

HR TO ONBASE DOCUSIGN WALKTHROUGH

A tutorial for completing custom envelopes that require storage in OnBase

PREFACE

This tutorial will serve as a reference guide for the proper procedure regarding the completion of custom uploaded documents that require storage in OnBase.

This is an advanced process and is only recommended for users that have previously created custom templates.

The documents able to be used with this cover sheet can be found at the end of this tutorial.



HR TO ONBASE

Starting the envelope

THE OHIO STATE UNIVERSITY

HOME MANAGE TEMPLATES REPORTS

Sign or Get Signatures

NEW

- Send an Envelope
- Sign a Document
- Use a Template
- Create a PowerForm

1. Click "New"
2. Click "Send an Envelope" from list of options

OVERVIEW Last 6 Months

- Action Required 1 >
- Waiting for Others -- >
- Expiring Soon -- >
- Completed 3 >

WHAT'S NEW

- Download/Upload Multiple Templates**
Move multiple templates at once between accounts. [More Info](#)
- Brand Your Account**
Style your DocuSign account by applying your brand colors and company logo. [More Info](#)
- Payments**
(Available in the U.S., U.K., Australia, and Canada only) Collect payments with your signed agreements. [More Info](#)

WYATTSIGN ID Edit

Wyatt Robert Wortkoetter
wortkoetter.5@osu.edu
Member since 2015

DocuSigned by:
Wyatt Robert Wortkoetter
87338A78E69745A...

TIPS AND TRICKS

- Download Our Mobile App**
Need to use DocuSign on the go? Sign anything, anywhere, anytime with the DocuSign mobile app.
[Download](#)

WE WANT YOUR FEEDBACK

We appreciate your ideas, suggestions, bugs, and even your compliments.
[Give Feedback](#)

Want to be the first to try out new features and give feedback on new ideas?
[Join Our Customer Panel](#)

HELP AND SUPPORT

- [Support Home](#)
- [Community](#)
- [Trust Center](#)

English | Powered by DocuSign | [Contact Us](#) | [eSignature Policy](#) | [eSignature FAQs](#) | [How To](#) | [Terms of Use](#) | [Privacy](#) | [Intellectual Property](#) | [xDTM Compliant](#)
Copyright © 2018 DocuSign, Inc. All rights reserved.


1. On the home page, click "New".
2. Click "Send an Envelope" from the list of options.



Selecting the template

< | Upload a Document and Add Envelope Recipients ? ACTIONS ▾ NEXT

Add Documents to the Envelope



UPLOAD

USE A TEMPLATE

GET FROM CLOUD ▾

1. Select "Use a template"

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

☰ IMPORT BULK LIST
👤 ADD FROM CONTACTS
📋 SIGNING ORDER

Set signing order

Name 👤 ✍️ NEEDS TO SIGN ▾ ⋮ MORE ▾

Email

👤 + ADD RECIPIENT

Message to All Recipients

Custom email and language for each recipient

Please DocuSign:

Advanced Options | [Edit](#)

- Recipients can change signing responsibility
- Incomplete envelopes expire 7 days after send date
- Recipients are warned 0 day(s) before request expires
- Comments are enabled

1. Click "Use a Template". This will open the document browser.

Upload a Document and Add Envelope Recipients

ACTIONS NEXT

Select Templates

BROWSE SELECTED (1)

2. Search for the "HR to OnBase" document, owned by Wyatt Wortkoetter

3. Click "Add Selected" to add the document to the envelope.

Name	Owner	Last Change
<input checked="" type="checkbox"/> HR to OnBase	Wyatt Robert Wortkoetter	10/31/2018 02:21:21 pm
<input type="checkbox"/> Risk Designated Itinerary Review - Individual Travelers	Erin K Rasche	10/31/2018 02:16:53 pm
<input type="checkbox"/> Request for Cell Phone Allowance (Working)	Laura Marie Campbell	10/31/2018 09:31:50 am
<input type="checkbox"/> File Review Acknowledgement 2018	Sandra Dawkins	10/31/2018 09:01:03 am
<input type="checkbox"/> [Untitled]	Emily Sarah Taylor	10/30/2018 03:50:30 pm
<input type="checkbox"/> [Untitled]	Benjamin T West	10/30/2018 03:41:59 pm
<input type="checkbox"/> Policy Review and Confirm Current Signatures	Roland A Kreml	10/30/2018 03:17:43 pm
<input type="checkbox"/> 10/30/18 Otterbein University - ScreenU	Shea Maryl Bennett-Callen	10/30/2018 03:09:51 pm
<input type="checkbox"/> TEAM-Self Training- 2 protocols	Huban Kutay	10/30/2018 01:40:50 pm
<input type="checkbox"/> [Untitled]	John Emery Ray	10/30/2018 12:46:32 pm
<input type="checkbox"/> MDs and PharmDs self-training-	Huban Kutay	10/30/2018 12:05:07 pm

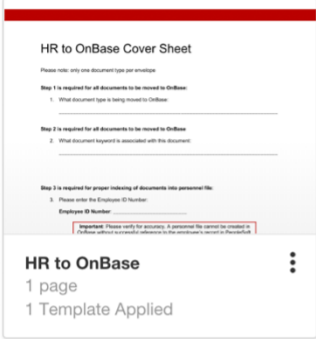
ADD SELECTED CANCEL

2. In the document browser, search for the "HR to OnBase" document owned by Wyatt Robert Wortkoetter.
3. Click "Add Selected" to add the document to the Envelope.




Please Fill Out HR to OnBase Cover Sheet ? ACTIONS ▾ NEXT

Add Documents to the Envelope



HR to OnBase
1 page
1 Template Applied



UPLOAD

USE A TEMPLATE

GET FROM CLOUD ▾

4. Click "Upload" and browse for the document you need.

Add Recipients to the Envelope

Some of the recipients are locked and cannot be changed [Learn More...](#) ADD FROM CONTACTS SIGNING ORDER

As the sender, you automatically receive a copy of the completed envelope.
[Import a bulk list.](#) Send copies of this envelope to many people at once. ⓘ

Set signing order

1

Initiator ✍ NEEDS TO SIGN ▾ MORE ▾

Name

Email

2

Signer One ✍ NEEDS TO SIGN ▾ MORE ▾

Name

Email

4. Click "Upload" and browse for the document you need. It is important that only 1 document type is added (i.e. do not upload both an Offer Letter and AMCP Memo in the same envelope as only 1 document type can be selected on the cover sheet). Remember that uploaded documents do not come with pre-applied tags. You will be adding these in later steps.



Configuring the recipients

< Please Sign Document
? ACTIONS ▾
NEXT

Add Recipients to the Envelope

Some of the recipients are locked and cannot be changed [Learn More...](#)

As the sender, you automatically receive a copy of the completed envelope. [Import a bulk list.](#) Send copies of this envelope to many people at once. ⓘ

Set signing order

1

Initiator ✍ NEEDS TO SIGN ▾ MORE ▾

2

Signer One ✍ NEEDS TO SIGN ▾ MORE ▾

ADD RECIPIENT

Envelope Custom Fields

Move Doc to OnBase

Yes ▾

Route Dynamically

-- Select -- ▾

Message to All Recipients

Custom email and language for each recipient

Advanced Options | [Edit](#)

- Recipients must be signers to view signed documents
- Incomplete envelopes expire 120 days after send date
- Recipients are warned 1 day(s) before request expires

2. Click "Next" to proceed.

1. Configure the recipients to fit your needs.

1. Configure the recipients to fit your specific needs. As the HR associate, you will need to enter yourself in the "Initiator" field. The Initiator is the only person that will be able to view the HR to OnBase cover sheet; it will be hidden for everyone else as long as the "Recipients must be signers to view signed documents" option is checked in Advanced Options. For this template, it is okay to modify the Email Subject, Email Message, Reminders and Expiration Date. Additionally, it is important that the two drop-downs under Envelope Custom Fields are not modified, as it will break the OnBase connection.
2. When finished, click "Next" in the upper right-hand corner to proceed.

Document Editor

The screenshot shows the Document Editor interface for a document titled "HR to OnBase Cover Sheet". The interface includes a top navigation bar with a back arrow, the document title, a help icon, an "ACTIONS" dropdown, and a red "SEND" button. Below the navigation bar is a toolbar with icons for undo, redo, and refresh. A dropdown menu shows the user "Wyatt Robert Wortkoetter".

On the left is a "Standard Fields" sidebar with various field types: Signature, Initial, Stamp, Date Signed, Name, Email, Company, Title, Text, Checkbox, Dropdown, Radio, Formula, Attachment, and Note.

The main content area displays the "HR to OnBase Cover Sheet" form. It includes instructions and three steps for filling out the form. Step 1 asks for the document type, Step 2 asks for a keyword, and Step 3 asks for the Employee ID Number. A red box highlights an important note: "Important: Please verify for accuracy. A personnel file cannot be created in OnBase without successful reference to the employee's record in PeopleSoft." The footer of the form includes "THE OHIO STATE UNIVERSITY HUMAN RESOURCES" and contact information.

On the right is a "Documents" sidebar showing a list of documents, including "HR to OnBase" and "DocuSign Offer Letter ...".

Two red callout boxes are overlaid on the screenshot:

1. Add the tags you need to your uploaded document. Do NOT modify the cover sheet.
2. Click "Send" after adding your necessary tags.


At the bottom of the interface, there is a footer with language settings (English (US)), "Powered by DocuSign", and various links (Contact Us, Terms of Use, Privacy, Intellectual Property, eSignature Policy, eSignature FAQs, How To). There are also "SHORTCUTS" and "FEEDBACK" buttons.

1. Add the tags you need to your uploaded document. Do NOT modify the cover sheet. If you add tags to the cover sheet, the settings to hide the cover sheet from the other recipients will be overridden.
2. Click the "Send" button in the upper-right corner to proceed. Do not worry about filling out form information in this step. If you previously designated yourself as the "Initiator", you will immediately receive the document back after sending it out.




Filling out the form


Please Review & Act on These Documents



Wyatt Robert Wortkoetter
The Ohio State University

Click "Continue" and fill out the document with the information to match the uploaded document type.



Powered by 

Please review the documents below.
CONTINUE
OTHER ACTIONS ▾

DocuSign Envelope ID: CCA7688B-1CEC-4D15-9EE3-8751E6687B6E

HR to OnBase Cover Sheet

Please note: only one document type per envelope

Step 1 is required for all documents to be moved to OnBase:

1. What document type is being moved to OnBase:


Step 2 is required for all documents to be moved to OnBase

2. What document keyword is associated with this document:

Step 3 is required for proper indexing of documents into personnel file:

3. Please enter the Employee ID Number:
Employee ID Number:

Important: Please verify for accuracy. A personnel file cannot be created in OnBase without successful reference to the employee's record in PeopleSoft.

Powered by 
Change Language - English (US) ▾ | Terms Of Use & Privacy ▾ | Copyright © 2018 DocuSign Inc. | V2R

1. At this point, you are ready to fill out the document. Click "Continue" and you will be able to fill out the document before passing it on to the next person. Be sure to match the applicable document type and keyword drop-downs on the cover sheet to the uploaded document.

COMPATIBLE DOCUMENT TYPES TABLE

DOCUMENT TYPE	DOCUMENT SUBTYPE/KEYWORD
HR PF Appointment and Salary Documents	AMCP Letter CWA Contract Increases Equity Letter FTE Hire Checklist HR PAR Other Salary/Appointment Memo Reclassification Letter Reemployment of Retired Faculty and Staff FLSA Transition Notifications
HR PF Disaster	HR PF Disaster
HR PF Offer Letter (Signed)	Faculty GA Staff Student
HR PF Performance Management	360 Review



	<p>Letters, Complaint</p> <p>Letters, Congratulatory</p> <p>Midyear Review</p> <p>Probationary Review (CCS)</p> <p>Self-Assessment</p> <p>Yearend Review</p>
HR PF Policy Acknowledgements	<p>Alternative Arrangement Agreement to Comply with Nepotism Policy</p> <p>Code of Responsibility for Security and Confidentiality of Student Information</p> <p>Ethics Acknowledgement</p> <p>Fraud Acknowledgement</p> <p>Grad Payroll Form</p> <p>Nepotism Disclosure</p> <p>Policy Acknowledgement</p>
HR PF Position Description (Signed)	HR PF Position Description (Signed)
HR PF Work Agreements	<p>Flexible Work Agreement Policy</p> <p>Enrollment for Course Enrollment During Regularly Scheduled Work Hours</p> <p>Staff External Work Approval Request</p>



HR PR Additional Pay	Awards Cell Phone/Internet ODP Supplemental Compensation
HR CA Vol Self Identification	Disability EEO

