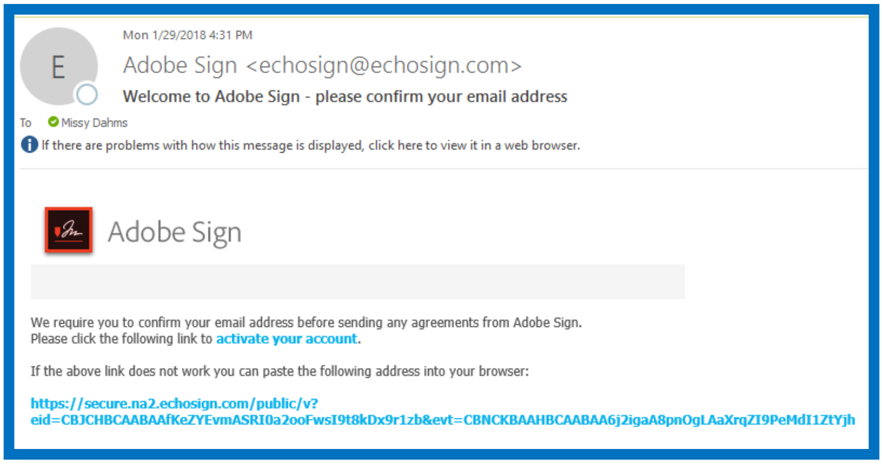
PAPERLESS MOBILE ONBOARDING FROM AVIONTÉ GETTING STARTED CHECKLIST

With Avionté's Paperless Mobile Onboarding, you have everything you need to quickly and easily connect with, qualify and onboard talent! This checklist will help you get started with the complete Avionté Paperless Mobile Onboarding solution, including E-Signature Documents powered by Adobe Sign. This checklist will walk you through configuring permissions, setting up applications and sending out Talent Tasks all as a part of Paperless Mobile Onboarding.

☐ 1. Reach Out to Your Strategic Account Executive (SAE) or Project Manager

To start using the complete Paperless Mobile Onboarding solution, first you need to set up your Adobe Sign account for E-Signature Documents. Reach out to your SAE or Project Manager to discuss package options and after they provision the account, you will receive an email from Adobe Sign asking you to confirm your account. Once you confirm your account and sign in for the first time, you can update your password from the original password created with your SAE.



Mon 1/29/2018 4:31 PM
Adobe Sign <echosign@echosign.com>
Welcome to Adobe Sign - please confirm your email address
To Missy Dahms
If there are problems with how this message is displayed, click here to view it in a web browser.

Adobe Sign

We require you to confirm your email address before sending any agreements from Adobe Sign.
Please click the following link to activate your account.

If the above link does not work you can paste the following address into your browser:

https://secure.na2.echosign.com/public/v?eid=CBJCHBCAABAAfKeZYEvmASRI0a2ooFwsI9t8kDx9r1zb&evt=CBNCKBAAHBCAABAA6j2igaA8pnOgLAaXrqZI9PeMdI1ZtYjh

☐ 2. Create Templates in Adobe Sign

Once you have confirmed your Adobe Sign account, it's time to start creating your E-Signature Document Templates in the Adobe Sign library!

a. On your dashboard, select "Add a new template". This is where your documents can be loaded and configured for use. Please refer to the configuration resources below:

- VIDEO: Getting Started with E-Signature Documents powered by Adobe Sign
- VIDEO: Configuring a Federal W-4
- RESOURCE: Field Mapping Document (Attached to this SUPPORT ARTICLE)

b. By visiting the Manage area, you can manage and edit your templates in the "Template Library".

3. Log Into the Recruiter Module

Contact your Project Manager or Strategic Account Executive to get your Company URL to log into the Recruiter Module. Your internal staff will find their Recruiter Module credentials by scrolling down to Web Login from the Start Page Action drop-down in the Core Application. If user does not see a username, an Admin Tools User can update Web Login credentials in User Administration.

4. Set Up Permissions in Admin > Permissions

Admin > Permissions: To access the Permissions area, the user needs to be a super user. If no set up is complete, you will want to make sure you're speaking with a super user. A super user can give Permissions to all areas in Admin to any other users.

- **Talent Module**: Themes, Talent Module Settings, Application Workflows
- **Integrations**: E-Signature Documents powered by Adobe Sign, IBM Kenexa Assess on Cloud, Equifax WOTC, E-Verify. For the Essential StaffCARE Integartion, please use this checklist.
- **Talent Tasks**: Email Management, Group Management, Talent Module Settings, Global Settings and Talent Confidential Information need to be permissioned to the proper users so they can fully set up and use Talent Tasks and Packets.

5. Configure Your Personalized Company Theme in Admin > Themes

Admin > Themes: Log into the Recruiter Module, access the Admin section and go to Themes to set up your company Theme. Select colors that match your branding, upload a logo for standard and mobile display and preview what it will look like. As a standard, you can configure up to five Themes. If you need more, contact your Project Manager or Strategic Account Executive to discuss package options.

6. Configure Application Workflows in Admin > Application Workflows

Admin > Application Workflows: Log into the Recruiter Module, access the Admin section and go to Application Workflows to configure up to four Workflows plus one Quick Apply option. Quick Apply, which is an application that asks for First Name, Last Name, Email, Resume (optional) and Phone Number (optional), is the default, but once you create a new Workflow, you can update it as the default application. If you need more than five Application Workflows, reach out to your Project Manager or SAE to discuss package options.

7. Connect to Adobe Sign in Admin > Integrations

Admin > Integrations: This is where you will connect to Adobe Sign to start using the integration within Recruiter Module. You will need the credentials you set up with your SAE. Simply hit the "Connect" button and enter your credentials into Adobe Sign. .

8. Permission E-Signature Documents powered by Adobe Sign in Admin > Group Management

Admin > Group Management: This is where you'll create user groups for group permissions on E-Signature Documents. Permissions will be assigned on a per document basis. User groups should reflect overall users within your organization i.e. Recruiters, HR, Compliance, etc. Please note, if a user is in more than one user group, they will always have the highest level of permission.

9. Set Up Email Templates in Admin > Email Management

Admin > Email Management: Click on the Admin section and navigate to Email Templates on the right-hand menu. This is where you'll set up email templates that talent will receive after a recruiter sends out various Talent Tasks.

10. Set Up General Talent Module Settings in Admin > Talent Module Settings > General Settings

Admin > Talent Module Settings > General Settings: Access the Talent Module Settings from the Admin section. In the "General settings" tab, you will find your Talent Module URL Address and need to select a Default Theme and Deafult Branches. **Both the Default Theme and Branch MUST be configured** in order to send out Talent Tasks. You can also configure the contact method for phone number and email, configure the settings for the job application finish page, the email settings, including the subject and body text for the follow-up job application email.

Here you will also see the profile page options that can be toggled ON to allow talent to update profile information on their own. This includes Personal Information, Resume, Education, Professional Experience, Competencies and Direct Deposit. *You now can give talent access to manage their own Direct Deposit information based on your Global Settings without needing to request it as a Task to update.

11. Toggle ON Talent Tasks in Admin > Talent Module Settings > Onboarding

Admin > Talent Module Settings > Onboarding: Navigate to Talent Module Settings and then select "Onboarding" from the three tabs. This is where you'll turn ON the Talent Tasks you want your recruiters to use. In order to send out specific Talent Tasks, they must be toggled ON. For E-Signature Documnets powered by Adobe Sign, this is the area that you can apply your created user groups from Group Management to allow your groups to send out specific E-Signature Documents.

12. Configure Packets in Admin > Talent Module Settings > Packets

Admin > Talent Module Settings > Packets: If you want to use Packets as a quick and easy way to send out multiple Talent Tasks at once, navigate to the Packets tab within Talent Module Settings. This is where you'll set up various Packets of Talent Tasks to send out for completion i.e. New Hire Packet, Re-hire Packet, etc.

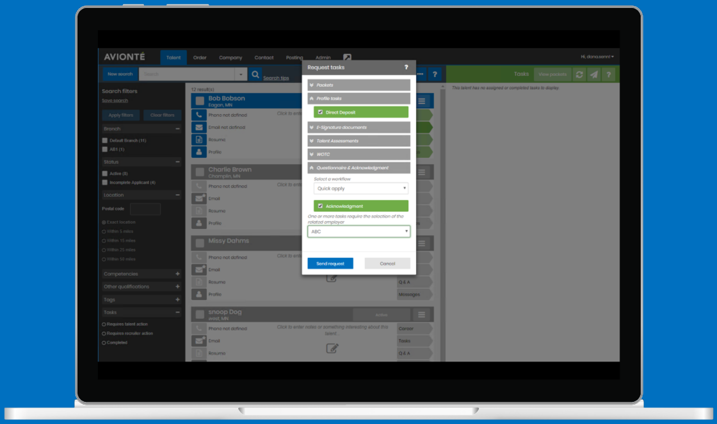
13. Configure Direct Deposit Business Rules in Admin > Global Settings

Admin > Global Settings: This area needs to be set up in order to utilize the Direct Deposit Talent Task. Here, you can configure business rules, including whether or not you want to require Direct Deposit and the number of Direct Deposit accounts you want to allow. You can set to zero all the way up to a max of 10. If you set Direct Deposit as required, this means the talent will see Direct Deposit as a notification on their profile until the Direct Deposit is correctly set up.

Want to learn more?

Check out our product resource page to find videos, highlight sheets and more information related to our Paperless Mobile Onboarding solution:

info.avionte.com/product-resources



AVIONTÉ

Avionté Staffing Software provides innovative front and back office staffing software solutions to over 550 customers and nearly 15,000 users throughout the U.S. and Canada. With one end-to-end staffing software solution, staffing agencies have access to the information and tools they need – anytime, anywhere via any device – to maximize productivity and profits.