HR Onboarding Solution

Installation and Setup Guide

Version: 3.0.x
Compatible with ImageNow Version: 6.7.x

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Table of Contents

What is the HR Onboarding Solution?

Effective employee onboarding software can simplify your HR (Human Resources) onboarding process with built-in tools that automate all your tasks and paperwork. The HR Onboarding Solution from Perceptive Software is a HR onboarding system that provides innovative time and money-saving solutions for hiring employees, completing HR transactional functions, and electronically storing HR files. The system allows HR professionals and candidates to complete the entire new hire process without using paper forms, including electronically signing applications and new hire paperwork.

The solution not only onboards your new employees, but also can facilitate HR transactions after the employees are hired. You can customize the system to suit the ever-changing needs of your organization.

The HR Onboarding Solution provides an integrated environment comprising Perceptive TransForm's suite of electronic forms products, ImageNow, Message Agent Server, and an AssureSign instance to ease the long standing requirements in terms of managing HR transactional functions and electronically storing HR files.

Perceptive TransForm's suite of electronic forms products provides all the tools and functionality required for automated electronic forms (e-forms) processing. Together with Perceptive TransForm Designer and Perceptive TransForm Filler or iFiller, Perceptive TransForm E-Forms Manager allows you to upload, create, publish, manage, sign, and automate form processing across the Internet.

- Perceptive TransForm Designer is used to create electronic forms.
- Perceptive TransForm Filler/iFiller is used to fill out, sign, and submit forms.
- Perceptive TransForm E-Forms Manager efficiently and economically automates business processes and form data collection.

The highlights of the HR Onboarding Solution are:

- Shorter hiring time
- Lower administration, printing, and shipping costs
- Improved data efficiency
- Consistent systematic processes
- New hire tracking
- Paperless new hire forms
- Easy-to-use reporting
- Intuitive workflow
- Electronic storage of HR files
- Better individual HR transactions

Required components

Software prerequisites

You must install the following software before you install and configure the HR Onboarding Solution.

- Perceptive TransForm E-Forms Manager
- Perceptive TransForm Filler

  Note Perceptive TransForm Filler is needed to register Perceptive TransForm E-Forms Manager after installation.
- Perceptive TransForm iFiller
- Access to an AssureSign environment
- ImageNow Server, version 6.7
- ImageNow Client, version 6.7 (optional to only view and manage the ImageNow server data)

  Note You must be a user with management privileges, a manager, or the owner.
- Message Agent Server, version 6.7

  Note The Message Agent Server version must be compatible with the ImageNow version.

Apart from the above-mentioned prerequisites, a database setup is also needed for setting up the HR Onboarding Solution.

Licenses

You are required to have the following component licenses for the HR Onboarding Solution. License requirements for required components are listed in the individual software package installation guides.

- Perceptive TransForm
- ImageNow Server
- Message Agent Server

Installation and setup

Download HR Onboarding Solution files

1. Go to the Perceptive Software website at www.perceptivesoftware.com and log into the Customer Portal.
2. In the **Product Downloads** page, search for all downloadable items for the product and version you want to use. These files may include a product installer, product documentation, or set of supporting files and artifacts.
3. Download the relevant files to a temporary directory on your computer.

About the HR Onboarding installation file

In the installation folder, several country and database specific files are available in the format HROB_<country>_<databasename>_DB_<version_number>.zip. You can search and use any ZIP file as per your environment requirements.

Each ZIP file mainly contains four folders namely, **AssureSign**, **Database**, **Forms**, and **ImageNow**. It also contains a tool named **InstallationHelper_<version_number>.jar**.

- **AssureSign**. This folder contains all the document templates that must be uploaded in your AssureSign server.
- **Database**. This folder contains artifacts used for initializing your database integration.
- **Forms**. This folder contains all the forms and their corresponding setting files that must be uploaded in your Perceptive Transform server.
- **ImageNow**. This folder contains iScript for creating ImageNow related prerequisites used by the HR Onboarding Solution.

Setup database schema

Before you perform the following procedures, make sure that all prerequisite software is installed and running.

Set up an Oracle database schema (supported versions: 10g, 11g)

To create the schema structure for an Oracle database, complete the following steps.

1. Search the following ZIP file in the installation folder and unzip the file into a local directory.
   - HROB_<country>_ORCL_DB_<version_number>.zip
2. Search the following database scripts inside the unzipped directory. Typically, the following files are available inside the **Database** directory in the installation folder.
   - HROB_Oracle_DDLScript.sql
   - HROB_Oracle_UserCreationScript.sql
3. To create a user, execute the **HROB_Oracle_UserCreationScript.sql** script inside your Oracle database. Else, use your existing user credential with similar privileges.

   Note If you create user using the script, you can use the credentials as username: **HROB3_0**, password: **imagenow**. These credentials are also used in the next step and in

Create and verify database integration data source details section.

4. To create the schema structure, log in to your Oracle database using the user credential mentioned above and execute the **HROB_Oracle_DDLScript.sql** script.
5. Search the jdbc driver.jar file for Oracle database (such as, ojdbc6.jar) inside the unzipped directory (typically, inside **Database\Thirdparty** directory), copy the file, and paste it in the **[*drive*:]\<Transform_installation_directory>\EFM\FSBServer\common\lib** directory.
6. After you modify the script information, ensure that you stop and start the Windows service (TransForm E-Forms Manager Server) again to implement the changes.

Set up a Microsoft SQL Server database schema

To complete the schema structure for a SQL Server database, complete the following steps.

1. Search the following ZIP file in the installation folder and unzip the file into a local directory.
    - HROB_<country>_SQLS_DB_<version_number>.zip
2. Search the following database script inside the unzipped directory. Typically, the following file is available inside the **Database** directory in the installation folder.
    - HROB_SqlServer_DDLScript.sql
3. To create database and schema structure, open the **HROB_SqlServer_DDLScript.sql** script in SQL Server Management Studio application and then execute the script. To execute this script, you must log in to SQL Server Management Studio either using Windows authentication or as an administrator with full access rights.
4. Search the jdbc driver.jar file for SQL server (such as, sqljdbc4.jar) inside the unzipped directory (typically, inside **Database\Thirdparty** directory), copy the file, and paste it in the **[*drive*:]\<Transform_installation_directory>\EFM\FSBServer\common\lib** directory.
5. Search the following DLL files inside the unzipped directory (typically, inside **Database\Thirdparty** directory) and copy the files.
    1. sqljdbc_auth.dll
    2. sqljdbc_xa.dll
6. Paste the files in the **[*drive*:]\<Transform_installation_directory>\EFM\FSBServer\fsrvjni** directory.
7. After you modify the script information, ensure that you stop and restart the Windows service (TransForm E-Forms Manager Server) to implement the changes.

Install and configure HR Onboarding Solution

You must have administrative privileges to perform the following procedure. To work with the supporting files, navigate to the local directory where you downloaded the supporting files following the instructions in **Download HR Onboarding Solution** section.

Log in to Perceptive TransForm E-Forms Manager

Before you log in to Perceptive TransForm E-Forms Manager, complete the following steps to verify that you are an administrator with full access rights to the application.

1. On the **Start** menu, click **All Programs** > **TransForm** > **TransForm E-Forms Manager** > **Administration Console**.
2. In the **Perceptive TransForm E-Forms Manager - Login** page, in the **Username** box, enter your user name.
3. In the **Password** box, enter your password.
4. Click **Log In** to initiate the connection to the **Perceptive TransForm E-Forms Manager** server.

What is a form category?

Form categories allow you to group related forms according to your business requirements. For example, all forms associated with hiring a new employee can be grouped into a category called "New Employees." As a result, when reviewing submitted forms and signed forms, your search criteria can be narrowed down to the "New Employees" category of forms.

Categorizing your forms is a simple yet powerful method of managing a library of forms and is used throughout Perceptive TransForm E-Forms Manager. When a form is initially uploaded using the new form page, you assign it to a form category. Throughout the form catalog, and when working with submitted forms and data, you can refine searches based on form categories that manage whether or not forms appear in the available forms page when published.

Create a form category

To create a new form category, complete the following steps.

1. In the **Perceptive TransForm E-Forms Manager** home page, click **Administration**.
2. On the **ADMINISTRATION** tab, in the **Categories** option, click **New Category**.
3. In the **Create Form Category** page, provide all necessary information.
4. To save your information, click **Save Changes**.

Create and verify database integration data source details

To create data source, complete the following steps.

1. In the **Perceptive TransForm E-Forms Manager** home page, click **Administration**.
2. On the **ADMINISTRATION** tab, in the **DB Integration** option, click **Data Sources**.
3. Under **Data Sources**, click **New Data Source**.
4. In the **Create Data Source** page, complete the following substeps.
    1. In the **Data Source Name** box, type a data source name based on your database server type, such as **SQLS_DB** for Miscrosoft SQL Server or **ORCL_DB** for Oracle Server.
    2. In the **Data Source Type** option, click **JDBC**.
    3. In the **JDBC Driver Class** box, type a driver class based on your database server type, such as **com.microsoft.sqlserver.jdbc.SQLServerDriver** for Miscrosoft SQL Server or **oracle.jdbc.OracleDriver** for Oracle Server.
    4. In the **JDBC Connection URL** box, type a URL as per your environment requirements. Typically, the format is **jdbc:oracle:thin:@<localhost>:<1521>:<orcl>** for Oracle server and **jdbc:sqlserver://<localhost>:<TcpPort>;databaseName=HROB3_0** for SQL server.
    5. In the **User** box, type a user name as per your environment requirements.

        Note If you are using Oracle Server and performed step 3 of **Set up an Oracle database schema (supported versions: 10g, 11g)** section, then type **HROB3_0**.
    6. In the **Password** box, enter a password as per your environment requirements.

        Note If you are using Oracle Server and performed step 3 of **Set up an Oracle database schema (supported versions: 10g, 11g)** section, then type **imagenow**.
    7. To save your information, click **Save Changes**.
    8. In the **Data Source** page, click the newly created data source.
    9. To verify the correctness of the database integration, in the **Data Source Details** page, click **Test Connection**. This opens a page that displays current connection status. Click **OK**. If you see a connection failure message then in the connection status page, click **OK**. In the **Data Source Details** page, click **Edit Data Source**, make necessary changes in all the field inputs, click **Save Changes**. Repeat step 8 onwards to verify the correctness of the database integration data.

Create and verify ImageNow Server details

To verify ImageNow Server details, complete the following steps.

1. In the **Perceptive TransForm E-Forms Manager** home page, click **Administration**.
2. On the **ADMINISTRATION** tab, in the **ECM Connectors** option, click **ImageNow**.
3. Under **ImageNow Servers**, click **New ImageNow Server**.
4. In the **ImageNow Server Setup** page, complete the following substeps.
    1. In the **Server Name** box, type **imagenow67**.
    2. In the **Server URL** box, type the ImageNow MessageAgent URL of your environment. Typically, the format is http://<servername>:6070.

3. In the **User Name** box, type an ImageNow user name as per your environment requirements. The user must have document management privileges.
4. In the **Password** box, enter a password as per your environment requirements.
5. Select the **Export Enabled** check box.
6. To save your information, click **Save Changes**.
7. In the **ECM Connectors** page, click the newly created ImageNow server.
8. To verify the correctness of the ImageNow integration data, in the **ImageNow Server Details** page, click **Test Connection** and click **OK**. If you see a connection failure message then in the **ImageNow Server Details** page, click **OK**. Under **ImageNow Servers**, click the **Edit** icon available next to the newly created server, make necessary changes in all the field inputs, click **Save Changes**. Repeat step 7 onwards to verify the correctness of the ImageNow integration data.

Create Perceptive eAuthorize details

To verify PerceptiveAuthorize details, complete the following steps.

1. In the **Perceptive TransForm E-Forms Manager** home page, click **Administration**.
2. On the **ADMINISTRATION** tab, in the **Perceptive eAuthorize** option, click **Servers**.
3. Under **Perceptive eAuthorize Servers**, click **New Perceptive eAuthorize Server**.
4. In the **Perceptive eAuthorize Server Setup** page, complete the following substeps.
    1. In the **Server Name** box, type **eAuthorize**.
    2. Enter all necessary information such as **Server URL**, **Username**, and **DocumentNOW Account Context Identifier** as per your environment requirements.
    3. Select the **Enabled** check box.
    4. To save your information, click **Save Changes**.

Set up email server details

To set up email server details, complete the following steps.

1. In the **Perceptive TransForm E-Forms Manager** home page, click **Administration**.
2. On the **ADMINISTRATION** tab, in the **Email** option, click **Email Server**. In this page, check whether a SMTP host is already defined. If not, configure the email server details following the steps provided below, else, skip the remaining steps and proceed to

3. **Import AssureSign templates into AssureSign** server section.
4. To begin configuring email server details, at the bottom of the page, click **Edit**.
5. Under **Email Configuration**, provide all necessary information.
6. To save your information, click **Save Changes**.

Import AssureSign templates into AssureSign server

Before you log in to your AssureSign server, you must verify that you are an administrator with full access rights to the server. To import the AssureSign templates into the AssureSign server, complete the following steps.

You must repeat this procedure for all document templates one by one.

1. Log in to AssureSign server as an administrator with full access rights.
2. In the **AssureSign** home page, click the **Templates** tab.
3. In the left pane, click **New**.
4. In the right pane, select **Import Template from a Template Export File**, and then click **Next**.
5. To import a template, in the **Document Templates** page, click **Browse** to navigate to the local directory where you unzipped the installation files, select an appropriate AssureSign template, and click **Open**.

   Note Typically, the AssureSign templates are available inside the **AssureSign** directory in the installation folder.
6. Click **Next**.
7. Optional. In the **Import Template from a Template Export File** page, in the **Accessibility** list, select **Account**, if not already selected.
8. In the **Import Template from a Template Export File** page, in the **Modify Workflow Template** option, click **No**. Do not modify the imported (default) template name.
9. Click **Next.**
10. In the right pane, click **Finish.** Do not modify any jotblock.
11. In the **Template Modifications** dialog box, click **Continue**.

Run the InstallationHelper tool and execute Update eAuthorize Handlers action

To know how to run the InstallationHelper tool, refer to **Appendix: About InstallationHelper tool**.

To update eAuthorize handlers, complete the following steps.

1. Run the **InstallationHelper_<version_number>.jar** file.
2. In the **Action** list, select **Update eAuthorize Handlers** and then click **Next**.
3. To provide all details, follow the instructions in the page.
4. Click **Next**.
5. Read and verify the execution report to ensure that execution is error free and then click **Finish.** In case of any error that you cannot fix, you may contact Perceptive Software Product Support with a copy of the execution report. To save the execution report summary, click **Save Report**. You may ignore warnings.

Add a new form to the HR Onboarding Solution

After a form is designed, you can upload it to the Perceptive TransForm E-Forms Manager application.

For a complete set of forms to be added, refer to the **Forms** directory in the installation folder. All forms must be processed individually. To add a new form to the HR Onboarding Solution, complete the following procedures.

1. Upload a form
2. Update the form summary
3. Complete form publishing information

What is form publishing information page?

Forms have a life cycle based on a business process and data collection requirements. The first phase of this form-publishing life cycle begins with staged forms, proceeds through approval and publication and ends in expiration when the form is no longer needed. As a form progresses through each phase, Perceptive TransForm E-Forms Manager graphically displays its status in a progress bar in the **Form Publishing Information** page.

Forms are automatically staged when new forms are initially uploaded. This staged status allows you to review and set the form management properties, as well as review the uploaded form for errors before publication. To navigate to the staged forms page to view and edit forms recently uploaded into Perceptive TransForm E-Forms Manager, on the **CATALOG** tab, click **Staged**. After a form is staged, it must be reviewed and approved.

Upload a form

In the Perceptive TransForm E-Forms Manager application, the **CATALOG** tab allows you to upload new forms and manage all aspects of form publication and data collection and displays options for managing the life cycle of forms and versions of forms. Each option in the list (except for the **New Form** option) allows you to find forms in the catalog so that you can view and edit their properties. The **New Form** option allows you to start the process of adding a new form to the catalog.

Before performing the following procedure, you must log in to the Perceptive Transform application as an administrator. To do so, complete the following steps.

1. In the **Perceptive TransForm E-Forms Manager** home page, click **Form Catalog**.
2. To start the process of adding a new form to the **Perceptive TransForm E-Forms Manager** catalog, on the **CATALOG** tab, click **New Form**.
3. In the **Upload Form** page, complete the following substeps.
    1. In the **Path to Form** box, click **Browse** to navigate to the local directory where you downloaded the supporting files, select an appropriate form (PFF), and click **Open**. Typically, the PFF files are available inside the **Forms** directory in the installation folder.
    2. In the **Form Lock Password** text box, type the form lock password. Typically, each form uploaded to **Perceptive TransForm E-Forms Manager** is encrypted in **TransForm Designer** using a form lock password. You may contact the form provider for this information. For the current set of forms, the default password is **imagenow**.
    3. In the **Version Notes** text box, type any descriptive text about the form's current version that may be useful for the end user.
    4. Click **Upload**.

Update the form summary

After you click the **Upload** button, you are guided to the **Update Form Summary** page.

The **Update Form Summary** page allows you to provide metadata associated with the form. This information is recorded with the form and made available to end users when the form is published. When viewing a form in **TransForm Filler**, end users can select the **Info** button to display the information entered here, for both summary and contact information.

1. In the **Update Form Summary** page, under **Summary**, complete the following substeps.
    1. In the **Form Title** text box, do not change the default text.
    2. In the **Form Category** list, select a form category. You must select a category that you created earlier.
    3. In the **Description** text box, type a brief description about use of the form. This information is published with the form. You may retain the default text that appears.
    4. Optional. In the **Keywords** text box, type any key words.
    5. Optional. In the **Number** box, type a number for your form using a numbering classification system.
    6. Optional. In the **Document Type Id** box, type a document type ID.
    7. Optional. In the **Subject** text box, type a form subject associated with the form.
    8. In the **Version** box, type a version, such as 3.0.
    9. Optional. In the **Version Date** box, select a date for this version of the form.
    10. Optional. In the **Approval** box, type the organization name that approved the form.
    11. Optional. In the **Expiration Date** box, select a date when the form is scheduled to expire.
2. In the **Update Form Summary** page, under **Contact Information**, complete the following substeps.
    1. Optional. In the **Designer** box, type the name of the form author (the person who created the form in **TransForm Designer**).
    2. Optional. In the **Designer Email** box, type the complete email address of the form author, including the domain (for example, jdoe@company.com).
    3. Optional. In the **Company** box, type the name of the company or government agency sponsoring the form.
    4. Optional. In the **Department** box, type the department in the company or government agency responsible for the form.
    5. Optional. In the **Contact** box, type the name of a contact person or help desk in case end users have questions about the form.
    6. Optional. In the **Phone** box, type the phone number end users can use in case they have questions about the form.
    7. Optional. In the **Contact Email** box, type the email address for technical support on the form.
    8. Optional. In the **Web Site** box, type the website address where users can go for frequently asked questions (FAQ) and other self-service support.
3. To save your information, click **Save Changes**.

Complete form publishing information

After saving the form summary information, you are guided to the **General** tab in the **Form Publishing Information** page. To know more about form publishing information, export, and import functions, refer to

Appendix: About form publishing information.

1. To begin the import process, at the bottom of the page, click the **Import** link.
2. In the **Import Form Version Settings** wizard, under **UPLOAD SETTINGS**, click **Browse** to navigate to the local directory where you downloaded the supporting files, select an appropriate import file (XML), and click **Open**. The name of a form's XML file usually matches with that of a form's PFF file. Typically, the XML files are available inside the **Forms** directory in the installation folder.
3. Click **Next**. The system validates that the chosen file can be imported into the current catalog version. On validation, you move to the next page.
4. Under **CHOOSE SETTINGS FOR IMPORT**, select or clear various check boxes to choose which groups of settings you wish to import. It is recommended that you select all check boxes.
5. Click **Next**.
6. Under **RESOLVE DEPENDENCIES**, resolve any dependencies that exist in the import file and pertain to the groups of settings that you import. Complete the following substeps.
    1. Under **DATA SOURCES**, select the **Assign Existing** option, if not already selected.
    2. Under **AUTOFILL QUERIES**, keep all values as they appear.
    3. Under **AUTOWRITE STATEMENTS**, keep all values as they appear.
    4. Under **IMAGENOW SERVERS**, select the **Assign Existing** option, if not already selected.
    5. UNDER **PERCEPTIVE EAUTHORIZE SERVERS**, select the **Assign Existing** option, if not already selected.
7. Click **Next**. This opens a page that prompts you to perform the import and lets you go back and review your selections. Click **Finish**. Once you click the **Finish** button, the import is processed and the wizard closes.
8. In the **Form Publishing Information** page, under **Form Management Properties**, complete the following substeps.
    1. In the **Version** box, type a version, such as 3.0. You may retain the default value.
    2. In the **Publish On** box, enter a date.
    3. In the **Publish End** box, enter a date.
    4. You must select the **Enable Processing**, **Enable Submission**, **Enable Data Export**, **Enable for iFiller**, and **Enable Print** check boxes, if not already selected.
    5. Click **Save Changes**.

Enable form handler

You must review the imported settings and make any necessary final configuration changes in the form management properties. To know more about form management properties, refer to **Appendix: About form management properties**.

You must navigate to the **Autofill**, **Autowrite**, **Perceptive eAuthorize**, and **Workflow** tabs to check and verify that all available options are selected and enabled. To enable the form handler, perform the following procedure.

1. In the **Form Publishing Information** page, under **Form Management Properties**, on the **Autofill** tab, under **GENERAL SETTINGS**, select the **Enable Autofill** check box, and click **Save Changes**.
2. Under **AUTOFILL HANDLERS**, select all check boxes that appear for the handler names, click **Enable Selected**.

3. On the **Autowrite** tab, in the **Database** option, select the **Enable DB Autowrite** check box, and click **Save Changes**.
4. Under **AUTOWRITE DB HANDLERS**, select all check boxes that appear for the handler names, click **Enable Selected**.
5. On the **Perceptive eAuthorize** tab, under **PERCEPTIVE EAUTHORIZE HANDLER**, click **Enable Handler**. However, if you see the comment **'No Perceptive eAuthorize handlers have been defined for this form version'** then you must skip this step and proceed to the next step.
6. On the **Workflow** tab, select the **Enable Workflow** check box, and click **Save Changes**.

Approve and publish forms

After a form is staged, it must be reviewed and approved.

1. To approve the form, in the **Form Publishing Information** page, click **Approve**.
2. In the page that prompts you to confirm to the approval process, click **Yes** and then click **OK**.
3. To publish the form, click **Publish**. This opens a screen that prompts you to confirm the publishing process. Click **Yes** and then click **OK**.

To navigate to the published forms screen to view forms that are recently published, on the **CATALOG** tab, click **Published**.

Run the InstallationHelper tool and execute Generate DB Insert Script action

To know how to run the InstallationHelper tool, refer to **Appendix: About InstallationHelper tool**.

1. Run the **InstallationHelper_<version_number>.jar** file.
2. In the **Action** list, select **Generate DB Insert Script** and then click **Next**.
3. To provide all details, follow the on-screen instructions.
4. Click **Next**.
5. In the **User Input** dialog box, in the **Select form category** list, select the desired form category. You must select the form category that you created earlier following the instructions in the **What is a form** category section.
6. Click **OK**.
7. To save the insert script, browse to a desired location in your computer and click **Save**.
8. Read and verify the execution report to ensure that execution is error free and then click **Finish.** In case of any error that you cannot fix, you may contact Perceptive Software Product Support with a copy of the execution report. To save the execution report summary, click **Save Report**. You may ignore warnings.
9. Click **Exit**.

Run the newly generated DB Insert Script in your database server

You must now run the newly generated DB Insert Script in your database server that is configured earlier using the instructions in the

Create and verify database integration data source details section.

To insert new employee details inside Import_Table table (which is created using HROB_<databasename>_DDLScript.sql), write data insertion queries as per requirements.

Run the iScript inside your ImageNow environment

You must run the HROB_IN67_<version>.js iScript inside your ImageNow server environment to create the default drawer, document types, and workflow used by the HR Onboarding Solution.

To run the iScript, complete the following steps.

1. Search the **HROB_IN67_<version>.js** iScript inside the unzipped directory. Typically, the iScript is available inside the **ImageNow** directory in the installation folder.
2. Copy the iScript and paste it inside the directory **<ImageNow server installation folder>/script**.
3. Open a command prompt in your ImageNow Server machine.
4. Change the active directory to ImageNow Server's bin directory. Typically, for 32-bit server environment, the directory is **<ImageNow server installation folder>/bin**, and for 64-bit server environment, the directory is **<ImageNow server installation folder>/bin64**.
5. Execute the following command: `intool –cmd run-iscript –file HROB_IN67_<version>.js`
6. Check and verify the log file to ensure there are no errors. The log file named ***HROB_IN67_<version>.log*** is available inside the directory **<ImageNow server installation folder>/log**. You may ignore warnings.

Uninstall HR Onboarding Solution

If you wish to uninstall the HR Onboarding Solution only and retain Perceptive TransForm's suite of electronic forms products installations then you need to uninstall the HR Onboarding Solution by deleting each form manually, one by one. To uninstall the solution, complete the following steps.

1. In the **Perceptive TransForm E-Forms Manager** home page, click **Form Catalog**.
2. Click the form you want to delete. The selected form displays in the **Form Details** page.
3. Click the **Edit Version** link, which toggles between **Version Details** and **Edit Version**.
4. Click **End Publishing**, click **Yes**, and click **OK**.
5. Repeat the above-mentioned steps for all the forms one by one.
6. Click the **Approved** tab.
7. In the **Approved Forms** page, click the **Delete** icon next to the form you want to delete.
8. Click **Yes** and then click **OK**.
9. In the **Perceptive TransForm E-Forms Manager** home page, click **Administration** > **DB Integration** > **Data Sources**. Delete the data source that you created in the

10. **Create and verify database integration data source** details section.
11. Similarly, navigate to **Autofill** and **Autowrite** tabs and delete the autofill query names and autowrite statement names listed in **Appendix: About autofill query names** and **Appendix: About autowrite statement names** one by one.
12. Click **Administration** > **ECM Connectors**. Delete ECM Connector's ImageNow server entry specific to the HR Onboarding Solution.
13. Click **Administration** > **Perceptive eAuthorize**. Delete the Perceptive eAuthorize server entry specific to the HR Onboarding Solution.
14. Delete all the tables listed in **Appendix: About database table names** from the database server you are using.

Appendix: About form publishing information

You can access form publishing information from each of the publishing menus (**Staged**, **Approved**, **Scheduled**, **Published**, and **Expired**). To open the **Form Publishing Information** page, you must click the form name you want to access.

The **Form Publishing Information** page of Perceptive TransForm E-Forms Manager displays a range of options and metrics specified by a form administrator for each version of a form. As part of form management properties, the **General** tab provides form administrators with an overview of the publishing status for a particular version of a form. In addition, this tab determines the publishing schedule (if any), obsolescence and replacement, as well as signing, submission, and data export capability. Some other form automation properties, such as submission, signing, and data export, are dependent on the criteria selected in the **General** tab.

If you are logged into the system with administrative privileges, **Export** and **Import** controls are visible. These controls allow you to export the form automation settings for the form to an XML file or import automation settings from an XML export file.

Perceptive TransForm E-Forms Manager allows you to export a form version's automation settings for submission, signing, data export, imaging, workflow, Autofill, and Autowrite to an XML file. This file contains information about all of the settings named, as well as information on many of the globally defined objects in Perceptive TransForm E-Forms Manager on which these settings might depend. This XML file may then be used along with an export of the form itself to import into another Perceptive TransForm E-Forms Manager system, saving you the effort of duplicating settings from one system to another manually.

When you import a form's settings, the system gives you options as to which groups of settings you wish to import. For example, if the exported settings contain information for Signing, Workflow, and Autofill, the import process allows you to choose any or all of those groups of settings. If you do not select a group of settings, any previous settings pertaining to that group that exist in the destination system are left alone. If you import a group of settings, ensure that any settings in the destination that already exist for that group in the destination system are removed and replaced with those imported. The import wizard described below provides a warning to this effect before you confirm the import.

Appendix: About form management properties

You can access form publishing information from each of the publishing menus (**Staged**, **Approved**, **Scheduled**, **Published**, and **Expired**). To open the **Form Publishing Information** page, you must click the form name you want to access.

In the **Form Publishing Information** page, the **Version Details** link, which toggles between **Version Details** and **Edit Version**, allows you to view the form management properties related to the selected form version. These properties are displayed across tabs on the lower part of the page. Some or all of the tabs described below are available in your Perceptive TransForm E-Forms Manager installation depending on which optional components have been registered.

General. This provides an overview of the form version and indicates whether the form can be signed, submitted, and processed.

Submission. This provides information on how the form is submitted (if allowed) and end user notification options.

Data. This provides information on which fields on the form are available for data export.

Autofill. This is for viewing and configuring any Autofill Handlers associated with the form, which allow the form to be pre-populated with data from a database.

Autowrite. This allows you to view settings related to automatic data export from submitted copies of the form to a database and or to a web endpoint.

Perceptive eAuthorize. This is used for electronically signing the form.

Workflow. This provides information and configuration for data handling and behavior management of a submitted form using rules and templates that you configure. By logging business process information for forms configured for workflow, users and administrators can check the status and history of a form's business processes.

Appendix: About InstallationHelper tool

InstallationHelper tool is a Java based tool used for updating eAuthorize handlers and generating SQL insert script for initializing database in client environment.

To run this tool, you must have Java run time, version 1.6 or above, installed on your computer.

If your local environment has *.jar files associated with Java run time as default opening application then you can run this tool simply by double-clicking the **InstallationHelper_<version_number>.jar** file.

Else, at the command prompt, change the active directory to your installation folder location and then execute the following command: `java –jar InstallationHelper_<version_number>.jar`

Appendix: About autofill query names

The autofill query names are:

- Company_Info
- Date_Current
- Assuresign_URL
- Employees
- Employees_Form
- Form_ID
- Password_Change_URL
- Password_Change
- UN_PW_Recv
- Employees_Auto
- Personal_Record
- Personal_Record_OnDL
- Submitted_Forms2
- Submitted_Forms2_Auto
- Import
- HCM_UID
- PEmail_Add_Chk

- AEmail_Add_Chk
- SSN_Add_Chk
- Status_Form
- Status_Forms_ALL
- Supervisor_Email
- UN_Add_Chk
- Search_Employees
- Employee_Ref

Appendix: About autowrite statement names

The autowrite statement names are:

- Company_Chk
- Company_Ins
- Company_Upd
- Update_Submitted_Forms2
- Form_ID
- Password_Change
- EMP_Ins_Coversheet
- EMP_Upd_Coversheet
- GetRecordID_SignID
- Insert_Submitted_Forms1
- Insert_Forms
- GetRecordID_UID
- Insert_Employee_Refs
- Insert_Employee_LocationRefs
- Reset_SubmittedForms2

Appendix: About database table names

The database table names are:

- SUBMITTED_FORMS1
- SUBMITTED_FORMS2
- ASSURESIGN
- EMPLOYEE_REFERENCE

- FORMS
- FORM_REFERENCE
- COMPANY
- IMPORT_TABLE
- EMPLOYEES
- DATE_TABLE (only for SQL Server)

Index