

Detailed guide

# **DocGen – Setup and use**



**HR** MANAGER  
TALENT SOLUTIONS

# Overview

- [What is DocGen?](#)
- [Setup](#)
- [Add merge fields in Word](#)
- [Upload the document to DocGen](#)
- [Template editor](#)
- [Convert merge field to system object](#)
- [Convert merge field to textlist](#)
- [Convert merge field to textbox](#)
- [Convert merge field to checkbox](#)
- [See used merge fields](#)
- [Changes to the document](#)
- [Generate documents](#)
- [Generate a document on a candidate](#)
- [See documents on candidate's profile](#)
- [Create a text list](#)
- [Mergeable documents](#)
- [Digital signature](#)

# What is DocGen?

DocGen enables you to add documents in the system and subsequently fill them out directly on a candidate from the candidate list. In this fashion, you do not need to enter all the details manually every time you want to send out a new contract or candidate specific document.

DocGen documents could for example be:

- *Employment contract*
- *Comission agreement*
- *Introduction program*

This guide will go through the following in detail:

- Setting up DocGen
- Generating documents
- Creating text lists
- Sending for digital signature

# Setup

The process of setting up DocGen documents contains the following action points:

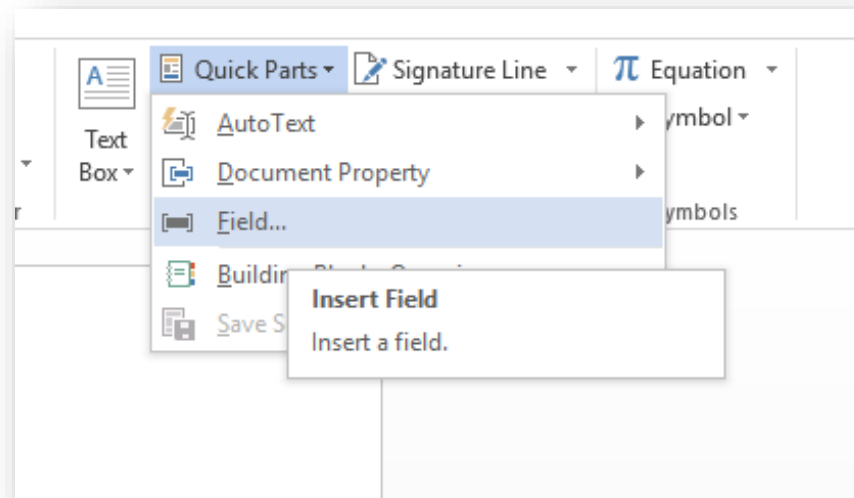
- Add merge fields to your Word document, that enables you to pull information directly from the system or type in information in a free text field.
- Link the merge fields to either system generated data in the form of system objects, textlists, textboxes, or checkboxes.
- Save the document

# Add merge fields in Word

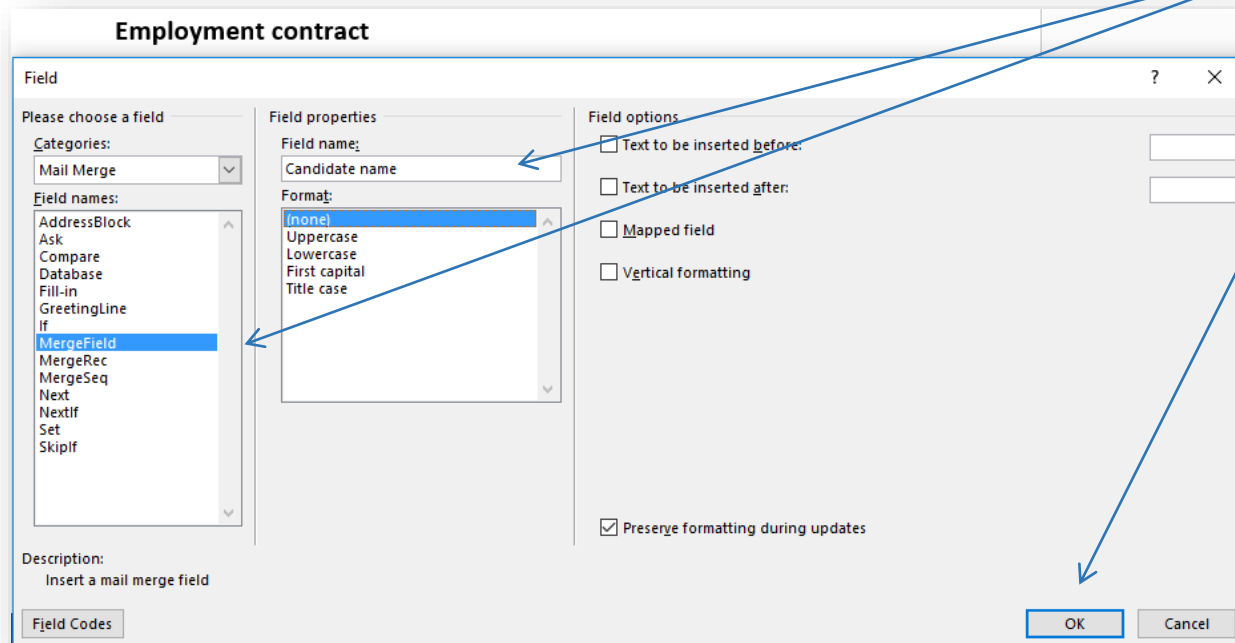
In order to link content to your document in Talent Recruiter, you first need to adjust the document with merge fields in Word.

Open the document in Word, select the place where you would like to pull data from the system or type in data in the document. Then find the fan "Insert".

Find 'Quick Parts' and choose 'Field' in the drop down menu below



# Add merge fields



The screenshot shows a dialog box titled "Employment contract" with a "Field" tab. It is divided into three main sections: "Please choose a field", "Field properties", and "Field options".

- Please choose a field:** A "Categories" dropdown is set to "Mail Merge". Below it, a list of "Field names" includes AddressBlock, Ask, Compare, Database, Fill-in, GreetingLine, If, MergeField (highlighted), MergeRec, MergeSeq, Next, NextIf, Set, and SkipIf.
- Field properties:** The "Field name:" field contains "Candidate name". The "Format:" dropdown is set to "(none)".
- Field options:** Includes checkboxes for "Text to be inserted before:", "Text to be inserted after:", "Mapped field", and "Vertical formatting". The "Preserve formatting during updates" checkbox is checked.

At the bottom left, there is a "Description:" field with the text "Insert a mail merge field" and a "Field Codes" button. At the bottom right, there are "OK" and "Cancel" buttons. Blue arrows point from the text instructions on the right to the "MergeField" selection, the "Candidate name" field, and the "OK" button.

Choose the field name 'MergeField' and type in a definition of the merge field. If you would like to pull the candidates' name directly from the system, you can for example call the merge field 'Candidate name'

Click 'OK' to finish

*Attention: do not use ' or ` in the field names as it will result in an error when uploading the document in Talent Recruiter or Talent Manager.*

[Back to overview](#)

# Add merge fields

You will now be able to see that the simple text in the document has been replaced by merge fields:



The screenshot shows a document titled "HR Manager Talent Solutions" and "Independent Contractor Agreement (Contract for Services)". Under the heading "1. Details of the Parties", it states "This agreement is made between:". Below this, there are two lines of text, each enclosed in a blue rectangular box representing a merge field. The first line contains the text «Company name», «Company Adress» «Company zip» «Company City» ("the Company"). The second line, preceded by the word "and", contains the text «Candidate name», «Candidate adress» «Candidate zip» «Candidate city» ("the Contractor").

 **HR MANAGER**  
TALENT SOLUTIONS

**HR Manager Talent Solutions**

**Independent Contractor Agreement (Contract for Services)**

**1. Details of the Parties**

This agreement is made between:

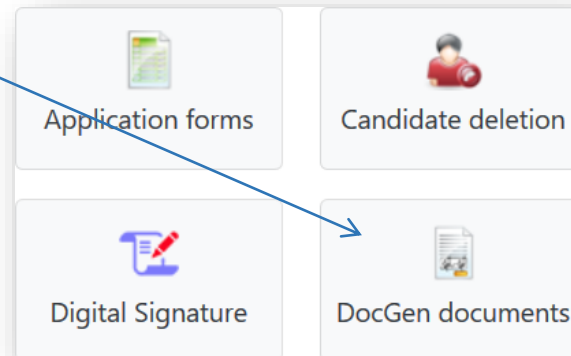
«Company name», «Company Adress» «Company zip» «Company City» ("the Company")

and

«Candidate name», «Candidate adress» «Candidate zip» «Candidate city» ("the Contractor")

# Upload the document to DocGen

Go to Talent Recruiter and 'Administration'.  
Choose 'DocGen documents'



Click 'Add new DocGen Template'

DocGen documents

HR Manager Talent Solutions > Digital Signature > Administration

DocGen templates

Here you can manage document generator templates.

Add new DocGen Template

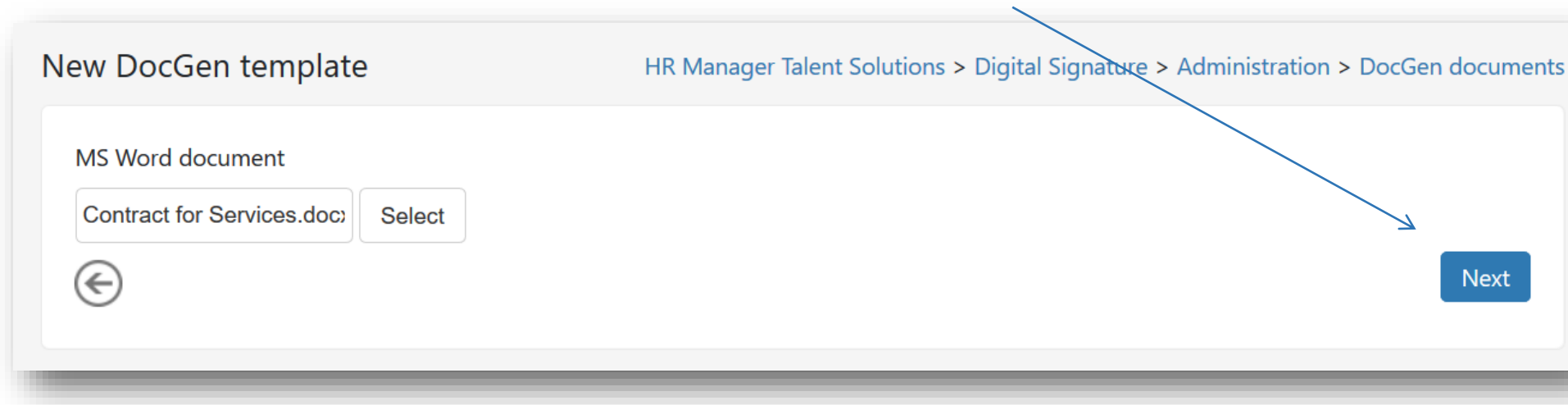
ID	Template name	Document name	Document type	Size	Actions
----	---------------	---------------	---------------	------	---------

[Back to overview](#)



# Upload the document to DocGen

Choose your document from your computer and click 'Next':



New DocGen template

HR Manager Talent Solutions > Digital Signature > Administration > DocGen documents

MS Word document

Contract for Services.doc Select

←

Next

You will then automatically be redirected to the DocGen 'Template editor'

*Attention: if you experience an error when clicking 'Next' it could be because an ' or ' has been added in one of the field names in the Word document. Go back to the document and remove the symbol from the field.*

[Back to overview](#)

# Template editor

## ‘General’

- Name your document – for example *Freelance contract*
- Choose an associated candidate status – this means that the candidate will change status when the document is generated – *remember that the status you choose needs to be part of your workflow in order to work properly*
- Choose whether or not the document is to be inheritable and hereby usable in subdepartments
- Choose whether or not the document is to be shown and generated from candidate lists on projects – this means that you can hold off making the document visible until you have finished editing it.

Template editor [HR Manager Talent Solutions](#) > [Digital Signature](#) > [Administration](#) > [DocGen documents](#) > [New DocGen template](#)

### General

Name

Contract

Associated candidate status

Sent offer

☒ Inheritable

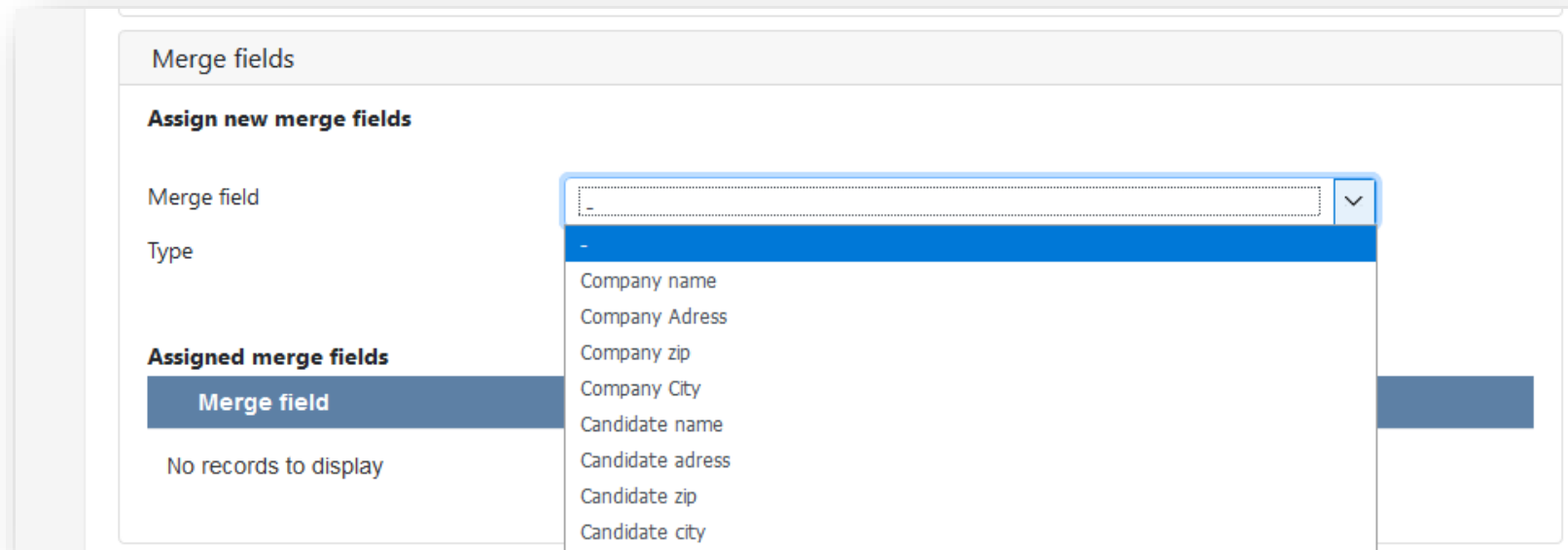
☒ Show in DocGen

[Back to overview](#)

# Template editor

## ‘Merge fields’

- In the first drop down menu, select one of the merge fields you have just created in Word:



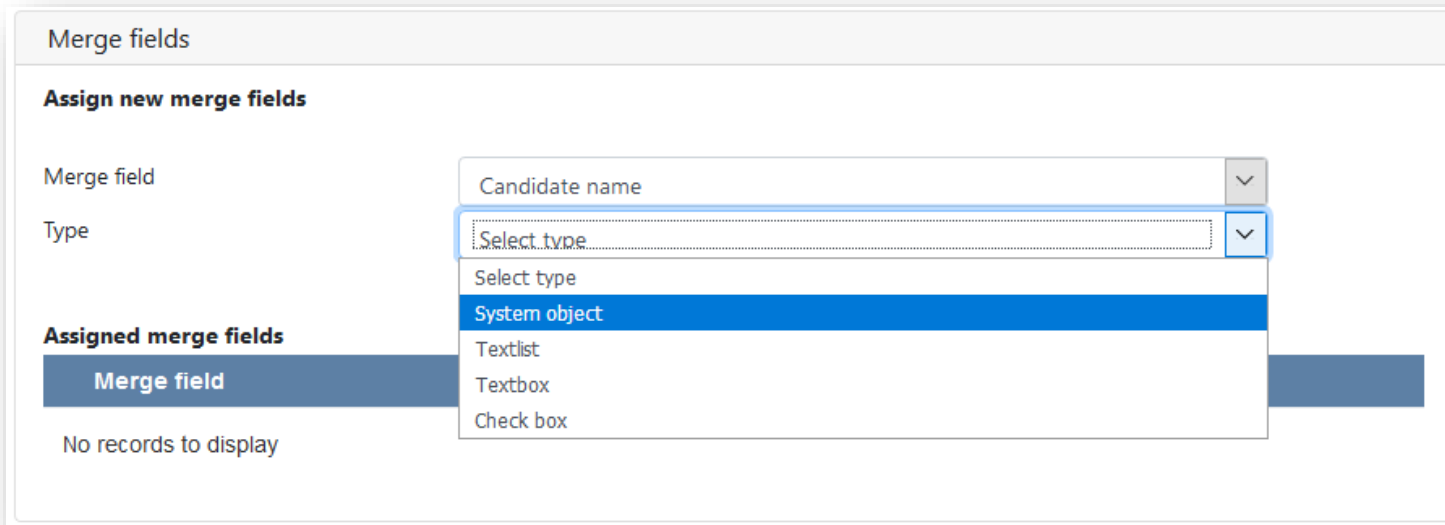
The screenshot shows a 'Merge fields' dialog box. It has a title bar 'Merge fields'. Below it, there's a section 'Assign new merge fields'. This section contains a 'Merge field' label and a dropdown menu. The dropdown menu is open, showing a list of options: '-', 'Company name', 'Company Adress', 'Company zip', 'Company City', 'Candidate name', 'Candidate adress', 'Candidate zip', and 'Candidate city'. The '-' option is currently selected and highlighted in blue. To the left of the dropdown, there's a 'Type' label. Below the 'Assign new merge fields' section, there's a section 'Assigned merge fields'. This section has a table with one column header 'Merge field' and one row with the text 'No records to display'.

Merge fields	
<b>Assign new merge fields</b>	
Merge field	<div><div></div><div></div></div>
Type	
<b>Assigned merge fields</b>	
Merge field	
No records to display	

# Template editor

## 'Merge fields'

- In the second drop down menu, select the type of content you would like the merge field converted to. You have four options:
  - *System object*: You can convert a merge field to already existing data/variables in the system – for example the candidate's name, adress, phone number, etc.
  - *Textlist*: You have the option to create drop down lists with fixed content and convert a merge field to one of those
  - *Textbox*: You can convert a merge field to a free text field where you can manually type in information.
  - *Check box*: You can can convert a merge field to either a checked or an unchecked check box



The screenshot shows a window titled "Merge fields". Inside, there is a section "Assign new merge fields" with two labels: "Merge field" and "Type". The "Merge field" label is next to a text input field containing "Candidate name". The "Type" label is next to a dropdown menu that is currently open, showing a list of options: "Select type", "System object", "Textlist", "Textbox", and "Check box". The "System object" option is highlighted in blue. Below the "Assign new merge fields" section, there is a section titled "Assigned merge fields" which contains a table with one column header "Merge field" and one row with the text "No records to display".

# Convert merge field to system object

Choose 'System object' when you would like to pull data from the system directly into your document

- When 'System object' is chosen, you will now get the option to pull a variable from the system into the document. The most frequently used are:
  - The candidate's full name (Candidate.FullName)
  - The candidate's adress (is to be applied in three different merge fields, converting respectively Candidate.Adress, Candidate.Zip og Candidate.City)
  - The company's name (Department.RootDepartment.Name)
  - Immediate superior – if used as project leader in the project (Project.ProjectLeader.FullName)

The screenshot shows a 'Merge fields' dialog box. In the 'Assign new merge fields' section, the 'Merge field' dropdown is set to 'Candidate name' and the 'Type' dropdown is set to 'System object'. A list of system objects is displayed, with 'Candidate.FullName' highlighted. An arrow points from the 'Add' button to the 'Candidate.FullName' item.

Assign new merge fields
Merge field
Type
Assigned merge fields
Merge field
No records to display
Hide Advance Options

- Candidate name
- System object
- Candidate.CurrentPositionId
- Candidate.EducationArea
- Candidate.EducationLevel
- Candidate.EducationTitle
- Candidate.Email
- Candidate.FirstName
- Candidate.FullName**
- Candidate.Gender
- Candidate.HasReferences

Remember to click 'Add' →

Add

# Convert merge field to textlist

Use 'Textlist' when you want to be able to use predefined pieces of text in your document.

*NB: To be able to use 'Textlist', you first have to create these. See more in this guide under 'Create text lists'*

When you have chosen 'Textlist', you get the opportunity to choose the textlist you would like to link to this merge field.

Merge fields

**Assign new merge fields**

Merge field	Services rendered	▼
Type	Textlist	▼
	-	▼
	-	
	Tekstliste	
	<b>Textlist 1</b>	

**Assigned merge fields**

Merge field	Løntrin
-------------	---------

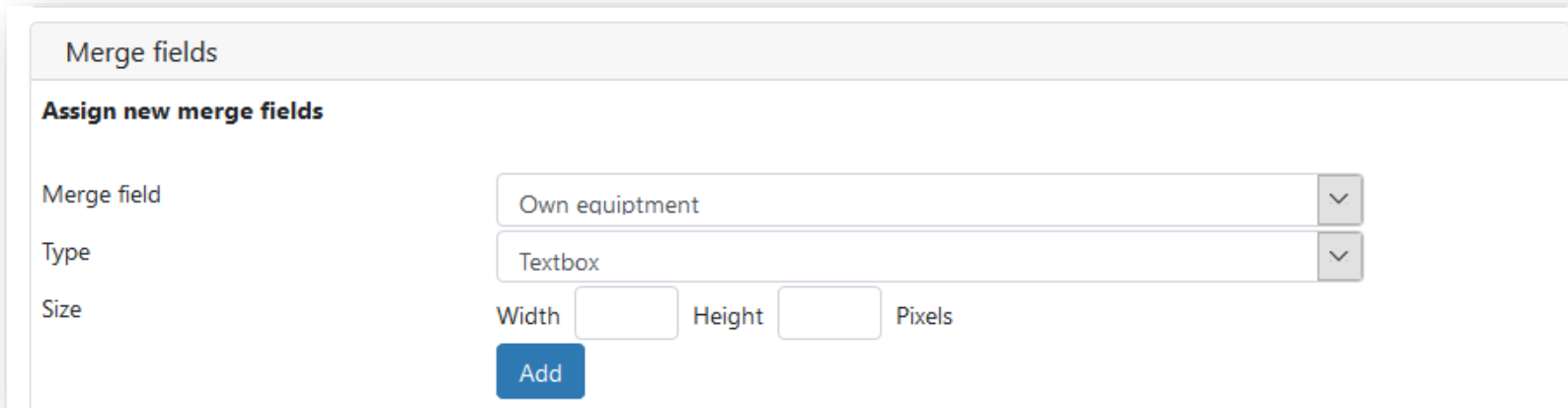
Remember to click 'Add' →

Add

# Convert merge field to textbox

Use 'Textbox', when you would like to manually type in content in your document.

When you have chosen 'Textbox', you get the option to define the textbox' width/height/pixels. The standard size is one single text line.



Merge fields

**Assign new merge fields**

Merge field

Type

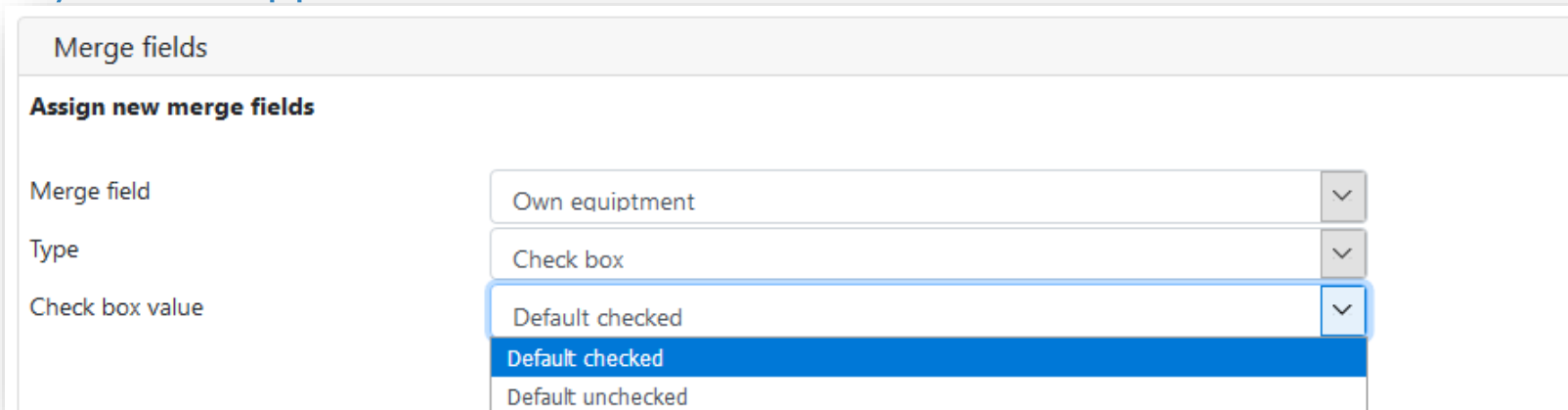
Size Width  Height  Pixels

Remember to click 'Add'

# Convert merge field to checkbox

Use 'Checkbox' when you would like to define a checkbox in your document.

When you have chosen 'Checkbox' you get the option to define whether the checkbox should by default appear as checked or unchecked in the document.



The screenshot shows a 'Merge fields' dialog box with a section titled 'Assign new merge fields'. It contains three rows of settings:

Merge fields	
<b>Assign new merge fields</b>	
Merge field	Own equipment
Type	Check box
Check box value	Default checked

Remember to click 'Add' → 



# See used merge fields

In 'Assigned Merge Fields' you can continuously see the merge fields you have already converted:

Assigned merge fields		
Merge field	Assigned type	
:: Candidate name	SystemObject:Candidate.FullName	Edit   Delete
:: Services rendered	TextList:Textlist 1	Edit   Delete
:: Own equipment	CheckBox:0	Edit   Delete
:: Company equipment	CheckBox:1	Edit   Delete
:: Company name	SystemObject:Department.Name	Edit   Delete
:: Company Adress	SystemObject:Department.Address	Edit   Delete
:: Company zip	SystemObject:Department.Zip	Edit   Delete
:: Company City	SystemObject:Department.City	Edit   Delete
:: Terms of Reference	TextList:Textlist 1	Edit   Delete

Simultaneously, the drop-down list under 'Merge fields' becomes shorter:

Merge fields

Assign new merge fields

Merge field

Type

-

Candidate zip

Candidate city

[Back to overview](#)

# Changes to the document

In case you need to add or remove new merge fields to the document, make the changes in Word and then update the document in DocGen.

Find 'Template' under advanced options and click 'Change'

Upload the latest version of your document and click 'Next'

Hide Advance Options

Template

MS Word document Contract for Services.doc ( 74KB )

Last updated 03-01-2019 12:21:52 by sys.clientsupport@hr-manager.net

Change

HR Manager Tal... > Administration > DocGen documents

New DocGen template 🗑

MS Word document:

Contract for Services.docx

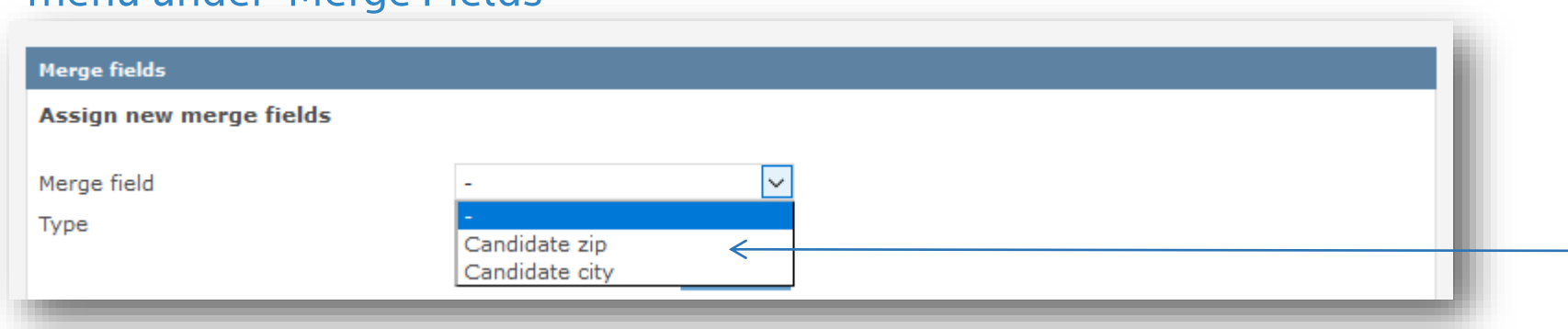
Select

Next

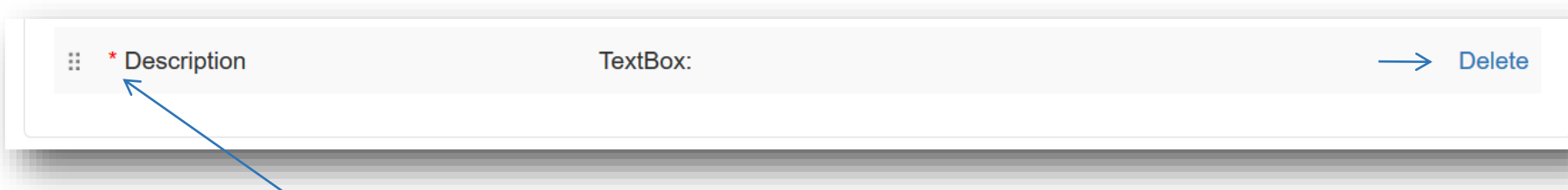
[Back to overview](#)

# Changing merge fields

If you have added new merge fields to your document, you will be able to see the new merge fields and convert them to your chosen content types in the drop down menu under 'Merge Fields'



If you have removed merge fields from your document, the old field will be marked with a red star in the list and you are now able to delete it permanently:



# Generate Documents

# Generate a document on a candidate

In order to generate a document on a candidate, tick off the box beside the candidate and click 'Generate document(s)' in the Toolbox

The screenshot displays a web application interface for managing candidates. At the top, a table lists five candidates with columns for Queue Number, Photo, Last name, First name, Age, Registration date, and Status. The candidate 'Danesh Dana' (Queue Number 2) is selected, indicated by a checked checkbox in the first column. Below the table, a 'Toolbox' panel on the left contains several actions, with 'Generate document(s)' highlighted. On the right, a panel for sending emails to selected candidates is visible, showing options for 'Application receipt (Auto)', 'Invitation Interview', and 'Invitation Interview 2'.

	Queue Number	Photo	Last name	First name	Age	Registration date	Status
<input type="checkbox"/>	4		Andersen	Anna		20-11-2018	Application confirmed
<input type="checkbox"/>	1		Eriksen	Erik		20-11-2018	Application confirmed
<input type="checkbox"/>	3		Camilsen	Camilla		20-11-2018	Invitation interview 1
<input checked="" type="checkbox"/>	2		Danesh	Dana		20-11-2018	Accepted invitation to interview
<input type="checkbox"/>	5		Briansen	Brian		20-11-2018	Sent offer

lection: Select page , Deselect page , Select all, Deselect all

View Scheduled Emails Filter Candidate List

**Toolbox**

- Export (PDF/XML/MS Excel/external)
- Delete Selected Candidates
- Generate document(s)**
- Add to Calendar Appointment

**Email** SMS

Send e-mail to selected candidates

- Edit and send Application receipt (Auto)
- Edit and send Invitation Interview
- Edit and send Invitation Interview 2

[Back to overview](#)

# Generate a document on a candidate

In the next window you are able to choose between the available documents.  
Click 'Next to fill out the document.

Document Generator (DocGen)

Below is an overview of the candidates you have selected and all document templates available for you.

Please select the document template you want to use, and click on **Next** to continue.

New templates

Selected candidates	Select template
Dana Danesh	Template Contract

Document archive

[View document archive](#)

⬅

Next

# Generate a document on a candidate

Fill out the fields in the next window:

You can choose to see a preview of the document, which opens in pdf.

If you are satisfied with the document, click 'Generate'

Document Generator

To generate a document for a specific candidate, select the desired candidate by clicking his/her name in the list of selected candidates. Then fill out the variables and click **Generate** to create an actual document. To view the generated documents, click the **Next** button in the bottom right corner of the page.

New templates

Selected candidates

Dana Danesh

Selected template

Template

Contract

Selected candidate

Dana Danesh

Variables

Candidate name

Dana Danesh

Services rendered

Listoption1

Own equipment

☐

Company equipment

☒

Company name

DocGen - merge documents

Company Adress

Company zip

Company City

Terms of Reference

Listoption1

Candidate adress

Danasvej 78

Candidate zip

1906

Candidate city

Frederiksberg

←

Preview Current

Preview All

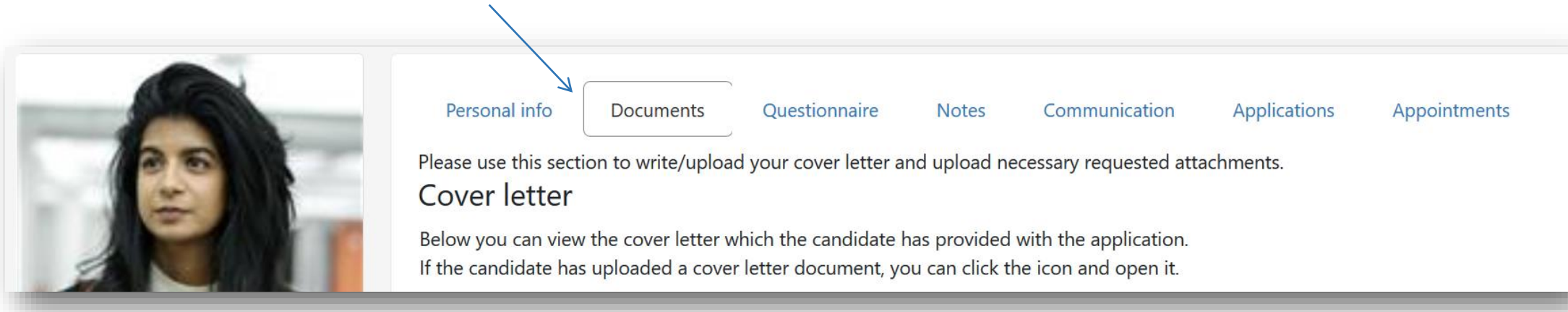
Generate Current

Document archive

[Back to overview](#)

# See documents on candidate's profile

When you have generated a document you will always be able to see and access it from the candidate profil from the tab 'Documents':



The screenshot shows a candidate's profile interface. On the left is a profile picture of a woman. To the right is a navigation bar with tabs: 'Personal info', 'Documents' (which is highlighted with a blue border and a blue arrow pointing to it from the text above), 'Questionnaire', 'Notes', 'Communication', 'Applications', and 'Appointments'. Below the navigation bar, there is a section titled 'Cover letter' with a sub-header 'Cover letter'. The text below the sub-header reads: 'Please use this section to write/upload your cover letter and upload necessary requested attachments. Below you can view the cover letter which the candidate has provided with the application. If the candidate has uploaded a cover letter document, you can click the icon and open it.'

Under 'Generated Documents you will be able to see, delete, and download the document:

Generated Documents

Following the documents generated by DocGen module for this candidate.

Document Name	Project	Written by	Size	Date/Time	Action
<a href="#">Ansættelseskontrakt for funktionær Dana Danesh.docx</a>	Projektkoordinator	System User Client Support	10,53 KB	02-01-2019 15:47:53	<a href="#">Delete</a>

[Back to overview](#)



# Create text lists

Use 'DocGen Text lists' if you want to use predefined text snippets in your document. 'DocGen Text lists' work as a drop down menu, you are able to choose from. In order to use 'DocGen Text lists', you first need to create these. This is done from the 'DocGen Documents' frontpage. Click ' Add new DocGen text list' to create your text list:

DocGen text lists

Here you can manage document generator text lists.

Add new DocGen text list

ID	Name	Description	Actions
101	Textlist 1	This is a textlist	Copy   Edit   Delete

Give your text list a name and a description and choose whether or not it is to be inheritable. Then, click 'Next'.

DocGen text list editor

Text Lists

Name

Textlist 1

Description

This is a textlist

Inheritable

☒

⏪

Next

# Create text lists

Create predefined text snippets as shown below. You need to give each snippet an alias that will appear when filling out the contract. In the example below, three predefined additions to the contract have been created.

You are able to move each snippet up and down, depending on the order you would like the drop down list to be shown in, when creating contracts.

Please be aware that the last text snippet will only be saved if you first click "Insert new line" before you click 'Finish'.

Manage text list

Manage text list

ID	Alias	Language	Text	Secondary value
6047	Listoption1	en	This is the text1	<a href="#">Edit</a>   <a href="#">Delete</a>
6048	Listoption2	en	This is the text2	<a href="#">Edit</a>   <a href="#">Delete</a>
6049	Listoption3	en	This is the text3	<a href="#">Edit</a>   <a href="#">Delete</a>

[Back to overview](#)

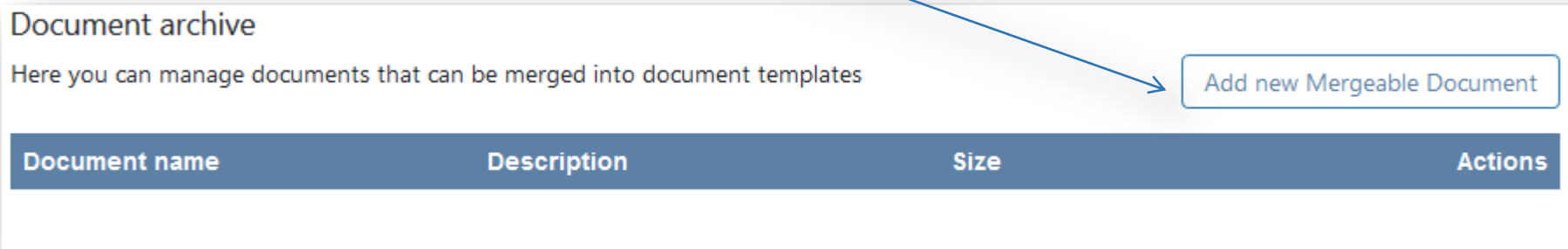
# Mergeable documents

Mergeable documents can be added and merged with DocGen documents. It is for example possible to add a personnel handbook or similar to the document.

*FYI: If you would like to be able to merge several documents, when generating it on a candidate, please contact support who will set the system up for you.*

Please be aware that mergeable documents are to be seen as predefined documents and can not be adjusted from candidate to candidate.

Scroll down to the bottom on the DocGen front page and find 'Document Archive'  
Then, click on 'Add new mergeable document'



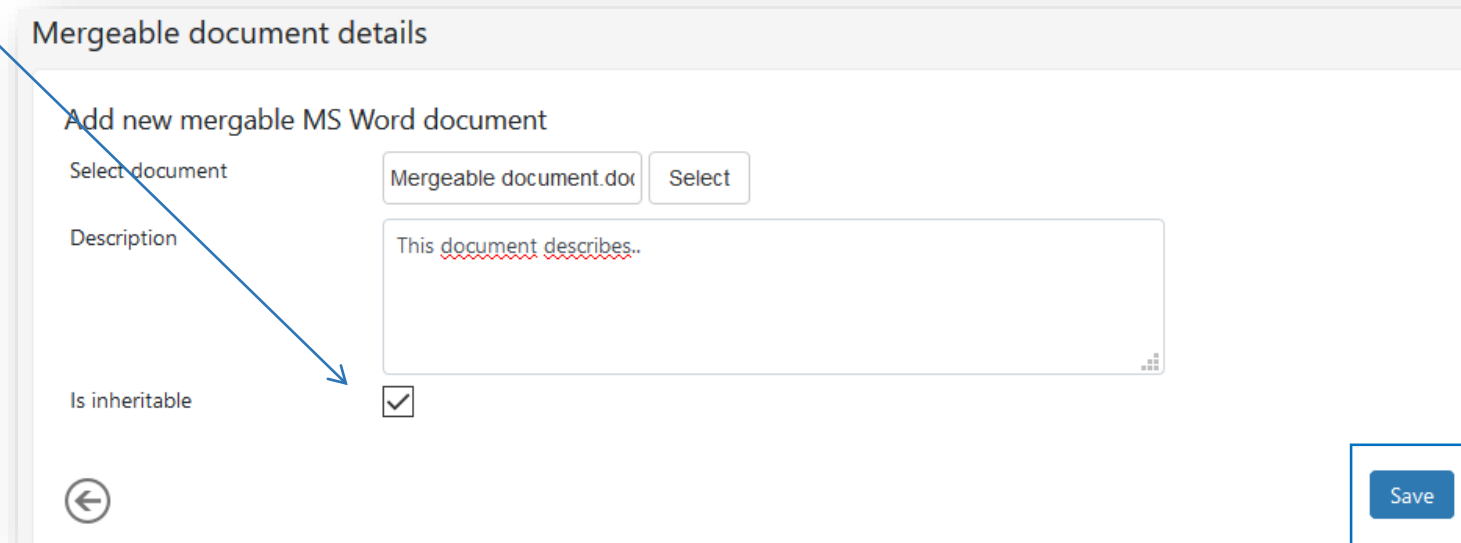
The screenshot shows a web interface for managing documents. At the top, it says 'Document archive' followed by the text 'Here you can manage documents that can be merged into document templates'. To the right of this text is a button labeled 'Add new Mergeable Document'. A blue arrow points from the text 'Add new mergeable document' in the paragraph above to this button. Below the button is a table with four columns: 'Document name', 'Description', 'Size', and 'Actions'.

Document name	Description	Size	Actions
---------------	-------------	------	---------

[Back to overview](#)

# Mergeable documents

Upload the document, write a description if you would like, and remember to tick 'Is inheritable, if sub departments are to use the document.



Mergeable document details

Add new mergable MS Word document

Select document

Description

Is inheritable ☒

Remember to click 'Save'

[Back to overview](#)

# Generate and merge documents

Document Generator

To generate a document for a specific candidate, select the desired candidate by clicking his/her name in the list of selected candidates. Then fill out the variables and click **Generate** to create an actual document. To view the generated documents, click the **Next** button in the bottom right corner of the page.

New templates

Selected candidates

Dana Danesh

Selected template

Template

Contract

Selected candidate

Dana Danesh

Variables

Candidate name

Dana Danesh

Services rendered

Listoption3

Own equipment

☐

Company equipment

☒

Company name

DocGen - merge documents

Company Address

Company zip

Company City

Terms of Reference

Listoption1

Candidate adress

Danasvej 78

Candidate zip

1906

Candidate city

Frederiksberg

←

Preview Current

Preview All

Generate Current

Document archive

When you generate a DocGen document that you would like to merge with a document from 'Document Archive', first click 'Generate Current'

Then, click 'Document Archive'

# Generate and merge documents

You will now be able to merge documents before you archive the document on the candidate's profile, by clicking 'Merge' on the right hand side.

Generated documents

The list below contains all documents generated in this session. Here you can download the document, send it by e-mail or delete it.

<input type="checkbox"/>	Candidate	Project	Template	Created	Status	Actions				
<input type="checkbox"/>	Dana Danesh	Projektkoordinator	Contract	03-01-2019 14:54:23	Generated	<a href="#">Download</a>	<a href="#">Archive</a>	<a href="#">Send</a>	<a href="#">Merge</a>	<a href="#">Delete</a>

Merge & download selected

Archive selected

Download and archive selected

Send selected

Delete selected

Previous

Finish

# Generate and merge documents

You are now able to merge your chose document into the DocGen template.

Merge document

Merge documents

Here you can select various mergeable documents to merge with selected document template.

Select	Document name	Description	Merge order
<input type="checkbox"/>	Provisionsaftale, skabelon.doc		
<input type="checkbox"/>	Dette er et flettedokument.docx	Dette dokument indeholder...	
<input checked="" type="checkbox"/>	Mergeable document.docx	This document describes..	

Merge

If you have uploaded several documents to Document Archive, you are able to add several documents and choose which order the documents are to appear in, in the final document. Consequently, the document you note as "1" will appear before "2", etc.

Click 'Merge' to save.  
You will now see a confirmation that the documents have been merged.

[Back to overview](#)

# Generate and merge documents

Click 'Archive' to save the generated document on the candidate's profile:

Generated documents

The list below contains all documents generated in this session. Here you can download the document, send it by e-mail or delete it.

<input type="checkbox"/>	Candidate	Project	Template	Created	Status	Actions				
<input type="checkbox"/>	Dana Danesh	Projektkoordinator	Contract	03-01-2019 14:54:23	Generated	Download	Archive	Send	Merge	Delete

Merge & download selected

Archive selected

Download and archive selected

Send selected

Delete selected

Previous

Finish

Next, click 'Finish'



# Digital Signature

It is possible to send employment contracts directly to the candidate by using Digital Signature. The candidate will then be able to sign the contract digitally by using NemID (DK) or Bank ID (NO & SE)

We have developed a module called Digital Signature that can be activated in Talent Recruiter and/or Talent Manager.

The setup depends on having made an agreement with Penneo who is a vendor of digital signature solutions-

In cooperation with Penneo we are able to offer a special deal where you get 50 free digital signatures to be used at your discretion.

Please contact support if you are interested in learning more.

# You are now ready to use DocGen

Please feel free to contact our support if you have any questions

Phone: +45 72 44 06 44

Mail: [support@hr-manager.dk](mailto:support@hr-manager.dk)

[Chat with us](#)



**HR MANAGER**  
TALENT SOLUTIONS