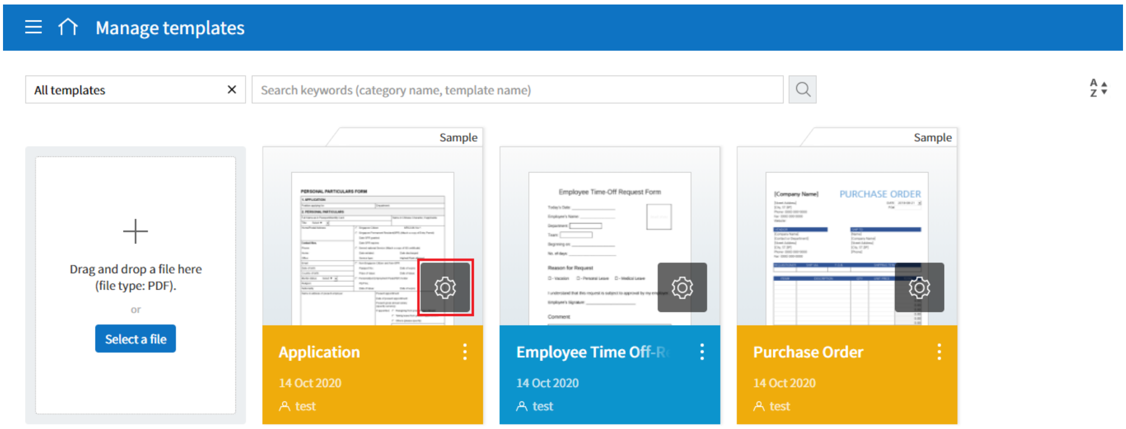
You need to have either the company administrator or template manager permission to perform this action.

---

1. Click the sidebar menu icon, and go to the **Manage templates** menu.

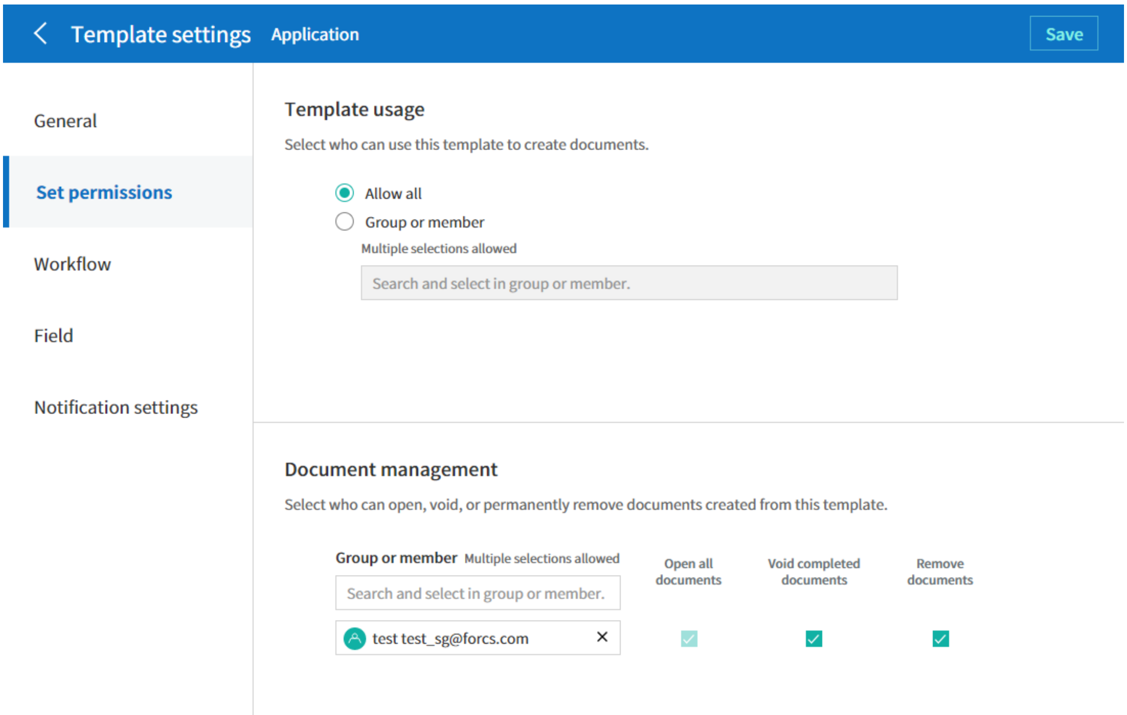
2. Click the **Template settings** ( ) icon.

[Figure 2.16] Template Settings Icon



3. Go to the **Set permissions** tab.

[Figure 2.17] Template Settings > Set Permissions



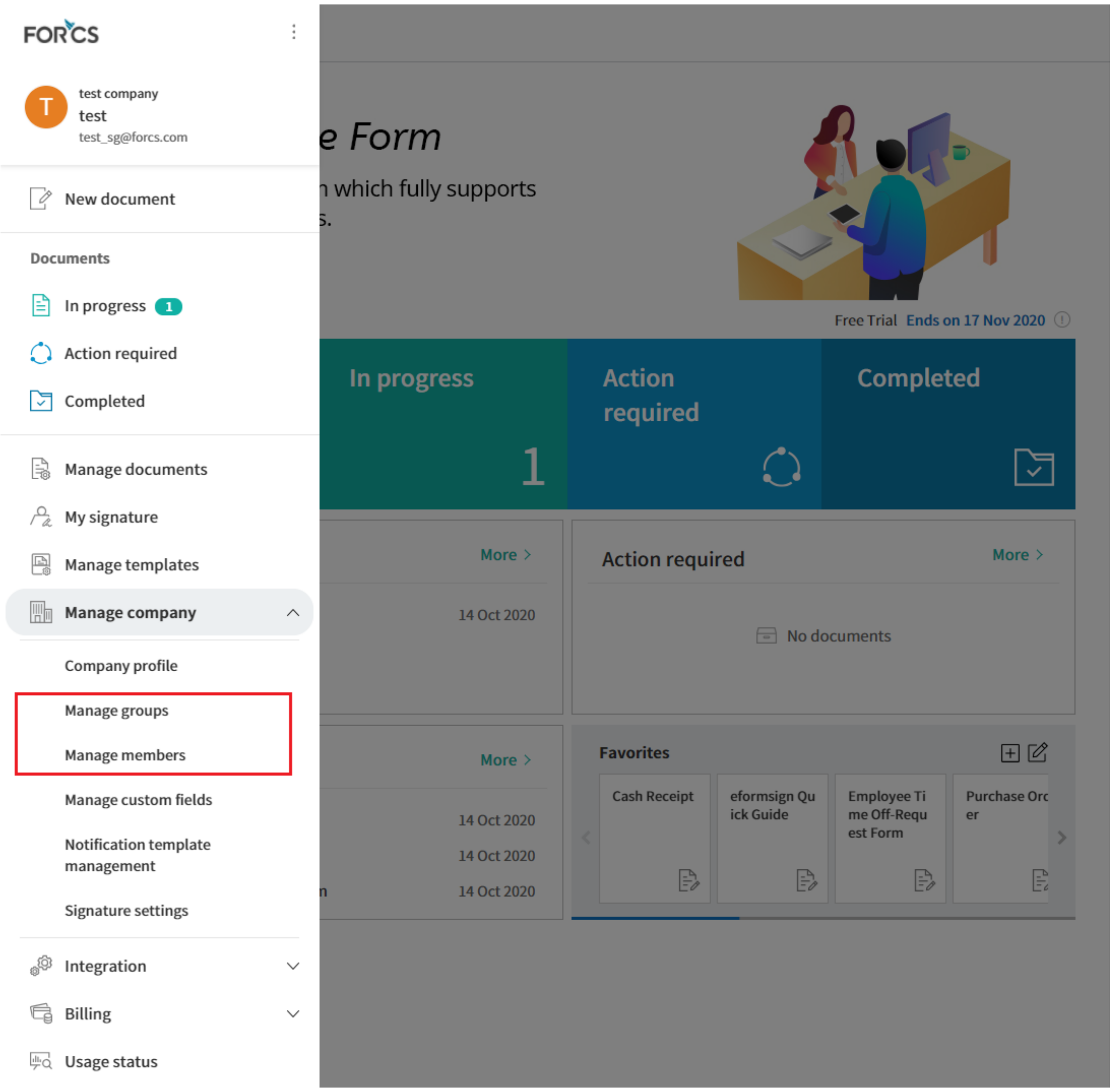
4. Select the groups or members you want to grant permission for template usage and document management.

5. Click the **Save** button.

2.4. Manage Groups and Members

You can invite, delete, and edit members and create, add, and delete groups in the **Manage company** menu.

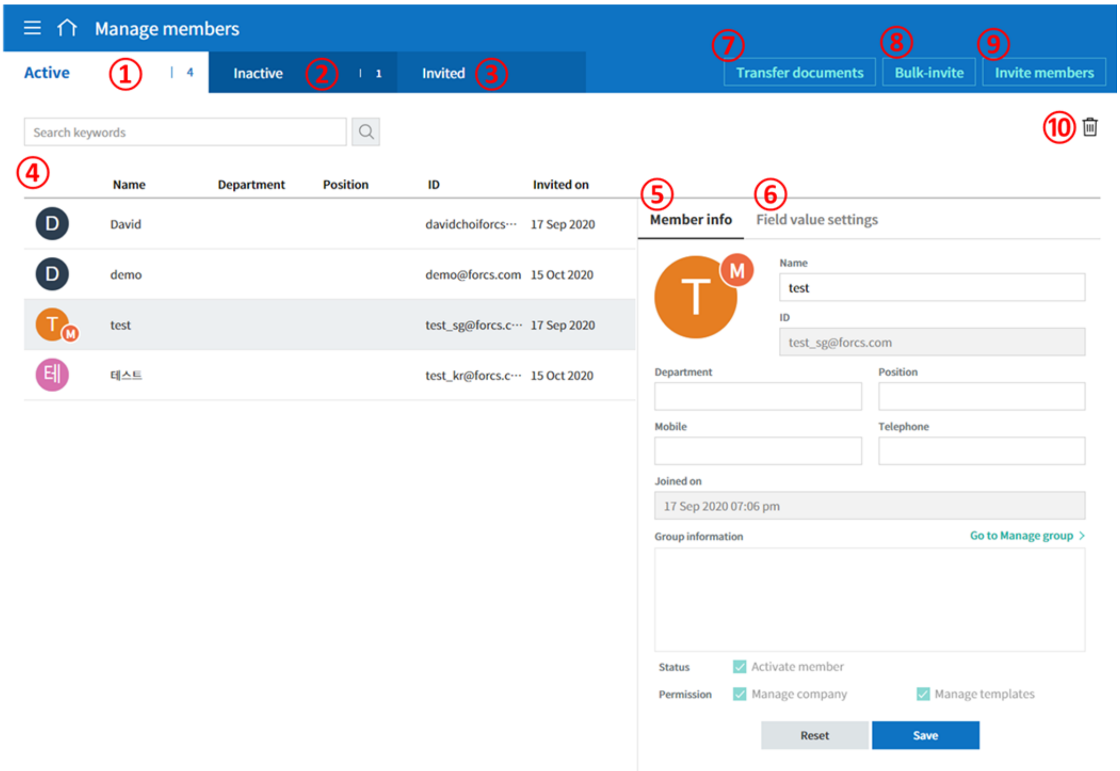
[Figure 2.18] Manage Company > Manage Groups/Members



2.4.1. Manage Members

You can invite members to your company or manage invited members in the **Manage members** menu.

[Figure 2.19] Manage Company > Manage Members



① Active

You can view the list of active members in the company and their information.

② Inactive

You can view the list of inactive members in the company and their information.

③ Invited

You can view the list of members invited to the company and their information.

④ Member list

You can view, edit, or delete the information of a member by selecting a member in the member list and then going to the Member info tab on the right.

⑤ Member info

You can view the member information, change the member status, and grant permissions including Manage company and Manage templates to members.

⑥ Field value settings

You can set the field values that are related to members.

⑦ **Transfer documents**

If a member no longer uses the eformsign service, the documents of the member can be transferred to other members.

⑧ **Bulk-invite**

You can invite multiple members at once.

⑨ Invite members

You can invite members via email or ID.

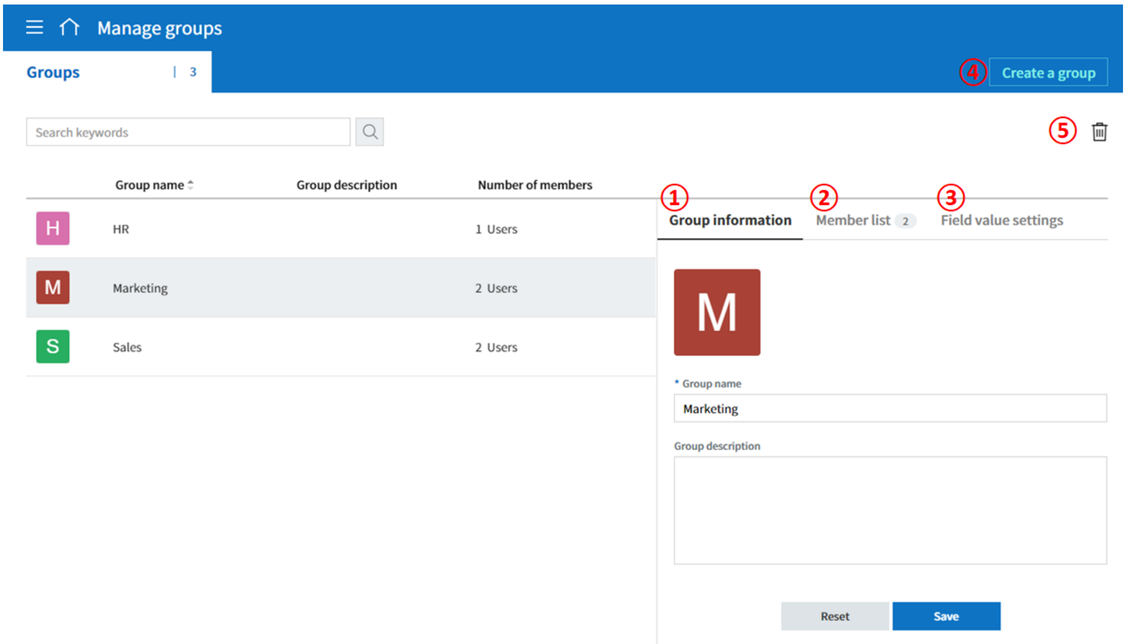
⑩ Delete members

When you click the **Trash** icon, a checkbox will be activated next to each member in the member list. Tick the members you want to delete and click the **Delete** button.

2.4.2. Manage Groups

You can create groups in the company and view, edit, or delete each group's information.

[Figure 2.20] Manage Company > Manage Groups



① Group information

When you select a group in the list, you can view the name and description of the group on the right side. You can also edit the group information in the Group information tab.

② Member list

You can view the list of the members in the group and can add or remove members from the group.

③ Field value settings

You can set the field values that are related to the group.

④ Create a group

When you click the **Create a group** button, the Create a group pop-up window will be displayed. Create a group by entering the group name and description, and adding members by searching.

⑤ Delete a group

When you click the **Trash** icon, a checkbox will be activated next to each group in the group list. Tick the groups you want to delete and click the **Delete** button.

2.5. My Signature

If you register your signature, initial, and stamp in the **My signature** menu, you can easily use them when signing documents.

Registering Your Signature and Initial

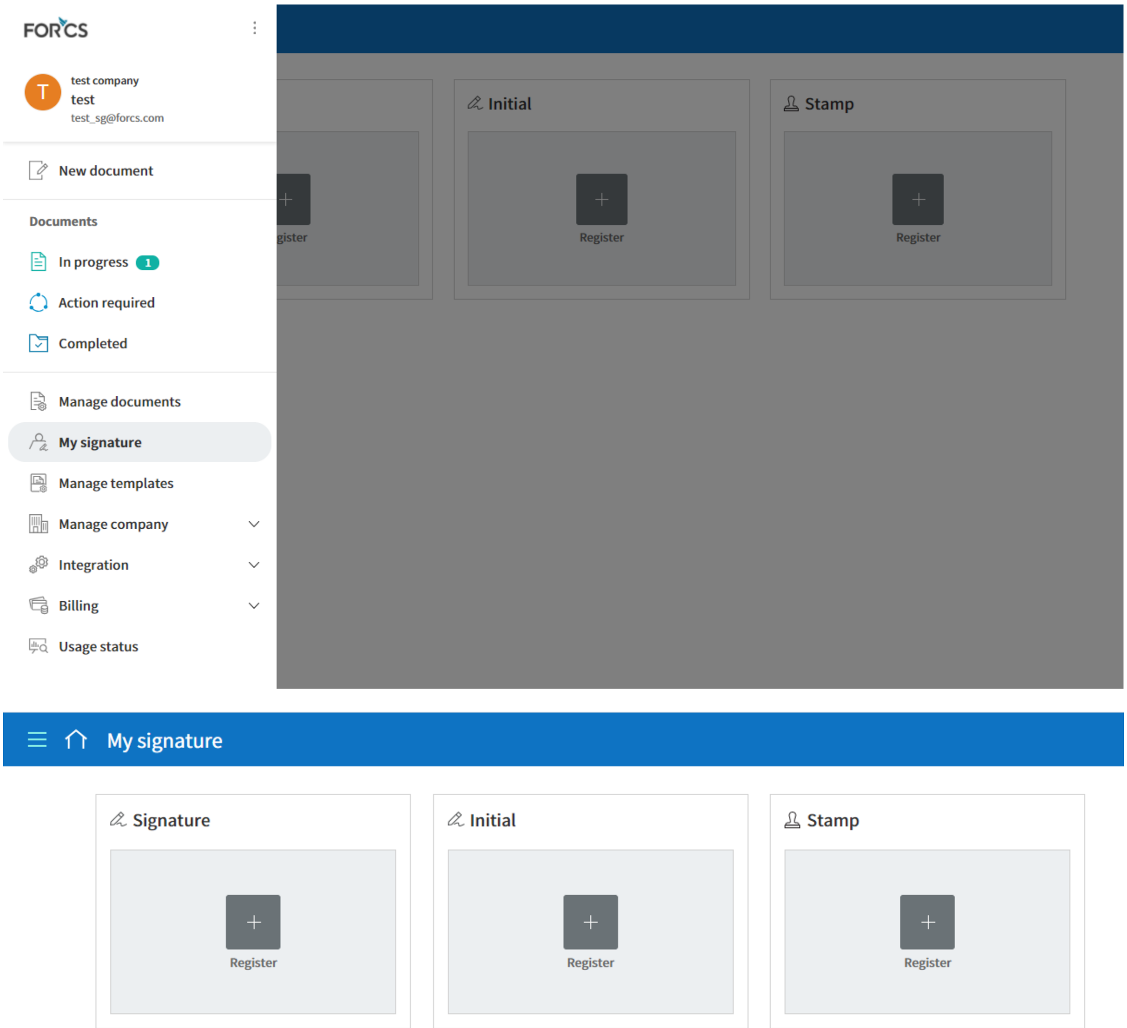
Note

You can register your signature and initial in **browsers (PC and mobile) and apps (mobile).**

---

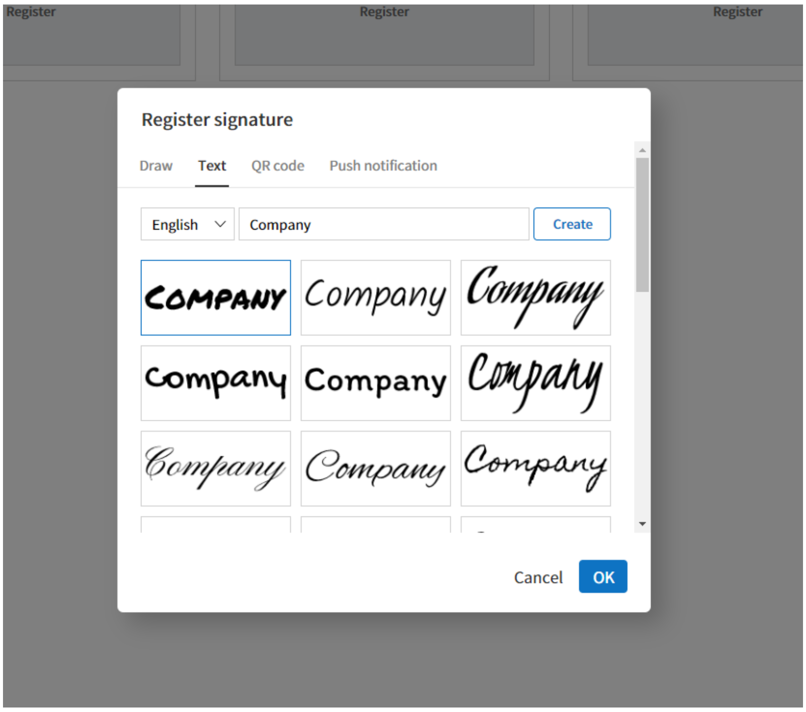
1. Click the sidebar menu icon, and go to the **My signature** menu.

[Figure 2.21] My Signature Page



2. Click the **OK** button to add a new signature, initial, or stamp.

[Figure 2.22] Register Signature



- **Draw**

  You can draw your signature on the screen.

- **Text**

  Type your name, and then select a signature style.

- **QR code**

  If you scan the QR code with your smartphone camera, you can access the sign pad page. Draw your signature on the sign pad.

- **Push notification**

  Select a mobile device you want to connect to and click the **Send** button. You can draw your signature using the eformsign app installed on the connected device.

3. Click the **OK** button to save the signature.

4. Click the **Edit** or **Delete** button to edit or delete the signature.

Registering Your Stamp

Some documents may require a seal or stamp rather than a signature or initial. You can apply a stamp/seal image to documents after registering the image in the eformsign service.

Note

A stamp/seal image needs to be prepared.

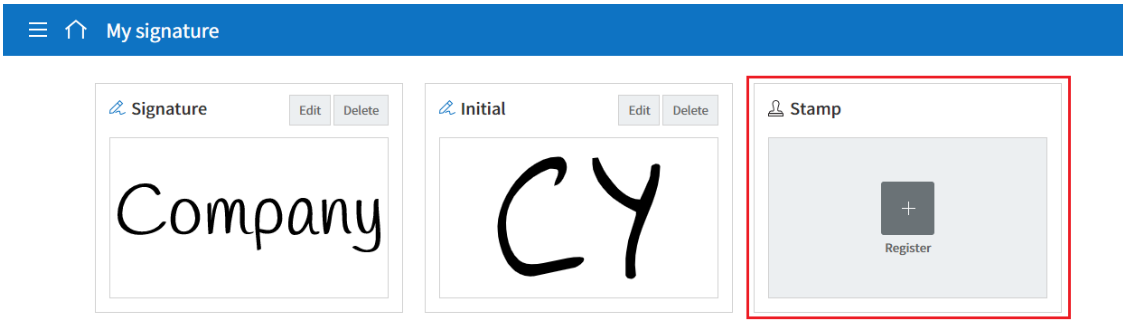
- Image type: PNG, JPG

- File size: Maximum of 300 KB

1. Click the sidebar menu icon, and go to the **My signature** menu.

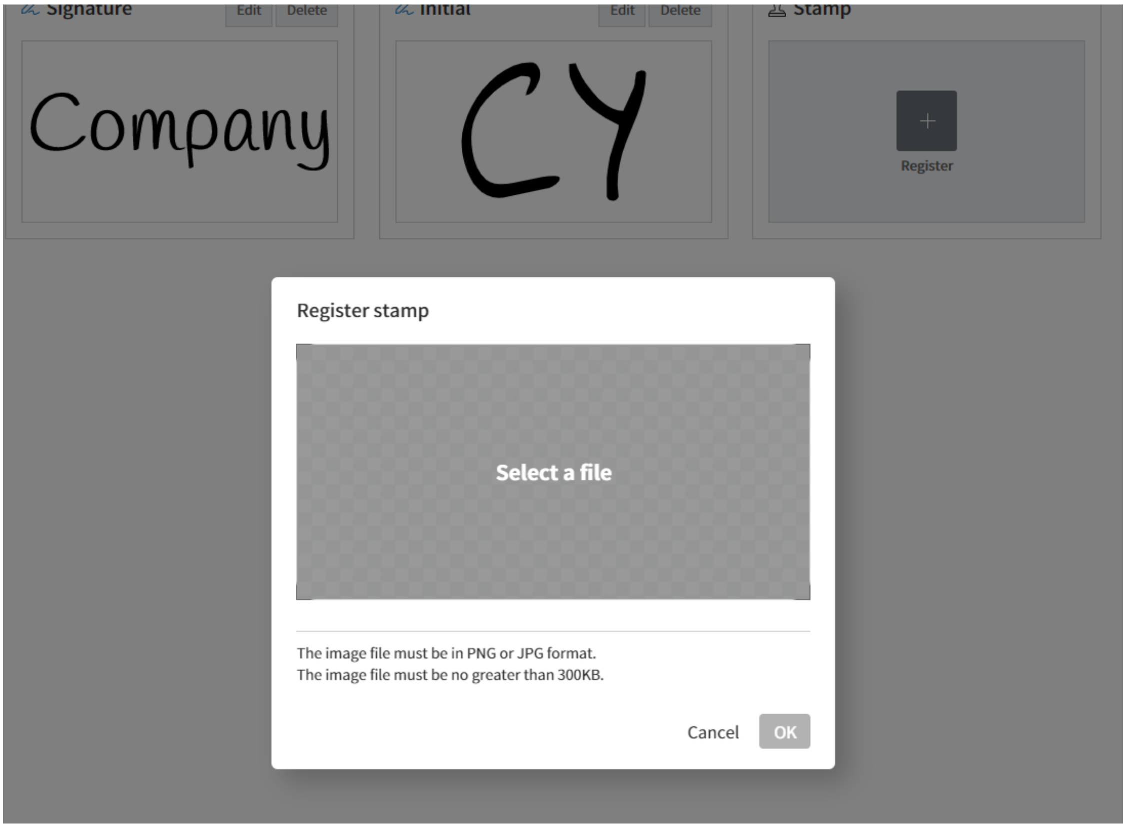
2. Click the **Register** button in the Stamp section to add a new stamp.

[Figure 2.23] Register Stamp



3. Click the image area. A pop-up window will be displayed where you can upload an image from your PC. Select the image that you want to register.

[Figure 2.24] My signature > Register Stamp Pop-up



4. Click the **OK** button to save the stamp.

5. Click the **Edit** or **Delete** button to edit or delete the registered stamp.

Chapter 3. Introduction to Form Builder

3.1. Form Builder Overview

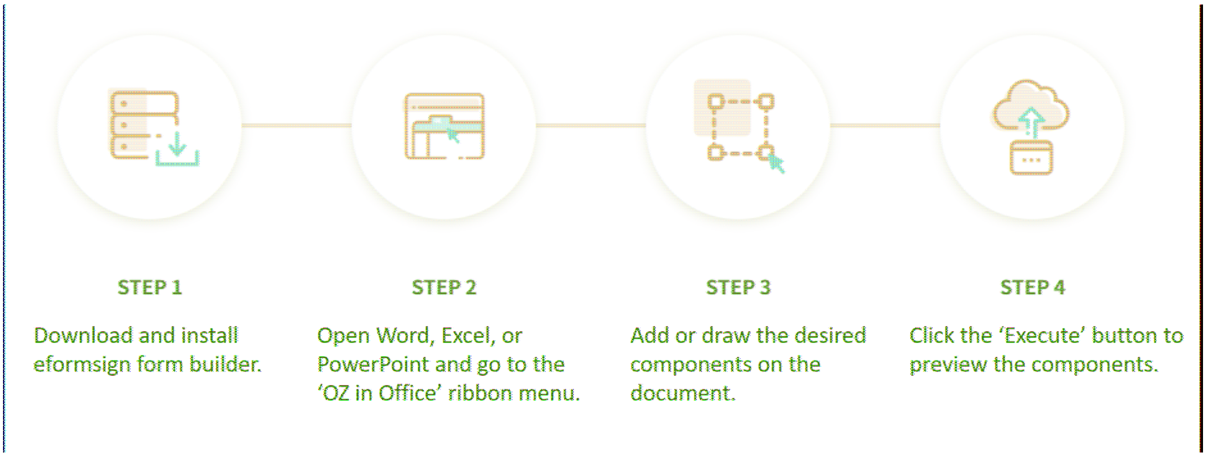
Also known as OZ in Office, Form builder is a form editor which converts a document created using Microsoft Office into an electronic document containing components (fields). By using OZ in Office, you can easily convert existing Excel, Word, and PowerPoint forms such as contracts, applications, and agreements into electronic documents.

Previously, converting Excel, Word, or PowerPoint documents into electronic documents required the use of an IDE (Integrated Development Environment) needing a high degree of programming knowledge for use. Now, with OZ in Office, anyone with the ability to use Microsoft Office can easily create electronic documents.

OZ in Office, provided as a Microsoft Office add-in, is easy to use as it is displayed as a ribbon menu and contains various components including signature, check box, text box, camera, and voice.

The process of creating electronic documents using OZ in Office's components is as follows:

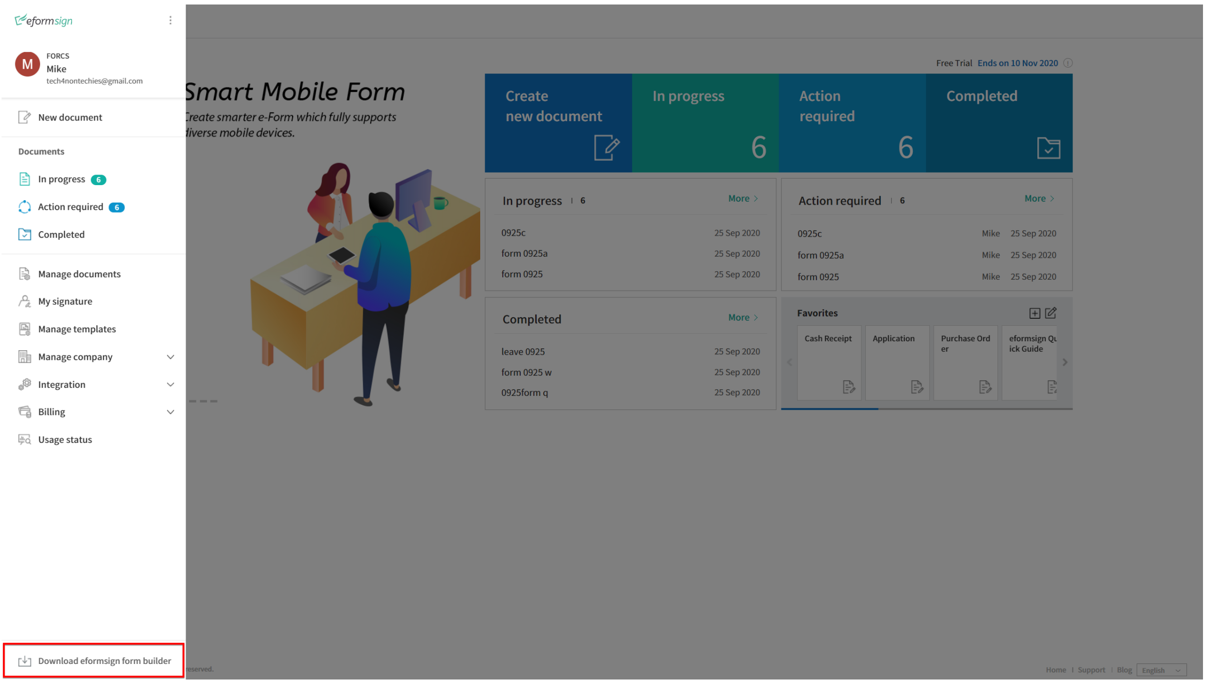
[Figure 3.1] OZ in Office Usage Flow



3.1.1. Download Form Builder

1. Login to eformsign and then click the menu icon (☰) on the top left corner of the dashboard screen to open the sidebar menu. Then, click the **Download eformsign form builder** button at the bottom.

[Figure 3.2] Location of the Download eformsign form builder button



2. The **Download eformsign form builder** page will be displayed, as shown below. Click the **Download form builder** button at the bottom of the page.

[Figure 3.3] eformsign Form Builder Download Page

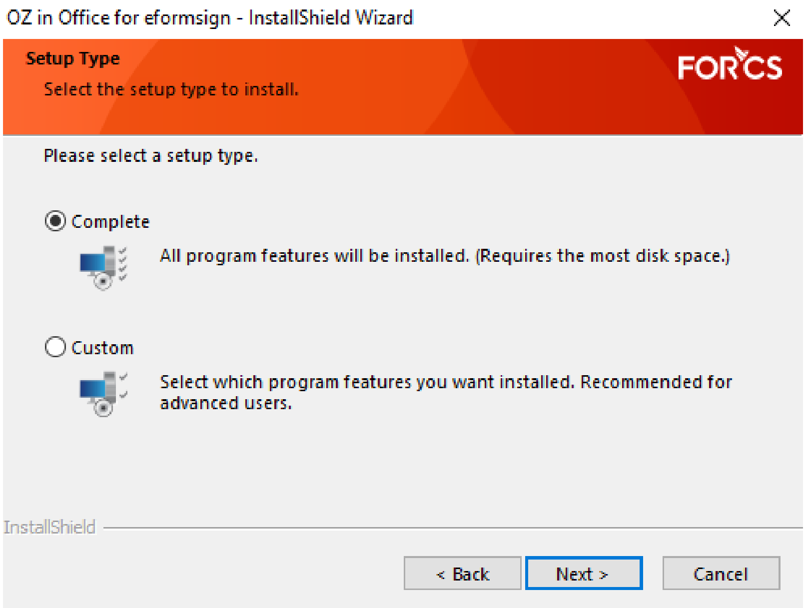
3. Select a location to save the Form builder executable file and download it.

3.1.2. Install Form Builder

1. Click the Form builder executable file to run it.

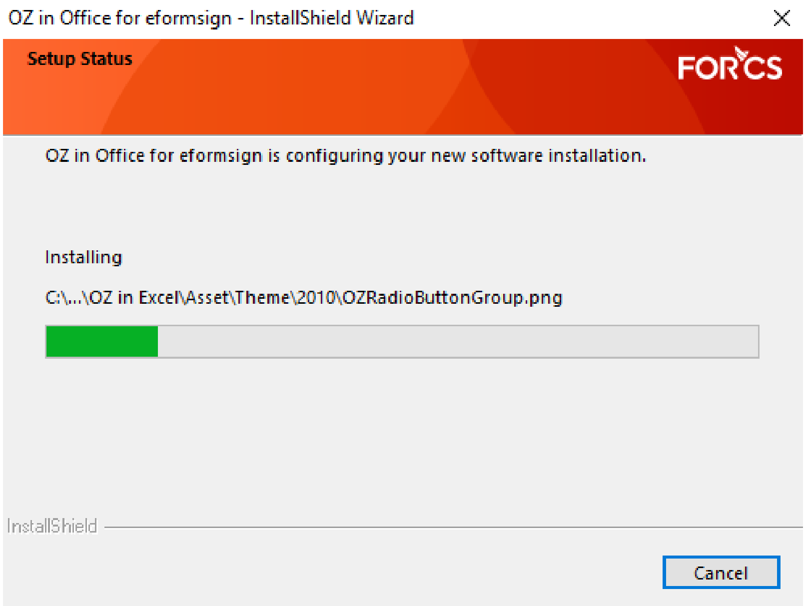
2. When the Wizard screen shown below is displayed, select the **Complete** option and then click the **Next** button.

[Figure 3.4] Form Builder Installation Screen (1)



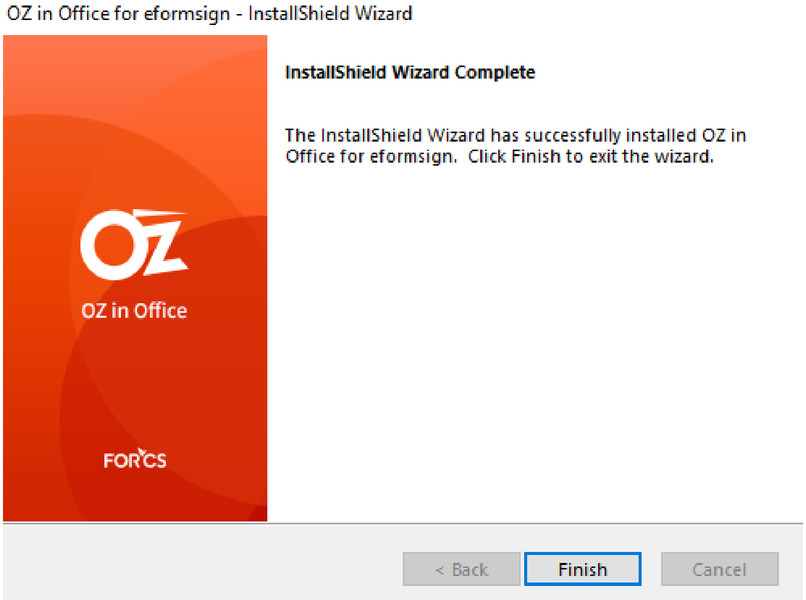
3. When the installation proceeds, the following screen is displayed.

[Figure 3.5] Form Builder Installation Screen (2)



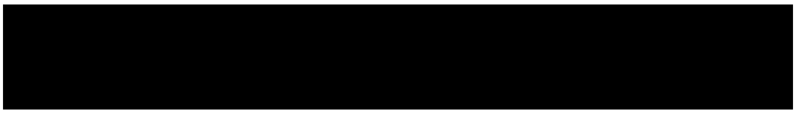
4. When the installation is completed, the following screen is displayed. Click the **Finish** button to close the installation screen.

[Figure 3.6] Form Builder Installation Screen (3)



5. Check whether Form builder was installed properly by running MS Office (Word, Excel, PowerPoint). If **OZ in Word/Excel/PowerPoint** is displayed as below, then it was installed properly.

[Figure 3.7] OZ in Word Ribbon Menu



3.1.3. Form Builder Menu Layout

If you run Microsoft Office Excel, Word, or PowerPoint after installing Form builder, you can see that the **OZ in Excel, OZ in Word, or OZ in PowerPoint** tab is added to the OZ in Office ribbon menu.

[Figure 3.8] Microsoft Office OZ in Office Ribbon Menu

1. **File:** Allows to execute (preview) the document as an electronic form, upload the document to eformsign as a template, or download an electronic form from eformsign.

2. **Property:** Sets the component properties including ID, and Items.

3. **Input:** Adds components used in templates.

4. **Info:** Adds the necessary components in order to have information such as user and date to be automatically entered into templates.

5. **Drawing:** Draws components in the location and size you want. **Drawing** is supported only in Word and PowerPoint.

6. **Deletion:** Deletes components after selecting components and then clicking the **Delete** button.

7. **Window:** Allows to open the **Properties** tab of the selected component or display selected components in the **Selection** tab.

8. **Help:** Checks the version of Form builder and performs updates.

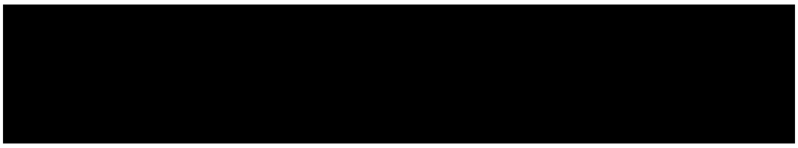
3.2. Overview of Components

Components are used to create fields in electronic documents that users can enter information. Many different components including signature, check, date, and text are provided in Form builder, and each component can be configured in detail by using the **Component Properties** tab.

3.2.1. Component Types

The components provided in eformsign are as follows:

[Figure 3.9] Component Types



- **Check:**Ticks a check box.

- **Radio:**Selects an item among multiple items (can also be set to select multiple items).

- **Text:** Enters short text (usually 1 to 2 words).

- **Multiline:**Enters long text with multiple lines.

- **Combo:** Displays a drop-down menu that allows you to select an item.

- **Datetime:** Enters a specific date.

- **Numeric:** Enters a number.

- **Toggle**: Switches to another value if two or more values are entered.

- **Signature**: Enters a signature.

- **Camera**: Takes a photo using a camera or selects a photo from an album in devices with a built-in camera (e.g. smartphone, tablet, etc.). Selects an image file in devices without a camera (e.g. desktop PC).

- **Voice**: Records audio in devices with a voice recording function.

- **Attachment**: Attaches a file.

- **User:** Enters information of the document user.

- **Date**: Enters the date in which the document is created or modified.

- **Document**: Enters the document number or ID in the document itself.

- **Label**: Sets the form ID.

3.2.2. Accessing Component Properties

Every component has its own detailed settings called **OZ Component Properties**. The properties of each component can be accessed by selecting a component and then clicking the property icon or the **Properties** menu.

[Figure 3.10] Accessing Component Properties

Note

All components must have an ID. An ID is automatically generated when you create a component, but it is recommended to rename it to something you can easily recognize. For example, you can rename the ID of a component for entering John Doe, Jane Doe, etc. as 'name'. By doing so, it is easier to identify components when deciding whether to display a field to a specific user when you are configuring the Field settings of a template.

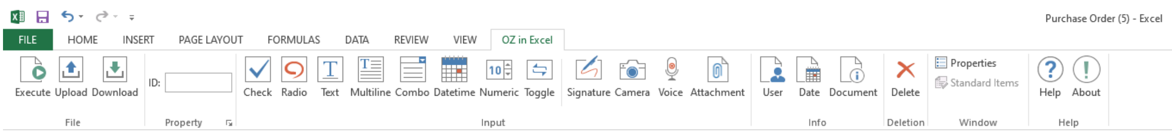
3.2.3. How to Add Components

There are two different ways of adding components: adding components in Excel, and adding components in Word/PowerPoint. In Word or PowerPoint, you can add components in two different ways.

3.2.3.1. Adding Components in Excel

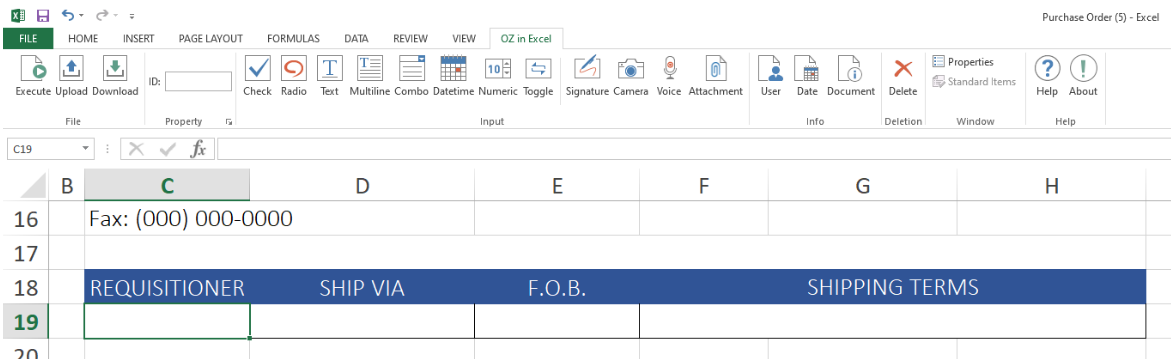
1. Open Excel and go to the **OZ in Excel** ribbon menu.

[Figure 3.11] Adding Components in Excel (1)



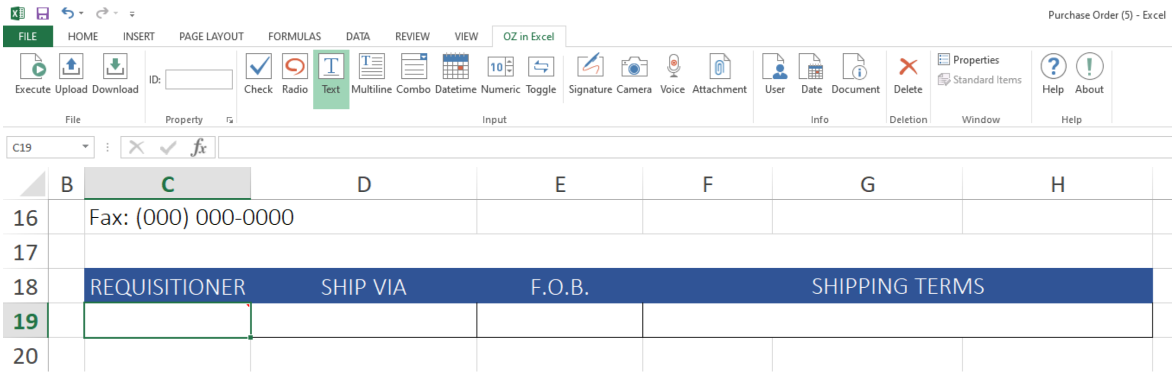
2. Select the cell in which you want to add a component.

[Figure 3.12] Adding Components in Excel (2)



3. Click the component you want.

[Figure 3.13] Adding Components in Excel (3)



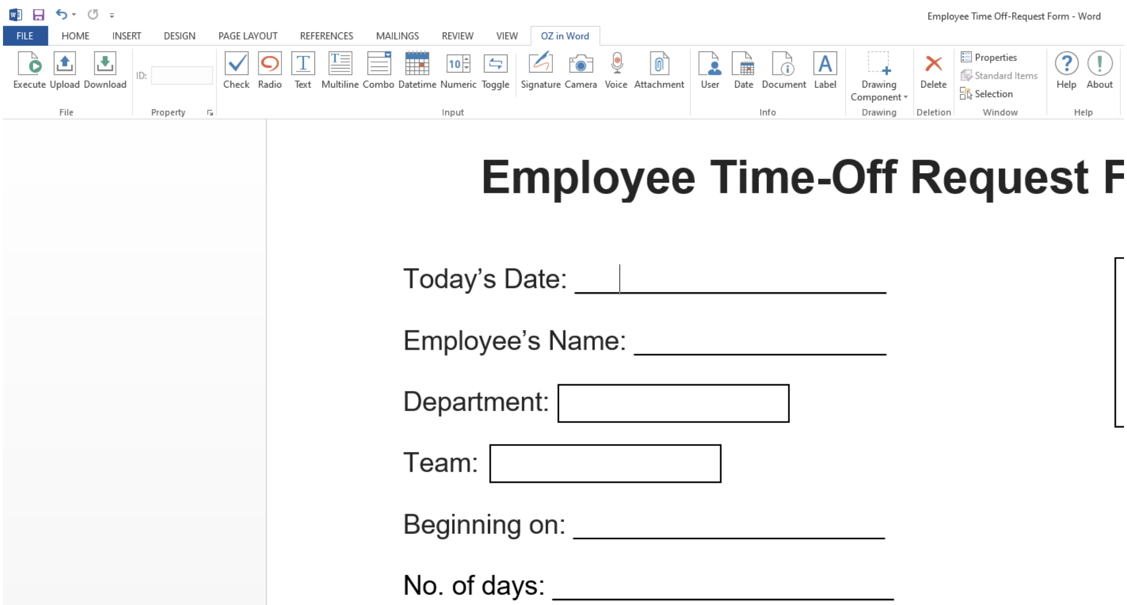
4. Check that the component has been added by viewing the **OZ Component Properties** tab.

3.2.3.2. Adding Components in Word or PowerPoint

Method 1: Adding Components by Clicking a Component Type

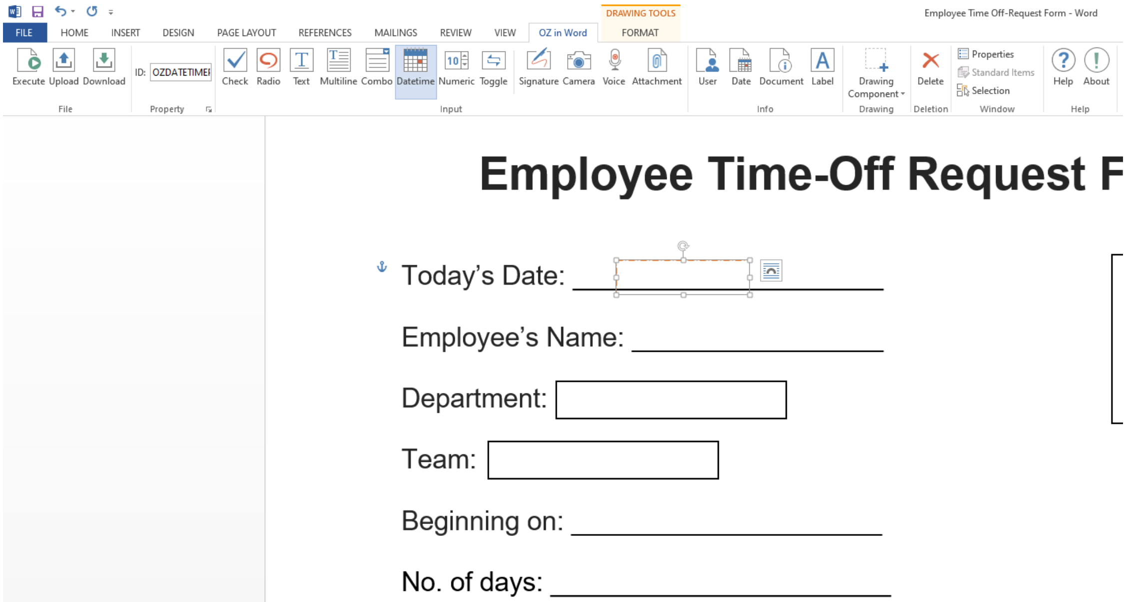
1. Open Word or PowerPoint and select the location in the document where you want to add the component.

[Figure 3.14] Method 1: Adding Components by Clicking a Component Type in Word or PowerPoint (1)



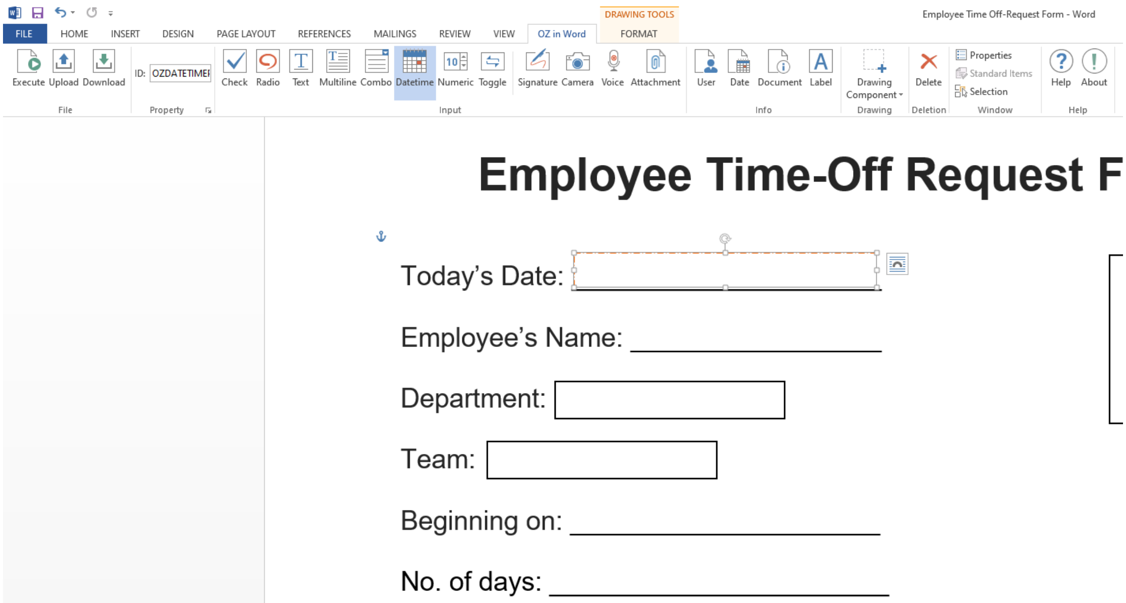
2.Click the component type you want to add in the ribbon menu of **OZ in Word** or **OZ in PowerPoint**.

[Figure 3.15] Method 1: Adding Components by Clicking a Component Type in Word or PowerPoint (2)



3. Adjust the size of the component.

[Figure 3.16] Method 1: Adding Components by Clicking a Component Type in Word or PowerPoint (2)

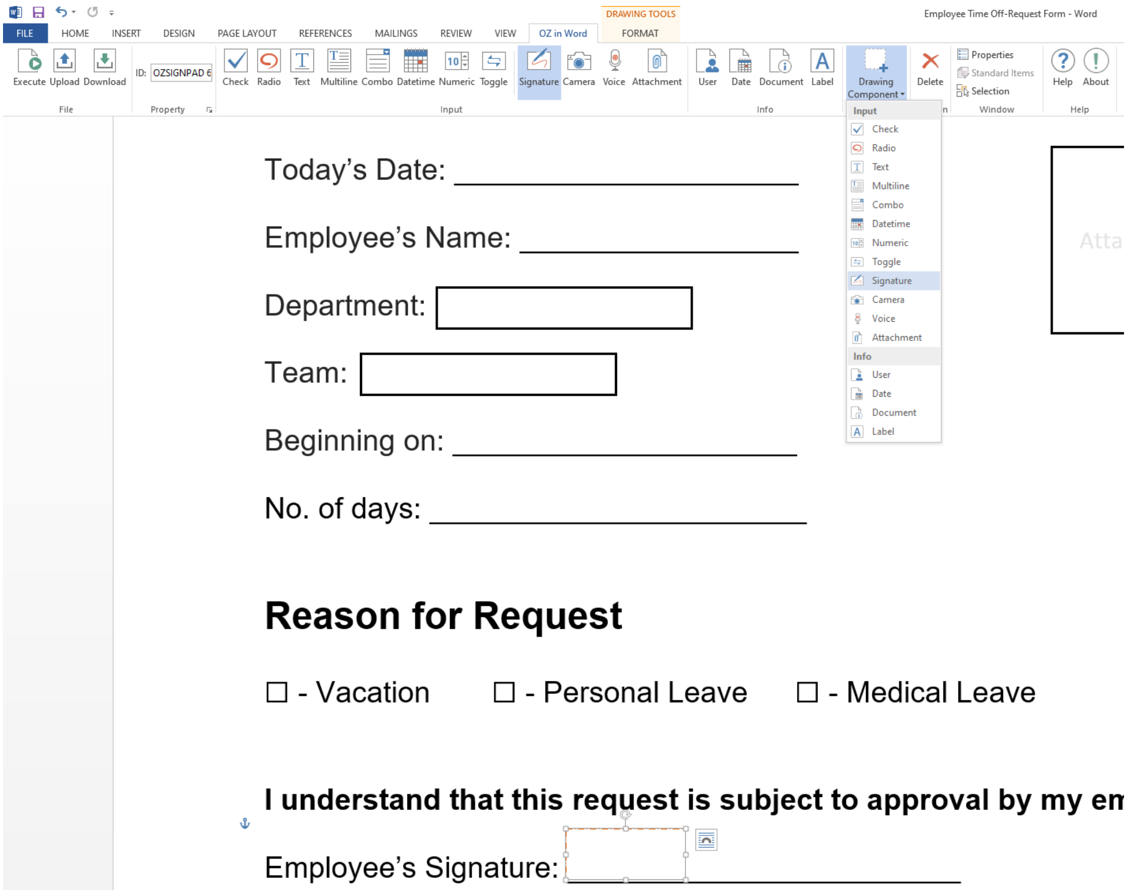


Method 2: Adding Components by Drawing a Component

1. Open Word or PowerPoint and go to the **OZ in Word/Powerpoint** ribbon menu.

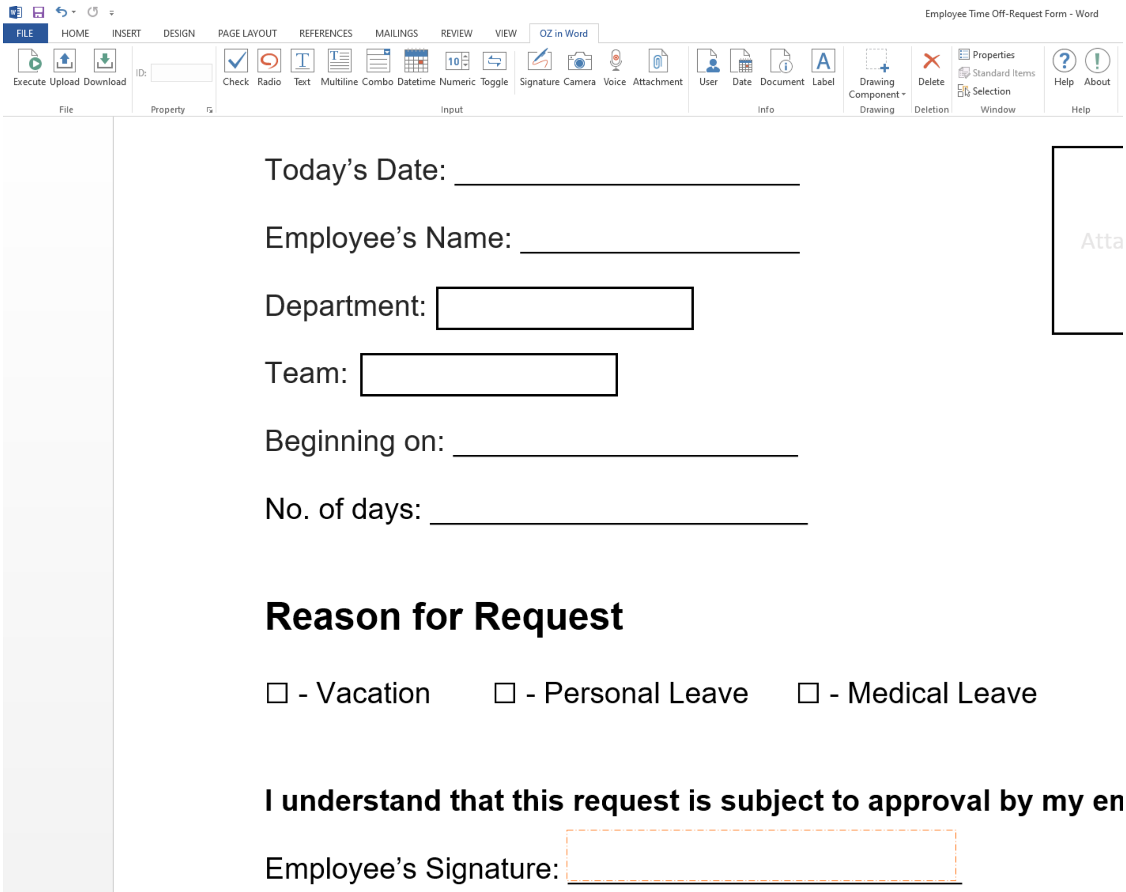
2. Click the **Drawing Component** icon and select the component type you want to add in the drop-down menu displayed.

[Figure 3.17] Method 2: Adding Components by Drawing a Component in Word or PowerPoint (1)



3. Add the component in the position and size you want.

[Figure 3.18] Method 2: Adding Components by Drawing a Component in Word or PowerPoint (2)



3.2.4. How to Delete Components

Select the component you want to delete and then click the **Delete** icon (✕) in the **OZ in Office** menu. You can also select and delete multiple components.

3.3. How to Use Each Component Type

eformsign provides various types of components such as check box, combo box, text, and signature through Microsoft Office's **OZ in Office** ribbon menu.

All components of **OZ in Office** have both common and unique properties. You can view both the common and unique properties of components in the **OZ Component Properties** tab. Common properties include ID and Tooltip Text, and the meaning of each property is as follows:

- **ID:** Unique key for using an entered value in eformsign.

- **Tooltip Text:** In Windows, the text in the Tooltip Text box of a component is displayed in the form of a speech bubble when hovering the mouse over the component. In mobile, the text is displayed on the quick type bar when clicking on the component.

Note

To open the **OZ Component Properties** window, click on a component and then click the **Properties** icon ( ) in the **OZ in Office** ribbon menu.

Note

The Tooltip Text feature is not provided for the Info group including User, Date, Document, and Label component types.

The description of each component type provided in eformsign is as follows.

3.3.1. Check

The **Check** component is used to check whether an item is checked or not. This component is similar to the **Radio** component, but it is used for checking the status of an item (whether it is checked or not) while the **Radio** component is used for checking which item among multiple items is checked.

[redacted]

When data is downloaded in the CSV format, the **Check** component's input value is displayed as follows:

- When the item is checked: true
- When the item is not checked: false

In Word and PowerPoint, the **Check** component is shown as a rectangular shape. Make sure to enter data inside the rectangular shape.

Component Properties

[Figure 3.19] Setting Check Component Properties

[redacted]

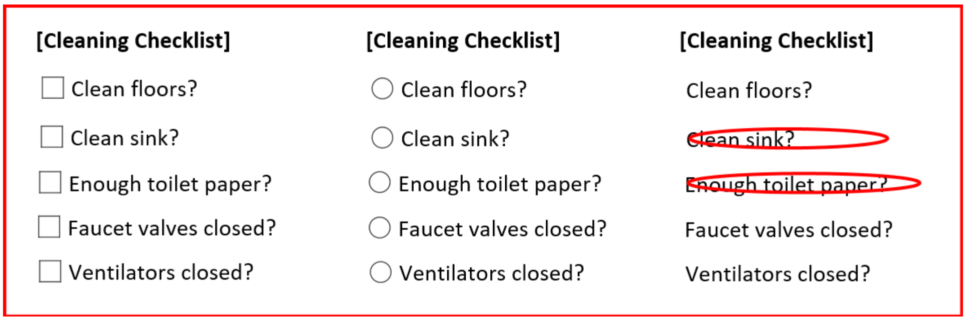
① **ID**

Each Check component must be given a different ID. If multiple check components are given the same ID, then only the value of the last component is displayed.

② **Check Style**

You can specify the style of each component in **Component Properties**. The check box is set as the default style, and you can change it to another style (radio button or red circle).

The below example shows how check boxes are displayed according to the selected style.



3.3.2. Radio

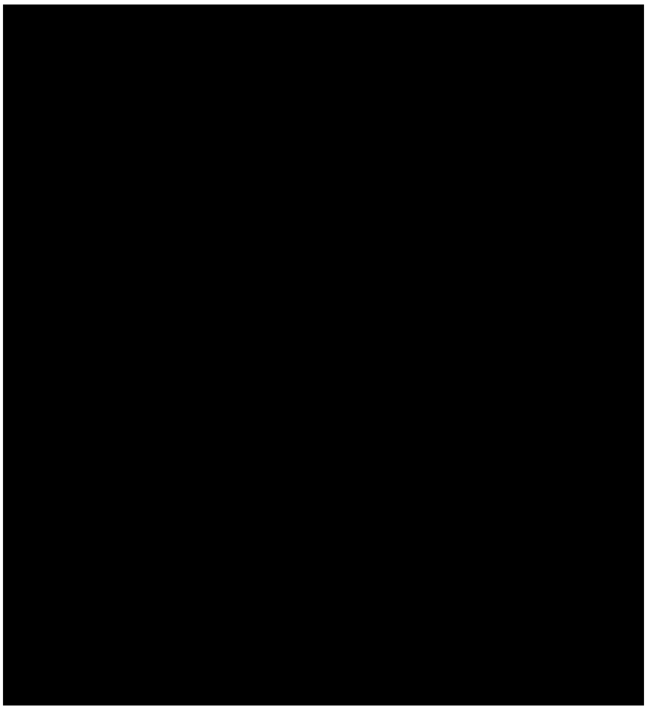
The Radio component is used for checking which radio button is selected among multiple items. When data is downloaded in the CSV format, the selected item will be displayed.

[redacted]

In Word and PowerPoint, the radio component is shown as a rectangular shape. Make sure to enter data inside the rectangular shape.

Component Properties

[Figure 3.20] Setting Radio Component Properties



① **ID**

In **Component Properties**, make sure that all the selected radio buttons are assigned the same ID.

For example, if there are six choices available in a multiple choice question, assign "question1" as the ID for all of them. In the example shown below, the IDs of all the items are set to the same "question 1".

[Figure 3.21] Example of Setting a Radio Component

② **Check Style**

You can choose the style of the Radio component in **Component Properties**. The default style is the **Circle**, and you can change it to another style (check box and radio button).

③ **Multiselectable**

Checking the **Multi-selectable** option allows you to select multiple items. If you select more than one item, then when data is saved, each item is separated with a comma (,).

④ **Uncheckable**

Checking the **Uncheckable** option allows you to deselect a selected item by clicking it again.

⑤ **Tooltip Text**

Displays the description in Tooltip Text when you hover the mouse over a component.

3.3.3. Combo

The Combo component is used when you need to select one of multiple items.

[redacted]

If you click a combo component, a list of items is displayed as follows:

Component Properties

[Figure 3.22] Setting Combo Component Properties

① ID

Enters the ID of the Combo component. For example, the ID of the component for selecting the favorite color can be 'favoriteColor'.

② Items

Enters the items you want. You can separate the items by pressing Enter.

Note

If you want to display a message such as 'Please select a color' in a combo box in a document for recipients to view, then enter the message at the top of the list of items in the combo box and select it before sending the document.

---

③ Allow Empty Value

Checking the **Allow Empty Value** option allows you to deselect a selected item. Empty Value can be allowed in the following ways:

- PC: Right-click on the component and select the **Allow Empty Value** option in the pop-up menu.
- Mobile: Click the Trash can icon.

④ Tooltip Text

Displays the description in Tooltip Text when you hover the mouse over a component.

3.3.4. Text and Multiline

Both Text and Multiline components are used to create text fields. The Text component is suitable for short text with 1 to 2 words, and the Multiline component is suitable for long text with more than 1 line.

[redacted]

Component Properties

[Figure 3.23] Setting Text and Multiline Component Properties

[redacted]

① **ID**

Enters the ID of the text/multiline component. For example, the ID of the component in which John Doe, Jane Doe, etc. are entered can be named ‘personName’.

② **Max Length**

Sets the maximum length of characters (including space) that can be entered. By default, it is set to ‘0’, and in this case, there is no limit for the number of characters.

③ **Keyboard Type**

Selects the keyboard type to be used when entering text in the component. Keyboard Type can only be used in mobile devices such as smartphones and tablets.

④ **Show Password Characters**

This option can be set only in the text component. By checking this option, the password is hidden with the password symbol (●) when entering text. The password is also hidden with the password symbol in PDFs, and can only be seen when downloaded in the CSV format.

⑤ **Tooltip Text**

Displays the description in Tooltip Text when you hover the mouse over a component.

3.3.5. Datetime

This component is used for entering a date. Clicking the component displays a date selection window where you can select the date you want.

[redacted]

Component Properties

[Figure 3.24] Setting Datetime Component Properties

[redacted]

① **ID**

Enters the ID of the Datetime component. For example, the ID of the component for selecting the vacation start date can be named ‘vacationStartDate’.

② **Format**

Sets the format in which date is displayed. The default setting is date_yyyy-MM-dd.

- **yyyy:** Displays the year.
- **MM:** Displays the month. Must be in uppercase.
- **dd:** Displays the days.

For example, if you want to display the date in the format of ‘15-02-2020’, then enter **dd-MM-yyyy** in the Format field.

③ **Minimum Date/Maximum Date**

Sets the range of dates that can be selected in the component by specifying the minimum and maximum dates.

④ **Display Today for Empty Value**

Checking this option automatically enters the date (the date in which the document is opened) when the document is opened. This option is checked by default when you add a **Datetime** component. You can change the date by clicking the component.

⑤ **Allow Empty Value**

Checking this option allows you to clear the number displayed on a Numeric component. In a Datetime component, once you select a date, you can change it to another date but cannot clear the date. However, checking this option allows you to clear the date displayed on the Datetime component. If no date is selected in the Datetime component but the **Display Today for Empty Value** option is checked, then the date component is automatically filled in with the date in which the document is opened.

- PC: Right-click on the component to display the pop-up menu and then select the **Initialize Input Data** menu.
- Mobile: Click the Trash icon.

⑥ **Tooltip Text**

Displays the description in Tooltip Text when you hover the mouse over a component.

3.3.6. Numeric

This component is used for entering a number. Clicking the component displays two arrows on the right, and you can increase or decrease the number by clicking them. In PCs, you can directly enter the desired number into the component by using a keyboard. In smartphones and tablets, you can scroll through the list of numbers and select the one you want.

[redacted]

Component Properties

[Figure 3.25] Setting Numeric Component Properties

[redacted]

① **ID**

Enters the ID of the numeric component. For example, the ID of the component for entering the number of people in a reservation can be named ‘peopleCount’.

② **Unit of Change**

Enters the unit of number that will increase/decrease the number whenever the up/down arrow icon is clicked. For example, if the 'Unit of Change' is set to 100, then when you click the up arrow icon (▲), the number is increased by 100 such as 200, 300, 400, and so on.

③ **Minimum/Maximum Value**

Sets the range of numbers that can be entered into the component by specifying the minimum and maximum values. For example, for the date of birth, setting the Minimum Value to 1900, Maximum Value to the current year, and the Unit of Change to 1. Also, if you enter a value that is lower/higher than the Minimum/Maximum Value, then the Minimum/Maximum Value will be automatically entered. For example, if the Maximum Value is set to 100 and you enter 101, then the number will automatically change to 100.

④ **Allow Empty Value**

Checking the **Allow Empty Value** option allows you to clear the number displayed on the numeric component. After entering a number in a numeric component, you can change the number again, but cannot clear the number. However, by checking this option, you can clear the number displayed on the component as described below.

- PC: Right-click on the component to display the pop-up menu and then select the **Initialize Input Data** menu.

- Mobile: Click the Trash icon.

⑤ **Tooltip Text**

Displays the description in Tooltip Text when you hover the mouse over a component.

3.3.7. Toggle

This component is used for indicating a specific status such as ON/OFF. If you use this component, then the input value is switched according to a defined order whenever the component is clicked.

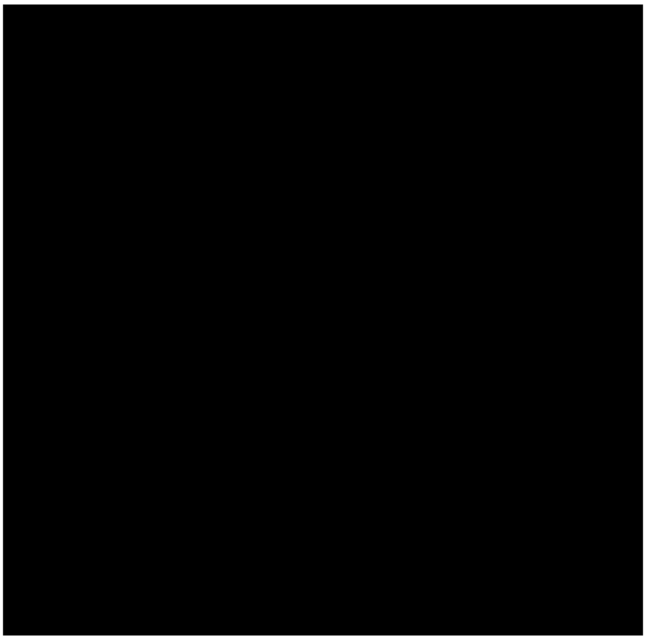
[redacted]

You can change the status to **Good** or **Bad** by clicking the components as follows:

New Apartment Checklist	Status
Condition of windows and doors	Good
Condition of wallpaper	Bad
Condition of bathroom tiles	Bad
Condition of carpets	Good

Component Properties

[Figure 3.26] Toggle Component Properties



① **ID**

Enters the ID of the toggle component. For example, the ID of the component for the first inspection item can be named ‘inspection1’.

② **Items**

Enters the list of items that will be toggled whenever the toggle component is clicked. You can separate each item by pressing Enter.

③ **Allow Empty Value**

Checking this option allows you to clear the item displayed on the toggle component. When you select a toggle component, you can toggle to another item but cannot clear the item displayed on the component. However, by checking this option, you can clear the item displayed on the component as described below:

- PC: Right-click on the component to display the pop-up menu and then select the **Initialize Input Data** menu.

- Mobile: Click the Trash icon.

④ Tooltip Text

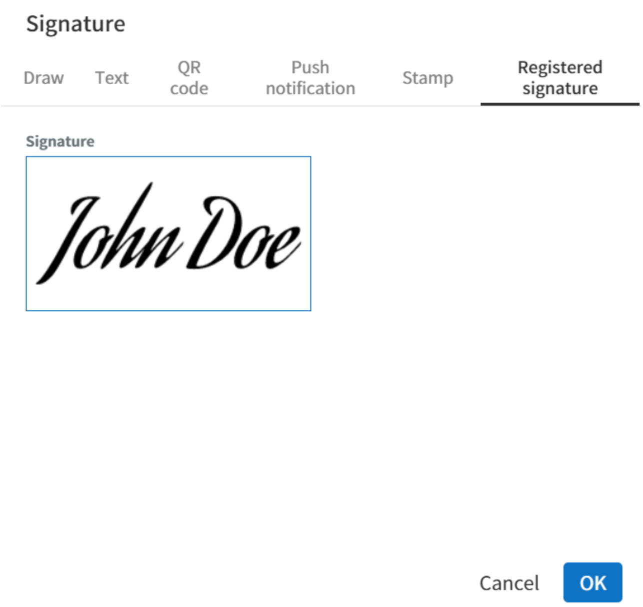
Displays the description in Tooltip Text when you hover the mouse over a component.

3.3.8. Signature

This component is used for signing a signature on a document.

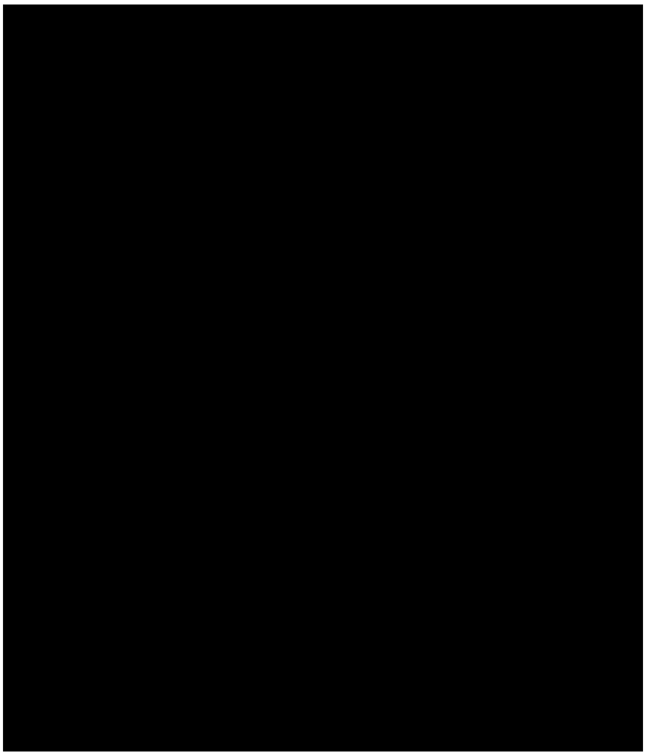
[redacted]

Clicking the signature area displays the **Signature** pop-up which allows you to sign a signature by drawing, entering text, or using a previously registered signature.



Component Properties

[Figure 3.27] Setting Signature Component Properties



① **ID**

Enters the ID of the signature component. For example, the ID of the component can be ‘signerSignature’ for contract signers.

② **Signature Type**

Selects the signature type to be used when signing.

- **Enter Directly:** Clicking the signature area displays the **Signature** pop-up which allows you to sign by selecting one of the multiple signing methods which are **Draw**, **Text**, **Mobile**, **Stamp**, and **Registered signature**.

- **Registered Signature:** If the user has already registered a signature on eformsign, then clicking the signature area inserts the registered signature into the document.

- **Registered Initials:** If the user has already registered an initial on eformsign, then clicking the signature area inserts the registered initial into the document.

Note

If there is a registered signature or initial, then it will be automatically entered in the signature area when a signature area is clicked. However, if there is no registered signature or initial, then a regular **Signature** pop-up will be displayed when a signature area is clicked.

Note

In some cases, you may need to use a seal or stamp on a document rather than your own signature. With eformsign, you can also use a stamp image to stamp the signature on a document. To use a stamp image when submitting a document, click the **Stamp** tab in the **Signature** pop-up, and then select a stamp image and click **OK**.

③ **Signature Pen Thick**

Sets the signature pen thickness.

④ **Signature Pen Color**

Sets the signature pen color.

⑤ **Tooltip Text**

Displays the description in Tooltip Text when you hover the mouse over a component.

Note

You can set the signature date to be automatically entered in documents that require signature, such as electronic contracts and electronic agreements.

1. Open the document file (Word, Excel, PowerPoint) to be converted into an electronic form or create a new document.

2. Add a Signature component in the area of the document to be signed.

3. Enter the ID of the Signature component in the **Component Properties** tab. For example, the ID can be named ‘signature1’.

4. Add the Date (not to be confused with Datetime) component where the signature date will be entered.

5. Open the **Component Properties** tab of the Date component.

6. Select the **Date Type** as **Last modified date of the content**.

7. Enter the ID of the Signature component in the Input Component ID field on the bottom. In this case, it would be ‘signature1’.

You can select the Format of date to be displayed on the Date component by selecting the desired date format in the **Component Properties** tab.

3.3.9. Camera

This component is for uploading photos (taken with a device with a built-in camera such as smartphones and tablets) on a document. In PCs without a camera, clicking the component displays a window for selecting a desired image file.

[redacted]

If the size of the selected image is larger than the size of the text box, then it is resized to fit the component.

Note

For the device with a built-in camera, camera feature will be executed, and for the devices with no camera, a window for selecting an image file will be displayed.

[redacted]

Component Properties

[Figure 3.28] Setting Camera Component Properties

① **ID**

Enters the ID of the Camera component. For example, the ID of the component that takes the photo of a driver's license can be 'driverLicense'.

② **Tooltip Text**

Displays the description in the Tooltip Text when you hover the mouse over a component.

3.3.10. Voice

This component is used for storing recorded voice. You can set the maximum recording time and you can also configure the settings to allow users to only listen to the voice recording.

When you add a Voice component in OZ in Office, you can record voice or play a voice recording as follows:

[redacted]

Note

If the recording time limit is set to 1 or higher, recording is completed automatically at the time set (unit: seconds).

In the case of ActiveX viewer, the recording playback UI is supported from Windows 8 and later.

In PCs, the Voice component works only when a voice recording device is connected to a PC.

Component Properties

[Figure 3.29] Setting Voice Component Properties

[redacted]

① **ID**

Enter the ID of the Voice component. For example, the ID of the component that plays voice recordings can be named 'Record1'.

② **Tooltip Text**

Displays the description in Tooltip Text when you hover the mouse over a component.

3.3.11. Attachment

This component is used for attaching a file to a document. When attaching a file to a document by using the Attachment component, the file will be attached at the very end of the document as a new page.

[redacted]

The types and sizes of files that can be attached are as follows:

- File type: PDF, JPG, PNG, and GIF

- File size: Up to 5MB

Component Properties

[Figure 3.30] Setting Attachment Component Properties

[redacted]

① **ID**

Enters the ID of the Attachment component. For example, the ID of the component for attaching a resume can be named ‘myResume’.

② **Tooltip Text**

Displays the description Tooltip Text when you hover the mouse over a component.

3.3.12. User

This component is used for entering the information of the user who created or modified a document. The user's basic information such as name or contact information, or custom field information is automatically entered into the user component based on the settings.

[redacted]

Component Properties

[Figure 3.31] Setting User Component Properties

[redacted]

① **ID**

Enters the ID of the user component. For example, the ID of the component that displays the name of the document creator can be named 'documentCreator'.

② **User Type**

- **Document Creator:** Displays the information of the user who created the document.

- **Current User:** Displays the information of the user who has most recently opened or modified the document.

- **Last modified user of the content:** Displays the information of the user who entered information in a specific component.

If you select **Last modified user of the content**, then the **Input Component ID** field will be displayed. In this field, enter the ID of the component that will display the information when triggered.

Note

You need to have company administrator or template manager permission to perform this action.

Note

To automatically fill in the signer's name in the User component, create a Signature component and then name the ID (for example, signer1). Then, create the User component that will display the signer's name when triggered and name the ID (for example, signer1name). Then, select **Last modified user of the content** under User Type and enter the ID of the Signature component (in this case, signer1) under **Input Component ID**.

---

③ **User Field Name**

This field allows to select the type of member information that will be displayed. You can select basic information in the **Manage member > Member info** menu of the member or information in a custom field.

- Basic member information types: Name, ID, Department, Position, Mobile, and Telephone

---

Note

You need to have company administrator permission to change basic member information.

To modify a member's basic information, login to eformsign and go to the **Manage company > Manage members** menu. Select a member in the member list and edit the information in the **Member info tab** on the right. Then, click the **Save** button.

3.3.13. Document

This component is used for entering document-related information in the document itself. You can select either one of the document ID or document number.

[redacted]

The document ID is a unique document ID assigned in the system, so it does not require separate settings. For settings related to document number, upload a template and then go to **Template settings > General**.

Component Properties

[Figure 3.32] Setting Document Component Properties

[redacted]

① **ID**

Enters the ID of the document component. For example, the component ID can be 'docNum' for document number.

② **Document info type**

Selects the type of information that will be used.

- **Document ID:** A unique ID containing 32 digits of alphanumeric characters assigned to all documents in the system. E.g. 0077af27a98846c8872f5333920679b7.

- **Document no.:** The document number set in **Template settings > General.** For information on how to set a document number, go to "5.2.3. General > Generating and Viewing a Document Number".

3.3.14. Date

This component is used for automatically entering the date in which a document is created, accessed, or modified into the document. You can automatically enter one of the following dates according to the date type selected: the date in which the document is created (Date created), the date in which the document is last accessed (Date accessed), or the date in which a specific component is filled in (Last modified date of the content).

[redacted]

Component Properties

[Figure 3.33] Setting Date Component Properties

[redacted]

① **ID**

Enters the ID of the Date component. For example, the ID of the component that displays the date in which the document is signed can be named ‘signed date’.

② **Format**

Sets the format in which date will be displayed.

- **yyyy:** Displays the year.

- **MM:** Displays the month. Must be in uppercase.

- **dd:** Displays the day.

For example, if you want to display the date in the format of ‘15-20-2020’, then enter dd-MM-yyyy in the Format field.

③ **Date Type**

- **Date created:** Displays the date in which the document is created.
- **Date accessed:** Displays the most recent date in which the document is modified or opened.
- **Last modified date of the content:** Displays the date in which the information of a specific component is filled in.

If **Last modified date of the content** is selected, the **Input Component ID** field is displayed. In this field, enter the ID of the component that will display the information when triggered.

Note

You need to have company administrator or template manager permission to perform this action.

Note

If you want the signature date of a signer to be displayed automatically in a contract, first add a Signature component and then name the ID (e.g. 'contractSign'). Then, add a Date component which will display the signature date when the signature is signed and name the ID (e.g. signDate). Then, select **Last modified date of the content** under Date Type and enter the ID of the signature component (in this case ‘contractSign’) in the **Input Component ID** field.

3.3.15. Label

This component is used for setting the form ID of a document.

Component Properties

[Figure 3.34] Setting Label Component Properties

[redacted]

① **ID**

The form ID of the document is automatically generated and displayed. It can also be changed.

The form ID defined here can be applied when editing the document.

3.4. Upload Form File

Form files created using OZ in Office are uploaded in the following order:

1. Click the **Execute** icon () in the File group. The login page will be displayed as a pop-up window.

[Figure 3.35] Login Page

[redacted]

2. After you log in, the document converted to a form will be displayed as a preview.

[Figure 3.36] Preview Form File

[redacted]

3. Click the **Upload form file** button or click the **Upload** () icon in the ribbon menu. The **Template list** page with the **Create template** card will be displayed.

[Figure 3.37] Template List Screen

[redacted]

4. Click the **Create template** card. The screen for configuring the template settings will be displayed. To create a template, click the **Save** button on the top right corner.

[Figure 3.38] Create Template Screen

[redacted]

3.5. Configuring Template Settings

After uploading a template, you can configure additional settings for documents created from the template such as the template name, document number, and workflow.

1. Login to eformsign.

2. Go to the **Manage templates** menu.

3. Click the Template settings icon ( ) of the desired template.

- **General:** Sets the template name, abbreviation, document name, document number, etc.

- **Set permissions:** Sets the permissions for who can create documents created from the template and who can open, void, or permanently remove documents created from the template.

- **Workflow:** Sets the steps of the document workflow from **Start** to **Complete**.

- **Field:** Sets the field default values, auto-filled values, etc.

- **Notification settings:** Sets the notification settings for documents created from the template.

4. After configuring all settings, click the **Save** button to save the settings.

Note

For a detailed explanation of templates, please refer to “Chapter 6. Template - Form Builder”.

Chapter 4. Introduction to Web Form Designer

4.1. Web Form Designer Overview

You can easily create a template using Web form designer by uploading a PDF file to eformsign in the **Manage templates** page. After uploading a file, simply click and locate the basic components available in the left tree menu of Web form designer and set the properties of each component. This is all you need to do to create a template.

Note

Currently, only PDF files are supported, but other various file formats such as Microsoft Office, JPG, PNG, etc. are planned to be supported.

Note

In addition to Web form designer, eformsign also provides an Microsoft Office Add-in feature named **OZ in Office (Form builder)** which allows you to create electronic documents directly in Microsoft Office. To use Form builder, please install the Microsoft Office add-in, and refer to "Chapter 3. Introduction to Form Builder".

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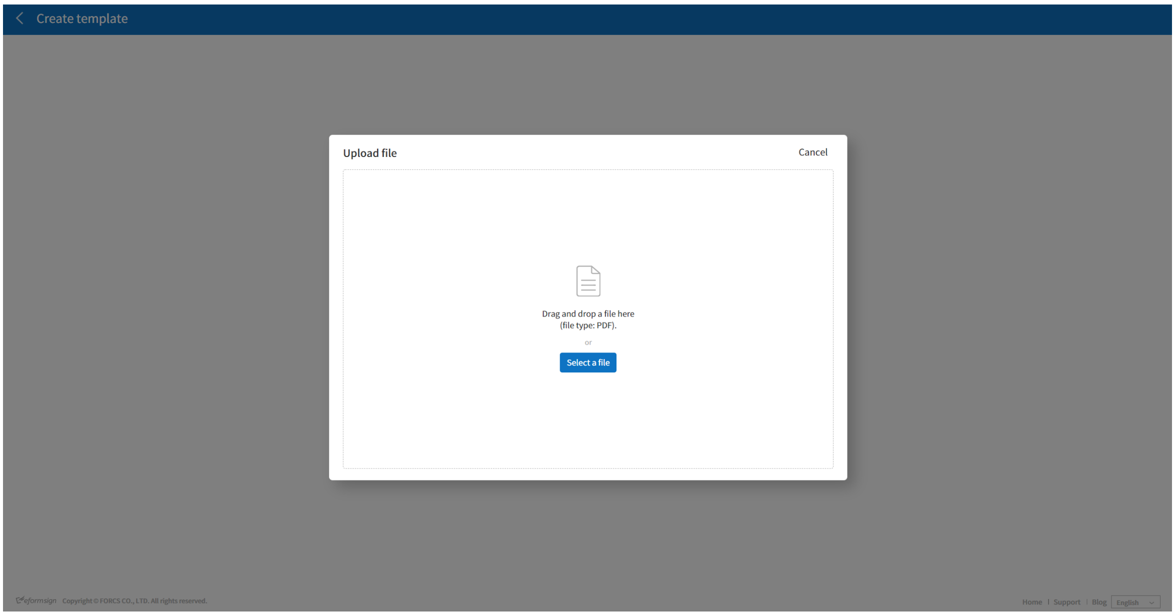
1. To create a template, go to the **Manage templates** page by clicking the **Manage templates** menu in the sidebar.

[Figure 4.1] Web Form Designer Screen

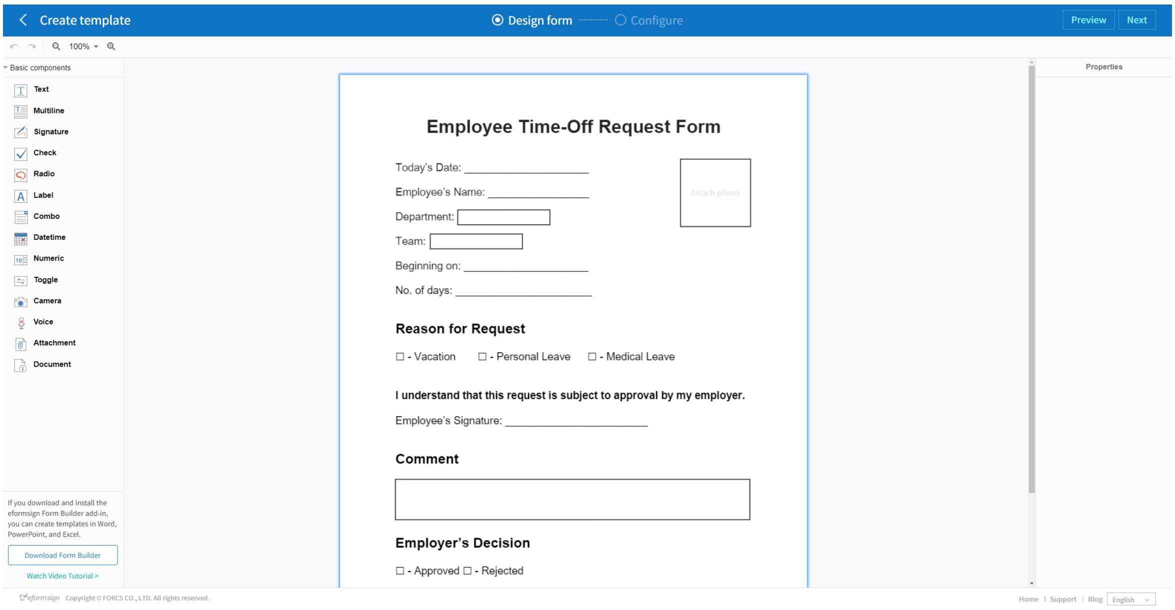
2. To upload a file, simply drag the file onto the **Manage templates** page or click the **Select a file** button and then upload the file.

[Figure 4.2] Web Form Designer Screen



3. When a file is uploaded, the **Create template** page will be displayed as follows:

[Figure 4.3] Web Form Designer Screen



4.1.1. Web Form Designer Menu Layout

Web form designer consists of a screen that displays the file, the left and right panels, and the top bar.

[Figure 4.4] Web Form Designer Menu Layout

1. **Document display screen:** Displays the uploaded file.

2. **Top bar:** Displays the **Design form** step and the **Configure** step, and allows you to preview the template with components added. It also allows you to go back to the **Manage templates** page where you can see the list of templates.

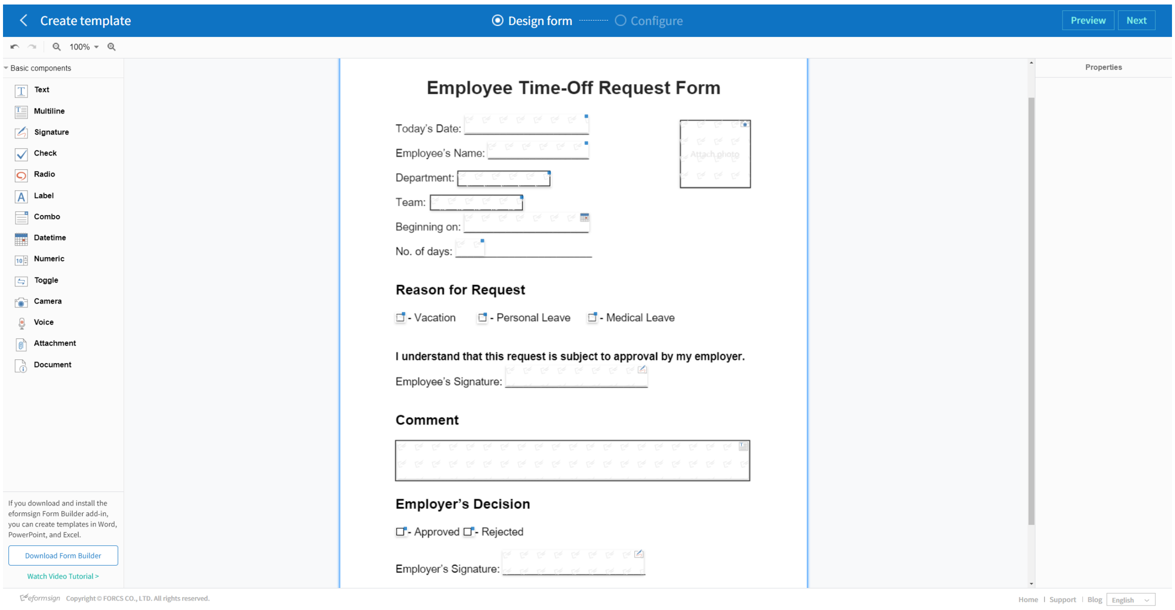
3. **Basic components list:** Provides 14 basic components including Text, Multiline, Signature, Check, and Radio components. Also, new components including custom and shape components are planned to be added.

4. **Properties:** Allows to set the properties of each component after adding components such as Signature, Text, and Check by clicking and locating them to the document display screen.

4.2. Overview of Components

Components are used to create fields in electronic documents that users can enter information. Many different components including Signature, Check, Date, and Text are provided, and each component can be configured in detail by using the **Properties** tab.

[Figure 4.5] Adding a component in Web Form Designer



4.2.1. Component Types

The components provided in eformsign are as follows:

- **Text**: Enters short text (usually 1 to 2 words).

- **Multiline**:Enters long text with multiple lines.

- **Signature**: Enters a signature.

- **Check**:Ticks a check box.

- **Radio:**Selects an item among multiple items (can also be set to select multiple items).
- **Label:** Sets the form ID.
- **Combo:** Displays a drop-down menu that allows you to select an item.
- **Datetime:** Enters a specific date.
- **Numeric:** Enters a number.
- **Toggle:** Switches to another value if two or more values are entered.
- **Camera:** Takes a photo using a camera or selects a photo from an album in devices with a built-in camera (e.g. smartphone, tablet, etc.). Selects an image file in devices without a camera (e.g. desktop PC).
- **Voice:** Records audio in devices with a voice recording function.
- **Attachment:** Attaches a file.
- **Document:** Enters the document number or ID in the document itself.

4.3. Setting Properties for Each Component Type

All components have common and unique properties. When you click the component added, the **Properties** tab where you can set and see detailed properties of each component will be displayed on the right side of the Web form designer screen. Common properties include ID and Tooltip Text, and the meaning of each property is as follows:

- **ID:** Unique key for using an entered value in eformsign.
- **Tooltip Text:** In Windows, the text in the Tooltip Text box of a component is displayed in the form of a speech bubble when hovering the mouse over the component. In mobile, the text is displayed on the quick type bar when clicking on the component.

Note

For the Document component which is for providing information, Tooltip Text is not provided.

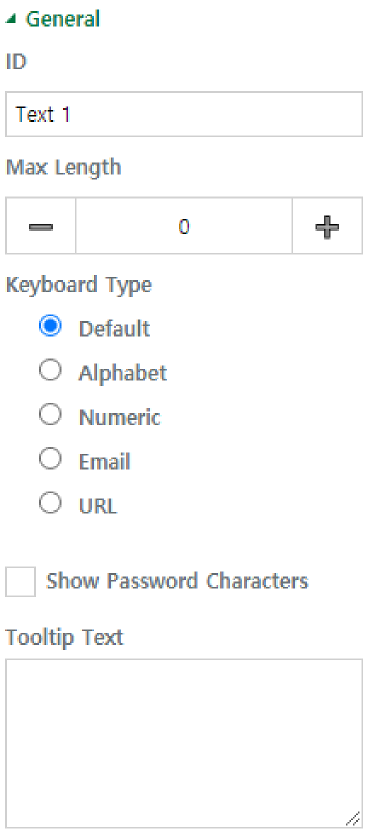
The description of each component is as follows.

4.3.1. Text and Multiline

Both Text and Multiline components are used to create text fields. The Text component is suitable for short text with 1 to 2 words, and the Multiline component is suitable for long text with more than 1 line.

Component Properties

[Figure 4.6] Setting Text and Multiline Component Properties



① ID

Enters the ID of the Text/Multiline component. For example, the ID of the component in which John Doe, Jane Doe, etc. are entered can be named ‘personName’

Note

All components must have an ID. An ID is automatically generated when you create a component, but it is recommended to rename it to something you can easily recognize. For example, you can rename the ID of a component for entering John Doe, Jane Doe, etc. as 'name'. By doing so, it is easier to identify components when deciding whether to display a field to a specific user when you are configuring the Field settings of a template.

---

② Max Length

Sets the maximum length of characters (including space) that can be entered. The default value is set to '0', and in this case, there is no limit for the number of characters.

③ Keyboard Type

Selects the keyboard type to be used when entering text in the component. Keyboard Type can only be used in mobile devices such as smartphones and tablets.

④ Show Password Characters

This option can be set only in the Text component. By checking this option, the password is hidden with the password symbol (●) when entering text. The password is also hidden with the password symbol in PDFs, and can only be seen when downloaded in the CSV format.

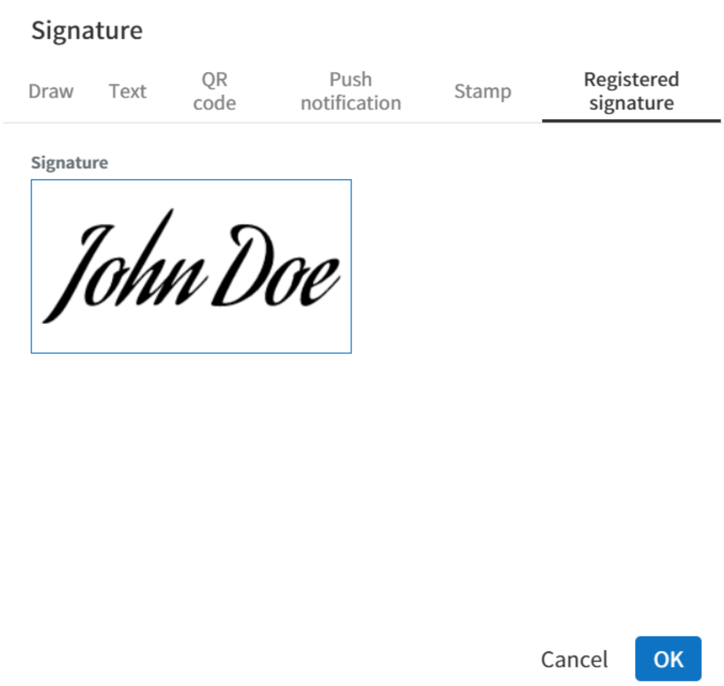
④ Tooltip Text

Displays the description in Tooltip Text when you hover the mouse over a component.

4.3.2. Signature

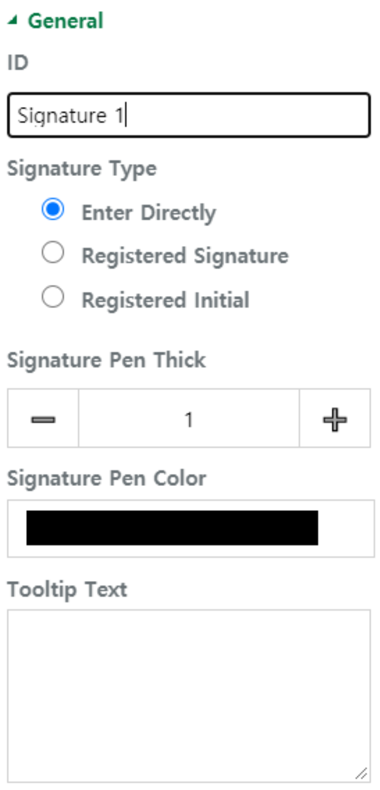
This component is used for signing a signature on a document.

Clicking the signature area displays the **Signature** pop-up which allows you to sign a signature by drawing, entering text, or using a previously registered signature.



Component Properties

[Figure 4.7] Setting Signature Component Properties



① ID

Enters the ID of the signature component. For example, the ID of the component can be 'signerSignature' for contract signers.

② Signature Type

Selects the signature type to be used when signing.

- **Enter Directly:** Clicking the signature area displays the **Signature** pop-up which allows you to sign by selecting one of the multiple signing methods which are **Draw**, **Text**, **Mobile**, **Stamp**, and **Registered signature**.

- **Registered Signature:** If the user has already registered a signature on eformsign, then clicking the signature area inserts the registered signature into the document.

- **Registered Initials:** If the user has already registered an initial on eformsign, then clicking the signature area inserts the registered initial into the document.

Note

If there is a registered signature or initial, then it will be automatically entered in the signature area when a signature area is clicked. However, if there is no registered signature or initial, then a regular **Signature** pop-up will be displayed when a signature area is clicked.

Note

In some cases, you may need to use a seal or stamp on a document rather than your own signature. With eformsign, you can also use a stamp image to stamp the signature on a document. To use a stamp image when submitting a document, click the **Stamp** tab in the **Signature** pop-up, and then select a stamp image and click **OK**.

③ **Signature Pen Thick**

Sets the signature pen thickness.

④ **Signature Pen Color**

Sets the signature pen color.

⑤ **Tooltip Text**

Displays the description in Tooltip Text when you hover the mouse over a component.

4.3.3. Check

The Check component is used to check whether an item is checked or not. This component is similar to the Radio component, but the Check component is used for checking the status of an item (whether it is checked or not) while the Radio component is used for checking which item among multiple items is checked.

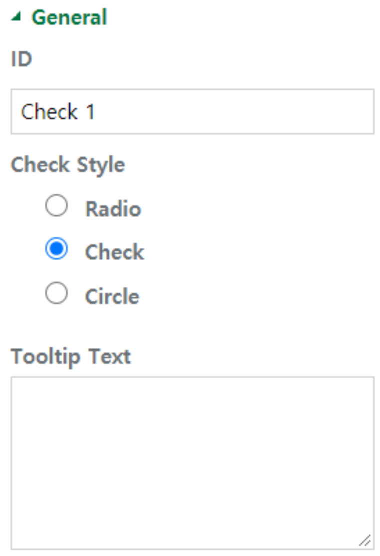
When data is downloaded in the CSV format, the Check component's input value is displayed as follows:

- When the item is checked: true
- When the item is not checked: false

In Word and PowerPoint, the Check component is shown as a rectangular shape. Make sure to enter data inside the rectangular shape.

Component Properties

[Figure 4.8] Setting Check Component Properties



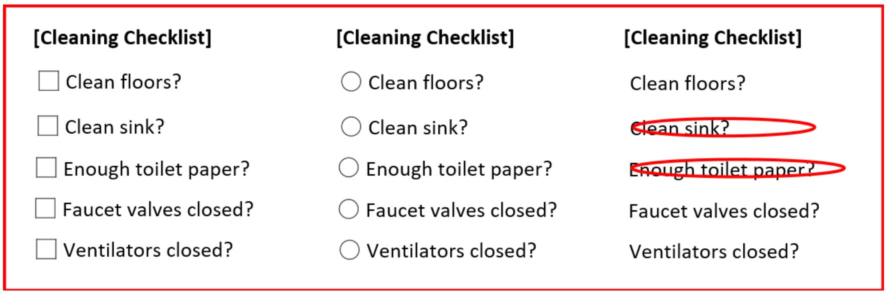
① ID

Each Check component must be given a different ID. If multiple check components are given the same ID, then only the value of the last component is displayed.

② Check Style

You can specify the style of each component in **Component Properties**. The check box is set as the default style, and you can change it to another style (radio button or red circle).

The below example shows how check boxes are displayed according to the selected style.



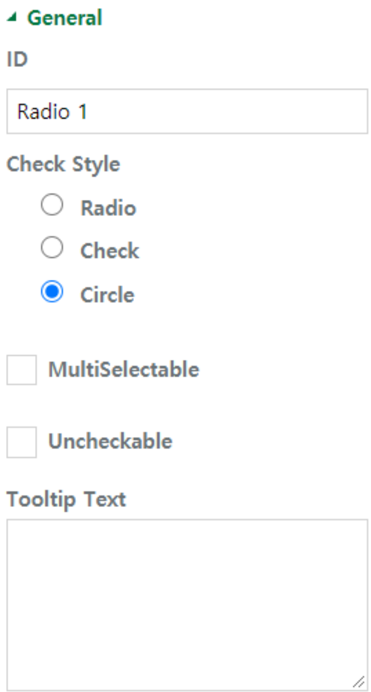
4.3.4. Radio

The Radio component is used for checking which item is selected among multiple items. When data is downloaded in the CSV format, the selected item will be displayed.

In Word and PowerPoint, the Radio component is shown as a rectangular shape. Make sure to enter data inside the rectangular shape.

Component Properties

[Figure 4.9] Setting Radio Component Properties



① ID

In **Component Properties**, make sure that all the selected radio buttons are assigned the same ID.

For example, if there are six choices available in a multiple choice question, assign ‘question1’ as the ID for all of them. In the example shown below, the IDs of all the items are set to the same "question 1".

[Figure 4.10] Example of Setting a Radio Component

② Check Style

You can choose the style of the Radio component in **Component Properties**. The default style is the Circle, and you can change it to another style (checkbox and radio button).

③ **Multiselectable**

Checking the **Multi-selectable** option allows you to select multiple items. If you select more than one item, then when data is saved, each item is separated with a comma (,).

④ **Uncheckable**

Checking the **Uncheckable** option allows you to deselect a selected item by clicking it again.

⑤ **Tooltip Text**

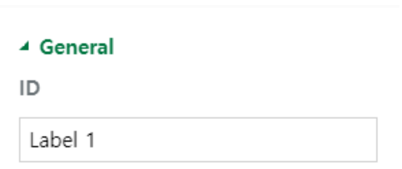
Displays the description in Tooltip Text when you hover the mouse over a component.

4.3.5. Label

This component is used for setting the form ID of a document.

Component Properties

[Figure 4.11] Setting Label Component Properties



① **ID**

The form ID of the document is automatically generated and displayed. It can also be changed.

The form ID defined here can be applied when editing the document.

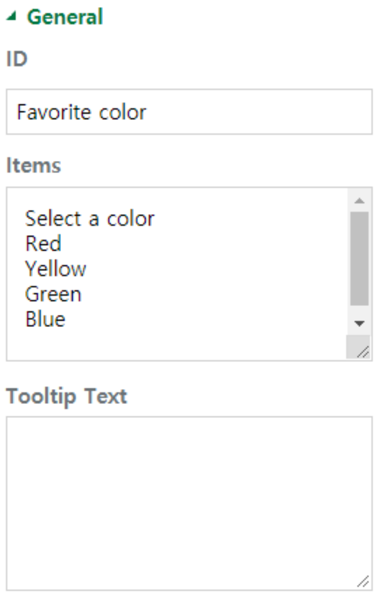
4.3.6. Combo

The Combo component is used when you need to select one of multiple items.

If you click a Combo component, a list of items is displayed as follows:

Component Properties

[Figure 4.12] Setting Combo Component Properties



① **ID**

Enter the ID of the Combo component. For example, the ID of the component for selecting the favorite color can be ‘Favorite color’.

② **Items**

Enter the items you want. You can separate the items by pressing Enter.

Note

If you want to display a message such as ‘Please select a color’ in a combo box in a document for recipients to view, then enter the message at the top of the list of items in the combo box and select it before sending the document.

---

③ **Tooltip Text**

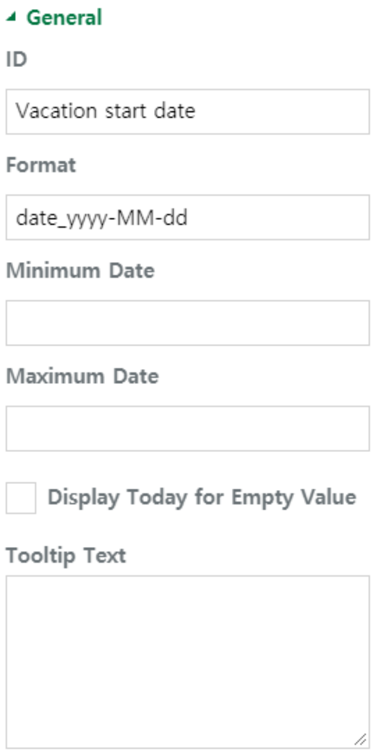
Displays the description in Tooltip Text when you hover the mouse over a component.

4.3.7. Datetime

This component is used for entering a date. Clicking the component displays a date selection window where you can select the date you want.

Component Properties

[Figure 4.13] Setting Datetime Component Properties



① ID

Enters the ID of the Datetime component. For example, the ID of the component for selecting the vacation start date can be named 'Vacation start date'.

② Format

Sets the format in which date will be displayed. The default setting is date_yyyy-MM-dd.

- **yyyy:** Displays the year.
- **MM:** Displays the month. Must be in uppercase.
- **dd:** Displays the day.

For example, if you want to display the date in the format of '15-02-2020', then enter **dd-MM-yyyy** in the Format field.

③ Minimum Date/Maximum Date

Sets the range of dates that can be selected in the component by specifying the minimum and maximum dates.

④ Display Today for Empty Value

Checking this option automatically enters the date (the date in which the document is opened) when the document is opened. This option is checked by default when you add a Datetime component. You can change the date by clicking the component.

⑤ Tooltip Text

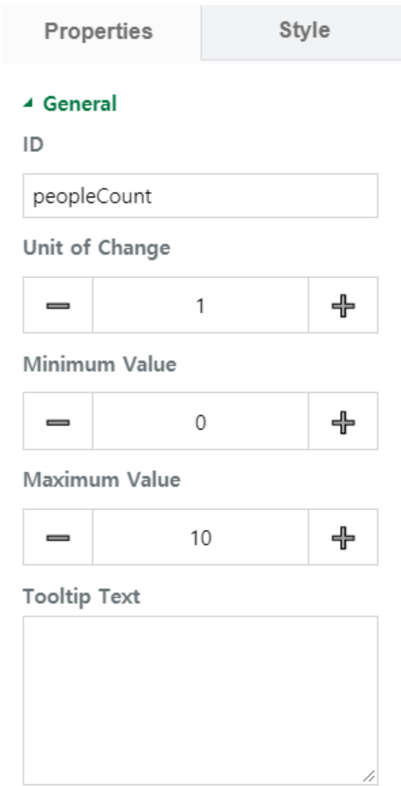
Displays the description in Tooltip Text when you hover the mouse over a component.

4.3.8. Numeric

This component is used for entering a number. Clicking the component displays two arrows on the right, and you can increase or decrease the number by clicking them. In PCs, you can directly enter the desired number into the component by using a keyboard. In smartphones and tablets, you can scroll through the list of numbers and select the one you want.

Component Properties

[Figure 4.14] Setting Numeric Component Properties



① ID

Enters the ID of the Numeric component. For example, the ID of the component for entering the number of people in a reservation can be named 'peopleCount'.

② Unit of Change

Enters the unit of number that will increase/decrease the number whenever the up/down arrow icon is clicked. For example, if the **Unit of Change** is set to 100, then when you click the up arrow icon (▲), the number is increased by 100 such as 200, 300, 400, and so on.

③ **Minimum/Maximum Value**

Sets the range of numbers that can be entered into the component by specifying the minimum and maximum values. For example, for the date of birth, setting the Minimum Value to 1900, Maximum Value to the current year, and the Unit of Change to 1. Also, if you enter a value that is lower/higher than the Minimum/Maximum Value, then the Minimum/Maximum Value will be automatically entered. For example, if the Maximum Value is set to 100 and you enter 101, then the number will automatically change to 100.

③ **Tooltip Text**

Displays the description in the Tooltip Text when you hover the mouse over a component.

4.3.9. Toggle

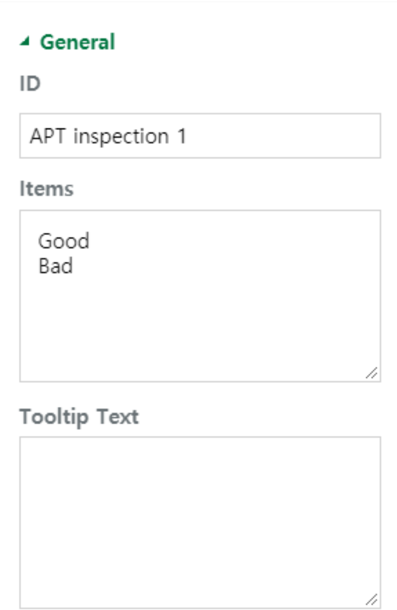
This component is used for indicating a specific status such as ON/OFF. If you use this component, then the input value is switched according to a defined order whenever the component is clicked.

You can change the status to Good or Bad by clicking the components as follows:

New Apartment Checklist	Status
Condition of windows and doors	Good
Condition of wallpaper	Bad
Condition of bathroom tiles	Bad
Condition of carpets	Good

Component Properties

[Figure 4.15] Toggle Component Properties



① **ID**

Enters the ID of the Toggle component. For example, the ID of the component for the first inspection item can be named ‘APT inspection 1’.

② **Items**

Enters the list of items that will be toggled whenever the Toggle component is clicked. You can separate the items by pressing Enter.

③ **Tooltip Text**

Displays the description in Tooltip Text when you hover the mouse over a component.

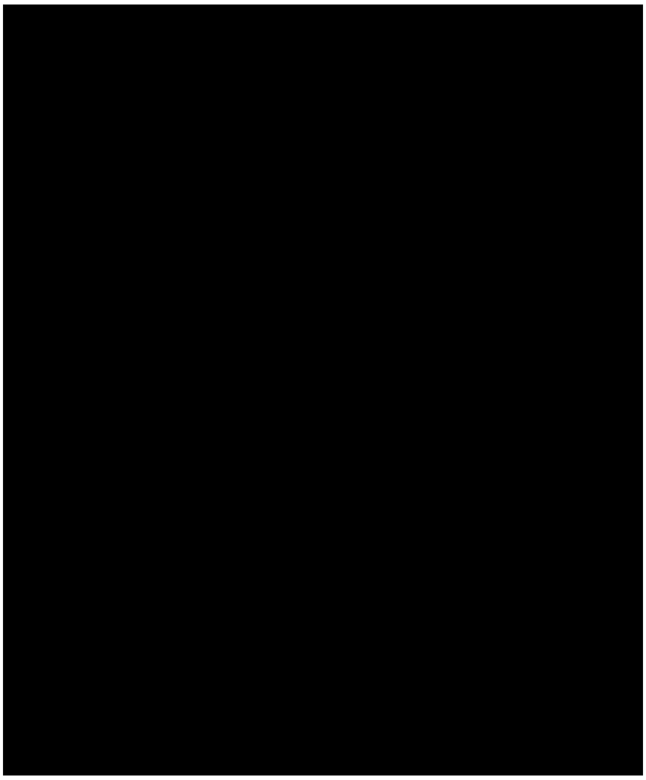
4.3.10. Camera

This component is for uploading photos (taken with a device with a built-in camera such as smartphones and tablets) to a document. In PCs without a camera, clicking the component displays a window for selecting the desired image file.

If the size of the selected image is larger than the size of the component, then it is resized to fit the component.

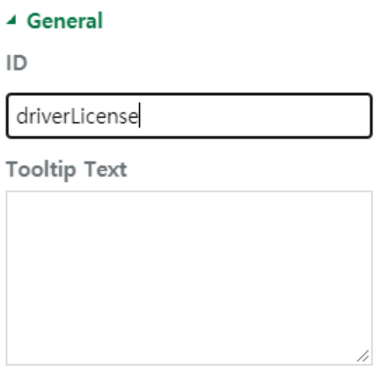
Note

For the device with a built-in camera, camera feature will be executed, and for the devices with no camera, a window for selecting an image file will be displayed.



Component Properties

[Figure 4.16] Setting Camera Component Properties



① ID

Enters the ID of the Camera component. For example, the ID of the component that takes the photo of a driver's license can be 'driverLicense'.

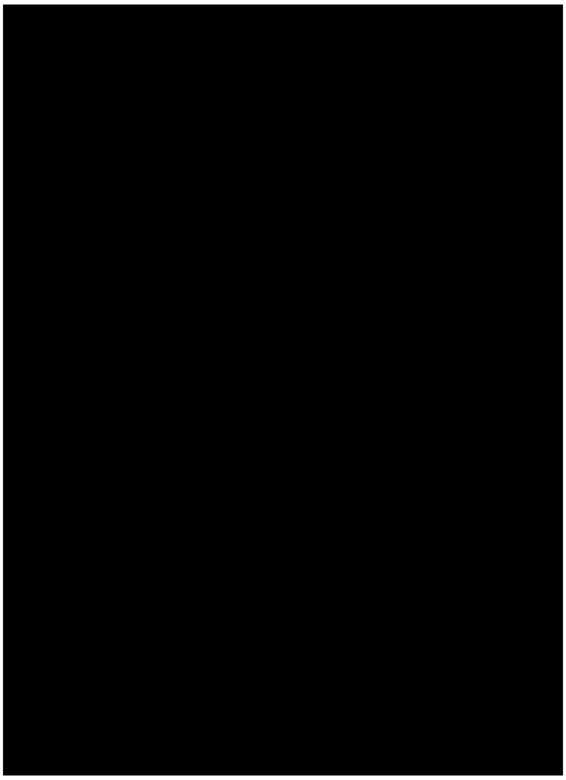
② Tooltip Text

Displays the description in the Tooltip Text when you hover the mouse over a component.

4.3.11. Voice

This component is used for storing recorded voice. You can set the maximum recording time and you can also configure the settings to allow users to only listen to the voice recording.

When you add a Voice component, you can record voice or play a voice recording as follows:



Note

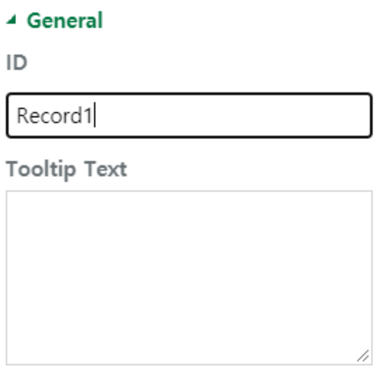
If the recording time limit is set to 1 or more, recording is completed automatically at the time set (unit: seconds).

In the case of ActiveX viewer, the recording playback UI is supported from Windows 8 and later.

In PCs, the Voice component works only when a voice recording device is connected to a PC.

Component Properties

[Figure 4.17] Setting Voice Component Properties



① **ID**

Enter the ID of the voice component. For example, the ID of the component that plays voice recordings can be named 'Record1'.

② **Tooltip Text**

Displays the description in Tooltip Text when you hover the mouse over a component.

4.3.12. Attachment

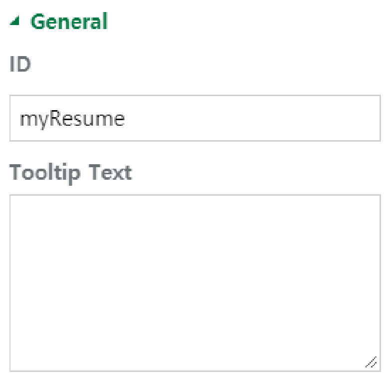
This component is used for attaching a file to a document. When attaching a file to a document by using the Attachment component, the file will be attached at the very end of the document as a new page.

The types and sizes of files that can be attached are as follows:

- File type: PDF, JPG, PNG, and GIF
- File size: Up to 5MB

Component Properties

[Figure 4.18] Setting Attachment Component Properties



① **ID**

Enters the ID of the Attachment component. For example, the ID of the component for attaching a resume can be named ‘myResume’.

② **Tooltip Text**

Displays the description in Tooltip Text when you hover the mouse over a component.

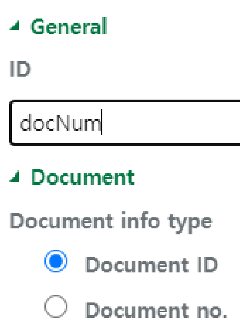
4.3.13. Document

This component is used for entering document-related information in the document itself. You can select either one of the document ID or document number.

The document ID is a unique document ID assigned in the system, so it does not require separate settings. For settings related to document number, upload a template and then go to **Template settings > General**.

Component Properties

[Figure 4.19] Setting Document Component Properties



① **ID**

Enter the ID of the Document component. For example, the component ID can be ‘docNum’ for document number.

② **Document info type**

Select the type of information that will be used.

- **Document ID:** A unique ID containing 32 digits of alphanumeric characters assigned to all documents in the system. E.g. 0077af27a98846c8872f5333920679b7

- **Document no.:** The document number set in **Template Settings > General.** For information on how to set a document number, please refer to “5.2.3. General > Generating and Viewing a Document Number”.

4.4. Configuring Template Settings

After uploading a file and adding components with Web Form Designer, you can configure additional settings for documents that will be created from the template such as the document name, document number, and workflow.

In the **Design form** screen, click the **Next** button to go to the **Configure** screen. In the **Configure** screen, you can configure the five settings shown below.

- **General:** Sets the template name, abbreviation, document name, document number, etc.

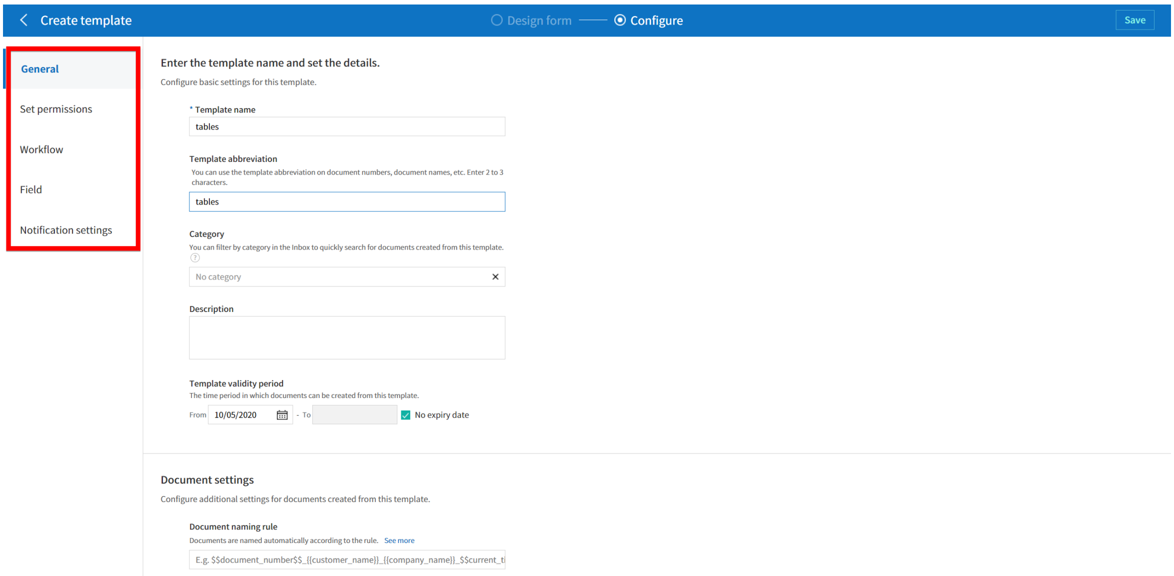
- **Set permissions:** Sets the permissions for who can create documents created from the template and who can open, void, or permanently remove documents created from the template.

- **Workflow:** Sets the steps of the document workflow from **Start** to **Complete**.

- **Field:** Sets the field default values, auto-filled values, etc.

- **Set notifications:** Sets the notification settings for documents created from the template.

[Figure 4.20] The 5 Configuration Tabs in Template Settings



After configuring all settings, click the **Save** button to save the settings.

Note

For a detailed explanation of templates, please refer to Chapter 5. "Chapter 5. Templates - Web Form Designer"

Chapter 5. Templates - Web Form Designer

5.1. About Templates

Templates are **electronic documents** used for the eformsign service. They are e-documents converted from existing paper forms such as applications, contracts, and agreements. You can create and upload templates in the eformsign service with its Web form designer or Form builder. For more information about Form builder, refer to "Chapter 6. Template - Form Builder".

5.1.1. Template Overview

To create and send electronic documents via eformsign, you have to first create a template, which can later be converted into an e-document.

How to create a template with Web Form Designer

You can easily create a template by uploading a file online.

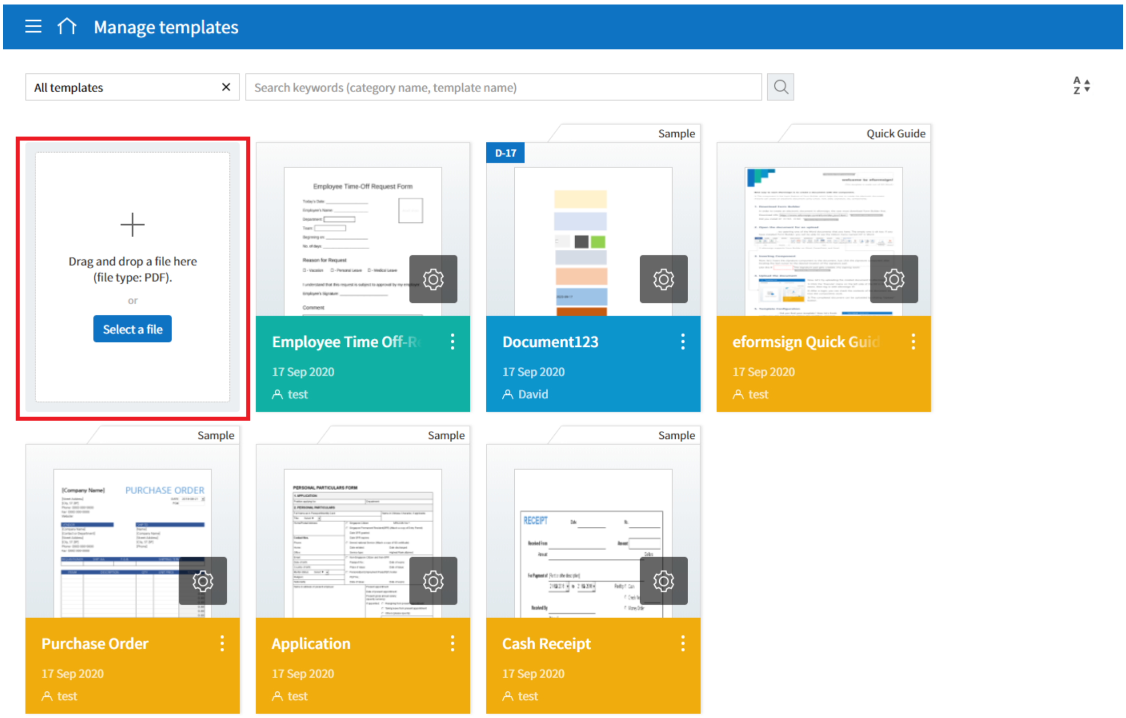
Note

For more information about Web form designer, please refer to "Chapter 4. Introduction to Web Form Designer".

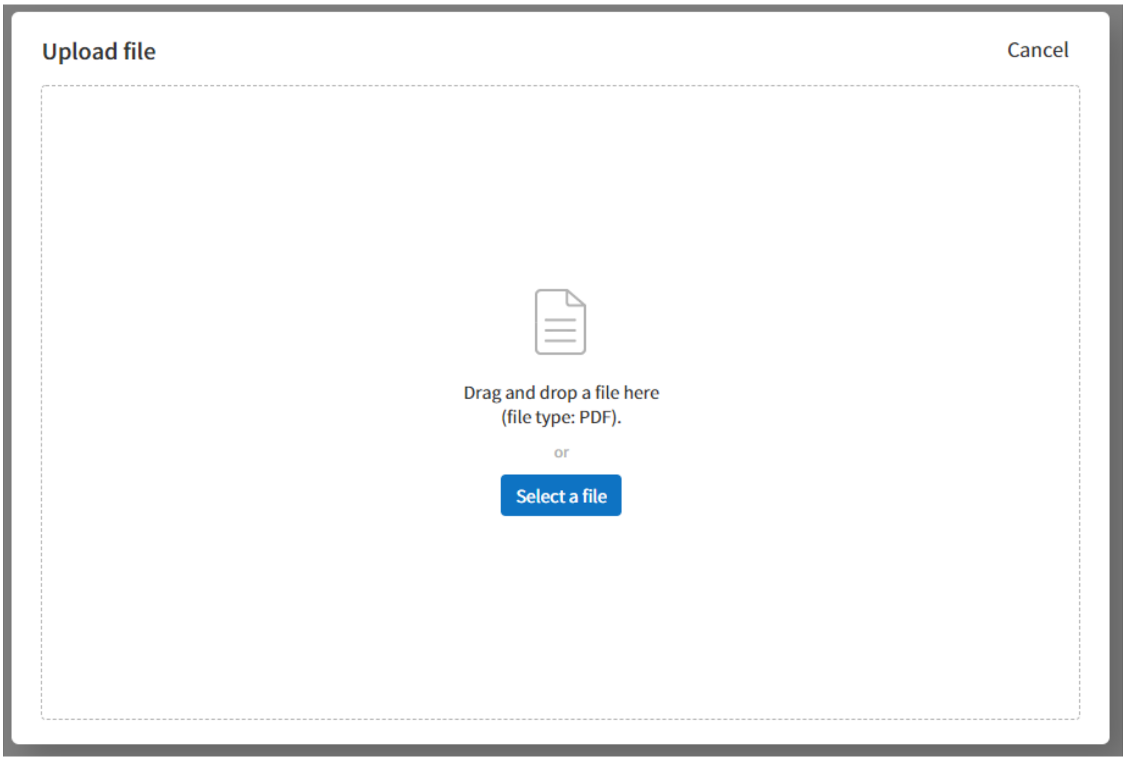
Convert the file you want into a PDF file and upload it to eformsign Web form designer.

1. Drag and drop the PDF file that you want to create as a template, or click the **Select a file** button to select the file from your computer and upload it.

[Figure 5.1] Manage Templates > Uploading a File (1)

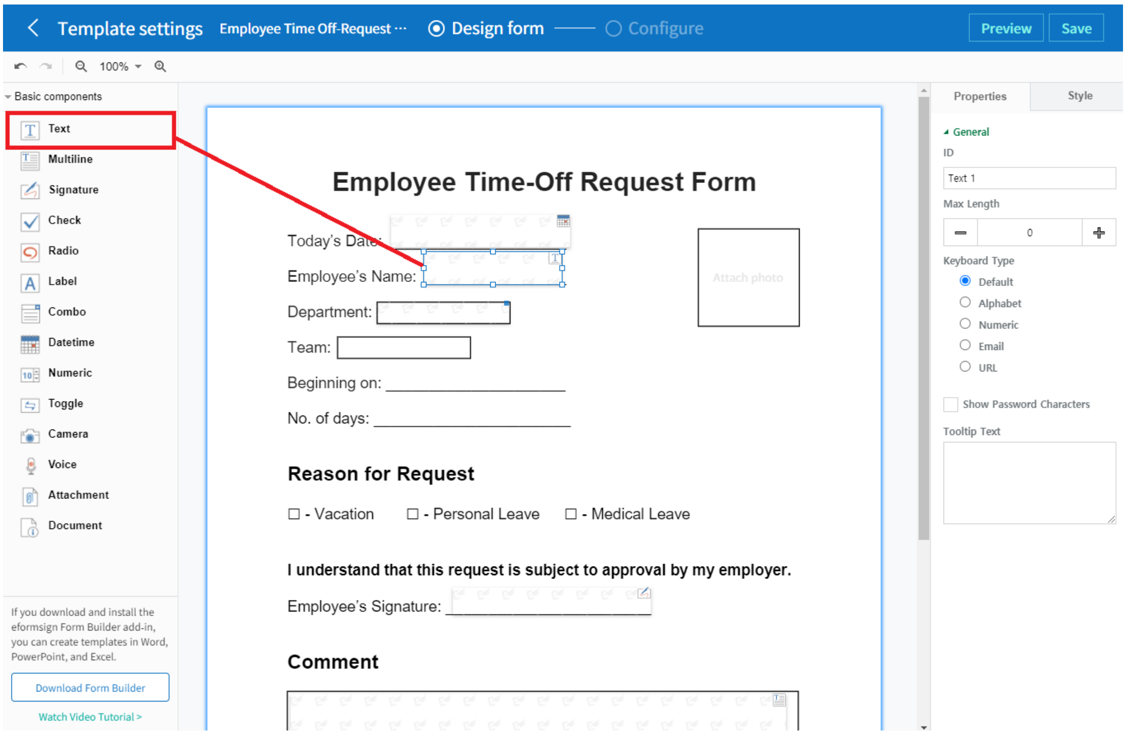


[Figure 5.2] Manage Templates > Uploading a File (2)



2. Select a component that you want to add and drag it onto the uploaded file.

[Figure 5.3] Dragging a Component



3. Adjust the size and position of the component.

4. Set the details in the **Properties** tab after clicking the component.

5. View the document by clicking the **Preview** button.

6. Click the **Next** button after you finish designing the form. The **Create template** page will be displayed.

Note

If you open an existing template, the Save button and Template settings page will be displayed instead of the Next button and the Create template page, respectively.

Template settings

You can set the details for the template.

- **General**

  Set the template name, abbreviation, document name, document number, etc.

- **Set permissions**

  Grant members or groups the permission to use the template and to create documents from it and manage them.

- **Workflow**

  Sets the workflow for the document from its creation to completion.

- **Field**

  Sets the default values and auto-filled values for fields.

- **Notification settings**

  Sets the notification channels, recipients, and the content of the notification messages for notifying requests or changes in the status of documents created from the template.

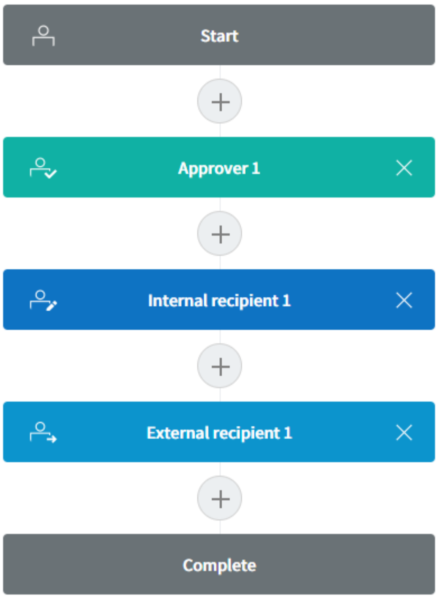
5.1.2. Workflow Overview

A workflow is a document process from its creation to completion.

The workflow for each template can be set by template managers by going to **Template settings** > **Workflow**.

By default, all workflows have **Start** and **Complete** steps. You can add as many **Approver**, **Internal recipient**, **and External recipient** steps as you want for each workflow.

[Figure 5.4] Workflow Steps



- **Approver**

  Sending an e-document approval request to a member in your company.

- **Internal recipient**

Sending an e-document to a member in your company to review and sign.

- **External recipient**

  Sending an e-document to a user outside of your company to review and sign.

Important

What's the difference between an approval and internal recipient?

Both an approver and internal recipient can approve or reject a requested document, but only the internal recipient can designate the next recipient(s) in line in the workflow to process the document.

In other words, only internal recipients can designate downstream recipients whether it be external recipients, internal recipients, or approvers.

For example, if you want a recipient in a workflow to have the ability to choose the recipients that come after her/him in the workflow, then you specify her/him as an internal recipient. In this case, when the internal recipient receives a document, then she/he can choose the recipient(s) that come after her/him in the workflow.

5.2. Template Settings

You can set detailed configurations for each template you create.

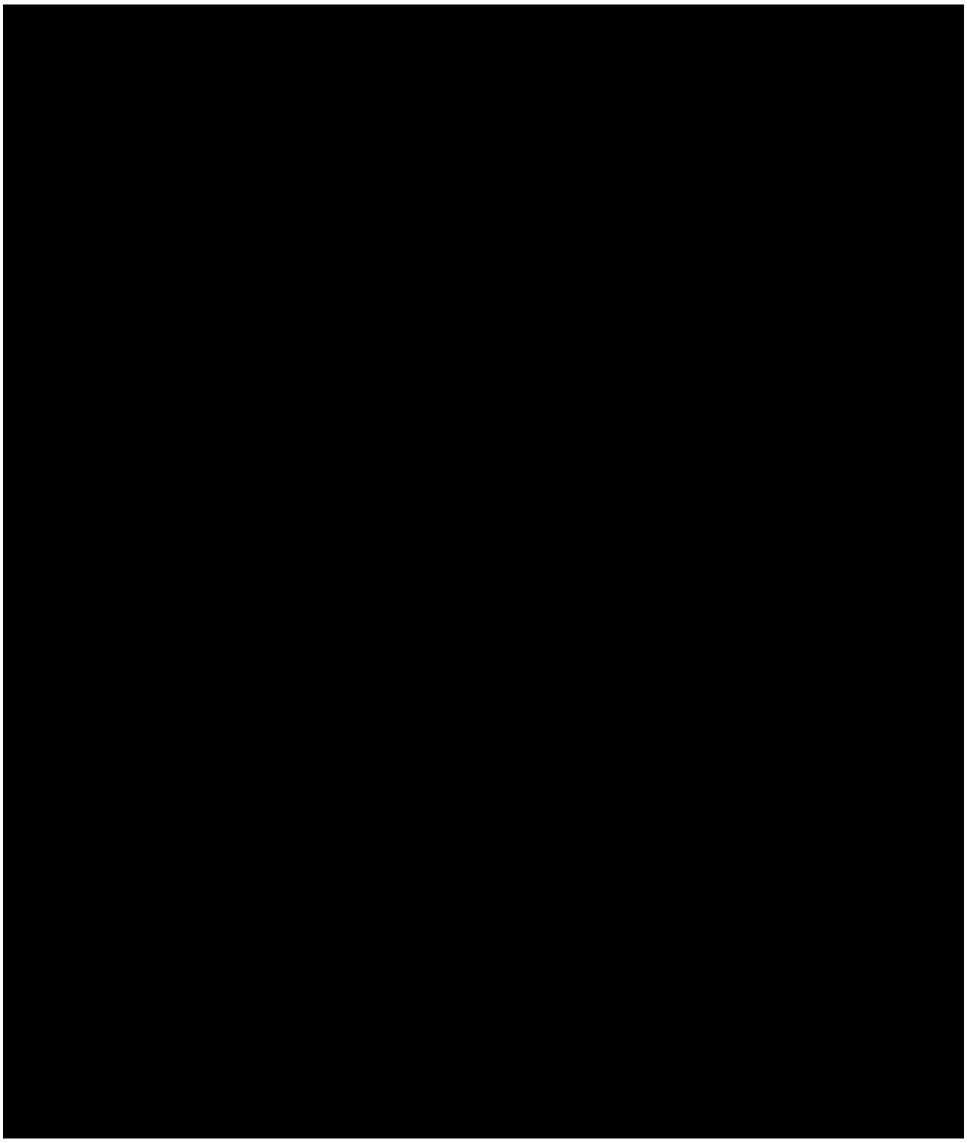
Note

Only the **company administrator** or **template manager** can perform this action.

This action can be performed in web browsers of computers and mobile devices, and also in mobile apps.

5.2.1. General

[Figure 5.5] Template Settings > General



Configure basic settings for the template

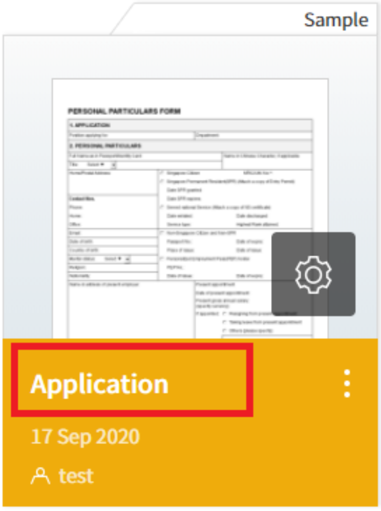
Set basic information about the template including the template name, category, validity period, etc.

① Template name

The template name will be displayed in the **Manage templates** and **New document** pages.

The recommended length of the template name is about 11 characters, including spaces. If the name is longer than 11 characters, you can see the full name by hovering the mouse over the name

[Figure 5.6] Template Name

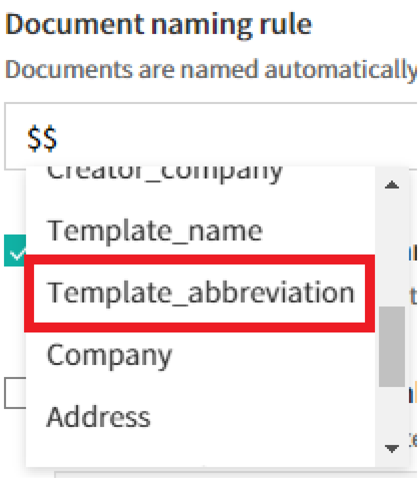


② Template abbreviation

A short name that briefly descries the template. It is recommended to use two or three words.

Template abbreviation can be used in the document number, document name, mail template, etc. by entering **$$**.

[Figure 5.7] Template Abbreviation



③ Category

Category is used to sort templates by type. With the category name, you can filter templates in the **Manage templates** menu, and can filter documents in the **Documents** menus and the **Manage documents** menu. You can choose from an existing category or create a new category by entering a new name.

You can set multi-level categories with a separator (**/**). For example, if you set a category as **HR Team/Vacation**, the Vacation category in the HR category is created.

④ Description

Enter additional comments about the template. This description is displayed under the template name in the New document page.

⑤ Template validity period

Sets the time period in which documents can be created from this template. By default, the start date is set to the uploaded date and you can change the date.

When **No expiry date** is checked, documents can be created without a time limit. **No expiry date** is unchecked and set the date, the document can only be created until the set date.

Document settings

Configure additional settings including document naming rules for documents created from the template.

⑥ Document naming rule

Sets the document name when creating the document from the template. If a document naming rule is not set, the template name will be the document name.

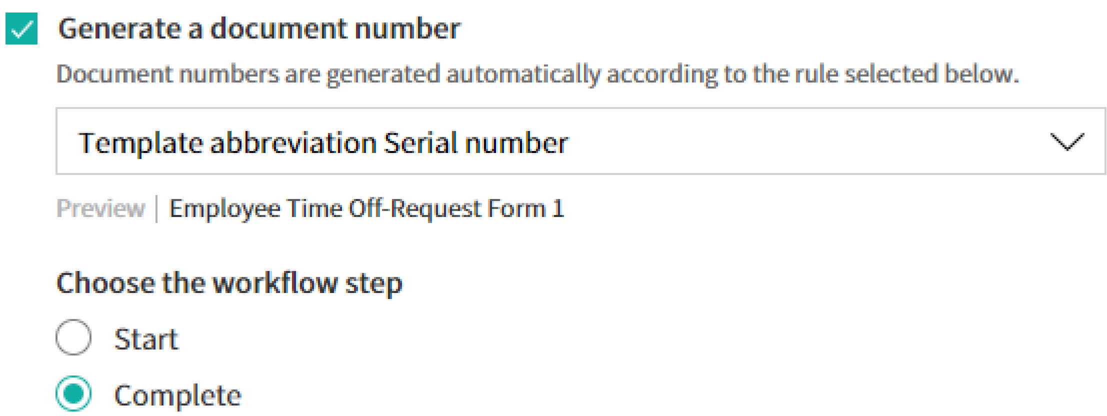
You can add reserved words in the document name using **$$** and **{{**.

⑦ Allow document name change

If **Allow document name change** is checked, the document creator can change the document name.

⑧ Generate a document number

If **Generate a document number** is checked, documents are automatically numbered. You can select the document number format and the workflow step in which document numbers are generated.



⑨ Skip pop-up window when sending documents

Use it when many documents are created and submitted. If this option is unchecked, a pop-up window for entering a message will appear when sending a document. When **Skip pop-up window when**

sending documents is checked, the pop-up window does not appear and the page proceeds to the next step.

5.2.2. General > Setting the Document Naming Rule

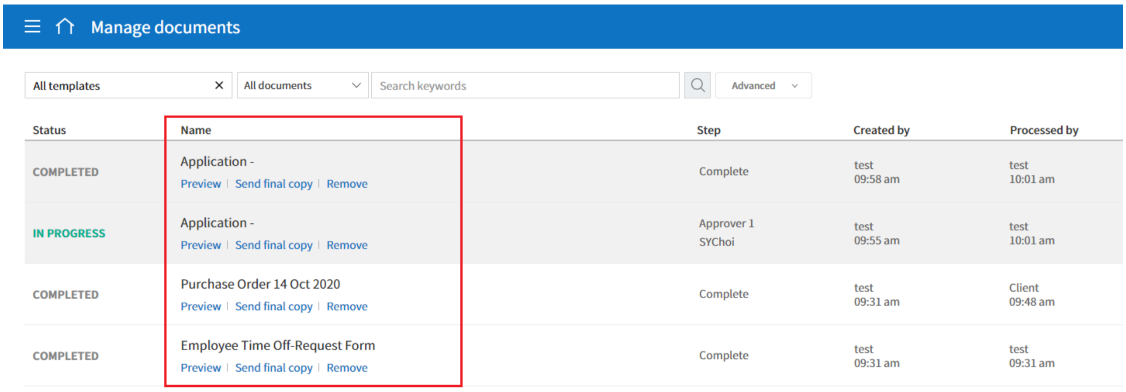
In **Template settings**, you can set the document naming rule for documents created from a template.

You can make a piece of information entered into a document or document-related information to be automatically entered into the document name. If you set the document naming rule, then the document name is automatically entered based on the information of the document. As well, you can see this name in all document pages (In progress, Action required and Completed) and the **Manage document** page.

Note

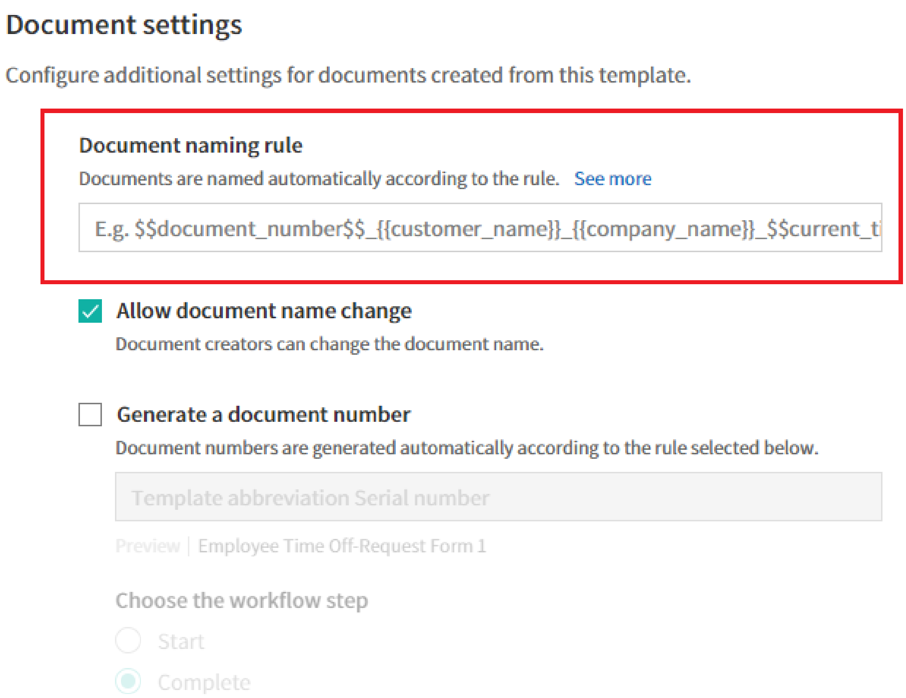
Only the **Company administrator** or **Template managers** can perform this action.

[Figure 5.8] Manage Documents > Documents List



How to set the document naming rule

[Figure 5.9] Template Settings > Setting the Document Naming Rule



1. In the sidebar menu, click the **Manage templates** menu.

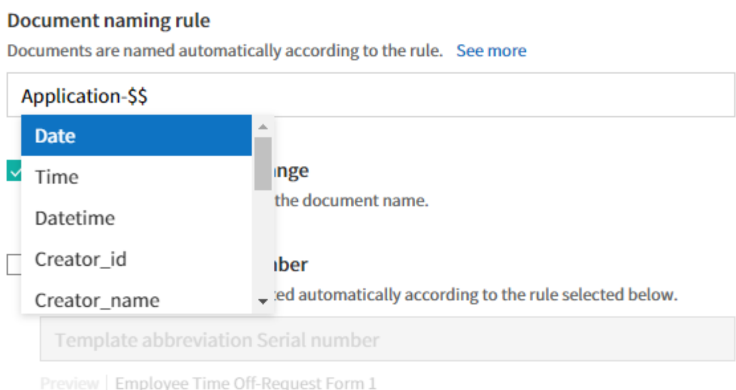
2. Click on the settings icon () of the desired template to go to the **Template settings** page.

3. Enter the desired naming rule in the **Document naming rule** field in the **General** tab.

4. Click the **Save** button on the top right corner to save the changes.

How to use reserved words

[Figure 5.10] Setting Document Naming Rules Using Reserved Words



{{

This symbol adds a piece of information in the document into the document name.

Enter **{{** in the Document naming rule field to display the list of Component IDs and then select the desired component ID. The information in that particular component will be added to the document name.

$$

This symbol adds document-related information into the document name.

Enter **$$** in the Document naming rule field to display the drop-down menu and then select the desired information.

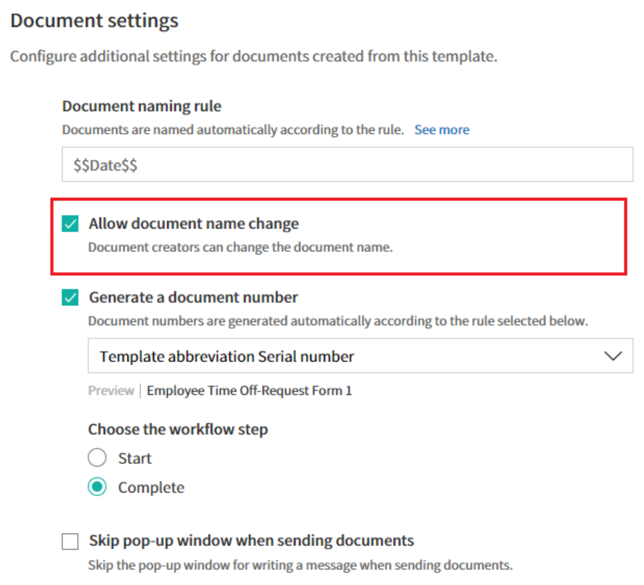
Information types	Description
Current_date	The date in which the document is created (e.g. Feb 20, 2020)
Current_time	The time in which the document is created (e.g. 02:59 pm)
Current_datetime	The date and time in which the document is created (e.g. Feb 20, 2020, 02:59 pm)
Creator_ID	The ID of the member who created the document
Creator_name	The name of the member who created the document
Creator_dept	The department of the member who created the document
Creator_company Name	The name of the company in which the member who created the document belongs to
Template_name	The template name entered in Template settings > General
Template_abbreviation	The template abbreviation entered in Template settings > General
Company	The company name entered in Manage company > Company profile
Company_address	The address entered in Manage company > Company profile
Company_contact_no	The contact information entered in Manage company > Company profile
Company_registration_no	The business registration number entered in Manage company > Company profile
Company_homepage	The homepage URL entered in Manage company > Company profile

Tip

Check the status of the **Allow document name change** field.

Even if the document naming rule is set, if the **Allow document name change** option is checked, the document creator can arbitrarily change the document name. If you do not want the document name to be changed, then make sure to uncheck the **Allow document name change** option.

[Figure 5.11] Checking the Allow Document Name Change Option



5.2.3. General > Generating and Viewing a Document Number

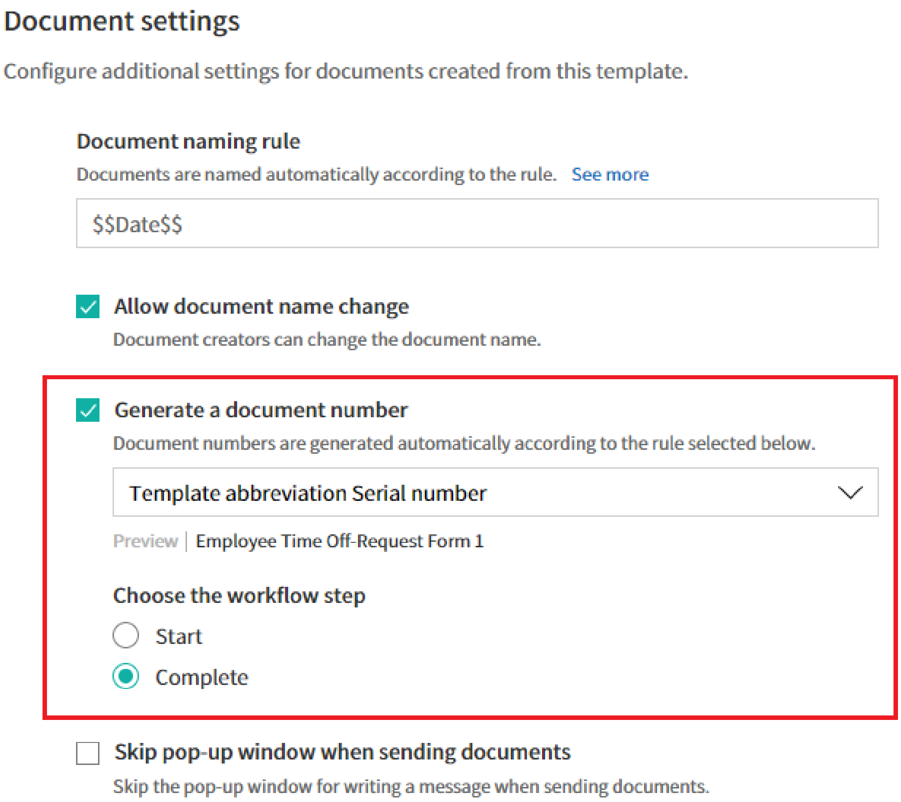
You can set a document number for documents created in eformsign. You can set it so that a document number is generated automatically for each template, and can select one of four document numbering formats. The document number can be generated in the document using the document component. You can also see a separate column in the document list and search documents by the document number.

Generating a document number

Note

Only the **Company administrator** or **Template managers** can perform this action.

[Figure 5.12] Setting a Document Number



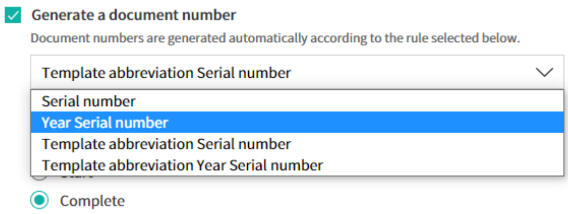
1. In the sidebar menu, click the **Manage templates** menu.

2. Click on the settings icon ( ) of the desired template to go to the **Template settings** page.

3. Tick the **Generate a document number** checkbox in the **General** page.

- **Selecting a document numbering rule**

[Figure 5.13] Selecting a Document Numbering Rule



Serial number

Generated in the format of the document creation order

E.g. 1, 2, 3...

Year_serial number

Generated in the format of the document creation year + document creation order

E.g. 2020_1, 2020_2...

Template_serial number

Generated in the format of the template abbreviation + document creation order

E.g. Application 1, Application 2...

Template_year_serial number

Generated in the format of the template abbreviation + document creation year + document creation order

E.g. Application 2020_1, Application 2020_2...

- **Choosing when to number a document**

Start

A number is generated when a document is created.

Complete

A number is generated when a document has been completed after going through all the steps in the workflow.

4. Click the **Save** button at the top right corner of the page to apply your changes.

Viewing a document number

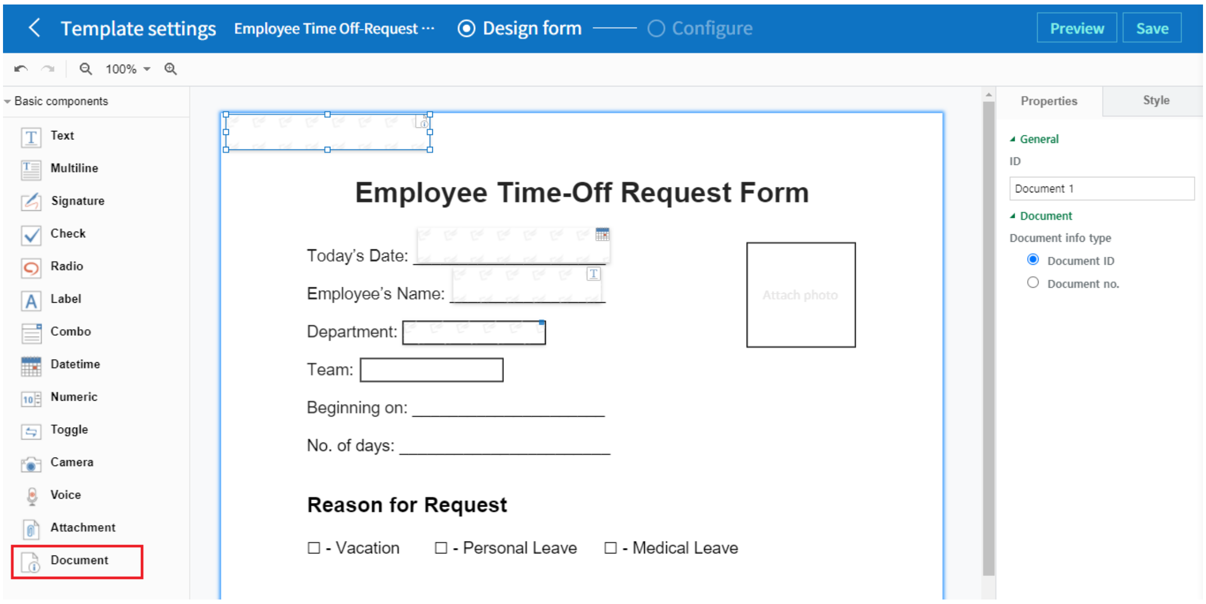
A document number can be viewed directly on a document using the document component and can also be viewed in the document list.

- **Viewing a document number directly on a document**

  You can generate a document number directly on a document by using the document component.

  1. Upload a PDF file on Web form designer.

  2. Add the document component in the location where the document number will be displayed.



3. Click the **Next** button to go to the **Template settings.**

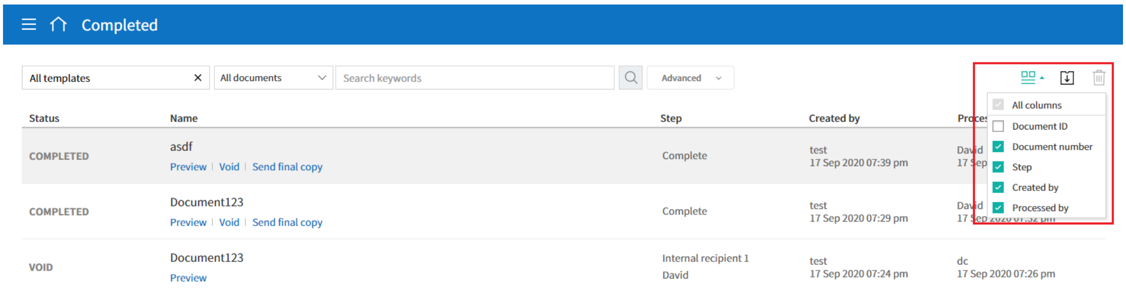
4. In **Template settings > General,** tick the **Generate a document number** checkbox.

5. Select a document numbering rule.

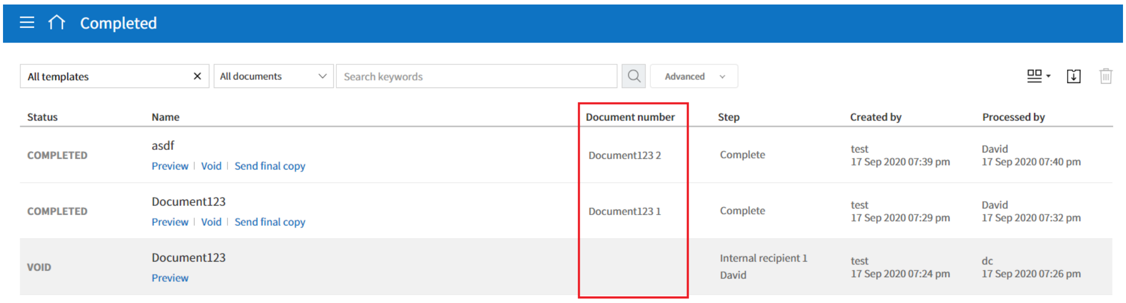
6. Click the **Save** button to save the settings.

- **Viewing a document number in the Completed and Manage documents pages**

[Figure 5.14] Completed - Document List



[Figure 5.15] Completed - Document List - Document Number

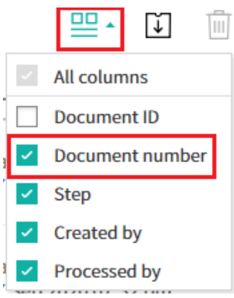


A document number can be viewed in the Documents menus (In progress, Action required, and Completed), and the Manage documents menu (requires document management permission).

1. In the sidebar, click the **Completed** or **Manage documents** menu.

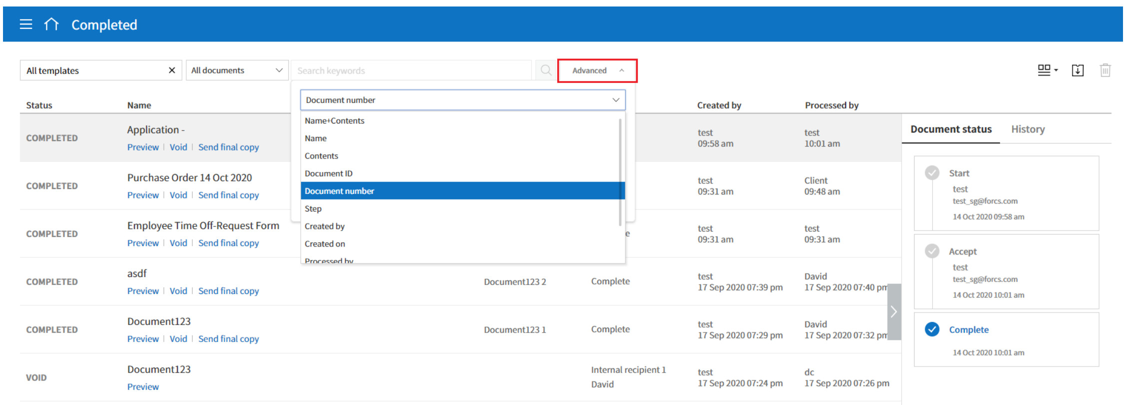
2. Click the column settings icon at the top right corner of the page.

3. Check **Document number** in the column list.



4. Check that **the document number** column is added.

- **Searching for a document using a document number**



You can search a document by its document number via advanced search.

1. Go to the **Completed** or **Manage documents** page.

2. Click the **Advanced** button at the top right corner of the page.

3. Select **Document number** among the search conditions.

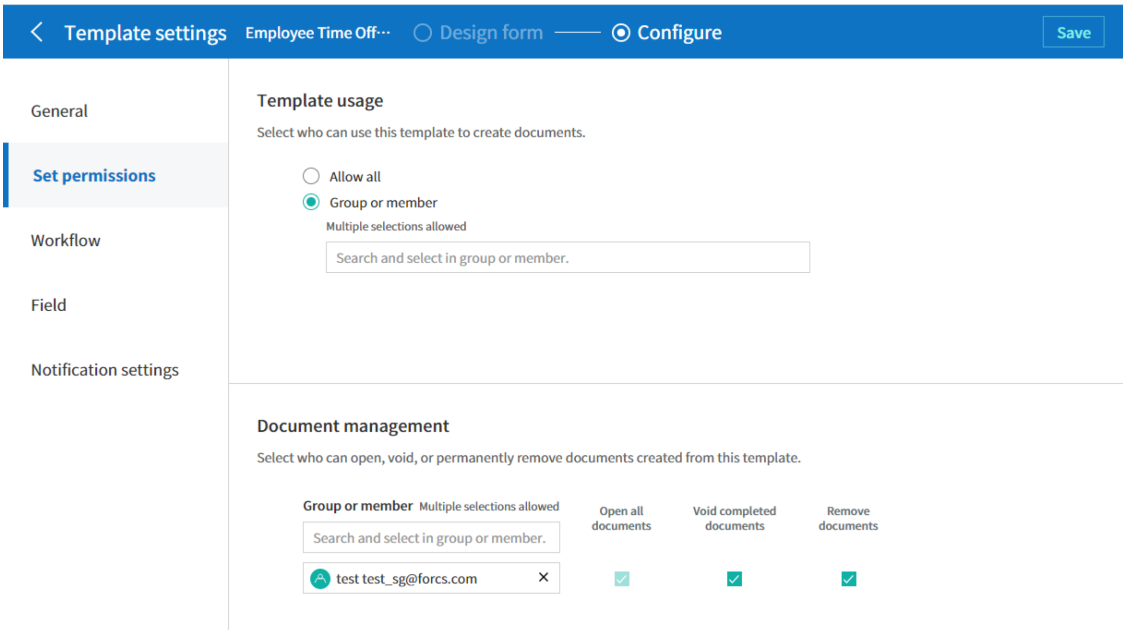
4. Type in the word or number to be searched.

5. View the search results.

5.2.4. Set Permissions

You can set the permissions for template usage and document management.

[Figure 5.16] Template Settings > Set Permissions



Template usage

This permission is needed to create documents from the template, and you can select **Allow all** or **Group or member** to allow all the members or some members in the company to create documents from the template.

Document management

You can select groups or members to open documents created from the template, void completed documents, or remove documents permanently. You can grant permission for all or some of the three options described below.

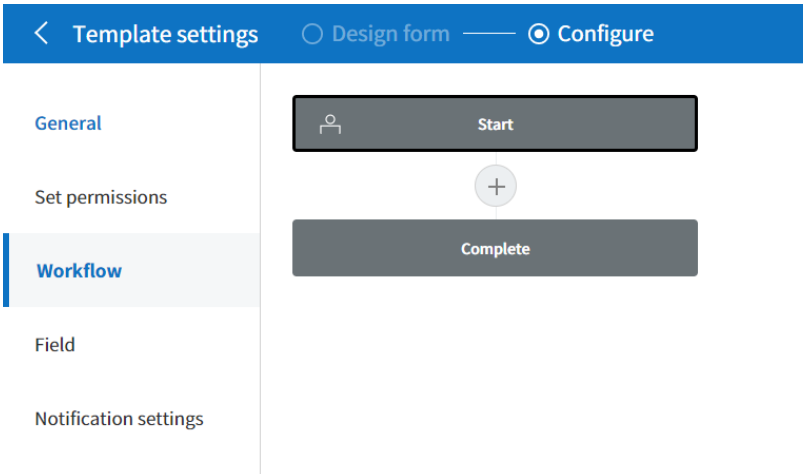
- **Open all documents** (default): Default permission granted to a document manager and gives the permission to open all documents to authorized groups or members.

- **Void completed documents** (optional): Permission for voiding completed documents when requested by the document creator.
- **Remove documents** (optional): Permission to permanently remove documents from the system.

5.2.5. Workflow Settings

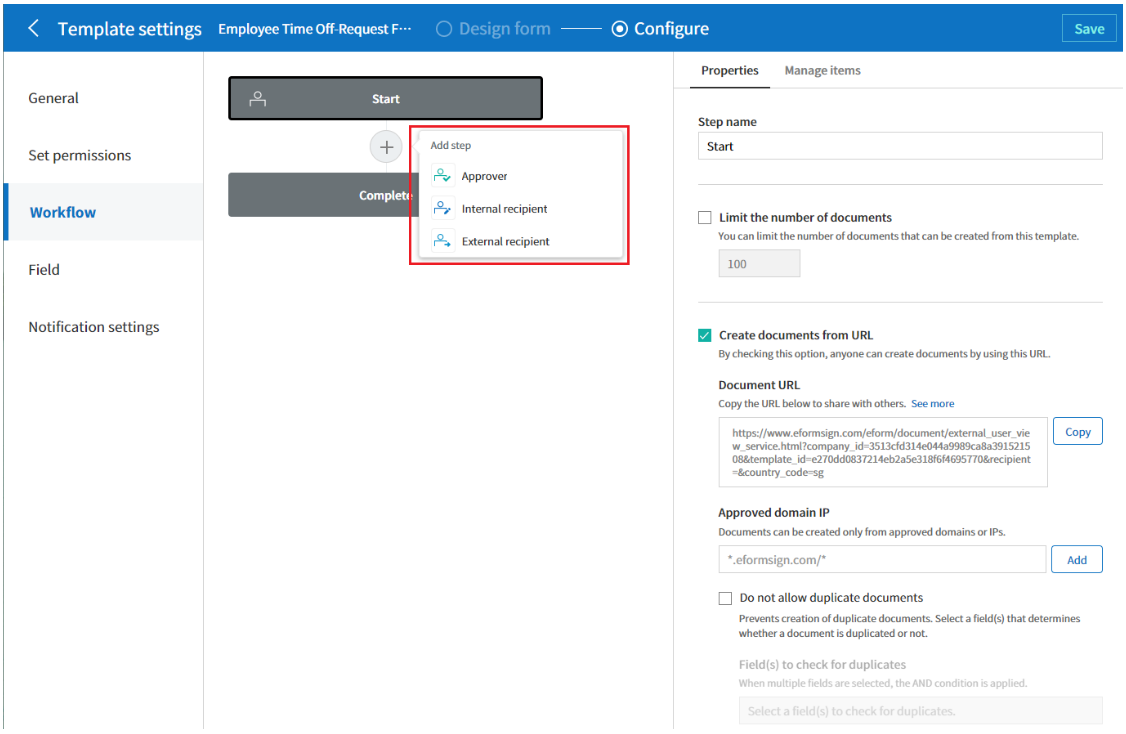
You can create or modify the workflow of the template by clicking the **Workflow** tab in the **Template settings** page.

[Figure 5.17] Template Settings > Workflow



Adding steps to the workflow

1. Go to the **Workflow** configuration page by clicking the **Workflow** tab.
2. Click the add button ( ) which is in between the **Start** and **Complete** steps.
3. Select the type of recipient you want to add.

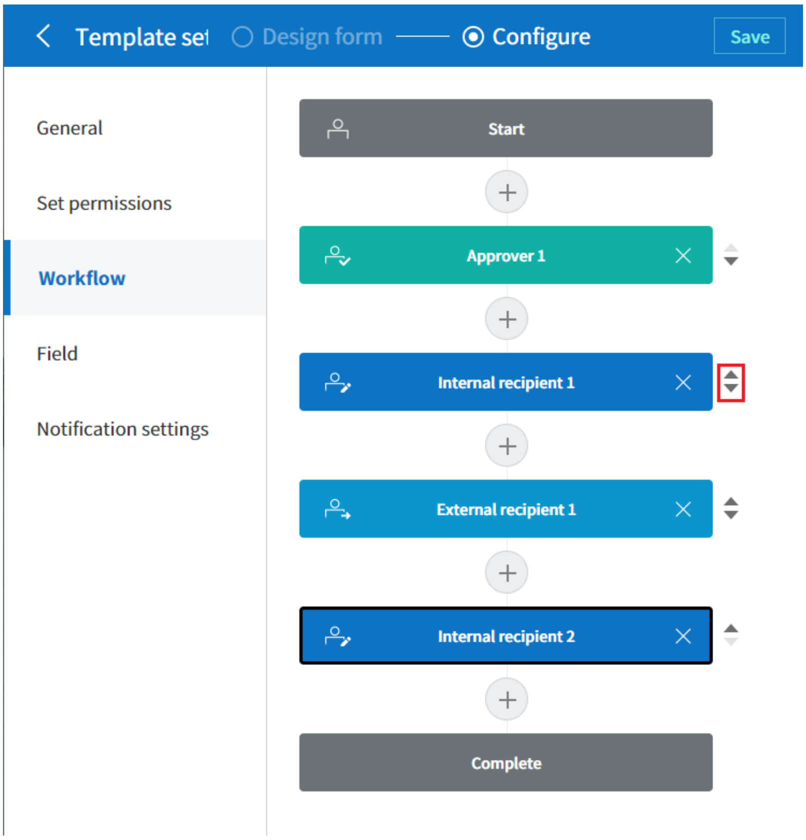


4. When selected, a step is added to the workflow.

Tip

You can add as many steps as you want. You can adjust the order of steps by clicking the arrow next to a workflow step.

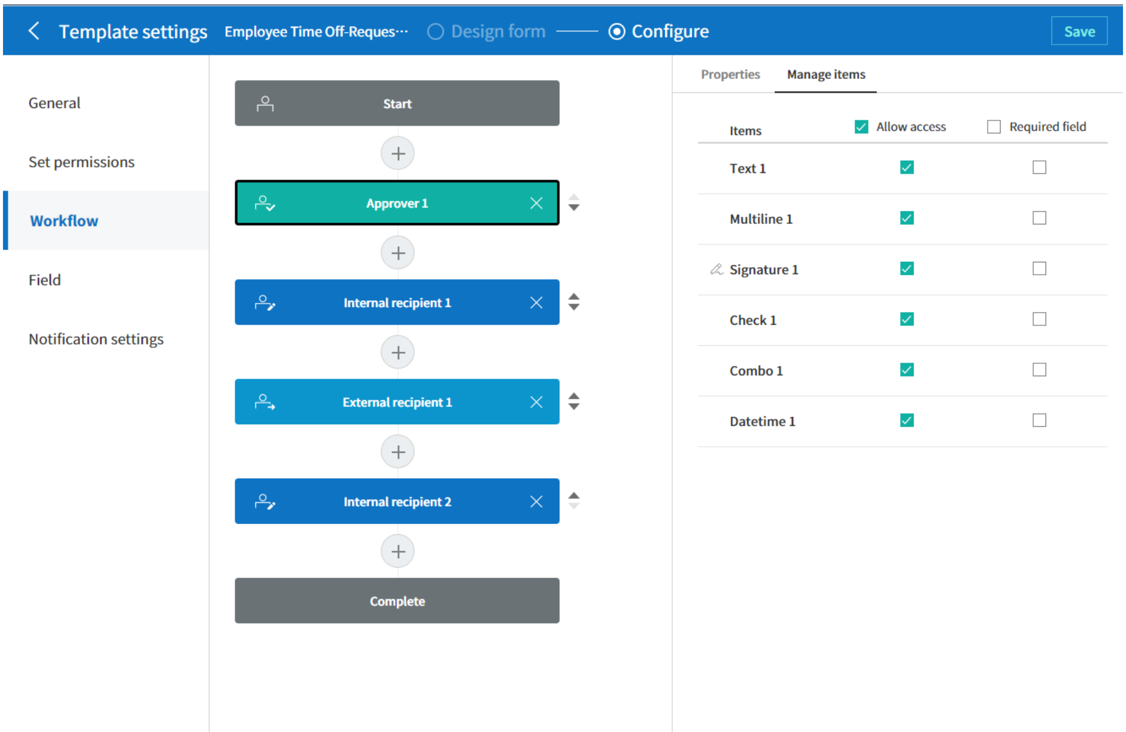
To delete a step, click **X** on the right side of the step button.



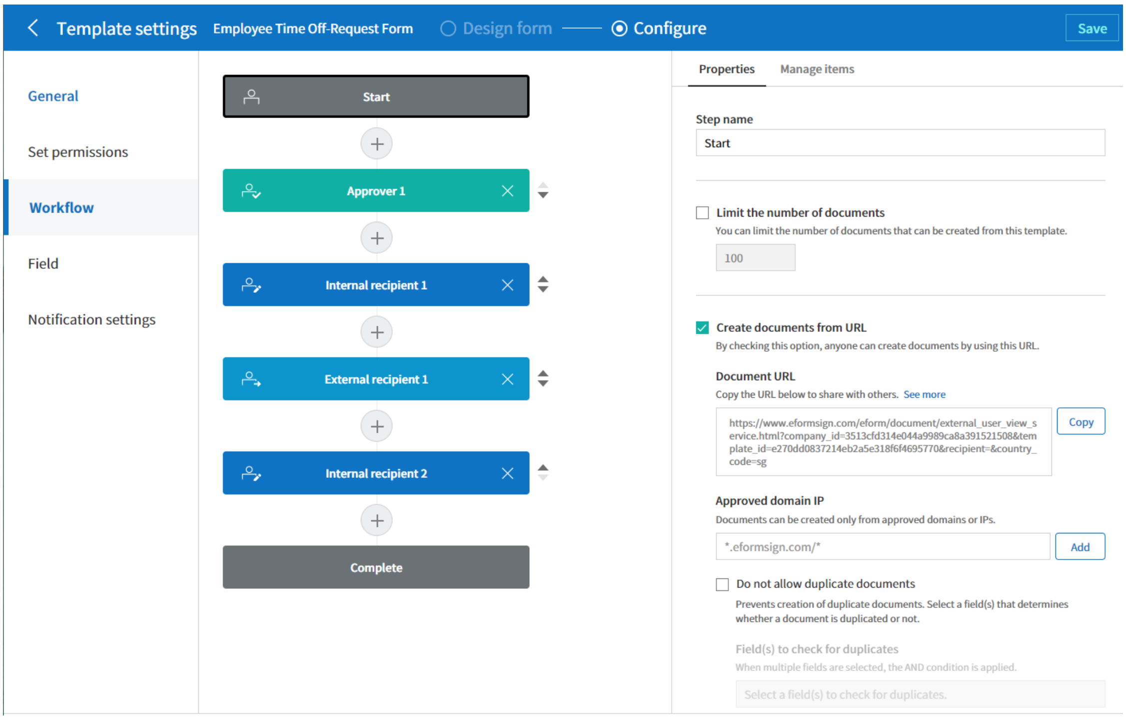
Configuring the details of each workflow step

You can click a step to set the details such as **Properties** and **Manage items** for each workflow step.

- In **Properties**, you configure the details of the step including the step name and recipients.
- In **Manage items**, you can set the fields in which the recipient has access to or is required to fill in.



Start: Step for creating a document

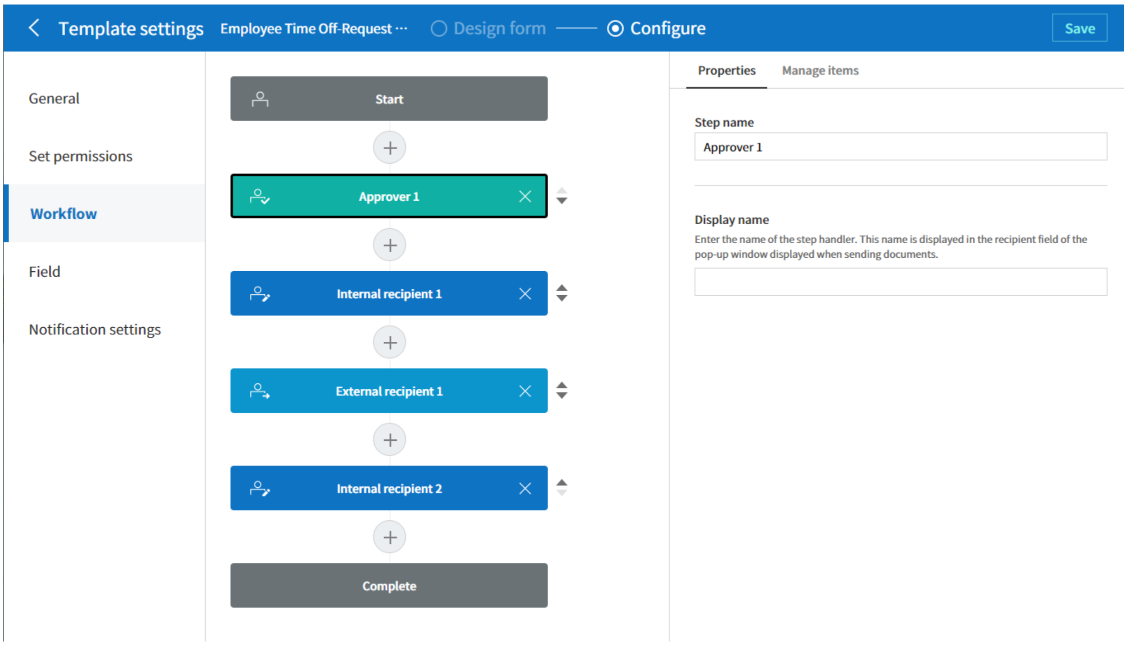


- **Step name**: Change the name of the step. The default name is 'Start'.
- **Limit the number of documents**: Set the maximum number of documents that can be created from the template.

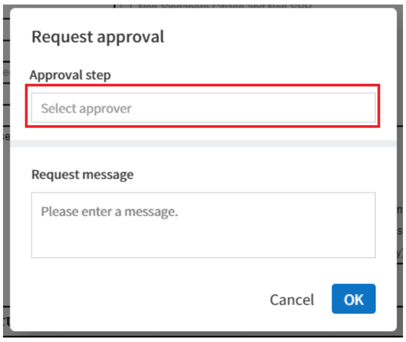
- **Create documents from URL**: Create a public link for external recipients (non-members) to review and sign documents directly via URL without the need to login to the eformsign service.

- **Do not allow duplicate documents**: Prevent the creation of duplicate documents and allows to select a field for determining whether a document is duplicated or not.

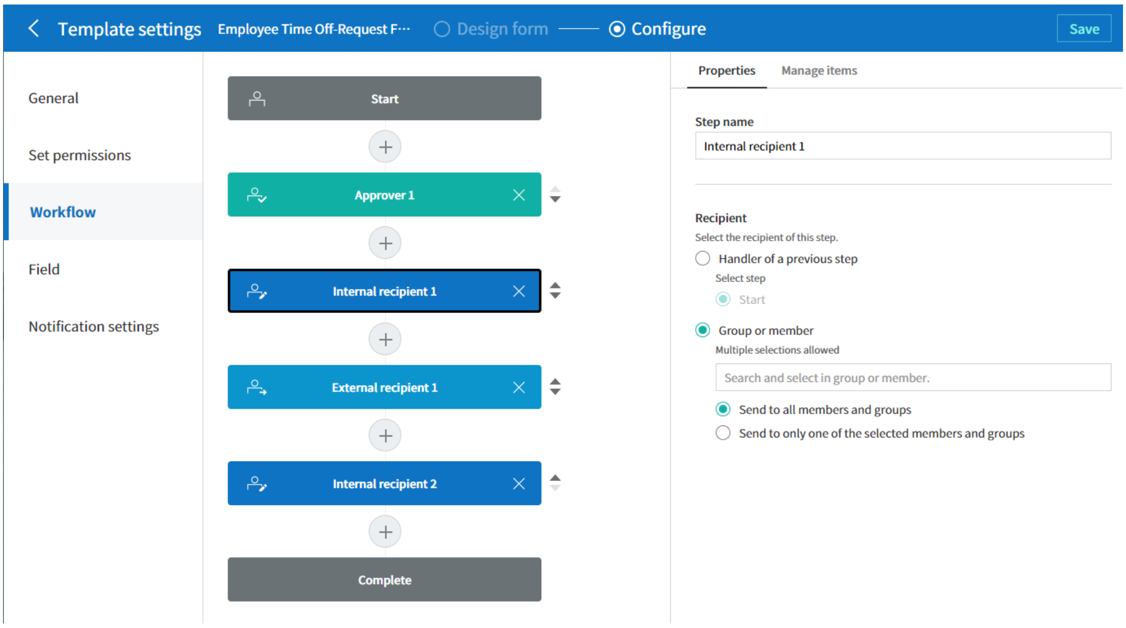
Approver: Step for requesting a document for approval



- **Display name**: Set the text to be displayed in the text box when requesting a document for approval. If you do not enter it, the default text will appear as shown below.

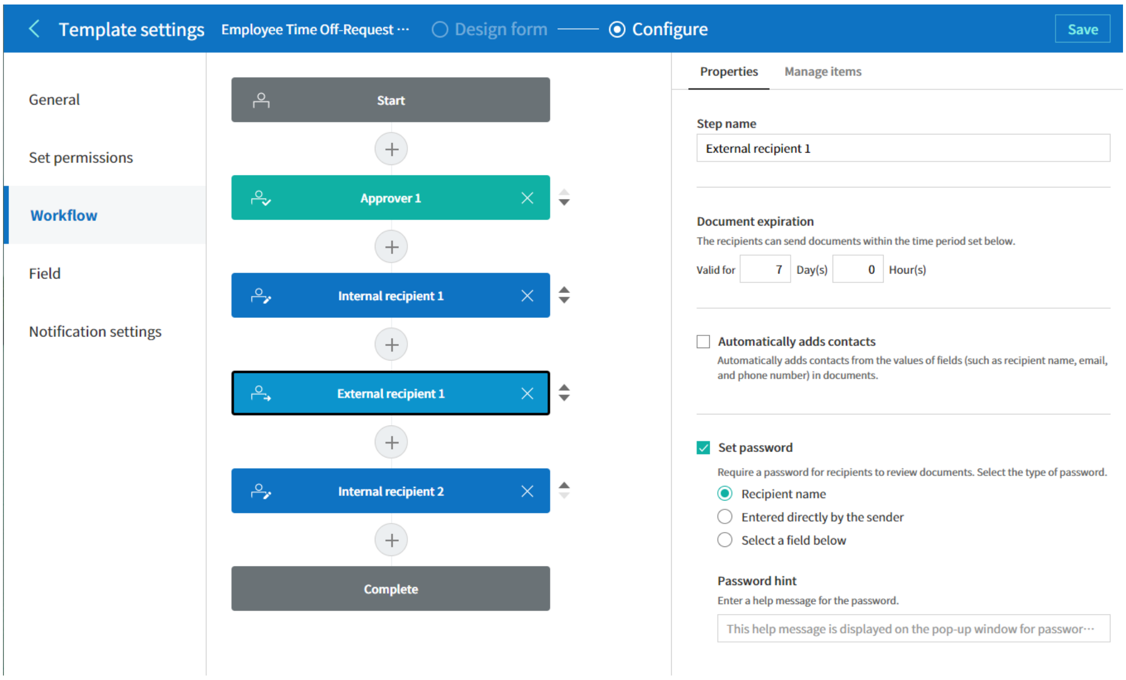


Internal recipient (member): Step for requesting a document to be reviewed and signed by internal members of your company



- **Recipient**: Select the member that will receive the document in this step.
  - **Handler of a previous step**: Select an internal recipient that will receive the document. You can choose an internal recipient from one of the previous internal recipient steps in the workflow or the document creator in the Start step.
  - **Group and member**: Select the groups or members in your company that will receive the document. You can select multiple groups or members.

External recipient: Step for requesting a document to be reviewed and signed by external users (recipients who are not members of your company)

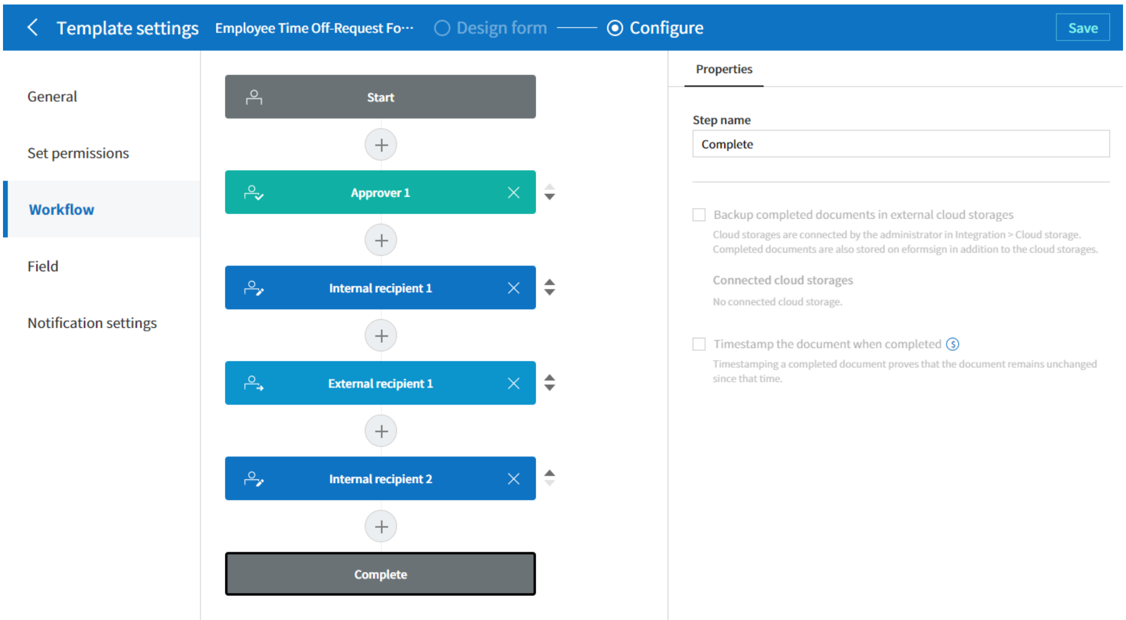


- **Document expiration**: Set the time period in which documents can be sent to external users using this URL.
- **Automatically adds contacts**: When sending documents to an external recipient, this option allows the name and contact of the external recipient to be added automatically based on the information the external recipient enters into the document.
- **Set password**: Set a verification password that external recipients must enter when viewing the document. The password can be the recipient name, a value entered directly by the sender, or a field in the document.
- **Password hint**: Set the help message that will be displayed when an external recipient enters a password to view the document.
- **Require mobile verification to review documents:** Require external recipients to verify identity using mobile to open the document. This feature will incur an extra charge.

Note

The **Require mobile verification to review documents** feature is available in Korea only.

Complete: Step in which a document is finally completed



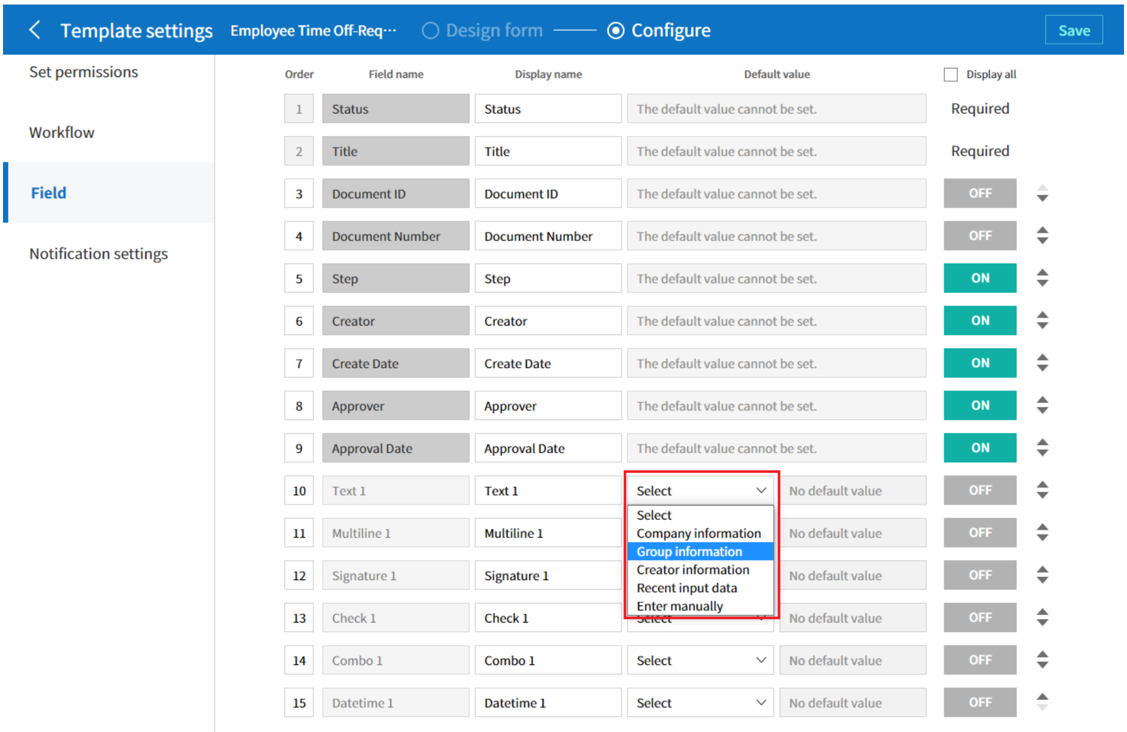
- **Backup completed documents in external cloud storages**: Allow the document to be stored in external cloud storages connected to eformsign by the administrator or company managers.

- **Timestamp the document when completed**: Allow the completed document to be timestamped which proves that the document remains unchanged since that time. This feature will incur an extra charge.

5.2.6. Field

In the **Field** menu, you can set the default values or auto-fill values for fields in the template, and adjust the order of the fields.

[Figure 5.18] Template Settings > Field



You can set the default value of a field to be the value saved in company/group/member information in **Manage custom fields.** You can also choose it to be the value entered recently or a value entered manually.

How to configure auto-fill

You can save information that are frequently entered into a document so that they can be used for auto-filling later.

For example, you can pre-save information about your company or group (such as department name, leader, and representative number) and information about the document creator (including name and contact details). You can add items for related fields and set the default values in **Manage company > Manage custom fields**.

1. In the **Manage custom fields** screen**,** add a field.

2. Go to the **Manage templates** menu.

3. Click the **Template settings** icon.

4. Go to the **Field** menu.

5. Enter the default value for the field that you want to be auto-filled.

6. After completing all the settings, click the **Save** button.

5.2.7. Notification Settings

You can select the method to send request or status notification message to recipients, view and edit the messages for documents created from the template.

Notification methods

Select the methods for sending notification messages to internal and external recipients. You can select either email**,** SMS, or both.

Note

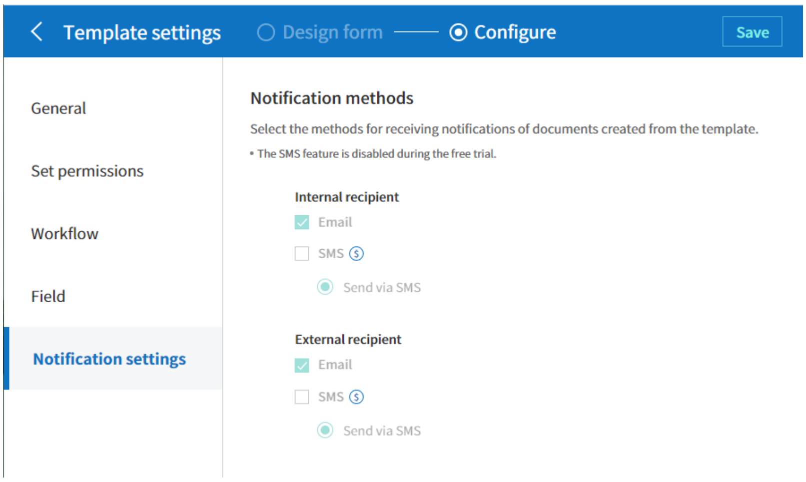
SMS can only be selected by a company subscribed a paid plan. Extra charges will apply.

When SMS is selected, **Send via SMS** and **Send via SMS if failed to send via KakaoTalk** are enabled.

- **Send SMS**: Send notifications to recipients via SMS.

- **Send via KakaoTalk and if fails, send via SMS**: Send notifications via KakaoTalk for recipients who use KakaoTalk and via SMS for recipients who do not use KakaoTalk.

[Figure 5.19] Notification Methods

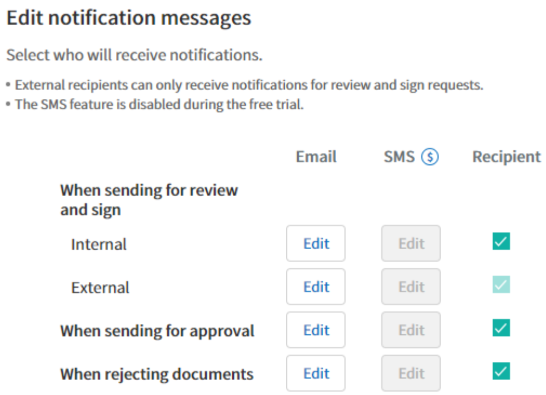


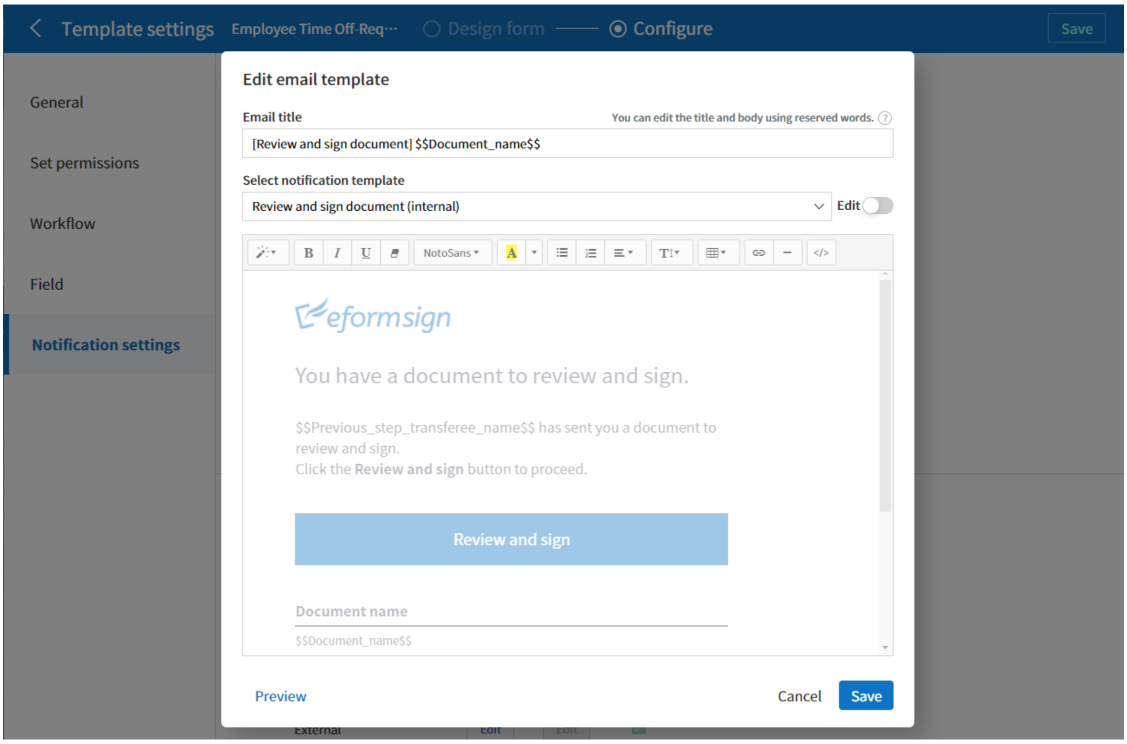
Edit notification messages

You can view and edit notification messages to be sent to recipients when sending documents created from the template. You can find the default notification messages in the **Manage company > Notification template management** page and can edit them by clicking the **Edit** button.

Note

SMS templates can only be edited by companies subscribed a paid plan.





- **When sending for review and sign > Internal**: You can edit the notification messages to be sent to internal recipients when sending a document to be reviewed and signed.

- **When sending for review and sign > External**: You can edit notification messages to be sent to external recipients when sending a document to be reviewed and signed.

- **When sending for approval**: You can edit the notification messages to be sent to approvers when sending an approval request.

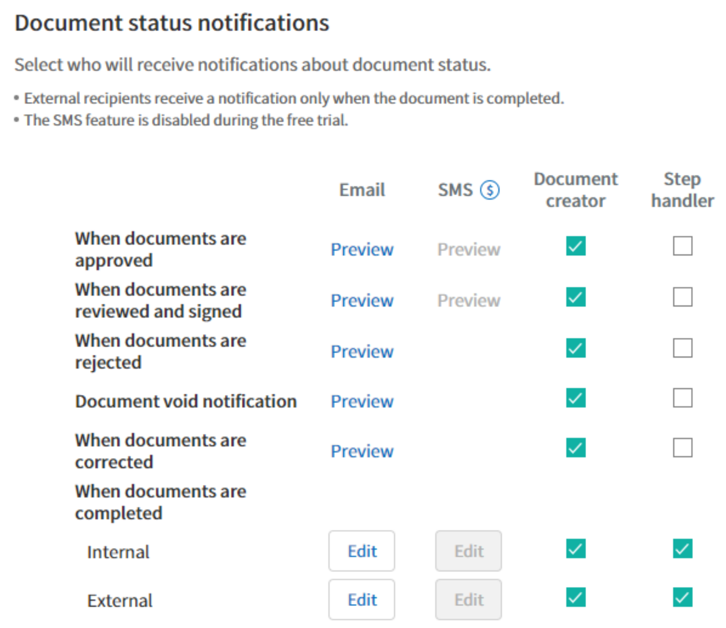
- **When rejecting documents**: You can edit the notification messages to be sent to document senders when a document is rejected by approvers, internal recipients, or external recipients.

Document status notifications

You can select who will receive status notifications for documents created from the template. You can also preview the following notification message types: approved, reviewed and signed, rejected, voided, and corrected. As well, you can edit and preview the notification messages for completed documents.

Note

For notifications sent when documents are rejected, voided, or corrected, only email templates are provided and they are not sent via SMS. Also, SMS templates for document completion notifications (internal/external) can only be edited by companies subscribed a paid plan.



Note

When the **Document creator** option is checked but the **Step handler** option is unchecked, a status notification is sent to the person who originally created the document.

When the **Document creator** option is unchecked but the **Step handler** option is checked, status notifications are sent to people who have processed the document before the current step, except the document creator.

When the **Document creator** and **Step handler** options are both checked, status notifications are sent to both the document creator and the people who have processed the document before the current step.

When the **Document creator** and **Step handler** options are both unchecked, no notifications will be sent for that status.

- **When documents are approved**: When the document is approved by an approver, a notification will be sent stating that the document has been approved.

- **When documents are reviewed and signed**: When the document is reviewed and signed by internal or external recipients, a notification will be sent stating that the document has been reviewed and signed.

- **When documents are rejected**: When the document is rejected by an approver, internal or external recipients, a notification will be sent stating that the document has been rejected.

- **Document void notification**: When a request for voiding a document is approved, a notification will be sent stating that the document has been voided.

- **When documents are corrected**: When the document is corrected by a document creator, a notification will be sent stating that the document has been corrected.

- **When documents are completed > Internal**: When the document is completed, a notification will be sent to the document creator, approvers, and internal recipients stating that the document has been completed.

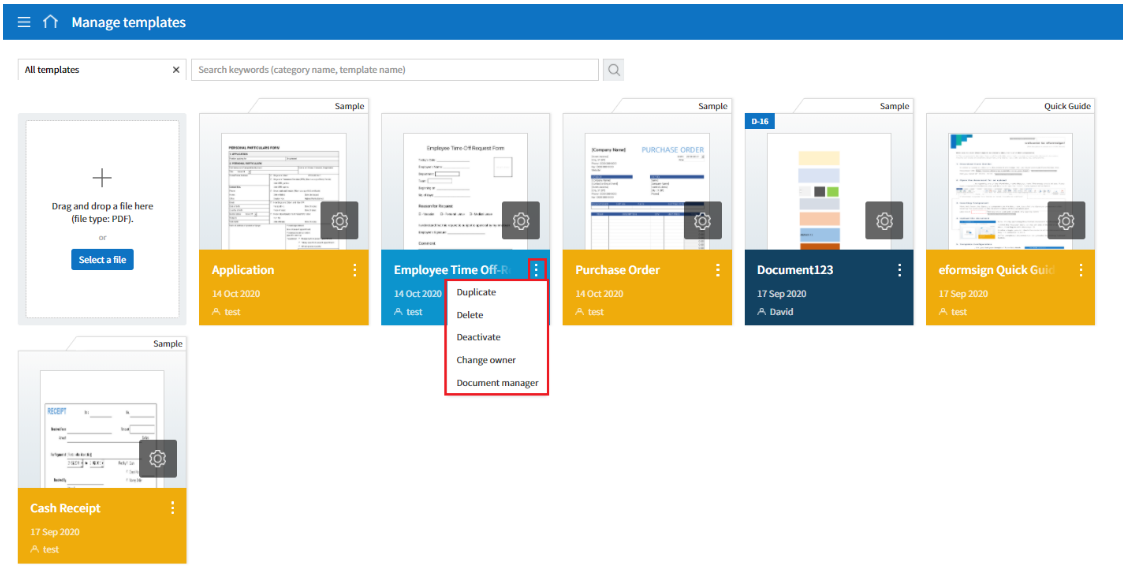
- **When documents are completed > External**: When the document is completed, a notification will be sent to external recipients stating that the document has been completed.

Note

When the **Document creator** option for **When the document is completed > External** is checked and an external recipient creates and submits a document via a URL, the external recipient must enter his/her email in which a notification will be sent to when the document is completed.

5.3. Menus for Each Template

Go to the **Manage templates** page, click the menu icon (⋮) right next to the template name to see the menus that can be set for each template.

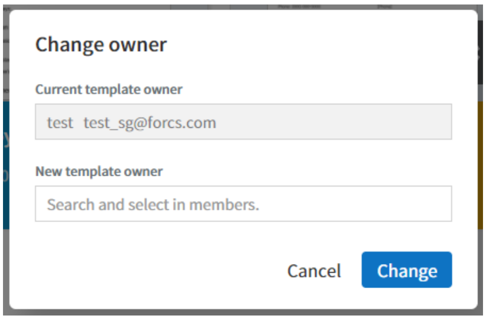


- **Duplicate**: Duplicates the template. The template's file and detailed settings for the template will be duplicated. You will have a chance to change and save the detailed settings before the template is duplicated.

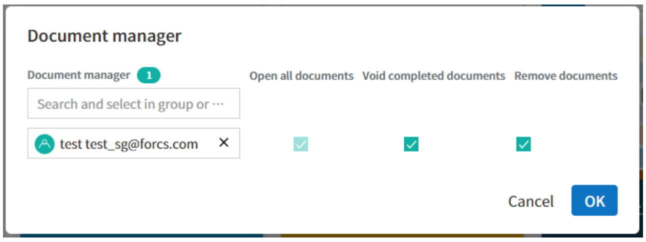
- **Delete**: Deletes the template. Once a template is deleted, you can no longer create documents from that template.

- **Deactivate**: When a template is deactivated, it will not be shown in the **New document** page for other members.

- **Change owner**: You can change the owner of the template. By default, the person who created the template is automatically assigned as the template owner. If you want to make changes later, you can change the owner to another member by clicking this menu. The new template owner can be selected among members who have permission to manage templates.

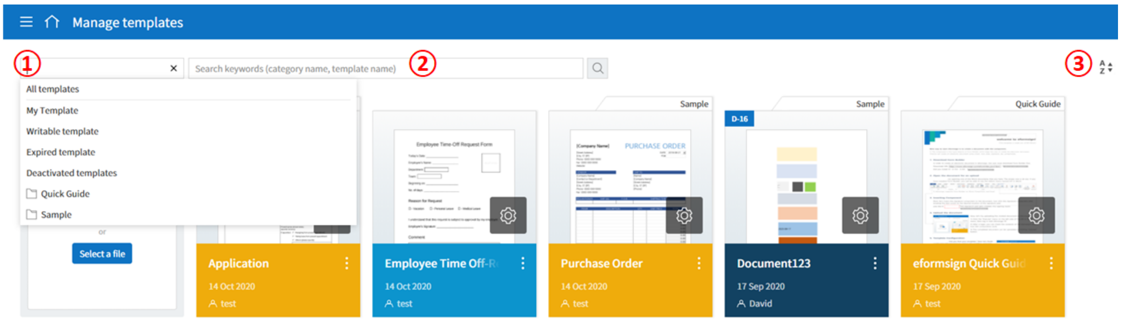


- **Document Manager:** You can select the members or groups that can manage documents created from the template. You can also select document managers in **Template settings > Set permissions.**



5.4. Search Templates

In the **Manage templates** page, you can lookup and search templates by template category.



① **Lookup Templates**

Click the box **(1)** to lookup templates by template status and category. Click **X** to return to view all categories.

By default, templates are saved in the Sample category. You can create categories in **Template settings > General.**

② **Search templates**

You can search templates by entering keywords for the template name and category name.

③ **Sort**

You can select the template sorting order in ascending or descending by template name or category.

Chapter 6. Template - Form Builder

6.1. About Templates

Templates are **electronic documents** used for the eformsign service. They are e-documents converted from existing paper forms such as applications, contracts, and agreements. You can create and upload templates in the eformsign service with its Web form designer or Form builder. For more information about Web form designer, please refer to “Chapter 5. Templates - Web Form Designer”.

6.1.1. Template Overview

To create and send electronic documents via eformsign, you have to create a template first which can be converted into an e-document.

How to create a template with Form Builder

To create a template with Form builder, you must first download eformsign Form builder.

Note

For more information about Form builder, please refer to “Chapter 3. Introduction to Form Builder”.

MS Office files such as Word, Excel, and PowerPoint can be uploaded as a template using eformsign Form builder.

1. Open a Word, Excel, or PowerPoint file.

2. Go to the OZ in Word/Excel/PowerPoint) menu in the file.

3. Choose a location you want to add a component.

4. Select a component type.

5. Adjust the size and position of the component.

6. Click the **Execute** button to preview the component.

7. Click the **Upload** button to upload the file as a template.

Template settings

You can set the details for the template.

- **General**

  Set the template name, abbreviation, document name, document number, etc.

- **Set permissions**

  Grant members or groups the permission to use the template and to create documents from it and manage them.

- **Workflow**

  Sets the workflow for the document from its creation to completion.

- **Field**

  Sets the default values and auto-filled values for fields.

- **Notification settings**

  Sets the notification channels, recipients, and the content of the notification messages for notifying requests or changes in the status of documents created from the template.

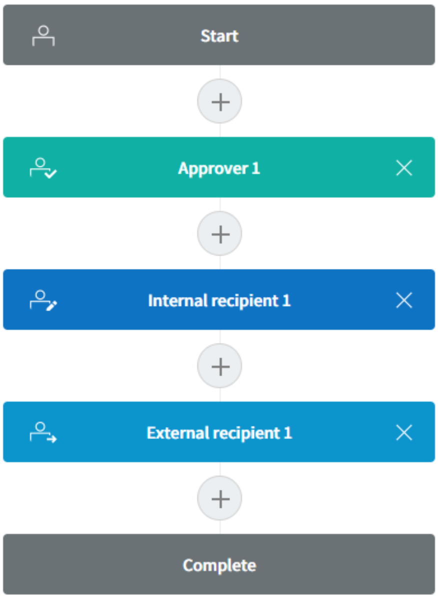
6.1.2. Workflow Overview

A workflow is a document process from its creation to completion.

The workflow for each template can be set by template managers by going to **Template settings** > **Workflow**.

By default, all workflows have **Start** and **Complete** steps. You can add as many **Approver**, **Internal recipient**, **and External recipient** steps as you want for each workflow.

[Figure 6.1] Workflow steps



- **Approver**

  Sending an e-document approval request to a member in your company.

- **Internal recipient**

  Sending an e-document to a member in your company to review and sign.

- **External recipient**

  Sending an e-document to a user outside of your company to review and sign.

Important

What's the difference between an approval and internal recipient?

Both an approver and internal recipient can approve or reject a requested document, but only the internal recipient can designate the next recipient(s) in line in the workflow to process the document.

In other words, only internal recipients can designate downstream recipients whether it be external recipients, internal recipients, or approvers.

For example, if you want a recipient in a workflow to have the ability to choose the recipients that come after her/him in the workflow, then you specify her/him as an internal recipient. In this case, when the internal recipient receives a document, then she/he can choose the recipient(s) that come after her/him in the workflow.

6.2. Template Settings

You can set detailed configurations for each template you create.

Note

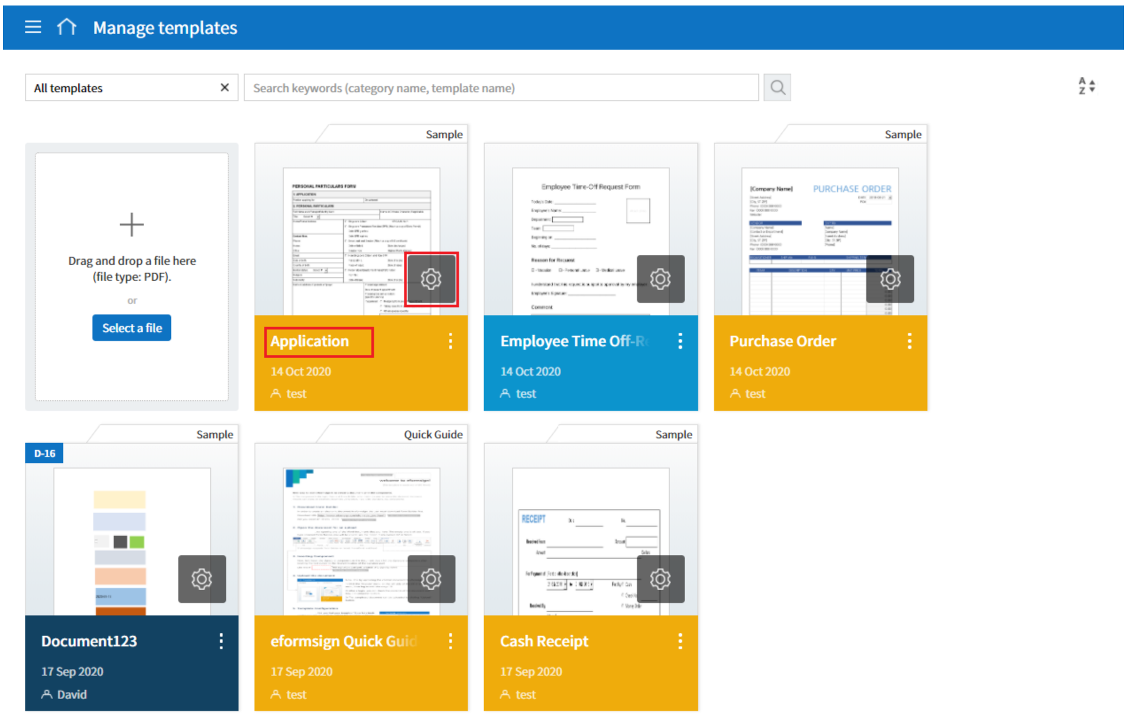
Only the **company administrator** or **template managers** can perform this action.

This action can be performed in web browsers of computers and mobile devices, and also in mobile apps.

How to go to the template settings screen

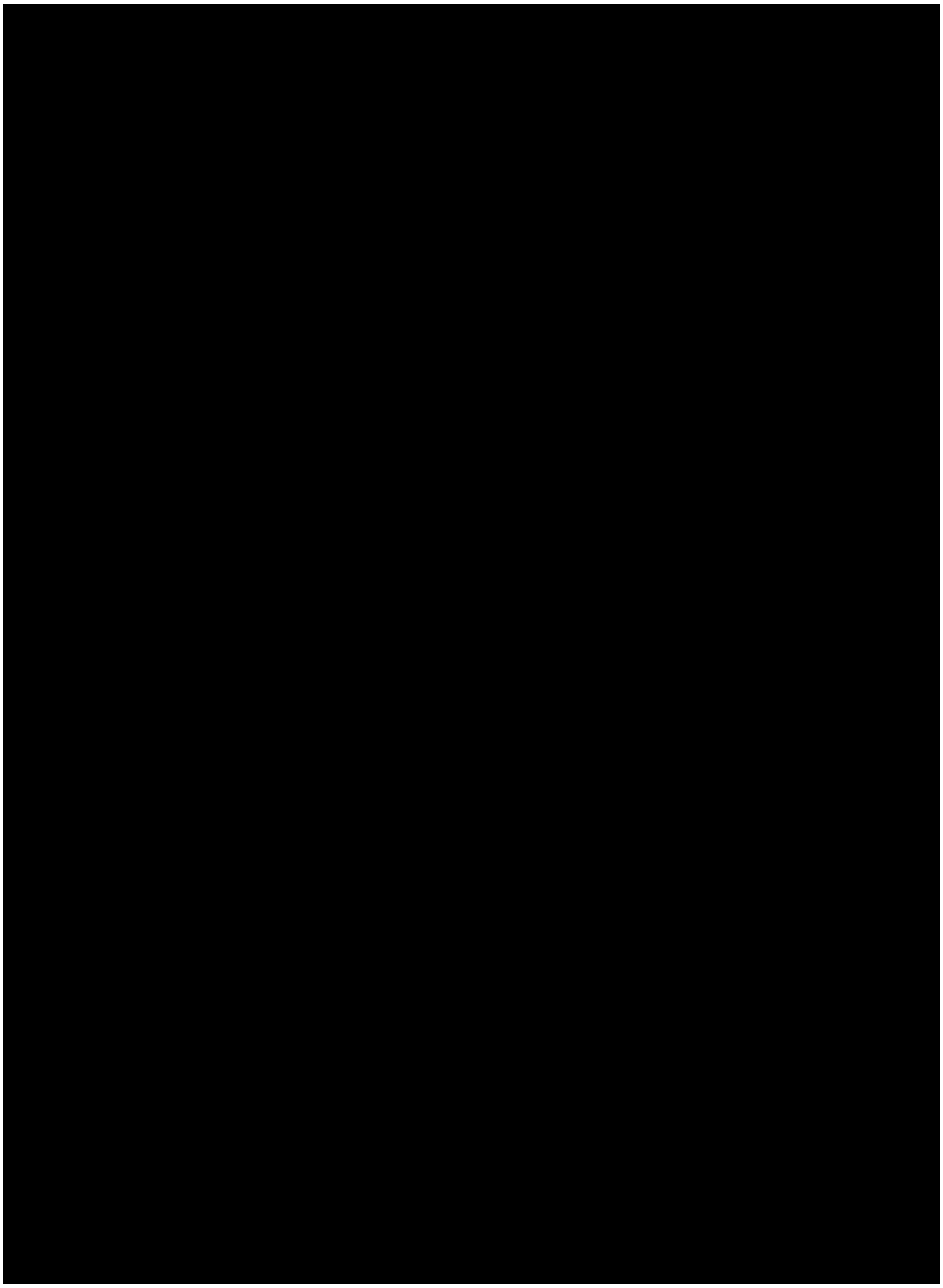
1. In the sidebar menu, click the **Manage templates** menu.

2. Click the name or settings icon ( ) of the desired template.



6.2.1. General

[Figure 6.2] Template Settings > General



Configure basic settings for the template

Set basic information about the template including the template name, category, validity period, etc.

① Form file

The name of the form file which is uploaded to eformsign from Word, PowerPoint, or Excel using Form Builder. To change the form file name, you need to change the file name of the uploaded Word, PowerPoint, or Excel file and then update it.

② Template name

The template name will be displayed in the **Manage templates** and **New document** pages.

The recommended length of the template name is about 11 characters, including spaces. If the name is longer than 11 characters, you can see the full name by hovering the mouse over the name.

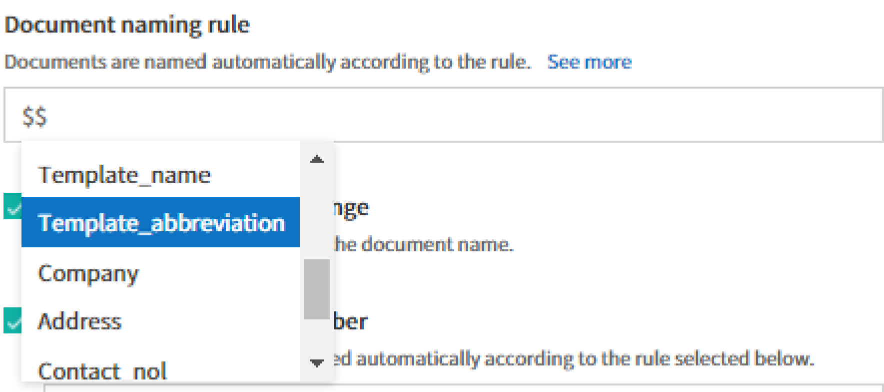
[Figure 6.3] Template Name

③ Template abbreviation

A short name that briefly descries the template. It is recommended to use two or three words.

Template abbreviation can be used in the document number, document name, mail template, etc. by entering **$$**.

[Figure 6.4] Template Abbreviation



④ Category

Category is used to sort templates by type. With the category name, you can filter templates in the **Manage templates** menu, and can filter documents in the **Documents** menus and the **Manage documents** menu. You can choose from an existing category or create a new category by entering a new name.

You can set multi-level categories with a separator (**/**). For example, if you set a category as **HR Team/Vacation**, the Vacation category in the HR category is created.

⑤ Description

Enter additional comments about the template. This description is displayed under the template name in the New document page.

⑥ Template validity period

Sets the time period in which documents can be created from this template. By default, the start date is set to the uploaded date and you can change the date.

When **No expiry date** is checked, documents can be created without a time limit. **No expiry date** is unchecked and set the date, the document can only be created until the set date.

Document settings

Configure additional settings including document naming rules for documents created from the template.

⑦ Document naming rule

Sets the document name when creating the document from the template. If a document naming rule is not set, the template name will be the document name.

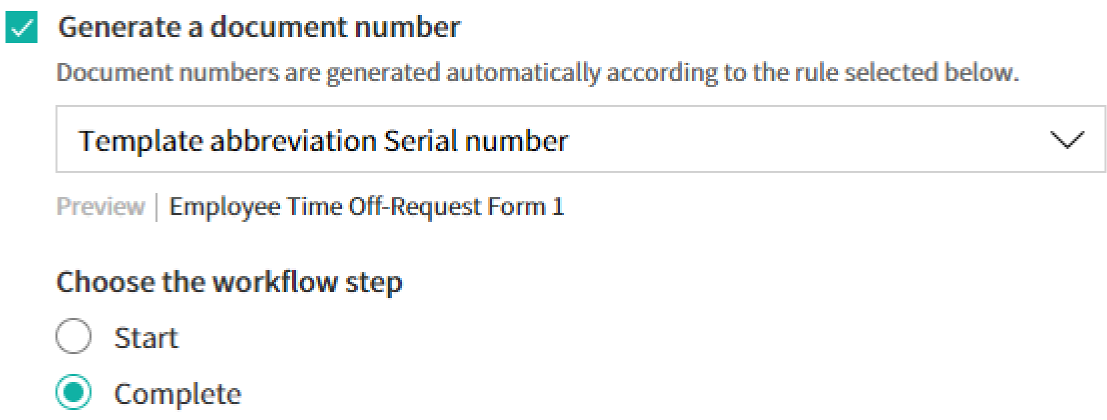
You can add reserved words in the document name using **$$** and **{{**.

⑧ Allow document name change

If **Allow document name change**is checked, the document creator can change the document name.

⑨ Generate a document number

If **Generate a document number** is checked, documents are automatically numbered. You can select the document number format and the workflow step in which document numbers are generated.



⑩ Skip pop-up window when sending documents

Use it when many documents are created and submitted. If this option is unchecked, a pop-up window for entering a message will appear when sending a document. When **Skip pop-up window when sending documents** is checked, the pop-up window does not appear and the page proceeds to the next step.

6.2.2. General > Setting the Document Naming Rule

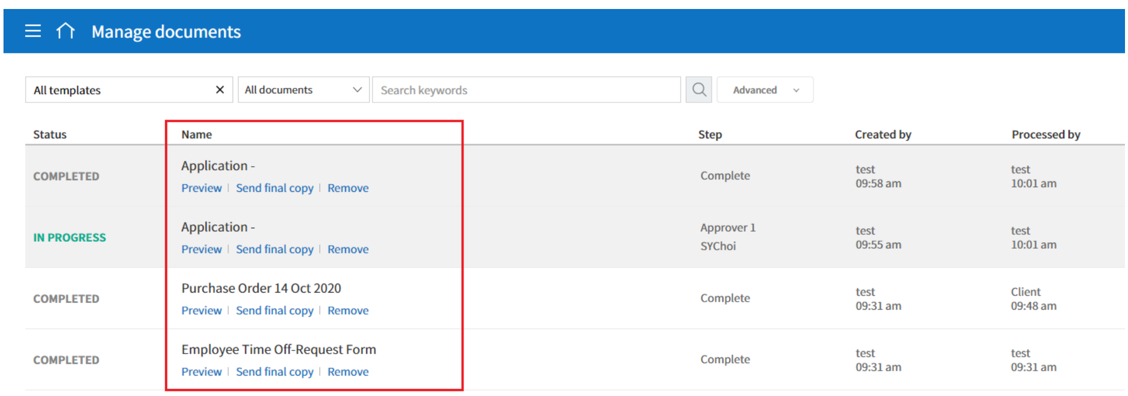
In **Template settings**, you can set the document naming rule for documents created from a template.

You can make a piece of information entered into a document or document-related information to be automatically entered into the document name. If you set the document naming rule, then the document name is automatically entered based on the information of the document. As well, you can see this name in all document pages (In progress, Action required and Completed) and the **Manage document** page.

Note

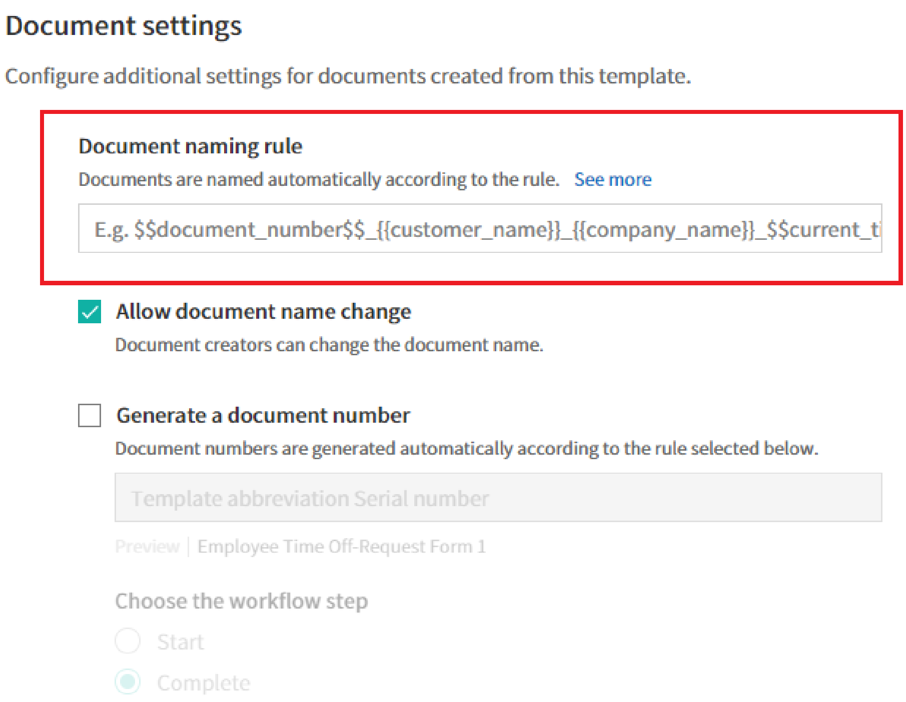
Only the **Company administrator** or **Template managers** can perform this action.

[Figure 6.5] Manage Documents > Documents List



How to set the document naming rule

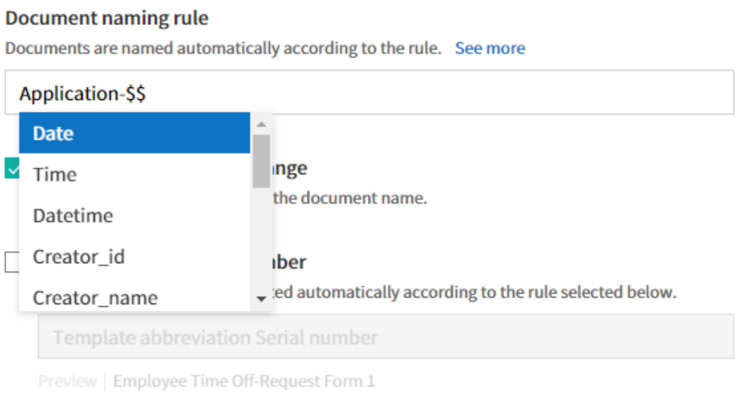
[Figure 6.6] Template Settings > Setting the Document Naming Rule



1. In the sidebar menu, click the **Manage templates** menu.
2. Click on the settings icon ( ) of the desired template to go to the **Template settings** page.
3. Enter the desired naming rule in the **Document naming rule** field in the **General** tab.
4. Click the **Save** button on the top right corner to save the changes.

How to use reserved words

[Figure 6.7] Setting Document Naming Rules Using Reserved Words



{{

This symbol adds a piece of information in the document into the document name.

Enter **{{** in the Document naming rule field to display the list of Component IDs and then select the desired component ID. The information in that particular component will be added to the document name.

$$

This symbol adds document-related information into the document name.

Enter **$$** in the Document naming rule field to display the drop-down menu and then select the desired information.

Information types	Description
Current_date	The date in which the document is created (e.g. Feb 20, 2020)
Current_time	The time in which the document is created (e.g. 02:59 pm)
Current_datetime	The date and time in which the document is created (e.g. Feb 20, 2020, 02:59 pm)
Creator_ID	The ID of the member who created the document
Creator_name	The name of the member who created the document
Creator_dept	The department of the member who created the document
Creator_company Name	The name of the company in which the member who created the document belongs to
Template_name	The template name entered in Template settings > General
Template_abbreviation	The template abbreviation entered in Template settings > General
Company	The company name entered in Manage company > Company profile
Company_address	The address entered in Manage company > Company profile

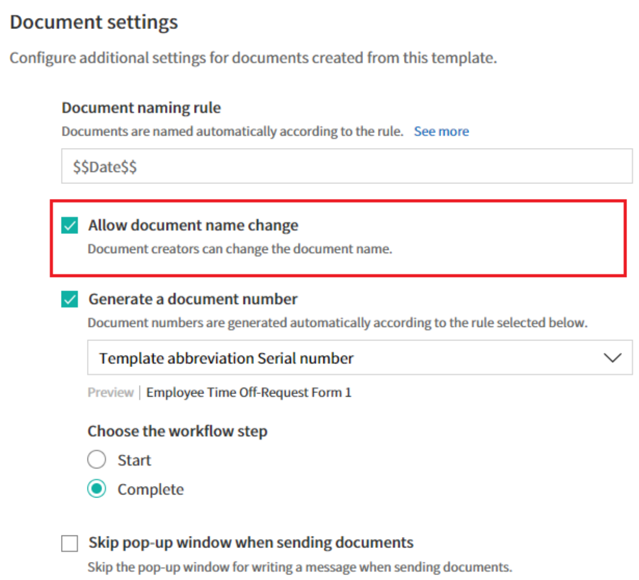
Information types	Description
Company_contact_no	The contact information entered in Manage company > Company profile
Company_registration_no	The business registration number entered in Manage company > Company profile
Company_homepage	The homepage URL entered in Manage company > Company profile

Tip

Check the status of the **Allow document name change** field.

Even if the document naming rule is set, if the **Allow document name change** option is checked, the document creator can arbitrarily change the document name. If you do not want the document name to be changed, then make sure to uncheck the **Allow document name change** option.

[Figure 6.8] Checking the Allow Document Name Change Option



6.2.3. General > Generating and Viewing a Document Number

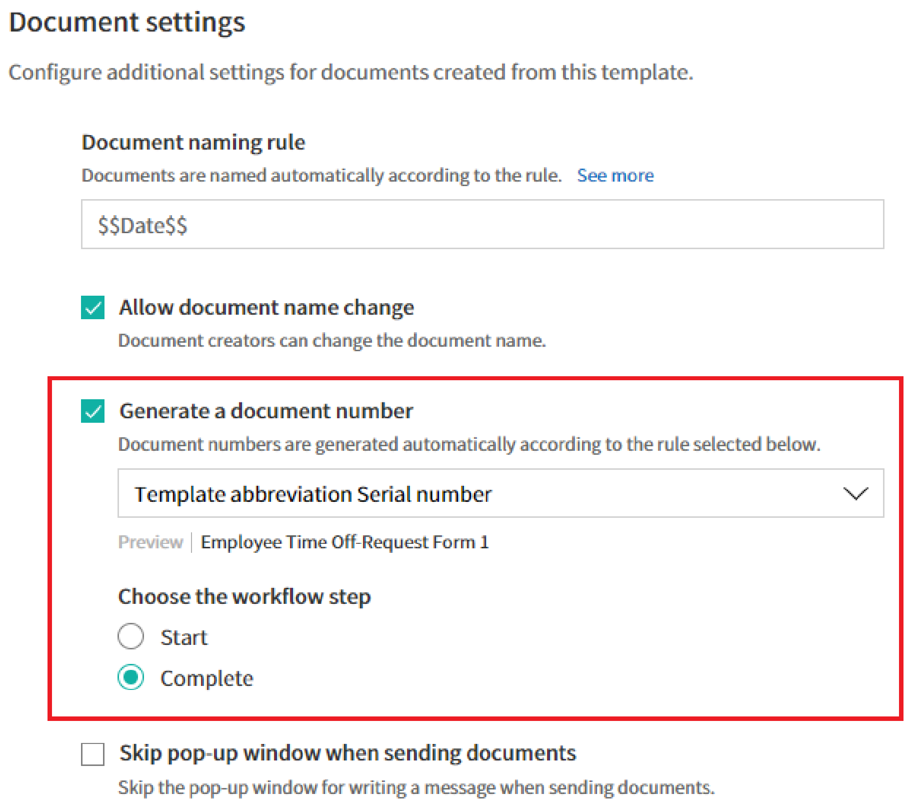
You can set a document number for documents created in eformsign. You can set it so that a document number is generated automatically for each template, and can select one of four document numbering formats. The document number can be generated in the document using the document component. You can also see a separate column in the document list and search documents by the document number.

Generating a document number

Note

Only the **Company administrator** or **Template manager** can perform this action.

[Figure 6.9] Setting a Document Number



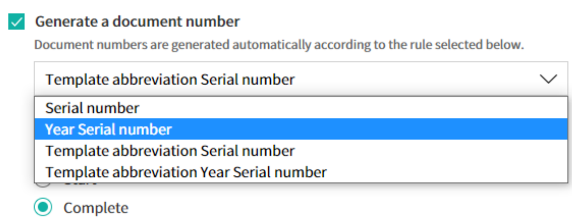
1. In the sidebar menu, click the **Manage templates** menu.

2. Click on the settings icon () of the desired template to go to the **Template settings** page.

3. Tick the **Generate a document number** checkbox in the **General** page.

- **Selecting a document numbering rule**

[Figure 6.10] Selecting a Document Numbering Rule



Serial number

Generated in the format of the document creation order

E.g. 1, 2, 3...

Year_serial number

Generated in the format of the document creation year + document creation order

E.g. 2020_1, 2020_2...

Template_serial number

Generated in the format of the template abbreviation + document creation order

E.g. Application 1, Application 2...

Template_year_serial number

Generated in the format of the template abbreviation + document creation year + document creation order

E.g. Application 2020_1, Application 2020_2...

- **Choosing when to numbered a document**

Start

A number is generated when a document is created.

Complete

A number is generated when a document has been completed after going through all the steps in the workflow.

4. Click the **Save** button at the top right corner of the page to apply your changes.

Viewing a document number

A document number can be viewed directly on a document using the document component and can also be viewed in the document list.

- **Viewing a document number directly on a document**

You can generate a document number directly on a document by using the document component in Form builder.

1. Open a file in Word, Excel, or PowerPoint.

2. Add the document component in the location where the document number will be displayed.

3. Click the **Upload** button to upload the file on eformsign.

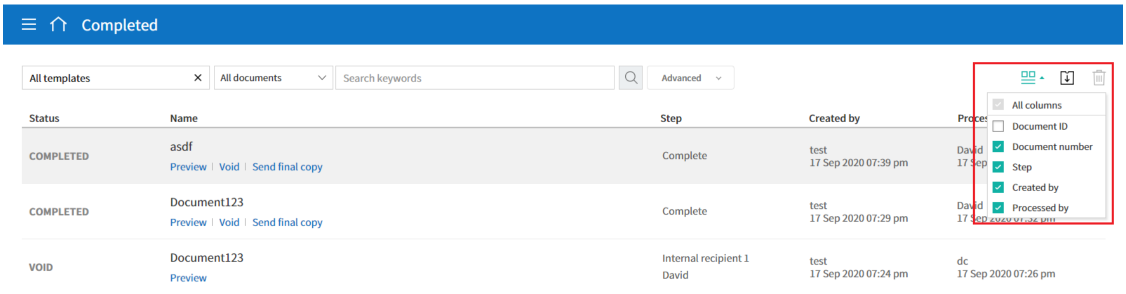
4. In **Template settings > General,** tick the **Generate a document number** checkbox.

5. Select a document numbering rule.

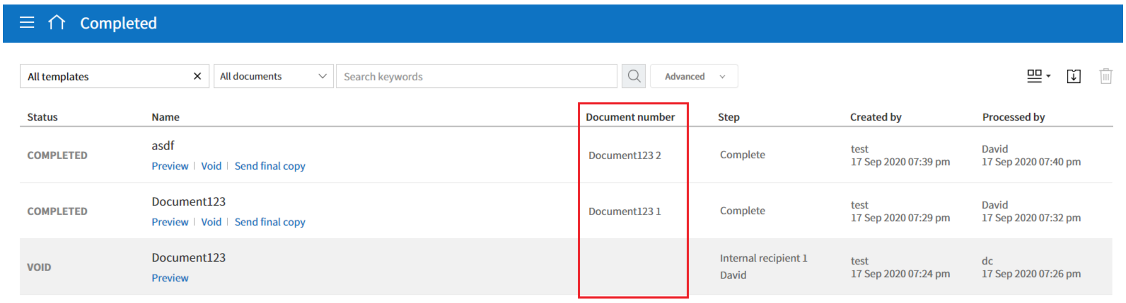
6. Click the **Save** button to save the settings.

- **Viewing a document number in the document list**

[Figure 6.11] Completed - Document List



[Figure 6.12] Completed - Document List - Document Number

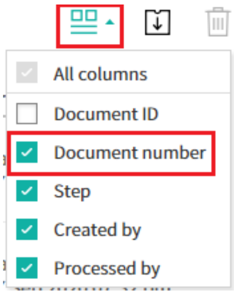


A document number can be viewed in the Documents menus (In progress, Action required, and Completed), and the Manage documents menu (requires document management permission).

1. In the sidebar, click the **Completed** or **Manage documents** menu.

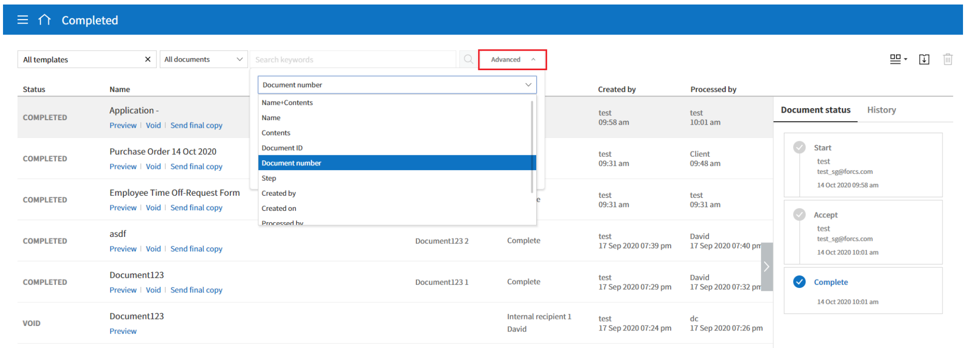
2. Click the column settings icon at the top right corner of the page.

3. Check **Document number** in the column list.



4. Check that **the document number** column is added.

- **Searching for a document using a document number**



You can search a document by its document number via advanced search.

1. Go to the **Completed** or **Manage documents** page.

2. Click the **Advanced** button at the top right corner of the page.

3. Select **Document number** among the search conditions.

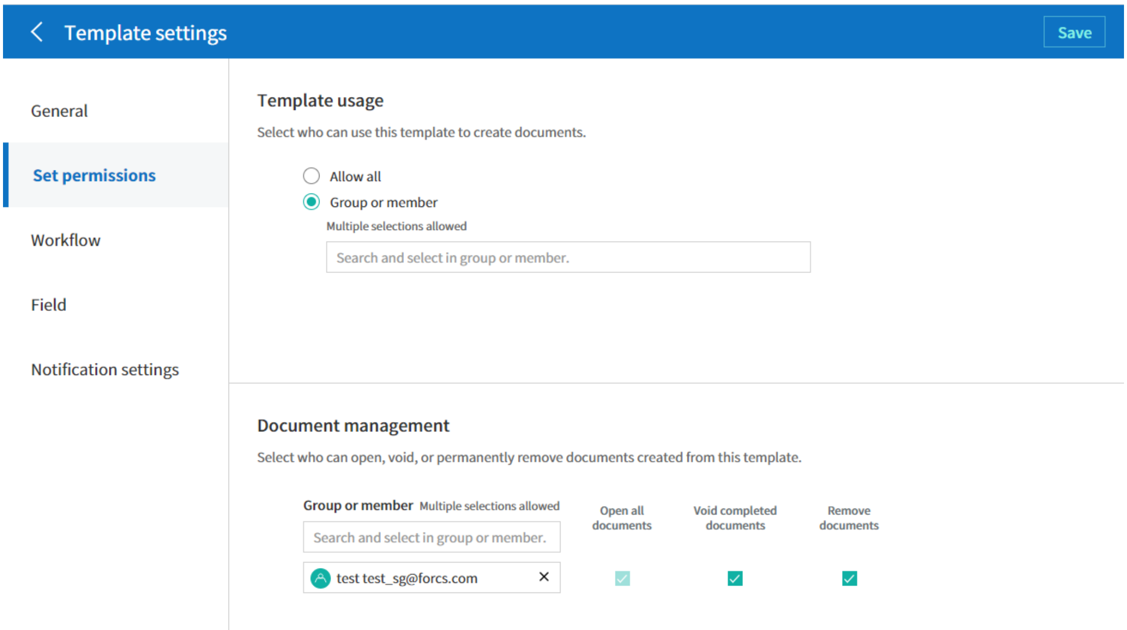
4. Type in the word or number to be searched.

5. View the search results.

6.2.4. Set Permissions

You can set the permissions for the template usage and document management.

[Figure 6.13] Template Settings > Set Permissions



Template usage

This permission is needed to create documents from the template, and you can select **Allow all** or **Group or member** to allow all the members or some members in the company to create documents from the template.

Document management

You can select groups or members to open documents created from the template, void completed documents, or remove documents permanently. You can grant permission for all or some of the three options described below.

- **Open all documents** (default): Default permission granted to a document manager and gives the permission to open all documents to authorized groups or members.

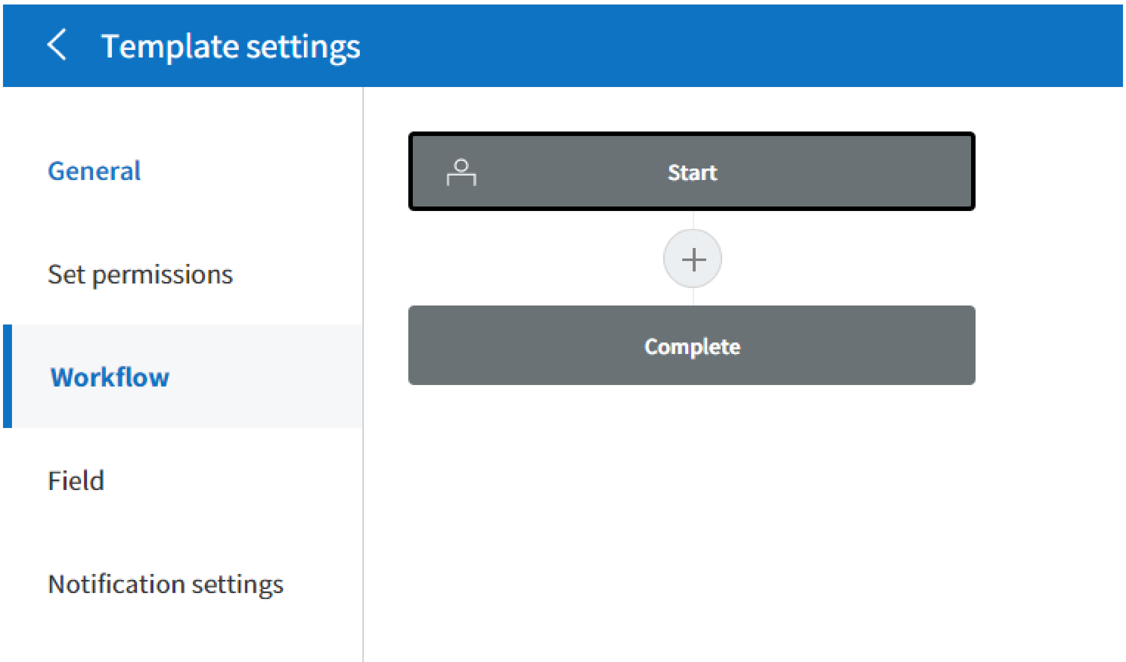
- **Void completed documents** (optional): Permission for voiding completed documents when requested by the document creator.

- **Remove documents** (optional): Permission to permanently remove documents from the system.

6.2.5. Workflow Settings

You can create or modify the workflow of the template by clicking the **Workflow** tab in the **Template settings** page.

[Figure 6.14] Template Settings > Workflow

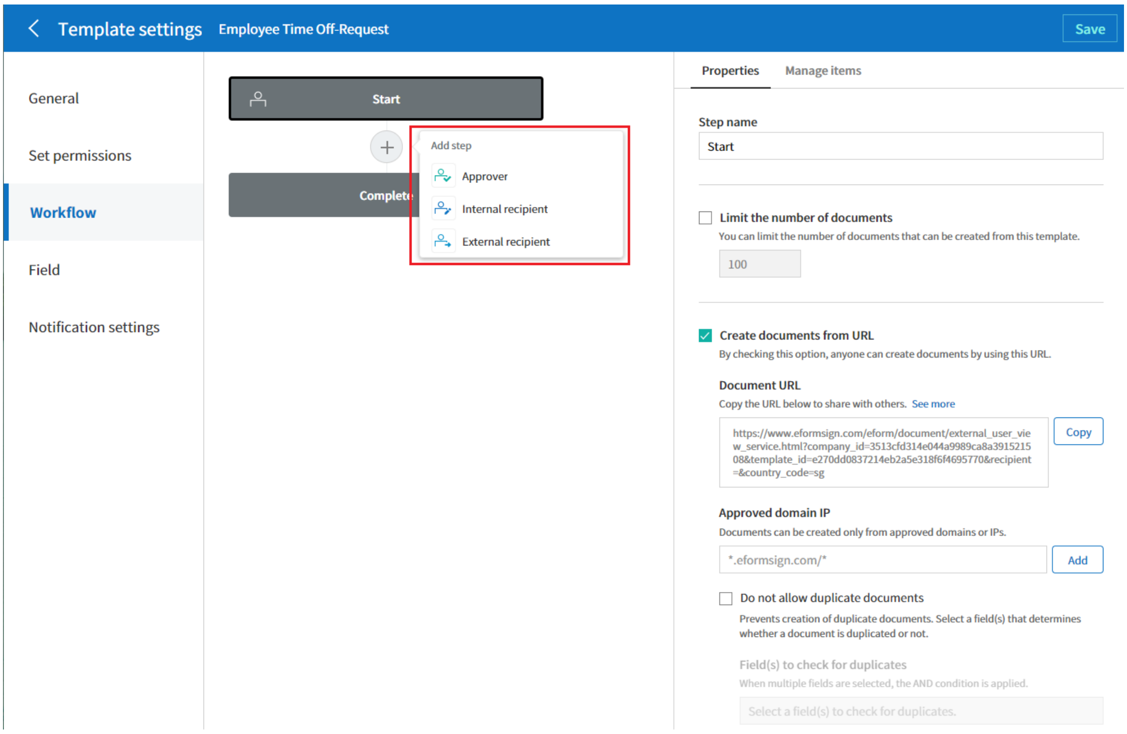


Adding steps to the workflow

1. Go to the **Workflow** configuration page by clicking the **Workflow** tab.

2. Click the add button ( ) which is in between the **Start** and **Complete** steps.

3. Select the type of recipient which you want to add.

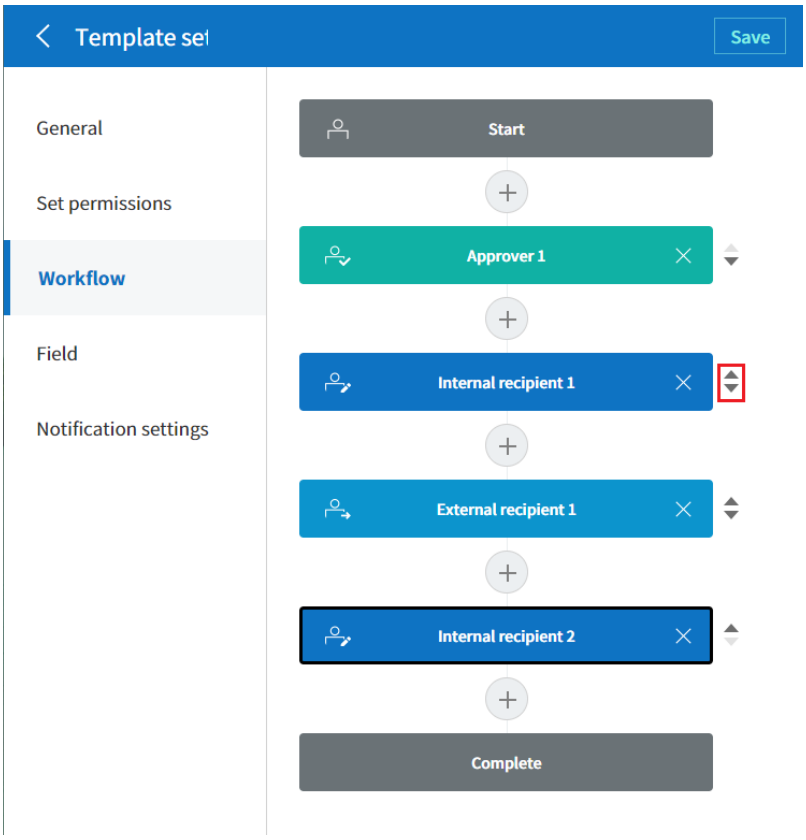


4. When selected, a step is added to the workflow.

Tip

You can add as many steps as you want. You can adjust the order of steps by clicking the arrow next to a workflow step.

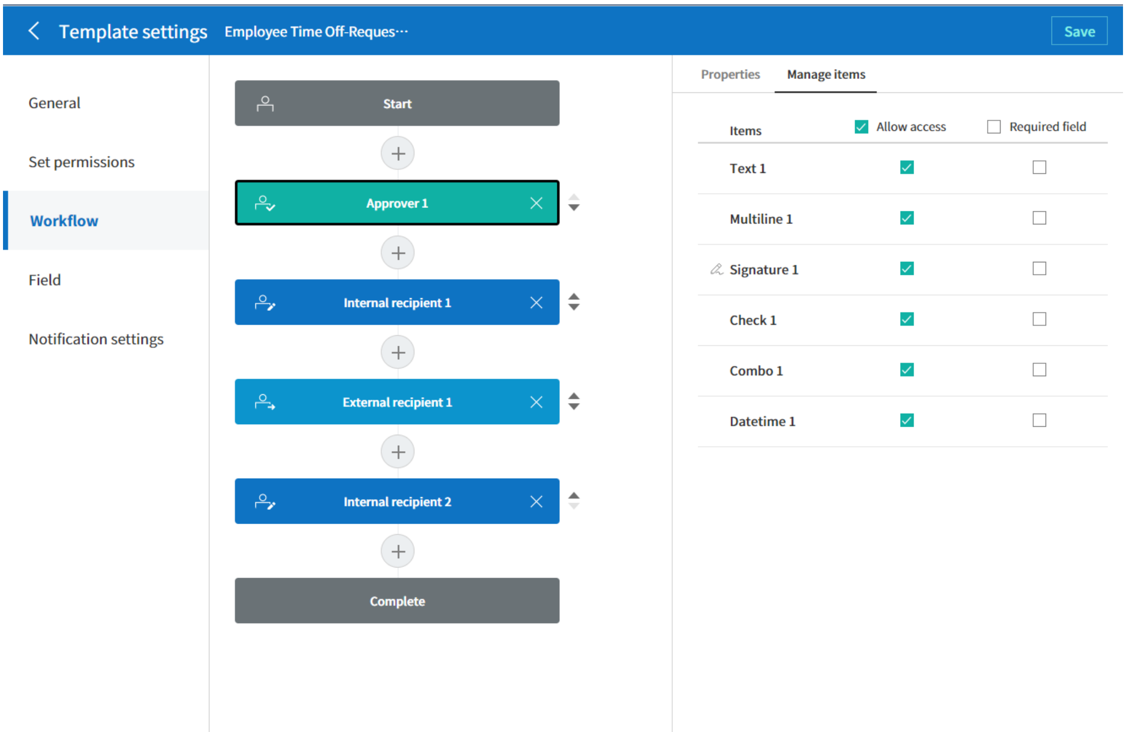
To delete a step, click **X** on the right side of the step button.



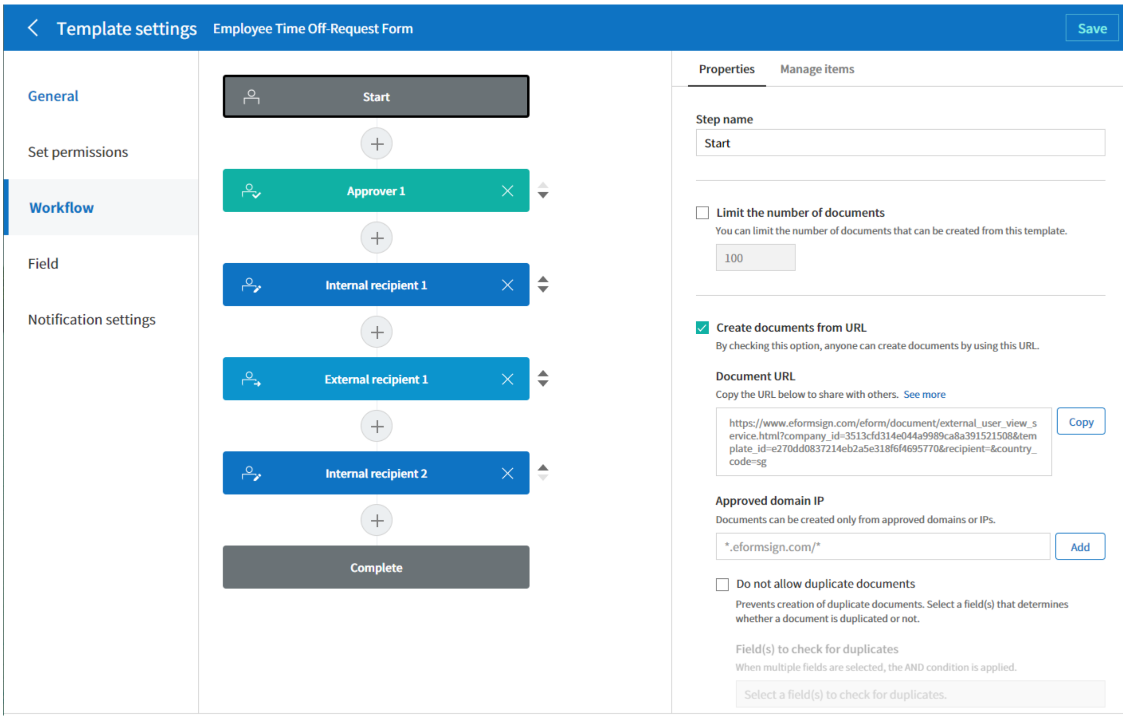
Configuring the details of each workflow step

You can click a step to set the details such as **Properties** and **Manage items** for each workflow step.

- In **Properties**, you can configure the details of the step including the step name and recipients.
- In **Manage items**, you can set the fields in which the recipient has access to or is required to fill in.



Start: Step for creating a document

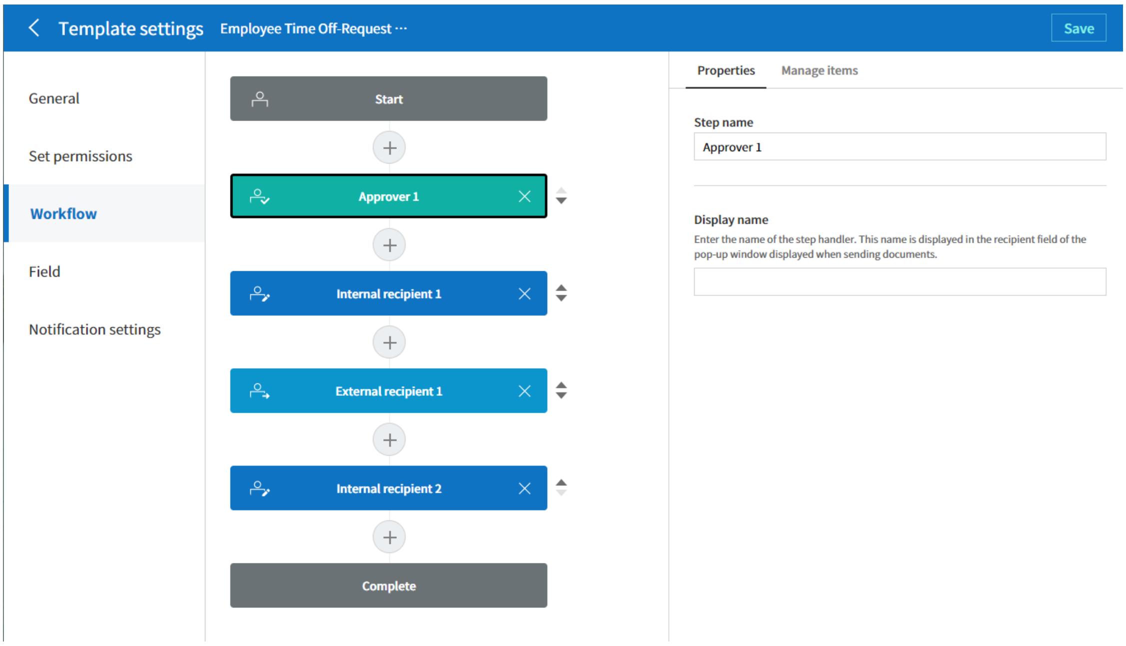


- **Step name**: Change the name of the step. The default name is 'Start'.
- **Limit the number of documents**: Set the maximum number of documents that can be created from the template.

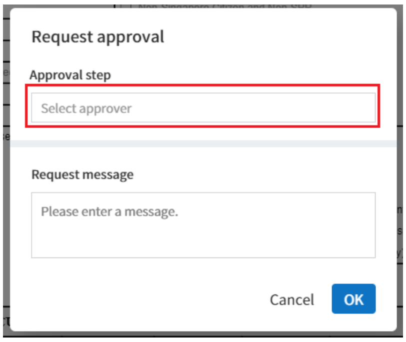
- **Create documents from URL**: Create a public link for external recipients (non-members) to review and sign documents directly via URL without the need to login to the eformsign service.

- **Do not allow duplicate documents**: Prevent the creation of duplicate documents and allows to select a field for determining whether a document is duplicated or not.

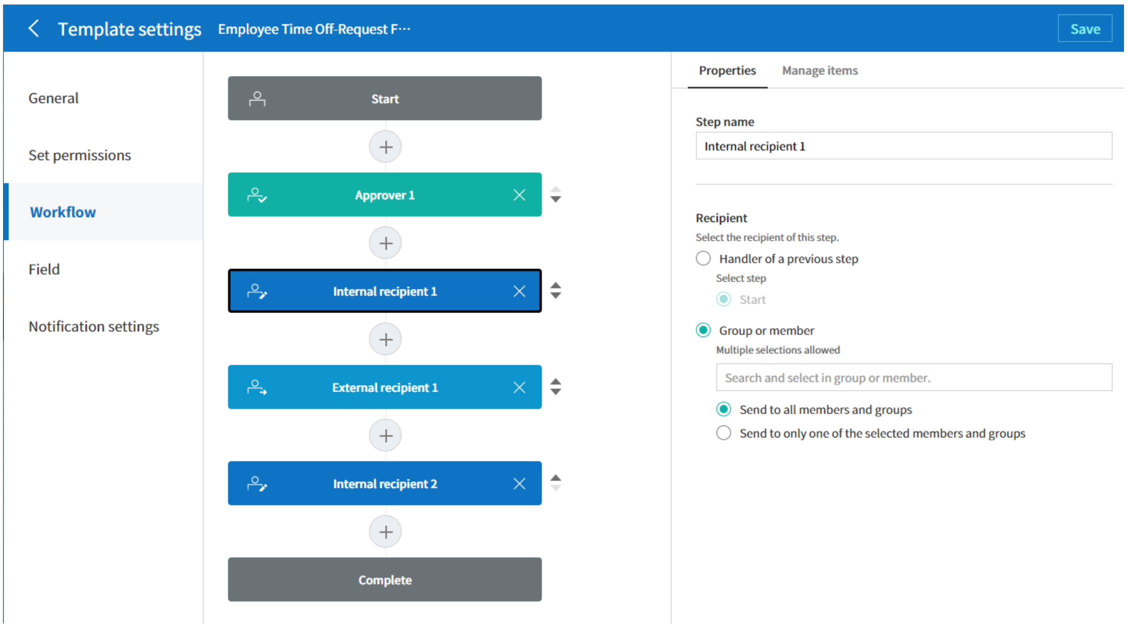
Approver: Step for requesting a document for approval



- **Display name**: Set the text to be displayed in the text box when requesting a document for approval. If you do not enter it, the default text will appear as shown below.

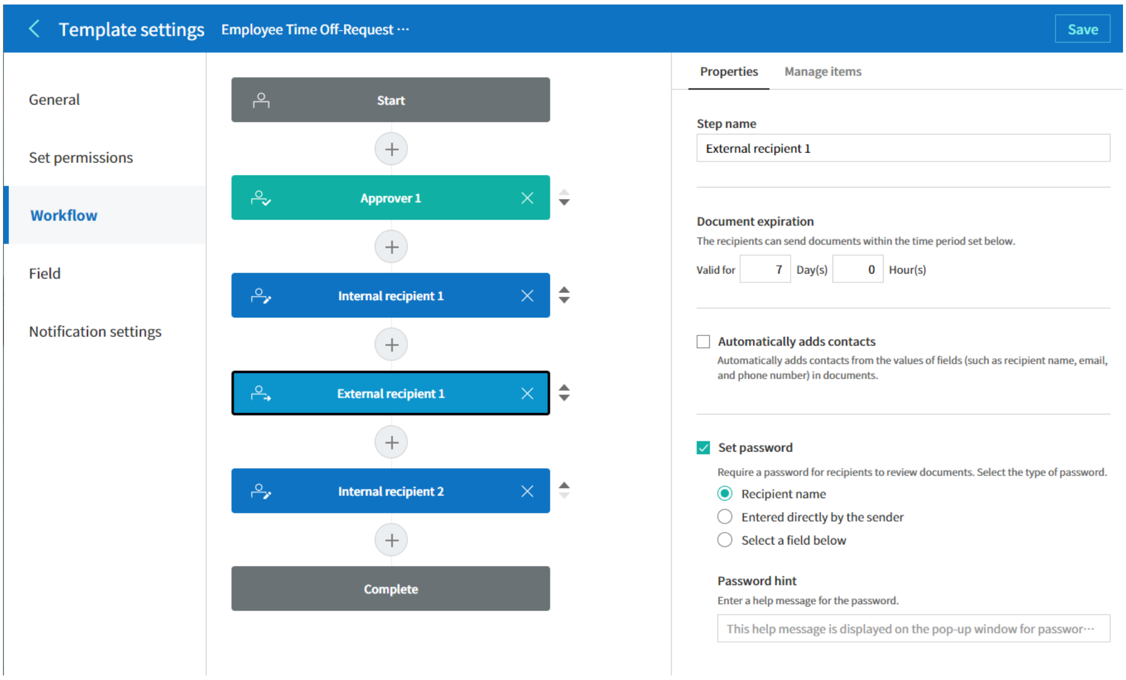


Internal recipient (member): Step for requesting a document to be reviewed and signed by internal members of your company



- **Recipient**: Select the member that will receive the document in this step.
  - **Handler of a previous step**: Select an internal recipient that will receive the document. You can choose an internal recipient from one of the previous internal recipient steps in the workflow or the document creator in the Start step.
  - **Group and member**: Select the groups or members in your company that will receive the document. You can select multiple groups or members.

External recipient: Step for requesting a document to be reviewed and signed by external users (recipients who are not members of your company)



- **Document expiration**: Set the time period in which documents can be sent to external users using this URL.

- **Automatically adds contacts**: When sending documents to an external recipient, this option allows the name and contact of the external recipient to be added automatically based on the information the external recipient enters into the document.

- **Set password**: Set a verification password that external recipients must enter when viewing the document. The password can be the recipient name, a value entered directly by the sender, or a field in the document.

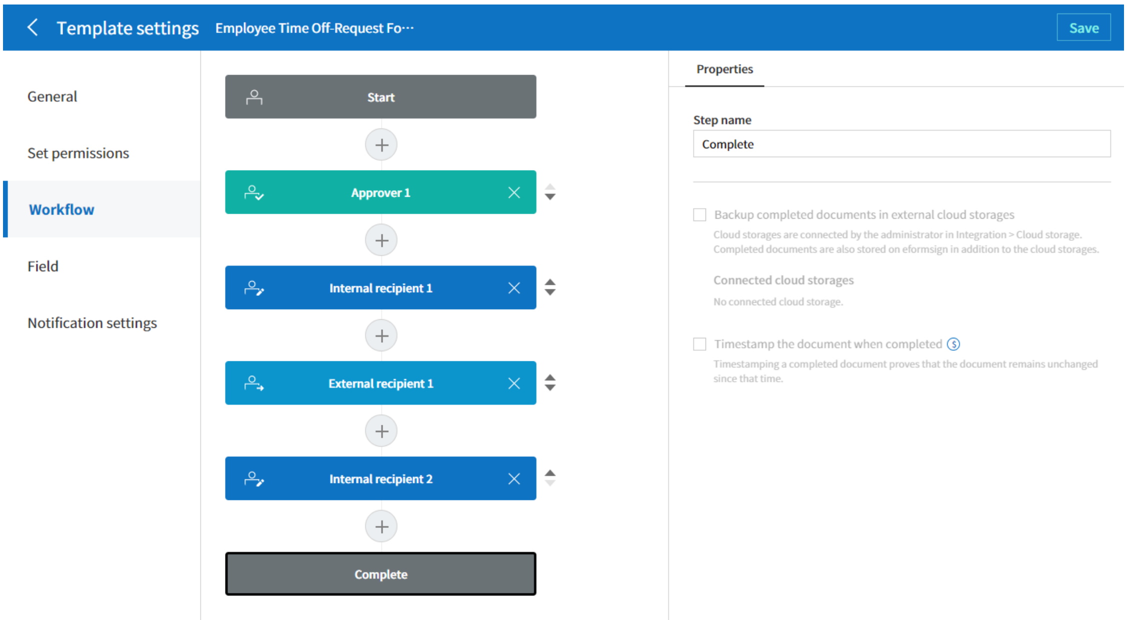
- **Password hint**: Set the help message that will be displayed when an external recipient enters a password to view the document.

- **Require mobile verification to review documents:** Require external recipients to verify identity using mobile to open the document. This feature will incur an extra charge.

Note

The **Require mobile verification to review documents** feature is available in Korea only.

Complete: Step in which a document is finally completed



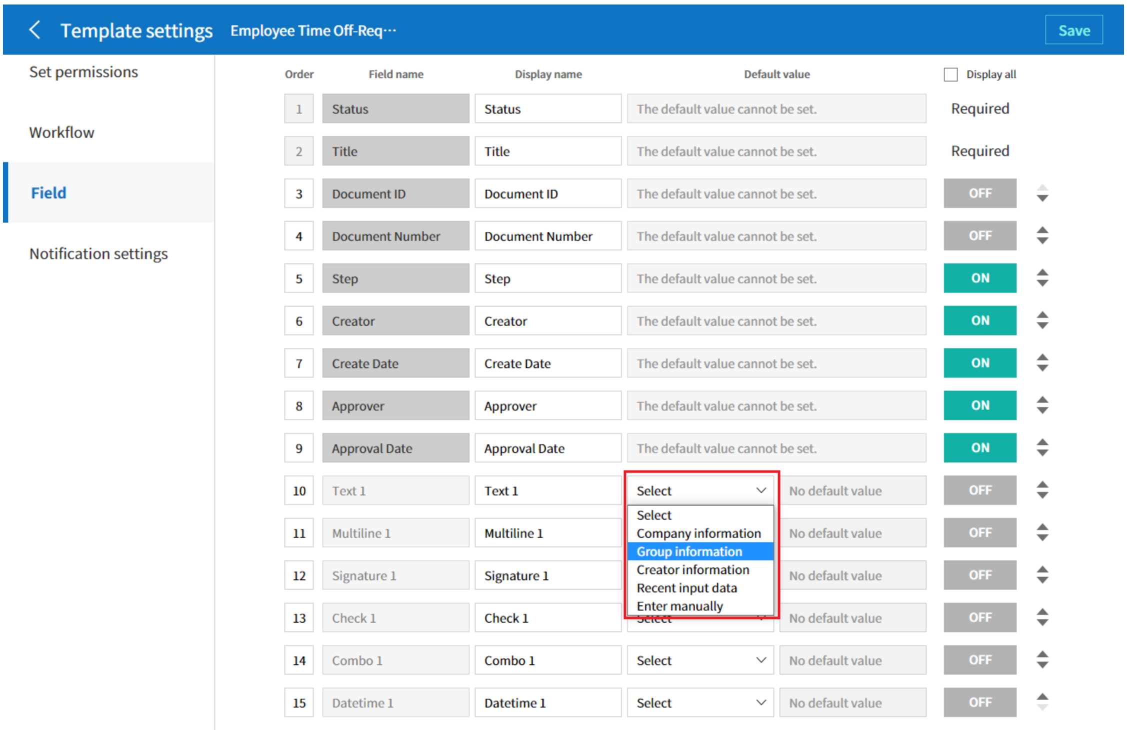
- **Backup completed documents in external cloud storages**: Allow the document to be stored in external cloud storages connected to eformsign by the administrator or company managers.

- **Timestamp the document when completed**: Allow the completed document to be timestamped which proves that the document remains unchanged since that time. This feature will incur an extra charge.

6.2.6. Field

In the **Field** menu, you can set the default values or auto-fill values for fields in the template, and adjust the order of the fields.

[Figure 6.15] Template Settings > Field



You can set the default value of a field to be the value saved in company/group/member information in **Manage custom fields**. You can also choose it to be the value entered recently or a value entered manually.

How to configure auto-fill

You can save information that are frequently entered into a document so that they can be used for auto-filling later.

For example, you can pre-save information about your company or group (such as department name, leader, and representative number) and information about the document creator (including name and contact details). You can add items for related fields and set the default values in **Manage company > Manage custom fields**.

1. In the **Manage custom fields** screen**,** add a field.

2. Go to the **Manage templates** menu.

3. Click the **Template settings** icon.

4. Go to the **Field** menu.

5. Enter the default value for the field that you want to be auto-filled.

6. After completing all the settings, click the **Save** button.

6.2.7. Notification Settings

You can select the method to send request or status notification message to recipients, view and edit the messages for documents created from the template.

Notification methods

Select the methods for sending notification messages to internal and external recipients. You can select either email**,** SMS, or both.

Note

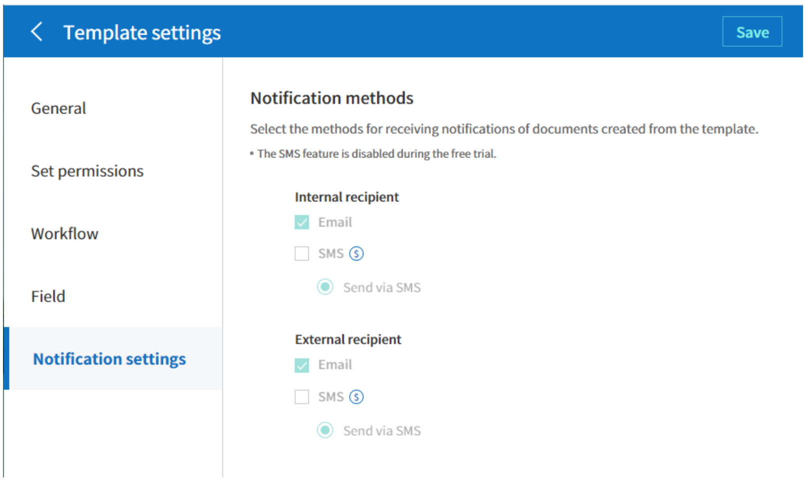
SMS can only be selected by a company subscribed a paid plan. Extra charges will apply.

When SMS is selected, **Send via SMS**and **Send via SMS if failed to send via KakaoTalk** are enabled.

- **Send SMS**: Send notifications to recipients via SMS.

- **Send via KakaoTalk and if fails, send via SMS**: Send notifications via KakaoTalk for recipients who use KakaoTalk and via SMS for recipients who do not use KakaoTalk.

[Figure 6.16] Notification Methods

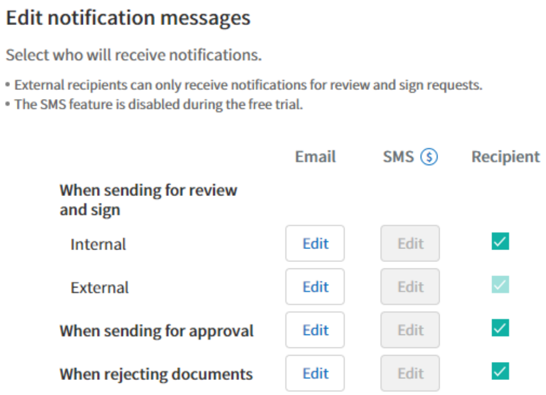


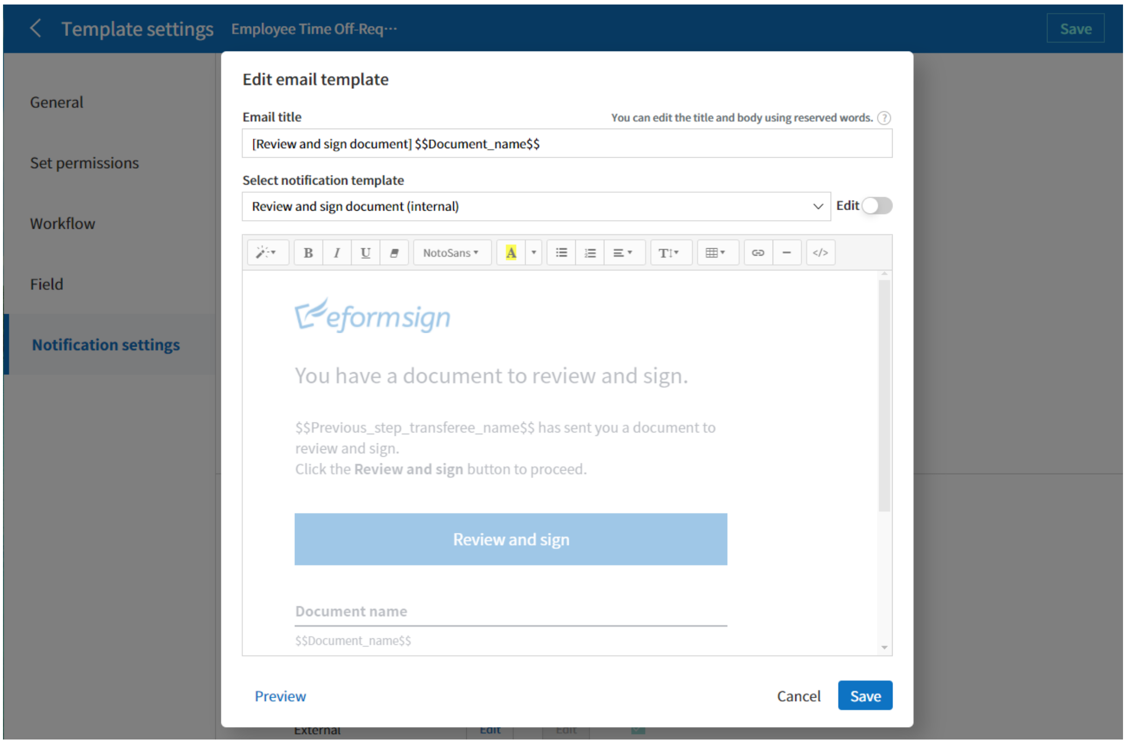
Edit notification messages

You can view and edit notification messages to be sent to recipients when sending documents created from the template. You can find the default notification messages in the **Manage company > Notification template management** page and can edit them by clicking the **Edit** button.

Note

SMS templates can only be edited by companies subscribed a paid plan.





- **When sending for review and sign > Internal**: You can edit the notification messages to be sent to internal recipients when sending a document to be reviewed and signed.

- **When sending for review and sign > External**: You can edit notification messages to be sent to external recipients when sending a document to be reviewed and signed.

- **When sending for approval**: You can edit the notification messages to be sent to approvers when sending an approval request.

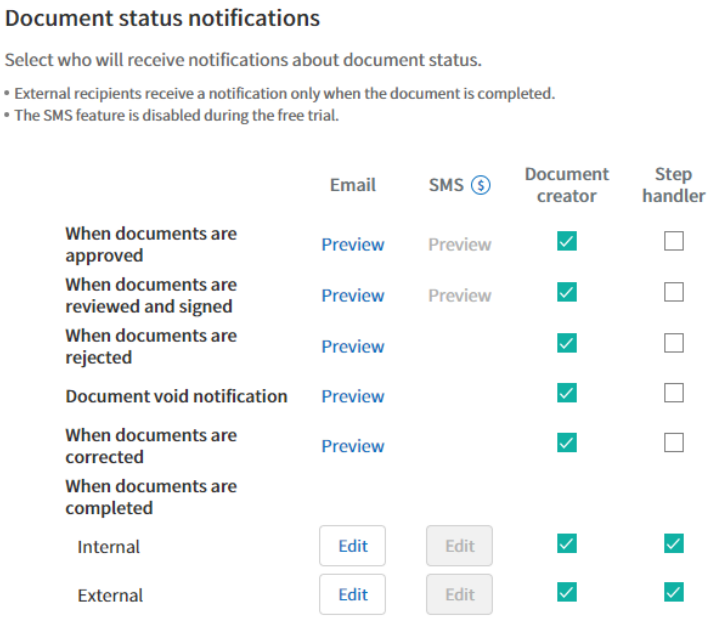
- **When rejecting documents**: You can edit the notification messages to be sent to document senders when a document is rejected by approvers, internal recipients, or external recipients.

Document status notifications

You can select who will receive status notifications for documents created from the template. You can also preview the following notification message types: approved, reviewed and signed, rejected, voided, and corrected. As well, you can edit and preview the notification messages for completed documents.

Note

For notifications sent when documents are rejected, voided, or corrected, only email templates are provided and they are not sent via SMS. Also, SMS templates for document completion notifications (internal/external) can only be edited by companies subscribed a paid plan.



Note

When the **Document creator** option is checked but the **Step handler** option is unchecked, a status notification is sent to the person who originally created the document.

When the **Document creator** option is unchecked but the **Step handler** option is checked, status notifications are sent to people who have processed the document before the current step, except the document creator.

When the **Document creator** and **Step handler** options are both checked, status notifications are sent to both the document creator and the people who have processed the document before the current step.

When the **Document creator** and **Step handler** options are both unchecked, no notifications will be sent for that status.

- **When documents are approved**: When the document is approved by an approver, a notification will be sent stating that the document has been approved.

- **When documents are reviewed and signed**: When the document is reviewed and signed by internal or external recipients, a notification will be sent stating that the document has been reviewed and signed.

- **When documents are rejected**: When the document is rejected by an approver, internal or external recipients, a notification will be sent stating that the document has been rejected.

- **Document void notification**: When a request for voiding a document is approved, a notification will be sent stating that the document has been voided.

- **When documents are corrected**: When the document is corrected by a document creator, a notification will be sent stating that the document has been corrected.

- **When documents are completed > Internal**: When the document is completed, a notification will be sent to the document creator, approvers, and internal recipients stating that the document has been completed.

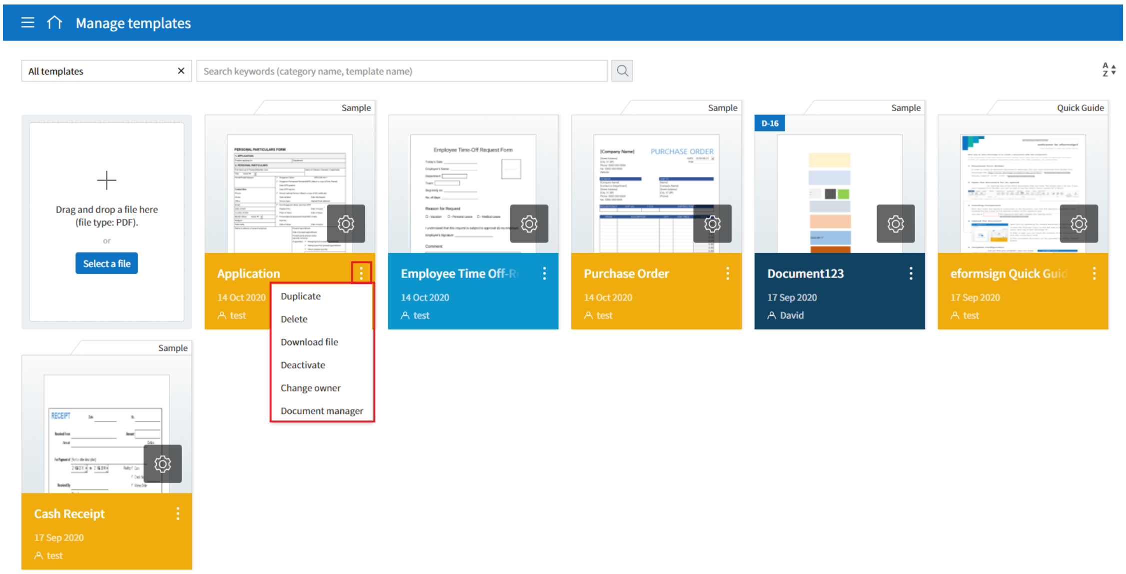
- **When documents are completed > External**: When the document is completed, a notification will be sent to external recipients stating that the document has been completed.

Note

When the **Document creator** option for **When the document is completed > External** is checked and an external recipient creates and submits a document via a URL, the external recipient must enter his/her email in which a notification will be sent to when the document is completed.

6.3. Menus for Each Template

Go to the **Manage templates** page, click the menu icon (⋮) right next to the template name to see the menus that can be set for each template.

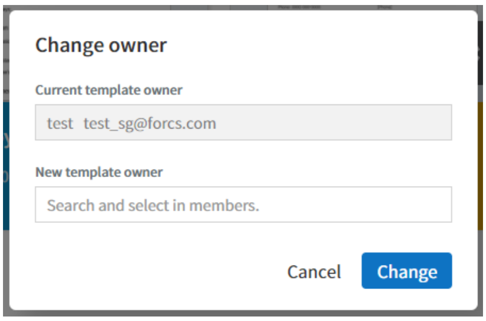


- **Duplicate**: Duplicates the template. The template's file and detailed settings for the template will be duplicated. You will have a chance to change and save the detailed settings before the template is duplicated.

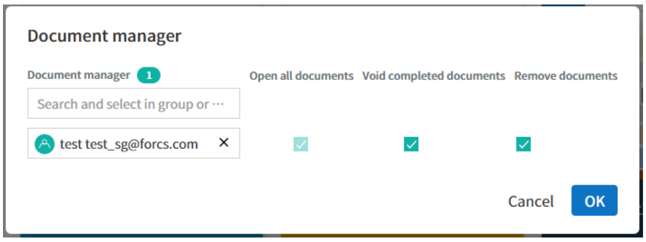
- **Delete**: Deletes the template. Once a template is deleted, you can no longer create documents from that template.

- **Deactivate**: When a template is deactivated, it will not be shown in the **New document** page for other members.

- **Change owner**: You can change the owner of the template. By default, the person who created the template is automatically assigned as the template owner. If you want to make changes later, you can change the owner to another member by clicking this menu. The new template owner can be selected among members who have permission to manage templates.

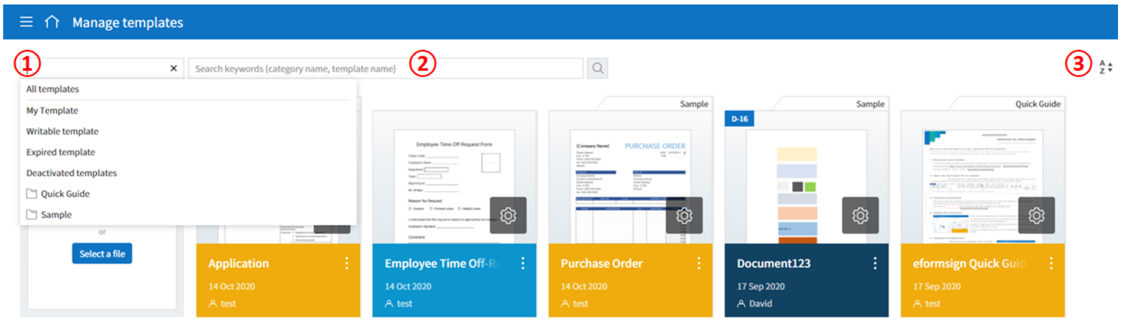


- **Document Manager:** You can select the members or groups that can manage documents created from the template. You can also select document managers in **Template settings > Set permissions.**



6.4. Search Templates

In the **Manage templates** page, you can lookup and search templates by template category.



① **Lookup Templates**

Click the box **(1)** to lookup templates by template status and category. Click **X** to return to view all categories.

By default, templates are saved in the Sample category. You can create categories in **Template settings > General.**

② **Search templates**

You can search templates by entering keywords for the template name and category name.

③ **Sort**

You can select the template sorting order in ascending or descending by template name or category.

Chapter 7. Documents

7.1. Documents

Documents are stored in the following three menus according to the document status:

- **In progress:** View the list of documents you have created or signed/approved that are incomplete.
- **Action required:** View the list of documents you have saved as a draft, requested by other members for you to sign or approve, or sent to external recipients but have yet to be signed.
- **Completed:** View the list of completed documents among the documents created by you.

By using these menus, you can easily view the status and history of each document, find the documents you want by filtering and searching, resend documents, void/reject documents that have yet to be completed in the workflow, and edit draft documents.

All documents and related activities are stored in the Documents menus, and you can view detailed information about the document status and history.

Aside from the three document menus, there is another menu for managing documents.

- **Manage documents:** View and manage all documents created from a template in which you have been given access permission.

Note

The company administrator can view and manage all documents in the company.

[Figure 7.1] Location of the Documents Menus and the Manage Documents Menu

The three Documents menus and the Manage documents menu are laid out almost the same.

Note

The layout of the Documents menus are very similar to each other, but the documents that are displayed differ according to the document status or granted permission to users.

[Figure 7.2] Documents Menus Layout

Each documents menu consists of the following five sections:

1. **Menu and home icon, and document menu name**

   You can go to another menu by clicking the menu icon ( ) or go to the dashboard by clicking the home icon ( ). You can also see the name of the documents menu you are currently viewing.

2. **Template category combo box, document status filter combo box, and search box**

   You can view documents by the selected template category and filter documents by document status.

   In addition to performing searches using keywords, you can also use advanced methods such as searching by name + contents, document ID, date, and many more.

3. **Document list**

   Up to 20 documents are listed per page and you can view the documents in other pages by clicking the page numbers at the bottom.

   The information of each document such as the document status, name, step, creator, created date, processed date, and document number is provided in columns in the document list. You can also change the column information displayed. Click the column icon ( ) displayed at the top right corner of the page, and then check the columns you want to display in the column check box.

   You can also perform actions on a document such as reviewing, previewing, correcting, voiding, resending, and deleting a document.

4. **Document status and history**

You can check the documents status and history.

In the **Document status** tab, you can see what happens to a document in each step of the workflow.

In the **History** tab, you can see the activities of the document creator and recipients from document creation to completion.

5. **The column selection icon, document download icon, and delete icon**

Clicking the column selection icon ( ) displays the column types which you can check to select which columns will be displayed in the document list.

Clicking the download icon ( ) allows to select the documents in the list you want to download. You can select multiple documents to download at once and choose the file type including the PDF of the completed documents, audit certificate, and CSV of selected fields.

Note that the delete icon ( ) is disabled in the three document menus, but is enabled in the **Manage documents** menu.

Note

Documents can be deleted only in the **Manage documents** menu and you can only delete documents in which you have document management permission. The company administrator or the template managers of a template can grant you document management permission for all documents created from a template in **Manage templates > Template settings > Set permissions > Document management** and selecting the groups/members you want to grant permission. Document management permission can be set for each template. Members with this permission can open, delete, and download the documents (PDF, CSV) created from this template in the **Manage documents** menu.

7.1.1. Template Category Combo Box, Document Status Filter Combo Box, and Search Box

The template category combo box, document status filter combo box, and search box are located at the top left side of the **Documents** menus and the **Manage documents** menu.

- **'In progress', 'Action required', and 'Completed' menus**

  In these menus, the template category combo box, document status filter combo box, and search box are also located at the top left side of the screen.

- **'Manage documents'**

In this menu, the template category combo box, document status filter combo box, and search box are located at the top left side of the screen. However, the document status filter combo box contains one additional menu, 'Voided', compared to the three documents menus.

Template category combo box

By using the template category combo box, you can display the list of documents by template category by selecting the desired template available in the **Manage templates** menu.

Clicking the **X** icon of the template category combo displays the templates according to categories as shown below:

[Figure 7.3] Template category combo box

Document status filter combo box

In addition to doing searches using keywords, you can also use advanced methods such as searching by name + contents, document ID, date, and filtering by document status.

You can also search for field values in documents in detail by using a custom filter. As well, by using a custom filter, you can search for documents according to the range of numbers and dates.

The following table describes the filters that can be used for performing searches. However, custom filters can only be used in the **Manage documents** and **Completed** menus.

[Table 7.1] List of filter types

In progress	Action required	Completed	Manage documents
Name + content	Name + content	Name + content	Name + content
Name	Name	Name	Name
Contents	Contents	Contents	Contents
Document ID	Document ID	Document number	Document number
Document number	Document number	Status	Step
Status	Status	Step	Created by
Template name	Template name	Created by	Created on
Step	Step	Created on	Processed by
Created by	Created by	Processed by	Processed on
Created on	Created on	Processed on	Custom filter
Processed by	Requested by	Step status	
Processed on	Requested on	Custom filter	
Step status	Step status		
	Days passed		

Using the custom filter

1. Select **Custom Filter** in the **Advanced** search combo box.

[Figure 7.4] Custom filter

2. Select the field name, field type (keyword, range, or period), and search value.

The default value of the field name is an empty value.

Make sure to manually enter the Display name of the field in the document you want to search for. You can view the Display name for fields in the Template settings > Field setting menu.

Note

1. Documents may not be searched if you search for a document by entering the display name of the field that does not exist.

2. You cannot enter special characters in the display name (", ', ;, <, >, \).

3. Empty spaces before and after the display name are all removed. E.g. “ Time off ”   “Time off”

4. When adding or editing a search value, if you enter a duplicate value in the custom filter, then the previously entered field type and field search value will be displayed. For example, when adding a custom filter again while 'years worked: 5~10' was entered in the custom filter, if you enter 'years worked' in the field name, then the previous value such as Range for Type, 5 for Min value, and 10 for Max value are displayed.

You can choose one of Keyword, Range, and Period for the field type. Keyword is the default.

Note that the input boxes displayed differ according to the field type selected.

Field type	Input box 1	Input box 2
Keyword	Text	
Range	Min	Max
Period	Start date	End date

- **Keyword**

  Used for searching multiple values by a comma (,) which is used as the delimeter. The default value is empty.

  When used, it searches for the text entered. In other words, it searches for documents that contain at least one of the multiple values entered. E.g. Field name: fruit / Field type: keyword / Value1: strawberries, apple   searches for documents that contain at least one of 'strawberries' and/or ' apple'.

- **Range**

  Used for searching values of range such as numbers or dates. E.g. number: 100 ~ 200, period: 01/01/2019 ~ 06/30/2019

  When used, it searches for values between the min and max. If you only enter the min, then only the values larger than the min value are searched, while if you only enter the max then only the values smaller than the max are searched. E.g. salary: 1000 ~ , salary: ~ 5000

- **Period**

  Selects the period in the calendar displayed. The default value of the period length is set to one week.

  Searches for the date between the start and end date selected.

3. Click the add search (+ Search) button to add the keyword entered and documents are searched according to the conditions set.

Note

1. You can add multiple custom filters, and can modify/delete the custom filters you added.

2. You cannot add multiple custom filters with duplicate field names.

3. If you modify a predefined custom filter, then the field type and search values are updated with the most recently entered values.

Displaying search keywords and modifying/deleting them

1. The search keyword is added in the form of **field name: value**.

- Keyword: “employment type: permanent, contract”

- Range: “years worked: 5~10”

- Period “contractperiod_yymmdd: 2018-01-01~2018-12-31”

2. Modify the custom filter by selecting a search keyword added. When modifying, the **Advanced** filter item is changed to **Customer filter**, and the selected filter's field name, field type, and search value are displayed.

3. Added keywords can be deleted by clicking the **X** icon on the right.

7.1.2. Actions that Can Be Performed in the Document List by Documents Menu

Actions on documents that can be performed in the document list include preview, correct, void, resend, send final copy, and download.

In progress

Can perform actions including preview, correct, void, send final copy, and download.

Action required

Can perform actions including preview, correct, void, review, resend, and download.

Completed

Can perform actions including preview, void, send final copy, and download.

Manage documents

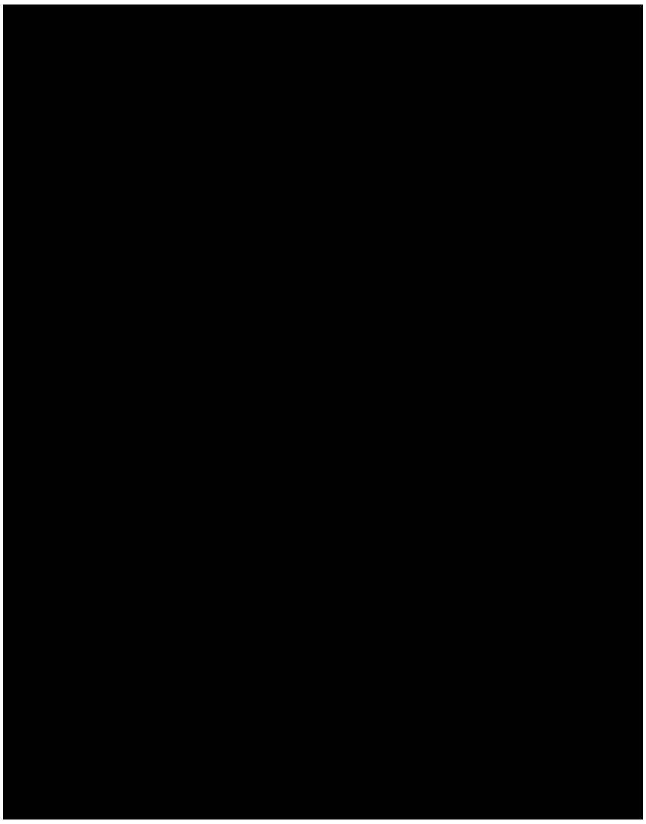
Can perform actions including preview, void, send final copy, remove, download, and delete. Documents can only be deleted in the **Manage documents** menu.

7.1.3. Document Status and History

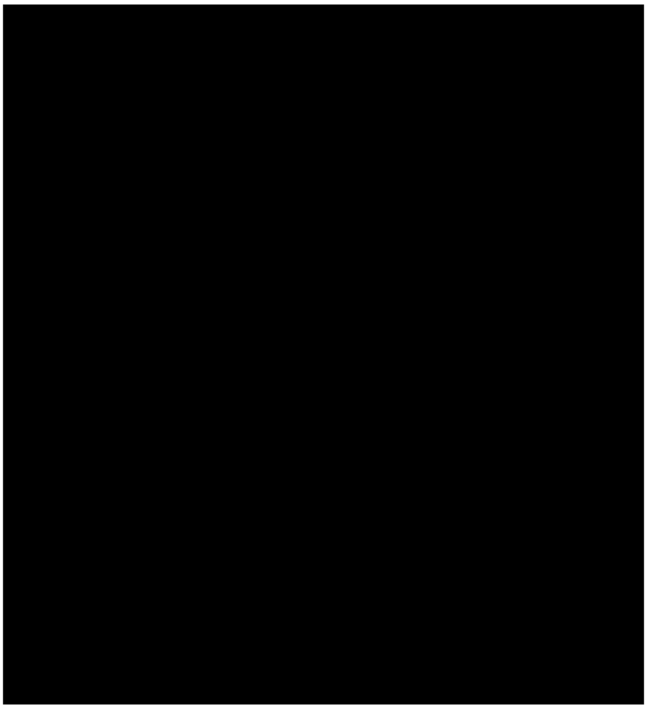
If you select a document in the document list, you can view the status and history of that document on the right side of the screen.

In the **Document status** tab, you can see when and what happens to a document in each step of the workflow. In the **History** tab, you can see the activities of the document creator and recipients from document creation to completion.

[Figure 7.5] Document status tab



[Figure 7.6] History tab



7.1.4. Document Download

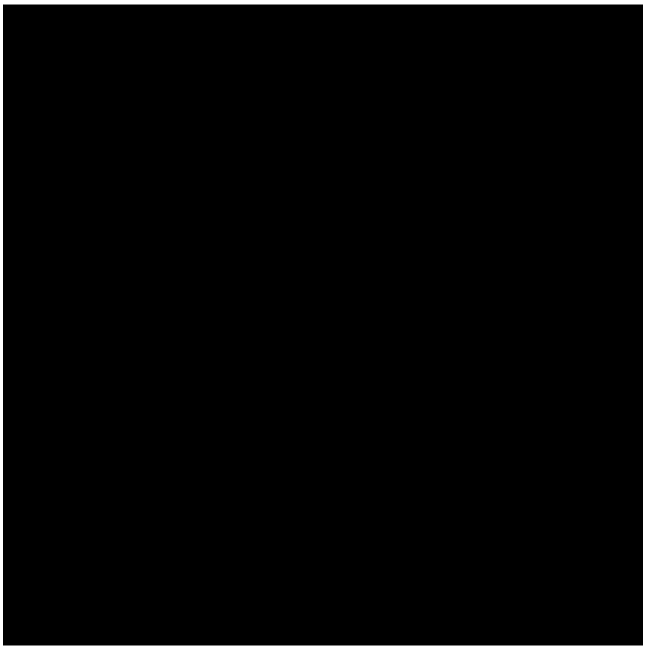
Documents created in eformsign can be safely stored for long periods of time.

All documents are stored in a file format for long-term storage (PDF/A) and only members with document management permission can open and delete them.

1. Click the download icon ( ) on the right side of the document list.

2. Select the document to be downloaded, and then click the **Download** button.

[Figure 7.7] Document download pop-up



Note

CSV files can also be downloaded in the **Download** pop-up where PDF files can be downloaded. Select **CSV download** in the pop-up and check the fields (columns) to be downloaded and then click the **Download** button.

7.1.5. Deleting Documents

In eformsign, only members with document management permission can delete documents.

1. Click the delete icon ( ) on the right side of the document list.
2. Select the document and then click the **Delete** button.
3. Click the **Yes** button in the Delete pop-up window to delete the document.

7.1.6. Document Menu Column Selection

If you click the column ( ) icon on the right side of the document list, you can select which column to be displayed on the list.

[Figure 7.8] Document column selection icon

7.2. Creating New Documents

You can create new documents by using uploaded templates.

Note

Members and groups can only create documents from templates in which they are given template usage permission.

Creating a new document

1. Go to the **New document** menu.

2. Click the create icon() of the template you want to create a document from.

[Figure 7.9] New document list

3. Create a document, and then click the **Complete** or **Request** button at the top right corner of the screen.

Note

Different buttons are displayed at the top right corner of the screen according to the workflow set in the template.

7.3. Send in Bulk

You can send multiple documents at once by using the **Send in bulk** feature. Also, you can preview the documents before sending them to recipients.

Note

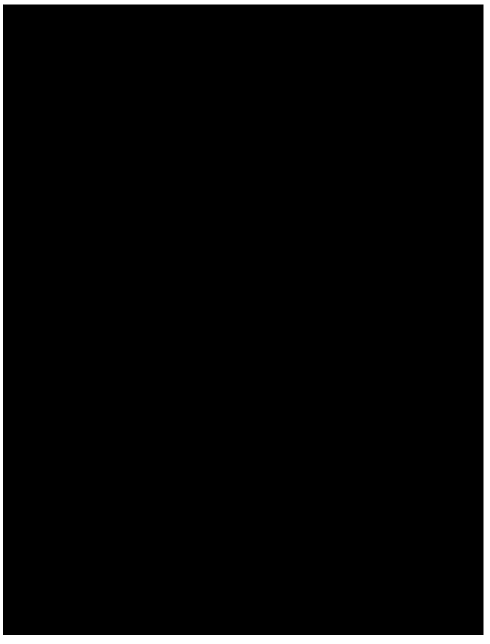
This action requires either one of document management or company administrator permission.

Send in bulk

1. Go to the **New document** menu.

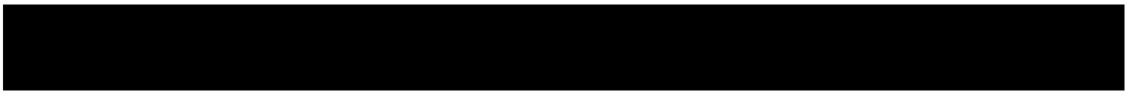
2. Click the send in bulk icon of the template you want to create documents from.

[Figure 7.10] Send in bulk icon



3. Enter the values in the columns displayed on the screen.

[Figure 7.11] Send in bulk screen



Note

Each column of the table contains all the fields of a document. The IDs of components (which are fields in a template) are shown as the name of each column. The last row of the first column (No.) indicates the number of documents to be created.

Tables are filled in a similar way as in Excel. You can double-click on each cell to enter value and right-click on the mouse to add or delete columns. The value entered in a cell can be copied and pasted, and dragged to another cell.

---

4. Click the **Preview** button on the top right corner of the screen to view the documents you created and then click the **Create** button to send the documents.

Note

If there is an external process step in a template, then the left area of the table is highlighted in blue. This area is for entering the external recipients' names, emails, etc. Depending on the external process settings, there can be phone numbers, verification passwords, etc.

[redacted]

Tip

If there is a component that is not shown in the **Send in bulk** screen, then the following must be checked.

1. The components that cannot be entered in **Send in bulk**: camera, voice, and grouped radio components cannot be used in Send in bulk.

2. Check whether the components are allowed access in Template settings: Only the components that are checked to be allowed access in the **Manage items** tab of **Template settings( ) > Workflow** are shown.

Chapter 8. Customizing eformsign

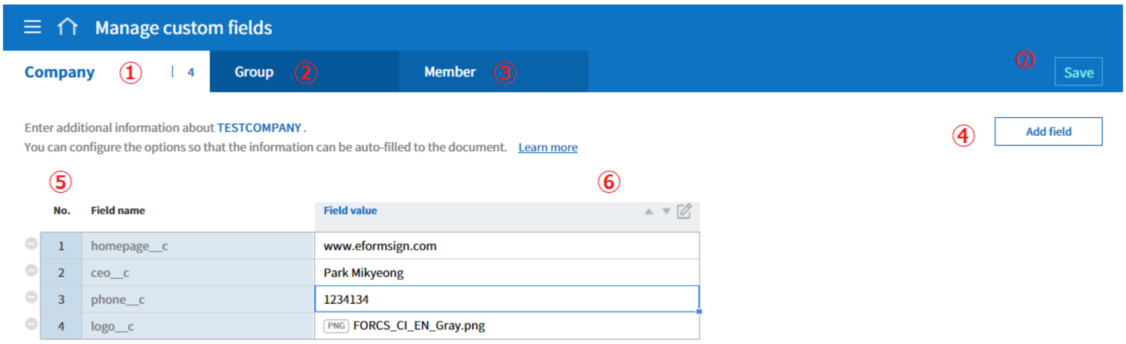
8.1. Manage Custom Fields

You can add and edit fields for companies, groups, and members in the **Manage company > Manage custom fields** menu.

Tip

By using custom fields, you can set frequently used companies, groups, and member information (e.g., company phone number, address, company representative name, etc.) to be added automatically in documents. After adding custom fields in the **Manage custom fields** menu, go to the **Template settings > Field settings** menu to set which information is to be entered automatically in the documents.

[Figure 8.1] Manage company > Manage custom fields



① Manage custom fields > Company

You can add fields related to the company such as the company representative name, company phone number, stamp and seal, and then set the values.

② Manage custom fields > Group

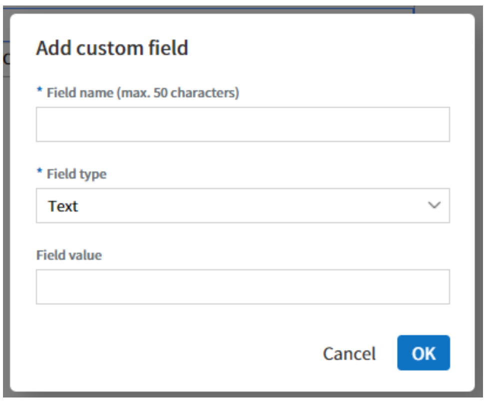
You can add fields related to groups such as the department name and manager, and then set the values.

③ Manage custom fields > Member

You can add fields related to members such as the job title, email address and phone number, and then set the values.

④ Add field

If you click the **Add field** button, the **Add custom field** pop-up window will be displayed where you can add a new field. Enter the field name, field type (select from text or image), and field value, and then click the **OK** button to add the field to the custom field list.



⑤ Field list

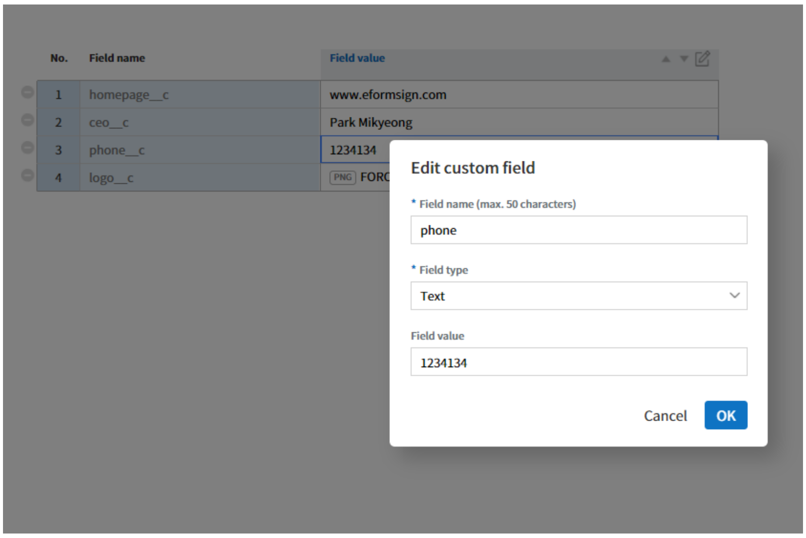
The custom field list shows the field names and the field values that you added. You can also delete the fields and edit the field values.

To delete a field, click the icon ( ) located to the left of the field list.

⑥ Edit field

If you select a field to edit and then click the edit icon, the **Edit custom field** pop-up window will be displayed where you can edit the field name, field type, and field value.

You can also change the field order. Select a field in which you want to change the order, and then click the arrow ( ) button.



⑦ Save

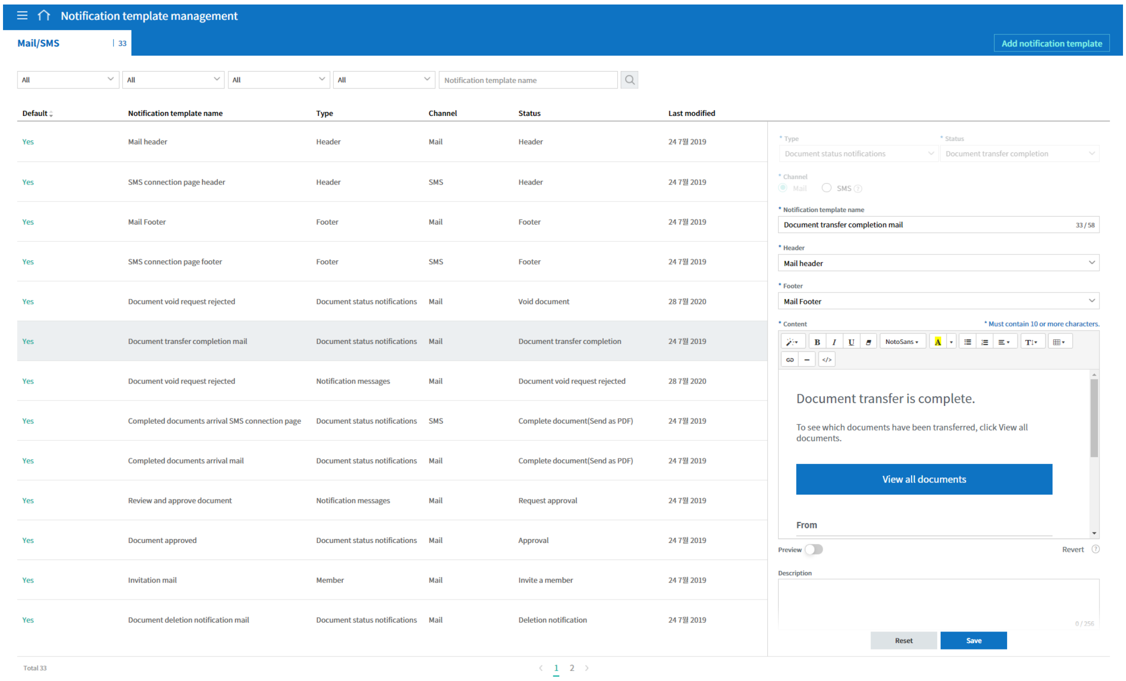
After editing the custom field, click the **Save** button to save your changes.

8.2. Notification Template Management

You can customize the email and SMS notification messages to best suit the needs of your company.

Notification templates can be edited in the **Manage company > Notification template management** menu or in the **Manage templates > Template settings > Notification settings** menu.

[Figure 8.2] Manage company > Notification template management



Default templates are shown in the **Manage company > Notification template management** menu. You can change the contents of the default templates and add new notification templates.

Basic template types (select from Mail or SMS)

[Table 8.1] Template Types and Status

Type	Status
Notification messages	Request approval, Acceptance request, External user processing request, Reject approval, Document void requested, and Document void request rejected
Document status notifications	Approval, Acceptance approval, Approve decline request, External user complete document, Complete document, Correct document, Void document, Deletion notification, Document transfer completion, and Complete document (Send as PDF)
Member	Invite a member, Accept the member invitation, Refuse the member invitation, and Withdraw from company
Header and footer	

Tip

The header is set with the eformsign logo by default. If you upload your company's logo in the **Manage company > Company profile > Company brand** tab menu, the logo is applied to the email templates.

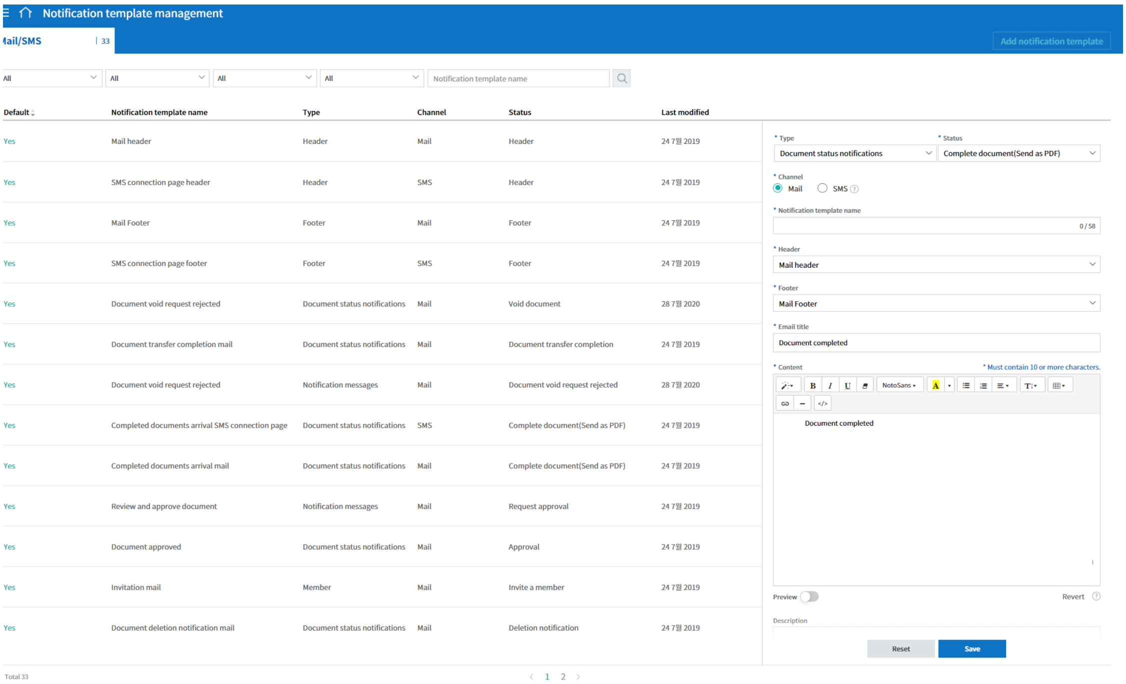
How to add a new notification template

In addition to the default templates, you can add a new notification template.

1. In the sidebar menu, click the **Manage company > Manage Notification Templates** menu.

2. Click the **Add notification template** button located at the top right corner of the **Notification template management** screen.

3. Select the appropriate **Type** and **Status**.



4. Select the **Channel** (select either Mail or SMS) and enter the **Notification template name**.

5. Select the **Header** and **Footer**.

6. Write a new notification message.

7. Click the **Save** button to add it as a notification template.

Chapter 9. Connecting with External Services

9.1. How to Connect with External Cloud Storages

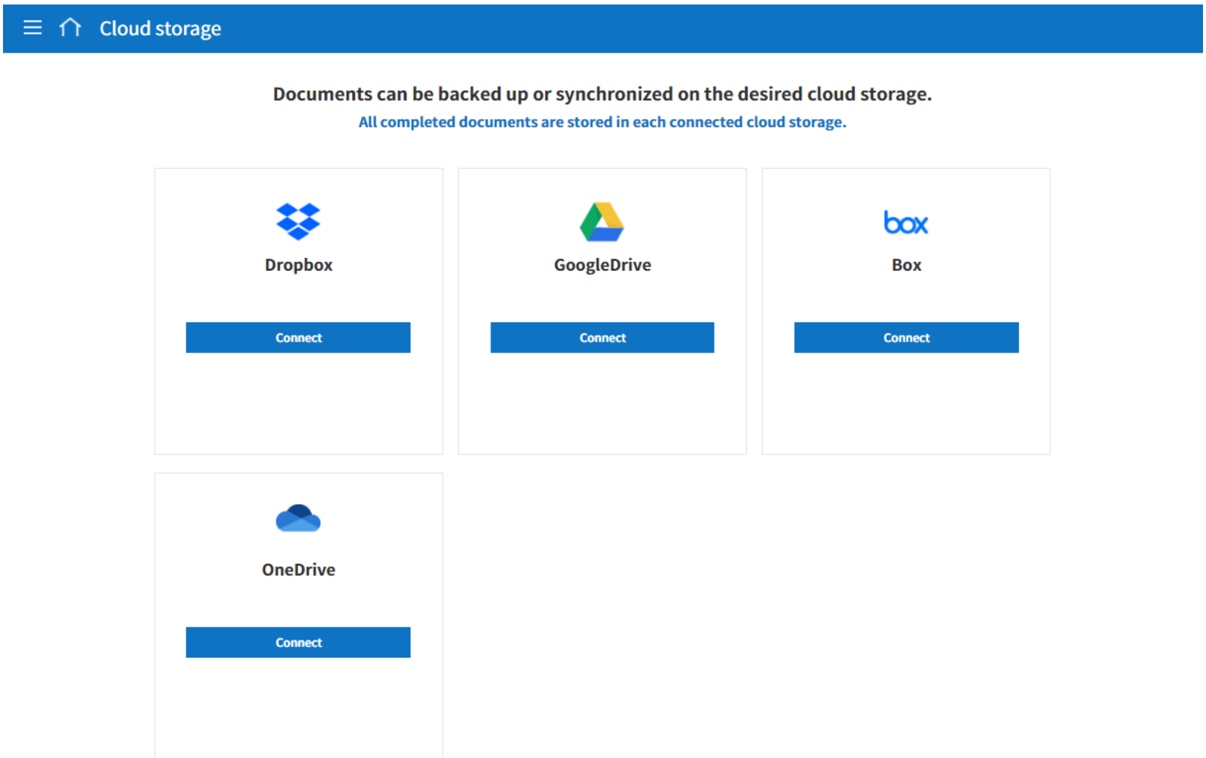
eformsign can automatically save completed documents in external cloud storage services. Currently, Dropbox, Google Drive, OneDrive, and box are supported.

Note

Only the company administrator can connect eformsign with external cloud storages.

1. Go to the **Integration > Cloud storage** menu.

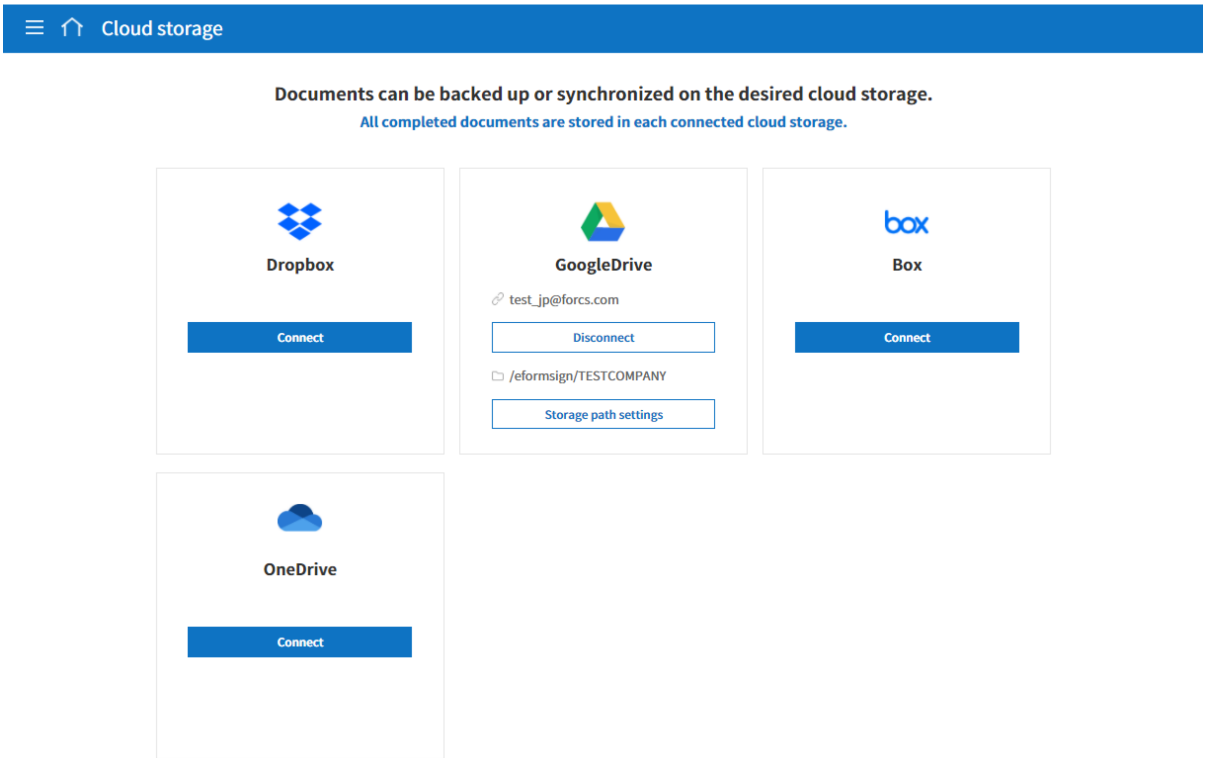
[Figure 9.1] Cloud Storage Screen



2. Select the cloud storage where you want to save completed documents, and then click the **Connect** button to log in.

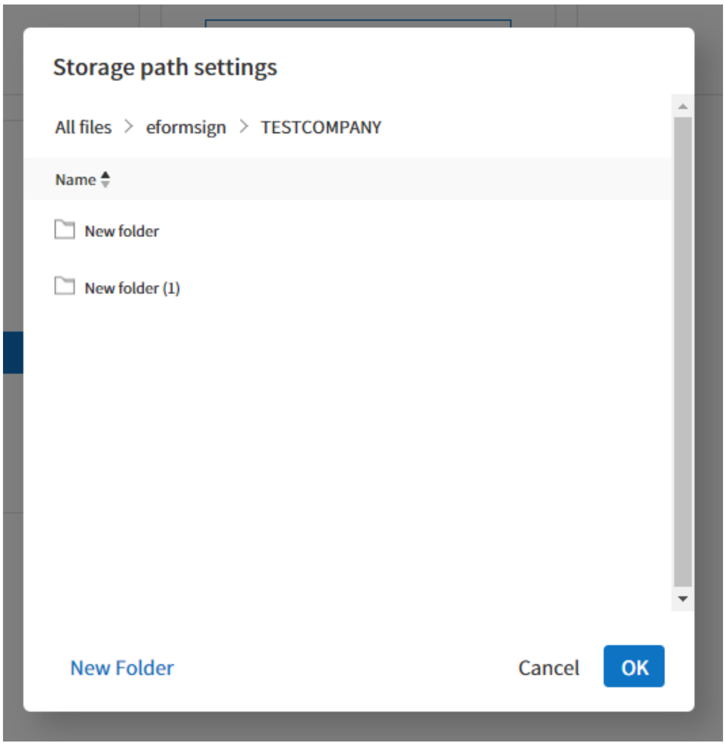
3. After logging in, the **Disconnect** button and the **Storage path settings** button will be displayed. If you need to save the storage path, click the **Storage path settings** button.

[Figure 9.2] Connecting and Disconnecting File Storage Accounts



Note

The **Storage path settings** pop-up window is displayed as follows:



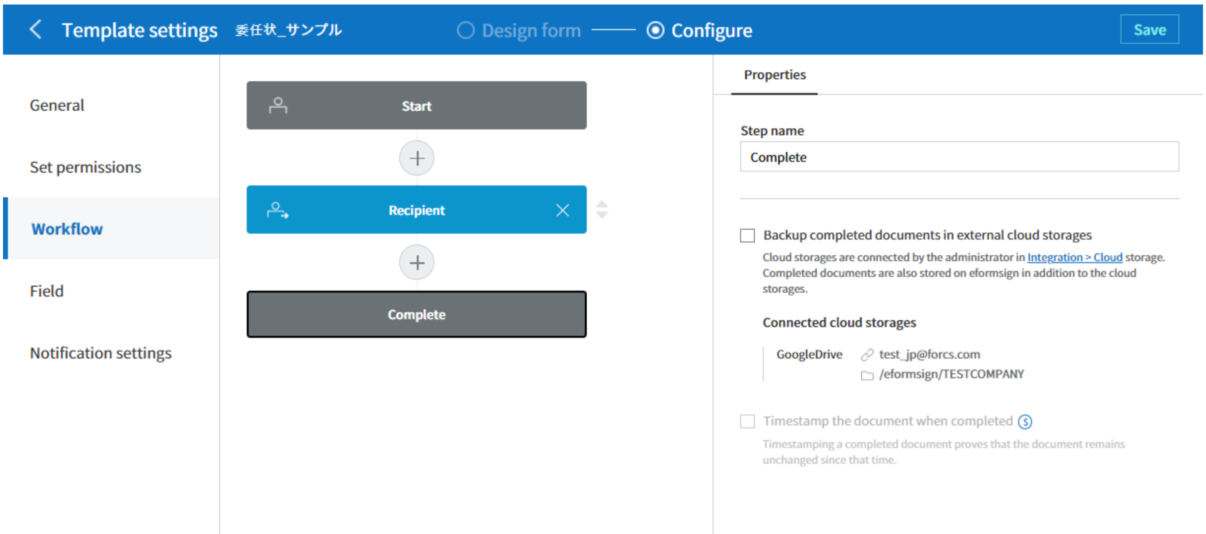
The default path is the subfolder named after your company name, which is located under the eformsign folder. You can also click the **New folder** button to create a new folder and change the storage path.

4. Go to the **Manage templates** menu.

5. Click the template you want to save the documents (created from the template) to the cloud storages, and then go to the **Template settings** screen.

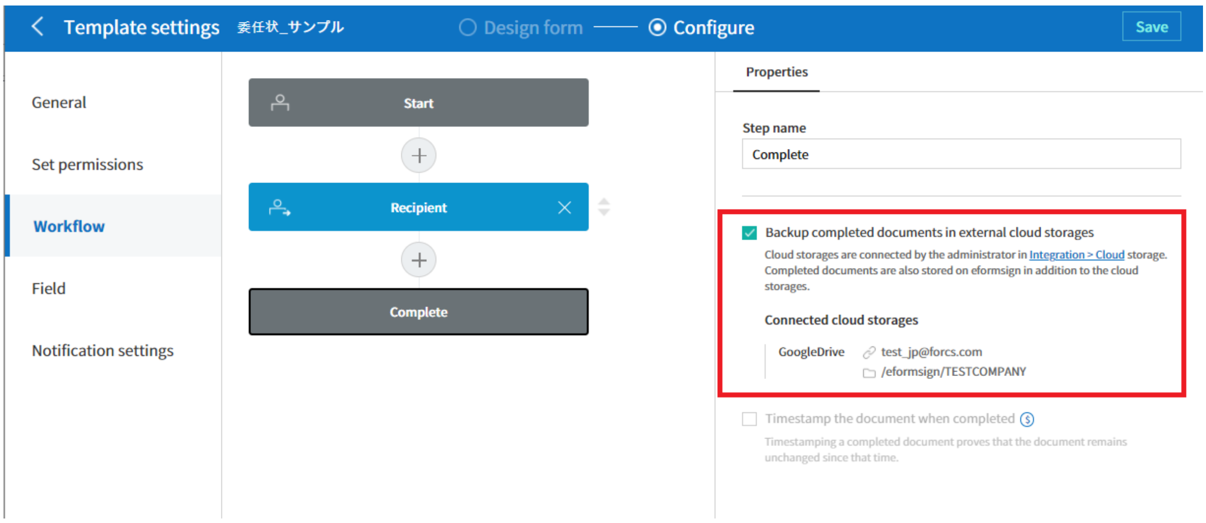
6. Go to the **Workflow** menu.

[Figure 9.3] Setting the Complete Step of the Workflow



7. In the **Properties** tab of the **Complete** step, tick the **Backup completed documents in external cloud storages** checkbox. You can check whether the cloud storages set in the **Cloud storage** menu are connected. When a document is completed, it will be automatically saved in the connected cloud storage as well as in eformsign.

[Figure 9.4] The Backup Completed Documents in External Cloud Storages Checkbox



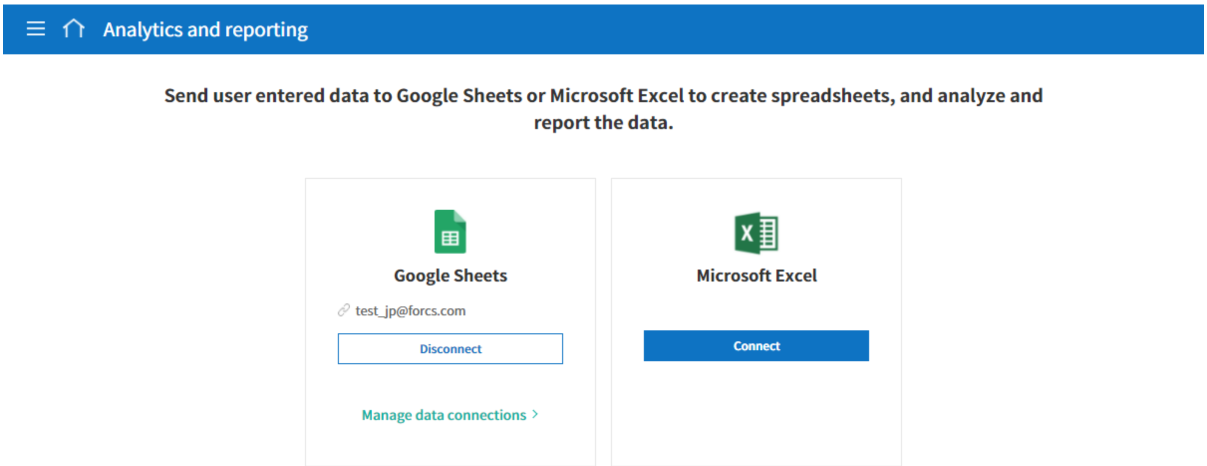
9.2. Analytics and Reporting

If you find it cumbersome and repetitive to download a CSV file every time a new document is added, using this feature is recommended. You can set the entered data to be automatically saved in a sheet in Google Sheets and Excel of Microsoft Office 365.

Note

Analytics and reporting can be set only by the company administrator.

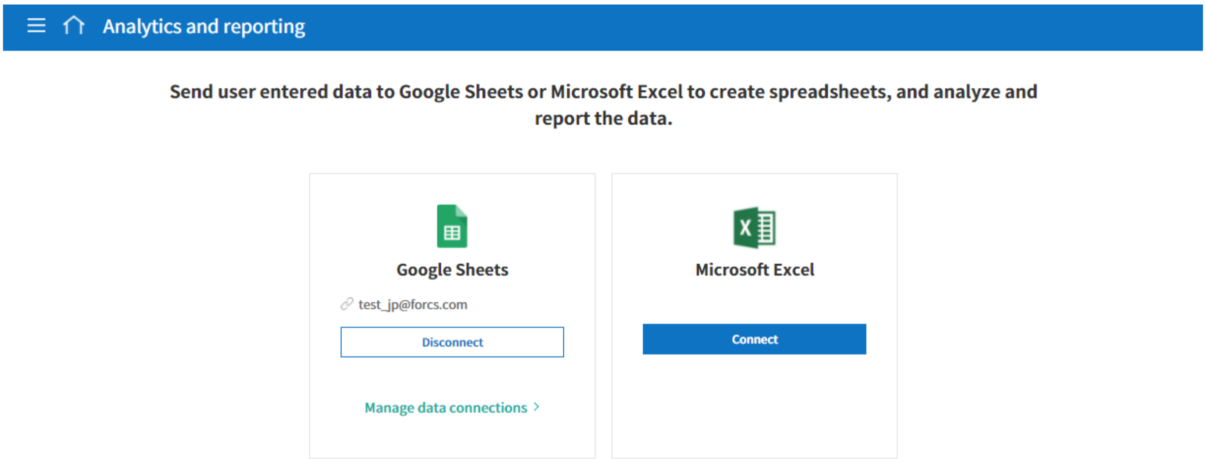
[Figure 9.5] Analytics and Reporting Menu Screen (1)



1. Go to the **Integration > Analytics and reporting** menu.

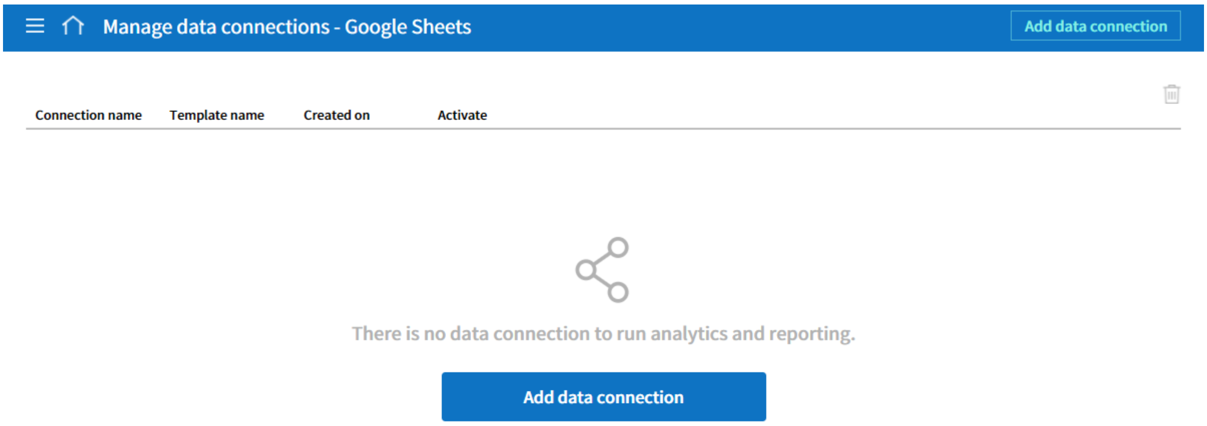
2. Select either Google Sheets or Microsoft Office 365, and then click the **Connect account** button to log in.

[Figure 9.6] Analytics and Reporting Menu Screen (2)



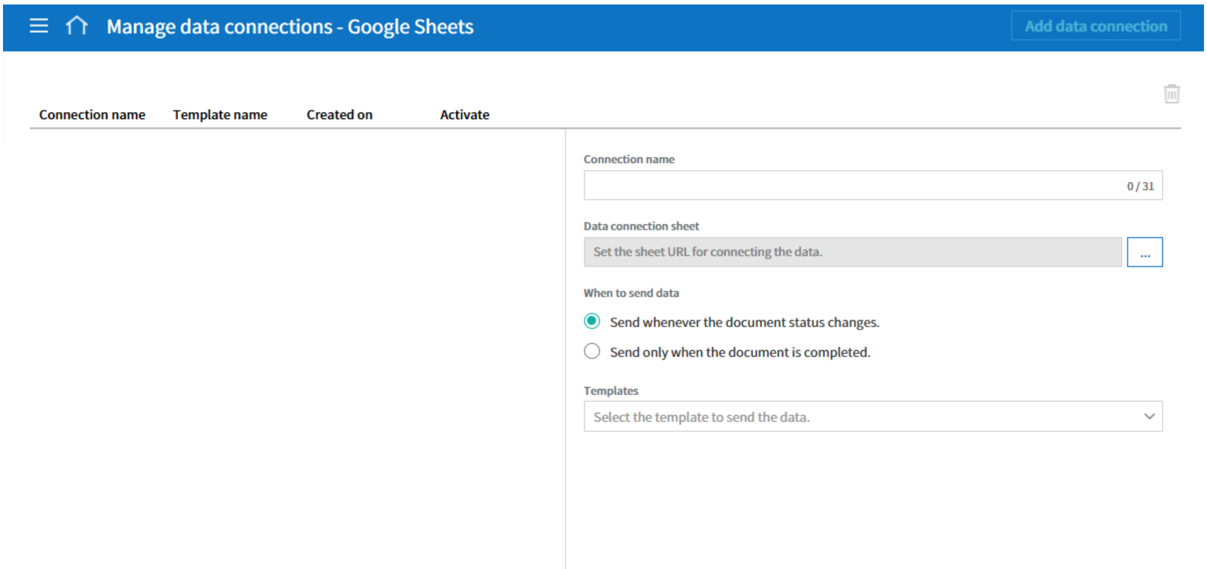
3. Click the **Manage data connections** button.

[Figure 9.7] Manage Data Connections Screen (1)



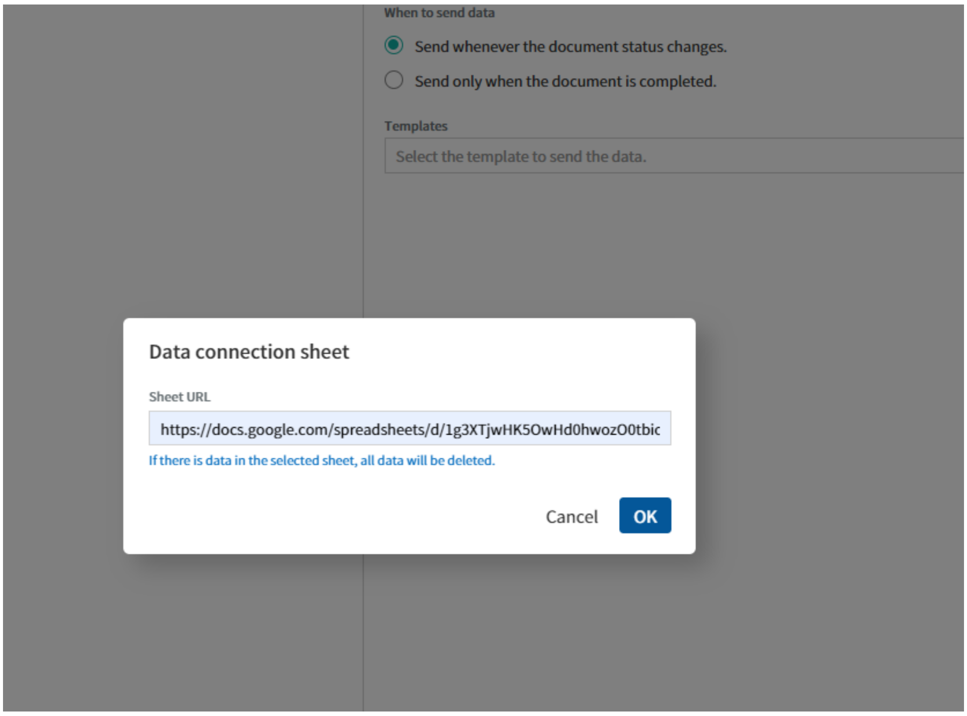
4. Click the **Add data connection** button in the center of the screen or at the top right corner of the screen.

[Figure 9.8] Manage Data Connections Screen (2)

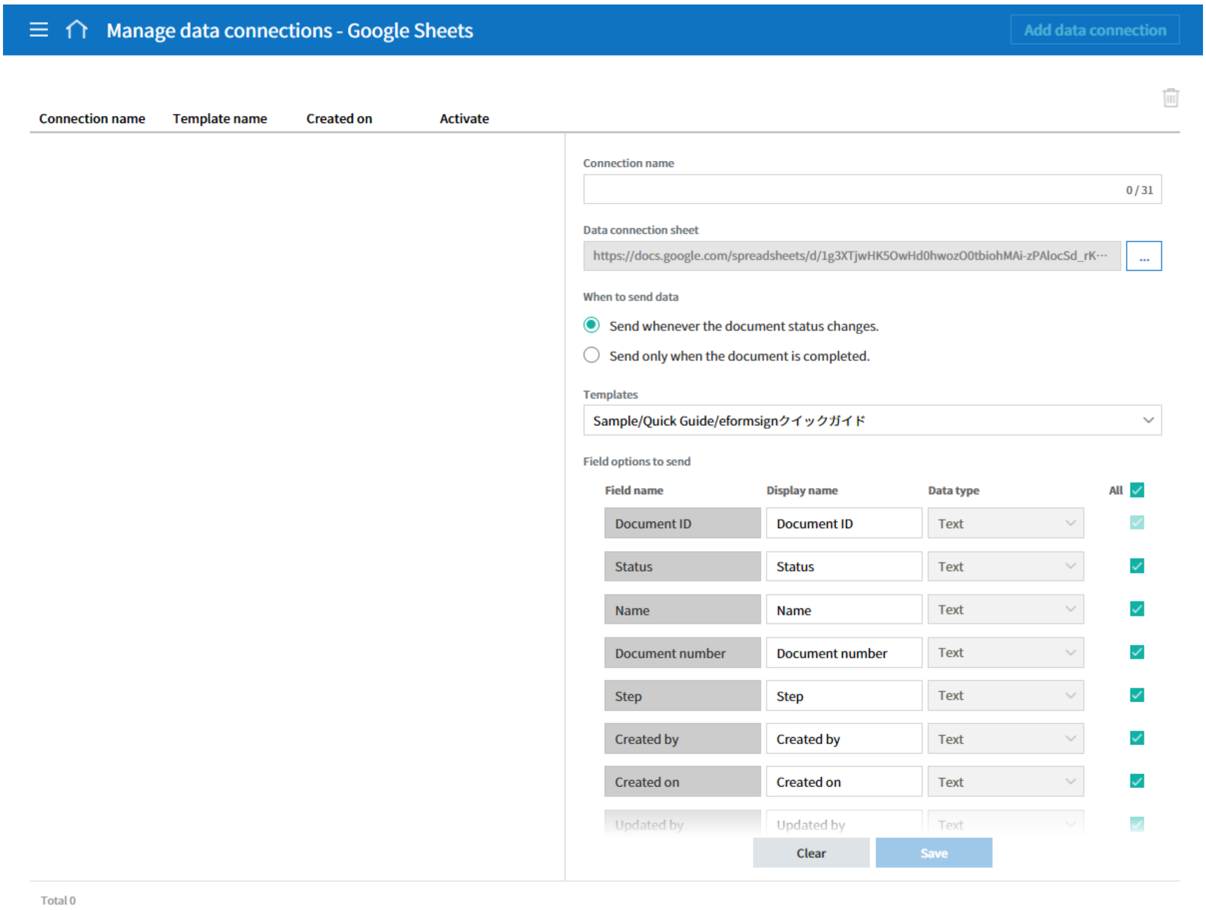


5. Set items such as the Connection name, Data connection sheet, When to send data, and Templates, and then click the **Save** button.

[Figure 9.9] Manage data connections Screen (3)



[Figure 9.10] Manage Data Connections Screen (4)

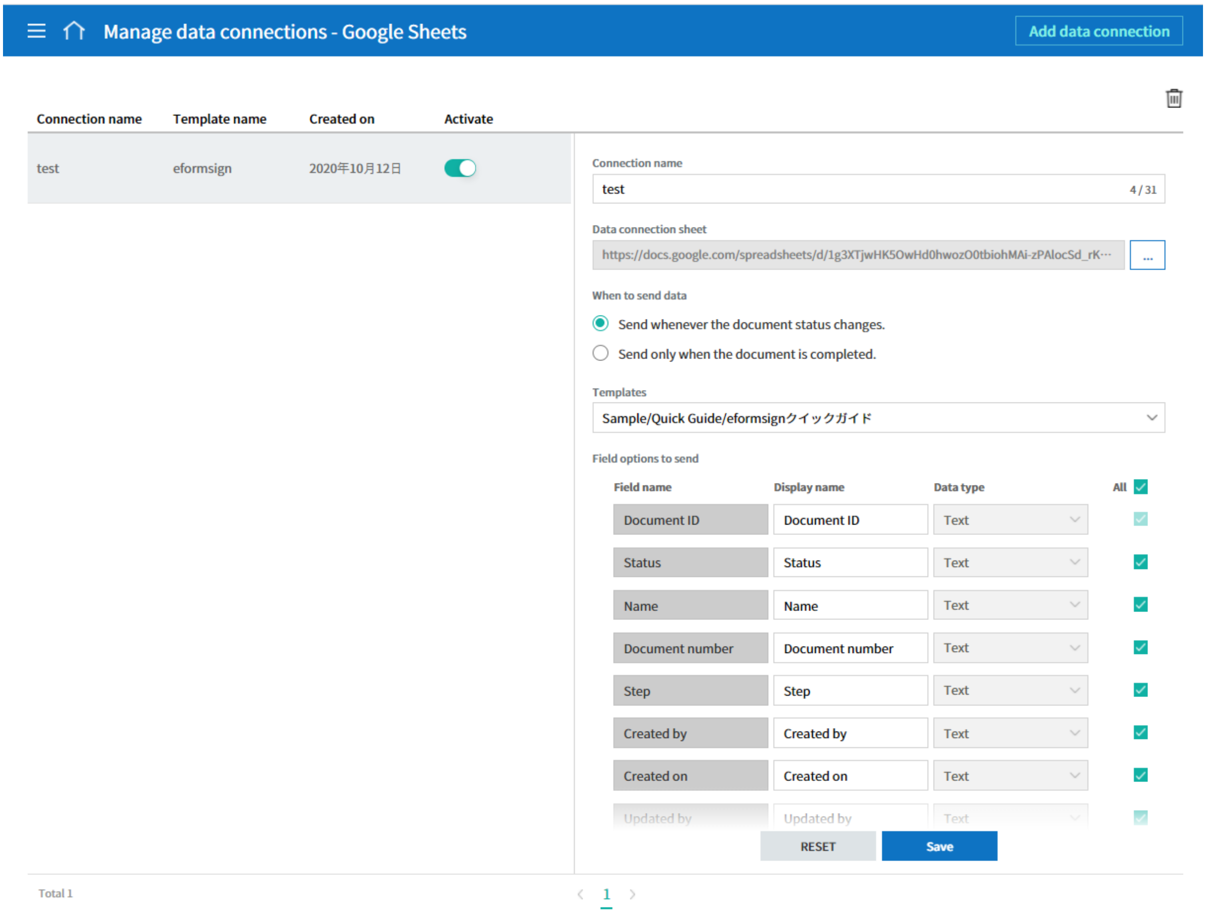


Note

A data connection sheet corresponds to the URL of a sheet in Google Sheets.

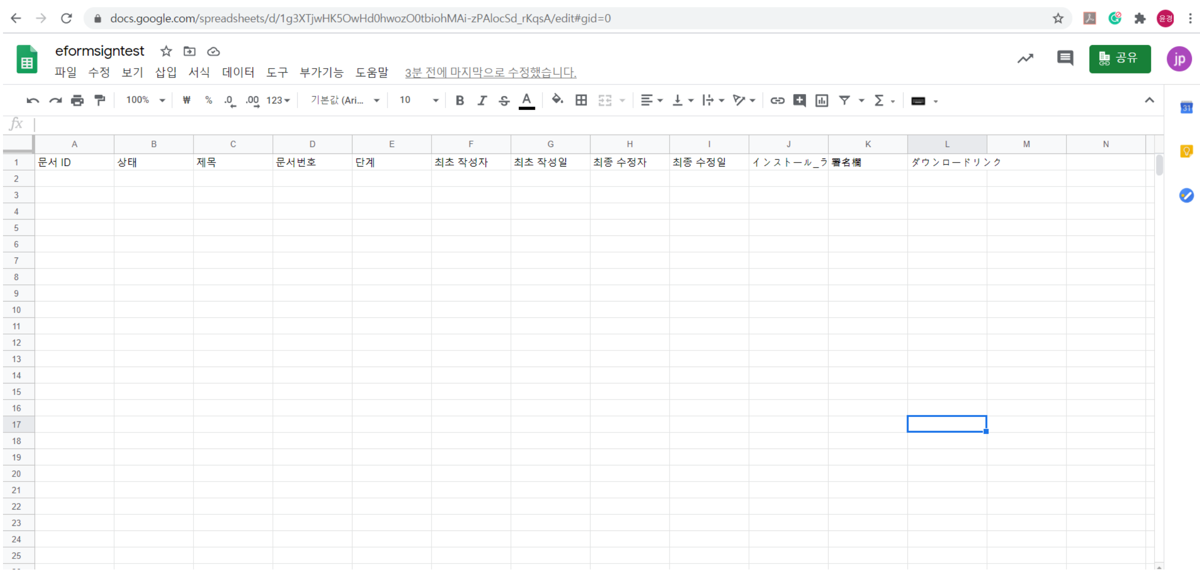
6. Data connection sheets are displayed in the **Manage data connections** screen.

[Figure 9.11] Manage Data Connections Screen (5)



7. If you select a connected sheet, you can see the columns in which field data will be automatically imported from eformsign.

[Figure 9.12] Manage Data Connections Screen (6)



索引

A

Action required, 4, 12, 13
Active members, 33
Analytics & reporting, 12
Analytics and reporting, 192
API, 12
Approver, 5

B

Bulk-invite, 34

C

Change company, 16
Cloud storage, 12, 189
Company Administrator, 5
Company administrator, 25, 26
Company brand, 22
Company manager, 25, 28
Company profile, 12, 19
Complete, 5
Completed, 4, 12, 14
Components, 45, 82
  Attachment, 46, 69, 83, 98
  Camera, 46, 66, 83, 95
  Check, 45, 52, 82, 87
  Combo, 45, 55, 83, 90
  Date, 46, 73
  Datetime, 45, 58, 83, 91
  Document, 46, 72, 83, 99
  ID, 51, 83
  Label, 46, 74, 83, 90
  Multiline, 45, 57, 82, 84
  number, 83
  Numeric, 45, 60, 93
  Radio, 45, 53, 83, 88
  Signature, 46, 63, 82, 85
  Text, 45, 57, 82, 84
  Toggle, 46, 61, 83, 94
  Tooltip Text, 52
  Tooltip Text:, 83
  User, 46, 70
  Voice, 46, 67, 83, 97

D

Dashboard, 3, 11, 13
Delegating the Company Administrator Permission, 26
Document management, 30, 119, 150
Document manager, 26
Documents, 4, 12, 167
  Action required, 167
  Completed, 167
  Document download, 176
  Document status filter combo box, 171
  In progress, 167
  Send in bulk, 179
  Template category combo box, 171
  Using the custom filter, 172
Download Form Builder, 13, 41

E

External recipient, 5

F

Favorites, 14
Form Builder, 41
Form builder, 3, 6
  Templates, 135

I

In progress, 4, 12, 13
Inactive members, 33
Integration, 12
Internal recipient, 5
Invite members, 34
Invited members, 33

L

Logout, 16

M

Manage company, 12
Manage custom fields, 12, 183
Manage documents, 12, 167
Manage groups, 12, 32
Manage members, 12, 32
Manage templates, 12
My profile, 16
My signature, 12, 35

N

New document, 11, 13
Notification template management, 12, 185

P

Push notification, 37

Q

QR code, 37

R

Register stamp, 37

S

Start, 5

T

Template
  Field, 127, 158
  Notification settings, 129, 160
Template manager, 26
Template manager permission, 29
Template usage, 26, 30, 119, 150
Templates, 4
  Document naming rules, 111, 142
  Generate a document number, 110, 114, 141, 145
  Reserved word, 143
  Reserved words, 112
Transfer documents, 34

W

Web Form Designer, 79
Web form designer, 3, 6
  Templates, 103
Webhook, 12
Workflow, 5, 106, 120, 136, 150
  Approver, 124, 155
  Complete, 127, 158
  External recipients, 126, 157
  Internal recipient (member), 125, 156
  Start, 123, 154