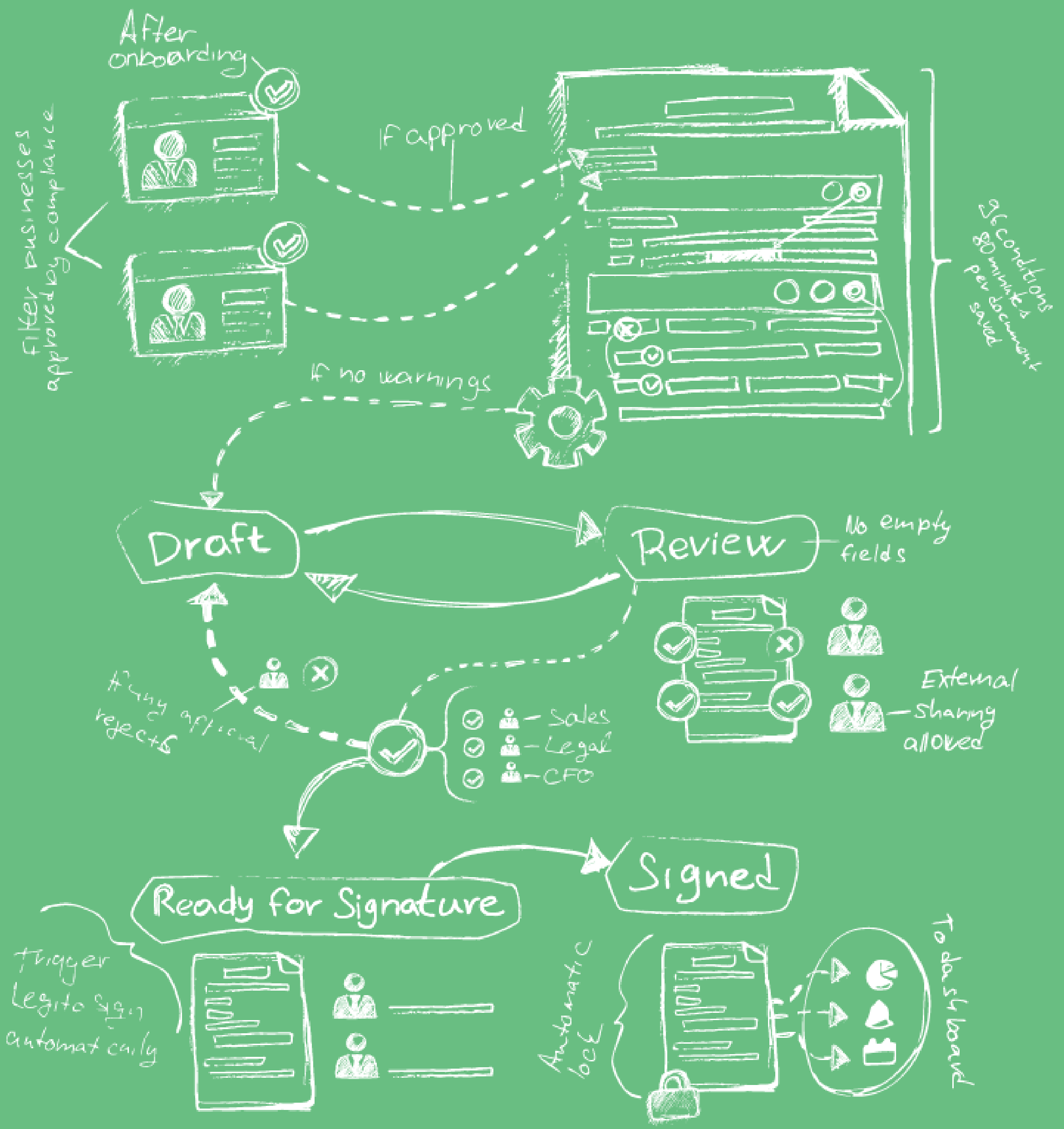
Legito



10-Day Training

ADVANCE FROM POWER USER TO EXPERT IN 10 DAYS BASED ON A DECADE OF DIGITAL TRANSFORMATION KNOW-HOW. EBOOK LESSONS WILL EMPOWER YOU TO HANDLE CHALLENGING REAL-LIFE REQUESTS AND SCENARIOS.

Foreword

The initiative that resulted in this ebook was launched a while ago as our internal training for new hires to our R&D and Customer Support teams.

Originally, our goal was to onboard new colleagues to Legito and help them reach the expert level as soon as possible. The nice side effect of the training is that it allows us to identify the best talents right at the beginning.

After several iterations of then internal training and talks with our customers, we realized that our customers face the same challenges as us, and would love to leverage such training materials.

Before moving forward, finish our Onboarding followed by Training Courses which both contain step-by-step instructions. This training program is different. It is **designed to be challenging** to help you get ready for real projects that often require working in suboptimal environments. We intentionally made some things harder compared to the courses and did not describe all the steps in such detail.

We wish you the best of luck!

Team Legito

Day One

In this training stage, you will learn the process for automating and formatting basic documents and creating Legito styles.

Note: Individual stages may have continuities. We recommend that you complete all steps in a stage so you can complete the next stage.

Tasks:

Documents:

a) Legito-Training-Document-01-import
b) Legito-Training-Document-01-automation-instruction
c) Training-Default-Styles

Prerequisites:

i. Legito workspace (skip if you already have a Workspace from initial Courses)
   a. If you don't have a workspace yet, create one.
   b. Once your workspace is set up, you need to request permission to create a new Template Suite at helpdesk@legito.com. Without permission, you cannot proceed with training.

1. Automate an imported Word document.

In this step, we will annotate the DOCX Documents to automatically create elements, import the Document into Legito, and automate by following instructions in the DOCX file.

1.1. Log in to the Legito Workspace

1.2. **Annotate word document**

Annotate the Word document before importing it into Legito

1.2.1. Open "*Legito-Training-Document-01-import*". It is intentionally formatted in this way to simulate cases that are happening in reality with Word files.

1.2.2. Replace the color-coded placeholders with annotations. Using annotations, the correct elements are imported into Legito along with the document.

a) **Yellow** **Textinput** element.
b) **Blue** **Money** element.
c) **Purple** **Date** element.
d) **Red** **Link** element

➢ Learn more about Annotation in Word for Import
➢ *Not sure? Find the solution here*

1.3. **Import document**

1.3.1. Import the edited *Legito-Training-Document-01-import* to the Legito Template Editor.

➢ Learn more about Import from Word
➢ *Not sure? Find the solution here.*

1.4. **Document automation**

1.4.1. Automate the document by following the instructions in the attached document comments *Legito-Training-Document-01-automation-instruction*.

2. Document formatting

In this step, the Document is formatted using Legito Template Editor features to demonstrate its capabilities.

2.1. Once imported into Legito, the document is not generated as a traditional Word/PDF Document, so further editing is required to achieve your desired style and design.

NOTE: This is showing you how to format a document in Legito. We will learn later how to import a Word document into Legito that requires no further formatting.

2.2. The goal is as follows:

a. The document must contain numbering (no numbering by "Text")
   - In the imported DOCX, some of the numberings were simple text. It is required to create the correct numbering.

b. The final document must visually look 1:1 like the original *Legito-Training-Document-01-import* including all details.

2.3. Formatting must be done directly in the Legito Template Editor
   - ➢ No Legito Styles, No Advanced Layout Design(ALD)

2.4. How to format a Document in Template Editor:
   - ➢ Learn more about formatting
   - ➢ Not sure? Look at the solution here

3. Legito styles

In this step, Styles from DOCX files will be recreated in Legito and set as default Styles to make future automation (and styling) of imported Documents much easier. With this approach, we will automate the Document without further need to use the Template Editor Design tab.

3.1. Open the individual style settings in the "*Training-Default-Styles*" Word document and create Legito styles based on these.
   - ➢ Learn more about Legito Styles

3.2. Set Legito styles as defaults for each level
   - ➢ Learn more about default Legito styles

3.3. Create a new template with the name "Legito Styles"

3.3.1. Create the content as it is in the "*Training-Default-Styles*" document. Each part must have the correct clause level.

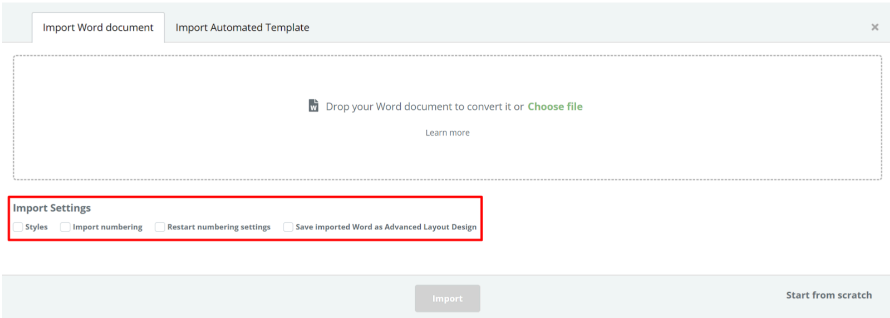
3.3.2. No manual assignment of styles. Default styles will be automatically assigned to Clauses based on the Default style set for the clause level.

3.3.3. The generated document should look 1:1 to "*Training-Default-Styles*" document

3.4. Create a new template with the name "Final Agreement Perform work"

3.4.1. Again import the word document "*Legito-Training-Document-01-import*" (the one edited with annotations)

3.4.2. Set the import of the Document to Legito without "Styles" (uncheck all the options in the Import Settings)



3.4.3. Default Legito styles should be automatically assigned after import.

3.4.4. Automate again according to the document "*Legito-Training-Document-01-automation-instructions*"

Now you are ready for the next stage of training!

Day Two

In this training stage, you will learn the process for advanced document automation (using forms in Template Suite, Clause Library), formatting of documents (including numbering), mandatory fields (Warnings), and eSignatures.

Note: Individual stages may have continuities. We recommend that you complete all steps in a stage so you can complete the next stage.

Tasks:

Documents:

a) Legito traning Document (LTD02)
b) Training-Styles-02

Prerequisites:

i. Completed Training Day 1

1. Creating Form Template

Creating a Form is a convenient way to gather data to populate your Documents. It is possible to only display forms to other users/guests and hide the main Documents from them. Forms are visually different from Documents.

1.1. Create a new Template Suite.
- The name of the template suite will be “Employment Contract”
- Set Template Suite Layout to "Dual"
    - This feature allows you to have the form visible at all times, and also see the contract populated with information from the form in real-time.

    ➢ Learn more about Template Suite Layout.
    ➢ Not Sure? Look at the solution.

1.2. Create a new Template of type Form
- Learn more about how to set Template type
- The name of the Form Template will be “Form for Employment Contract”

1.3. Open Word LTD02 and review it in detail

1.4. Create a Questionnaire (in the Form Template) from which the data will be entered into the document, and the content of the contract edited (see Step 3).
- There are several comments in the document LTD02 with instructions on what fields or options are required in the questionnaire.
- The questionnaire will include all Questions mentioned in LTD02
- Learn more about how to create a Form Template

Not sure? Look at the solution

2. Warnings

Warnings help you to prevent users taking premature steps or alert them when certain data is missing.

2.1. Set all fields about employer and employee data with a warning to notify when empty.

2.2. The Document cannot be exported without filling in the Job Description.

2.3. The Document cannot be signed without filling all the fields and answering all the Questions.

- Learn more about how to set Warnings

Not sure? Look at the solution.

3. Advanced automation, formatting, and numbering creation

Using Legito's advanced automation features enables you to create the entire content of the Document, including Numbering and Styles, and connect it with other Templates in the Template Suite. This can be further leveraged for external sharing.

3.1. Create the same Numbering list in Legito as in the Word document Training-Styles-02

- Learn more about how to create Numbering

3.2. Create Legito styles according to the document Training-Styles-02

- there are two new styles in the document that will be used later:
    - *Numbered list*
    - *Bulletnoindentation*
- Assign numbering from step 3.1 to these styles
- Learn more about how to create Legito styles

3.3. Open Word LTD02 to help you with the next steps.

3.4. Create a new Template (type Document) in the same Template Suite that was created in Step 1.1.

- The template name will be “Employment Contract - document”

3.5. Import and automate the document (LTD02) by following the instructions in the comments.

- Connect Template with Template Form
    - The parts you created in the form will be linked directly to the document.
    - For example: if there is a name field in the form, the name will be automatically populated from the Form into the Document via the Link element.
- Do not automate the parts that will be in the Clause Library yet. We will work with them in Step 4.

3.6. Using Legito styles (primarily) and formatting in the Template editor, achieve the same formatting as in LTD02.

3.7. Make sure the main Document is internal, so not visible to either Guests with whom you share it externally, or people without proper permission (they will only be able to fill in the Form). Make sure Attachments are allowed so relevant files can be uploaded if necessary, and if they are PDFs, they should be merged with the main document as one file by default. The Form cannot be exported.

3.8. First Default Draft Tab should be set to "None" and Reviewing tab "Review"

3.9. Test those settings by creating a link for External Sharing and open the link in an incognito window or another browser (to simulate being a guest). Templates via the link should always open as a blank Template and guests should only be able to fill in the Form.
- Learn more about Document Sharing.

NOTE: You will already know most of the automation functions from previous training. If you are not sure how to do repeats, conditions, formatting, or any other tasks, see the "Template Editor" section in the Knowledge Base. You will also find information such as how to create a Table of Contents and Header/Footer.

4. Creating and applying Clause Library Clauses

Clause Library allows users to centrally manage frequently used clauses in one place, saving time when clause edits are required.

4.1. In the LTD02 document, some parts are annotated to be created in the Clause Library. These clauses are:
- 5. Working Hours
- 10. Confidentiality

4.2. Create a Clause Library for each clause above
- including automation, formatting, and numbering
- Learn more about Clause Library.

4.3. Set the elements in the Clause Library to automatically load the data from the questionnaire in Step 1. The same applies to conditions.
- Use "Link to Any Content" and "Condition To Any Content". That way it can be used for other templates in the future.
    - Learn more about Condition To Any Content
    - Link to Any Content works similarly to the Condition above

4.4. Replace clauses **5. Working Hours** and **10. Confidentiality** in Template from point 2 with Clause Libraries
Not sure? Look at the solution.

5. eSignature (LegitoSign)

Legito's very own electronic signature allows you to electronically sign contracts and other documents directly in your Legito Workspace. Legito Sign is embedded in your Legito Workspace with absolutely no integration required. Where required, Legito has integrations with other eSignature solutions.

5.1. The email and name of the signatories will be completed automatically by extracting data via tags from the Document.

- Learn more about data extraction via tags

  Not sure? Look at the solution

5.2. Annotate Document for LegitoSign
  - When signing, the document must have a date and place for signatures
  - Learn more about eSignature annotations

5.3. Create new contacts in your Signatories
  - Learn more about how to manage Signatories

5.4. Set Signature option for Template from step 2
  - Learn more about how to set the Signature

5.5. Start document signing with LegitoSign
  - Learn more about how to start Signing

You are ready for the next stage of training!

Day Three

In this training stage, there will be tasks to further utilize Legito Advanced Automation features, mainly documents with multiple different sections within a single Document with a specific Table that also needs to be recreated.

Note: Individual stages may have continuities. We recommend that you complete all steps in a stage so you can complete the next stage.

Tasks:

Documents:

a) ACME Terms and Conditions

1. Creating the Template

1.1. Create a new Template Suite.
- The name of the template suite will be “ACME Term & Conditions”
- Set Template Suite to be by default generated as “No Advanced Layout Design”
- This Template could be exported from Legito only as a PDF

1.2. Open the Document ACME Terms and Conditions and review it in detail. It is recommended to have all the Symbols (non-printing characters) in the MS Word (or Google) editor turned on, and to look in detail for every symbol relevant to Sections.

1.3. Replace all “ACME” occurrences in the Document with a Link element.

2. Recreate the Template

Today we will create a Document consisting of multiple sections (Next page and Continuous) and prepare a specific Table in the middle of such a Document.

2.1. Recreate the Template ACME Terms and Conditions completely so it’s generated 1:1 with the original.

2.2. Insert the article set as “no export” before the main Document. This article should contain a single Textinput element with the system name “company”.

2.3. All Links should refer to the “company” element.

2.4. You cannot use Advanced Layout Design as all styling should be done in Legito.

2.5. Learn more about Sections to create the Template.

2.6. The table on the second page must have exactly the same properties. Learn more about Tables in Legito to achieve it.
- To make Step 3 easier it might be beneficial to bulk-change all the Links to “any Template Suite Content” with the system name “company”. Use search to select all links and bulk change them to the new ones.

3. Copy the Template

Previously created Templates can be imported to another Template Suite. Keep in mind there might be some limitations if the Conditions are referring to another Template within Template Suite.

3.1. Create a new Template Suite “Services Agreement”
3.2. Create a single Textinput in that Template with the system name “company”
3.3. Create another Template in the Suite named “Terms & Conditions”
3.4. Import there the already created ACME Term & Conditions Template
    - Learn more about importing Legito Templates
3.5. If Links are set to “any Template Suite Content” no further steps are required. If not, Links must be set again.
3.6. Uncheck “Show Document Menu Bar” to hide it from the document view.
3.7. Save and Test the Template.
3.8. If the name of the company is populated correctly, Publish the template to make it accessible to other users in your workspace.

Today may have saved you time to complete the first two days of work. Now you're ready for the next stage of training!

Day Four

In this training stage, we will test Legito's data import options. Import from sheets, Import from Legito, Batch generation, importing data from Objects and creating them.

Note: Individual stages may have continuities. We recommend that you complete all steps in a stage so you can complete the next stage

Tasks:

Documents:

- Stage 4 - Import from sheet.xlsx
- Stage 4- Batch Generation.xlsx

Prerequisites:

i. Completed Training Day 2

1. Import from sheets

In this step, we will use the Import from Sheets tool. This tool can be used if we have a table containing dials or other data in specific cells, and can easily import them into a Legito document. This will reduce the time required to work with the data because we don't have to manually overwrite anything, and also eliminate any errors when manually transferring data.

Task:

a. Download this Excel file Stage 4 - Import from sheet.xlsx
b. Create a document from the Template suite "Employment contract" from Training Day 2.
c. Select the "Import from sheet" tool in the top menu of the Document editor.
d. Choose or drop an Excel file in the drop-down area.
e. Match cells from the Excel file to the correct elements in the Employment Contract form. Unchecking “Apply conditions” in the View window is recommended so all the available Elements in the Template are visible.
    i. We call this process “Match Data Fields”
f. Every value in the Sheet has a relevant Element for mapping in the LTD02 Document.
g. Once all the fields have been mapped, create “Favorite Settings” so you can use the same mapping in future.
    i. Uncheck the "Only for me" checkbox so your colleagues can see your favorite settings.
h. Import data
i. Download the document with the imported data and check if all data from the table has imported into the document:
    i. Creator
    ii. Representative name and surname
    iii. Representative function
    iv. Employee Name

v. Employee Surname
vi. Address
vii. Date of Birth
viii. Work
ix. Salary
x. Work Time from
xi. Work Time to
xii. Working Hours
xiii. Contract from
xiv. Contract to

- Learn more about how to use the Import from Sheets tool
- *Not sure? Look at the solution.*

2. Batch Generation

In this step, we will test the Batch Generation tool. We can use this tool if we need to generate more than one contract at a time. Typically, this tool is used for HR contracts, but it also has applications in other areas where we need to generate large contract volumes with minimal work. Just prepare or export a table from your database and Legito will generate one contract for each row of the table. Using this tool, we can significantly reduce the time required to create documents and eliminate manual transfer errors.

Task:

a. Download this Excel file Stage 4- Batch Generation.xlsx
b. Create a document from the Template suite "Employment contract" from Training Day 2.
c. Select the "Batch Generation" tool in the top menu of the Document editor.
d. Choose or drop an Excel file in the drop-down area.
e. Match Columns from the Excel file to the correct elements in the Employment Contract form.
f. Once all the Columns have been assigned, create "Favorite Settings" so you can use the same mapping in the future.
    i. Uncheck the "Only for me" checkbox so you colleagues can see your favorite settings.
g. Continue to Batch Generation.
h. Download zip. file once the generation is complete.
i. Check if one document has been generated for each row in the Excel table (there should be 4) and if all data has been popuated in each document:
    i. Creator
    ii. Representative name and surname
    iii. Representative function
    iv. Employee Name
    v. Employee Surname
    vi. Address
    vii. Date of Birth
    viii. Work

ix. Salary
x. Work Time from
xi. Work Time to
xii. Working Hours
xiii. Contract from
xiv. Contract to

- Learn more about how to use Batch Generation tool
- *Not sure? Look at the solution.*

3. **Import from Legito**

If we need to use data from an existing Legito contract, there is no need to manually transfer data. With Legito Smart Import, we can easily transfer data from one contract to another. We can transfer data within a pattern and between different patterns. This feature is frequently used for Change Contracts.

Task:

a. Open Form Template “Employment contract-Form” from Template suite "Employment contract” from Training Day 2
b. Set the system name for each element in the form.
    - Some elements may already have system names. Replace existing system names with the new ones listed below. If the element has no system name, fill in the name from the list below. For easy reference, the system names will be the same as the set tags.

    i. Name and Surname (first representative employer)
        - The system name will be named "Name_Surname_Employer”
    ii. Function (first representative employer)
        - The system name will be named "Function_Employer”
    iii. Name (employee)
        - The system name will be named "Name_Employee”
    iv. Surname (employee)
        - The system name will be named "Surname_Employee”
    v. Date of birth (employee)
        - The system name will be named "Birth_Employee”
    vi. Address (employee)
        - The system name will be named "Address_Employee”
    vii. Employee Compensation
        - The system name will be named "Employee_Compensation”
    viii. Creator
        - The system name will be named "Creator”
    ix. Learn more about how to set System names.
c. Create a new document from the Template suite "Employment contract” and fill in all the fields in the form.
d. Save document.
e. Go to the document management area and open the document record of the document you just created.
f. Find the Document Record ID and copy it.

g. Create another new document from the Template suite "Employment contract" and fill in all the form fields.
h. Select the "Import from Legito" tool in the top menu of the Document editor.
i. Click "Choose document record" and search for the document record by the Document ID you copied. Select it.
j. Start Smart Import
k. Check that all data from:
    i. Name and Surname (first representative employer)
    ii. Function (first representative employer)
    iii. Name (employee)
    iv. Surname (employee)
    v. Date of birth (employee)
    vi. Address (employee)
    vii. Employee Compensation
    viii. Creator

- Learn more about how to use "Import from Legito"
- *Not sure? Look at the solution.*

4. Objects

Objects can be used for easy data management or list creation. Thanks to objects, we can maintain different categories of information up to the last detail. Objects can be used for Customized case management tools for example, Client and vendor management lists that align with their records, and Real Estate property reports. This all depends on the creativity and requirements of the client.

Task

a. Create a new object called "Employees
    i. Learn more about Object Administration
b. Create the following object Properties for this object:
    - All Object properties will have the following settings:
        - Show in the management area
        - Allow filtering
        - Unless otherwise specified, property options are default
        - Learn more about property settings
    I. Employee Name
        - Property type: Single-line text
        - Use as a name for Records
    ii. Employee Surname
        - Property type: Single-line text
        - Use as a name for Records
    iii. Employee's Date of birth
        - Property type: Single Date
    iv. Employee Address
        - Property type: Single-line text
    v. Work
        - Property type: Single-line text
    vi. Salary

- Property type: Single-line text

vii. Employee ID
   - Property type: Identifier
   - 5 Decimals Values
   - Month and year in Identifier number
   - Restart value after the year
   - Use as a name for Records

- Learn more about properties

c. Create 3 object records for employees:

i. Elisabeth White
   - Name: Elisabeth
   - Surname: White
   - Date: 17.8.1996
   - Address: 104 Grover Via, South Brett, WA 47435
   - Work: Lawyer
   - Salary: 2 800 USD

ii. John Doe
   - Name: John
   - Surname: Doe
   - Date: 4.12.1987
   - Address: 77071 Mohr Springs, Marvinshire, OH 39435-8166
   - Work: HR
   - Salary: 1 500 USD

iii. Nick Adams
   - Name: Nick
   - Surname: Adams
   - Date: 25.9.1973
   - Address: Apt. 621 6783 Kyle Lights, Onabury, SD 16994
   - Work: Marketing Specialist
   - Salary: 2 250 USD

Not sure? Look at the solution.

5. **Objects in Templates**

In addition to managing data in Objects, you can also use the Objects created in Legito as a base for importing data into your Legito documents.
In Legito Templates, you can reference and import data from an Object record, save time, and skip any manual entry of repetitive information.

Task

a. Open Form Template “Employment contract-Form” from Template suite "Employment contract” from Training Day 2.
b. Add a question to the top of the form "Fill in employee data manually or automatically from Object?"
    i. Option A: Manually
    ii. Option B: From Object
c. Add Element select to the position next to the Texintput element for the employee name.
    i. Link select to Object “Employee” to Object Property “Name”
        - Learn more about Selects referring to Objects
    ii. Set the condition to make the original Element Textinput appear if the employee is filled in manually
    iii. Set a condition for the Element Select to appear if the employee is filled in automatically
    iv. Set the System name to “Employee_List”
d. Insert Element Link next to the following fields:
    i. Surname
        - Set the link to Element Select "Employee_List" and link it to Object Property "Surname".
        - Set a condition for the Element Link to appear if the employee is filled in automatically.
        - Set the condition to make the original Element Textinput appear if the employee is filled in manually.
    ii. Date
        - Set the link to Element Select "Employee_List" and link it to Object Property "Date".
        - Set a condition for the Element Link to appear if the employee is filled in automatically.
        - Set the condition to make the original Element Date appear if the employee is filled in manually.
    iii. Address
        - Set the link to Element Select "Employee_List" and link it to Object Property "Address".
        - Set a condition for the Element Link to appear if the employee is filled in automatically.
        - Set the condition to make the original Element Textinput appear if the employee is filled in manually.

iv. Work
   - Set the link to Element Select "Employee_List" and link it to Object Property "Work".
   - Set a condition for the Element Link to appear if the employee is filled in automatically.
   - Set the condition to make the original Element Textinput appear if the employee is filled in manually.

v. Salary
   - Set the link to Element Select "Employee_List" and link it to Object Property "Salary".
   - Set a condition for the Element Link to appear if the employee is filled in automatically.
   - Set the condition to make the original Element Textinput appear if the employee is filled in manually.

- Learn more about how to link to Select to object.

e. Save changes and test if the form behaves correctly
   i. If the question "Fill in employee data manually or automatically from Object?" "Manually" is answered, and all the original elements (for manual filling) are in the form
   ii. If the question "Fill in employee data manually or automatically from Object?" is answered "Automatically", there is a Select element in the form to select the employee from Object.
   iii. Select one employee and check that the data for Surname, Birth, Address, Work, and Salary are automatically populated and there are no elements to fill in manually.

f. Open Template “Employment Contract - document” - from Template suite "Employment contract” from Training Day 2

g. Find Elements Link for Employee linked to the form:
   i. Name
      - Insert the new element Link next to the original Element Link.
      - Set the link to Element Select "Employee_List" and link it to Object Property "Name".
      - Set a condition for the New Element Link to appear if the employee is filled in automatically
      - Set the condition to make the original Element Link appear if the employee is filled manually.

   ii. Surname
      - Insert the new element Link next to the original Element Link
      - Set the link to Element Select "Employee_List" and link it to Object Property "Surname".
      - Set a condition for the New Element Link to appear if the employee is filled in automatically
      - Set the condition to make the original Element Link appear if the employee is filled manually.

   iii. Date
      - Insert the new element Link next to the original Element Link
      - Set the link to Element Select "Employee_List" and link it to Object Property "Date".

        - Set a condition for the New Element Link to appear if the employee is filled in automatically.
        - Set the condition to make the original Element Link appear if the employee is filled manually.
    iv. Address
        - Insert the new element Link next to the original Element Link
        - Set the link to Element Select "Employee_List" and link it to Object Property "Address".
        - Set a condition for the New Element Link to appear if the employee is filled in automatically.
        - Set the condition to make the original Element Link appear if the employee is filled manually.
    v. Work
        - Insert the new element Link next to the original Element Link
        - Set the link to Element Select "Employee_List" and link it to Object Property "Work".
        - Set a condition for the New Element Link to appear if the employee is filled in automatically.
        - Set the condition to make the original Element Link appear if the employee is filled manually.
    vi. Salary
        - Insert the new element Link next to the original Element Link
        - Set the link to Element Select "Employee_List" and link it to Object Property "Salary".
        - Set a condition for the New Element Link to appear if the employee is filled in automatically.
        - Set the condition to make the original Element Link appear if the employee is filled manually.
h. Save changes and test if the Template behaves correctly
    i. If the question "Fill in employee data manually or automatically from Object?" "Manually" is answered, and data for Name, Surname, Birth, Address, Work, and Salary is filled into the document after the form is filled in manually (as before)
    ii. If the question "Fill in employee data manually or automatically from Object?" is answered "Automatically", data for Name, Surname, Birth, Address, Work, and Salary is filled into the document after the employee is selected in the Element select in the form.

Day Five

In this tutorial, you will learn to create PDF Templates and how to link them with standard Templates. We will review how to electronically sign documents and how to use signatures on PDF Templates.

Note: Individual stages may have continuities. We recommend that you complete all steps in a stage so you can complete the next stage.

Tasks:

Documents:

- PDF Template example (hand sign)..pdf
- PDF Template example (electronic sign).pdf

Prerequisites:

i. Completed Previous Training

1. **Form creation for PDF Template**

   In this step, we will prepare a PDF form for a PDF Template. We will use the Document Type "Form" which will allow us to easily create a form from which we will import data into the PDF Template in Task 2.

   Task:

   a. Create a new Template Suite
      i. Name it "EMPLOYEE INFORMATION FORM"
   b. Rename the first Template in Template Suite to “Questionnaire”
   c. Change the document type of the first Template to “Form”
      - Learn more about Template Types
   d. Create Form for this PDF PDF Template example (hand sign)..pdf
      i. Insert the text inputs, selects, and switchers that are listed in the PDF. It uses a table to make the layout of the elements look nice.
         - Uses Element Switcher for Checkbox
           - Learn more about Switcher Element
         - .Checkboxes are not checked by default
           - Learn more about Default Values
         - The drop-down menus in the PDF contain several options. Convert them all to Legito Templates.
         - Selects in Legito Template will not have any default option/first option selected
           - Learn more about Element Select.
         - “Phone Number” may contain only digits. Set these fields so that you cannot insert text into them.
           - Learn more about Element Texinput.
         - The fields for first name, last name, and department are mandatory and the document cannot be saved if these fields are not filled in.
         - If the field for "Previous Work Experience" is not filled in, a warning will pop-up that this field should be filled in if this information exists. The warning does not prevent anything, it just notifies the user.
           - Learn more about Warnings

        - *Not sure? Look at the solution*
    - all text fields will have the example entered
  ii. All elements will be "Full Width"
  - PDF and Legito Template will not look 100% the same. It's okay.
  - *Not sure? Look at the solution*.

2. **PDF Template**

   With a Legito PDFTemplate we can export data from Legito documents/forms directly into a PDF document, preserving the original form of the PDF document.

   In this training, we will show how to work with and automate PDF templates. PDF Templates are used, for example, when you need to automate Government forms that have strictly defined form and PDF functions. We will also show how to condition PDF Templates.

   Task:

   a. Open template "Questionnaire"
   b. At the beginning of the template add the Question Element with the text "Will the document be signed manually or electronically?"
      i. Options will be "Hand Signed" and "E-Signed"
      ii. The question has no default option

      ➢ Learn more about Element Question.
      ➢ *Not sure? Look at the solution.*

   c. Create and set Tags for all fillable fields. The tag names will be the same as the field name:
      i. Name
      ii. Surname
      iii. Address
      iv. Phone Number
      v. E-mail
      vi. Date of Hire
      vii. Department
      viii. Employment Status
      ix. Salary
      x. Certifications and License
      xi. Previous Work Experience
      xii. Signing Date

      ➢ Learn more about Tags.
      ➢ *Not sure? Look at the solution.*

   d. Create a new PDF template.
      i. The template type will be "PDF"

ii. The name of the template will be "EMPLOYEE INFORMATION FORM - Hand Sign"
iii. Upload this PDF PDF Template example (hand sign)..pdf
iv. Start editing the "EMPLOYEE INFORMATION FORM - Hand Sign" Template
v. Assign the tags you created in the "Form for PDF" template to the correct fields
vi. Set the "Document Condition" to display this PDF Template if the question "Will the document be signed manually or electronically?" is answered "Hand Signed"

➢ Learn more about PDF Template Conditions.
➢ *Not sure? Look at the solution.*

➢ Learn more about how to create PDF Template
➢ *Not sure? Look at the solution.*

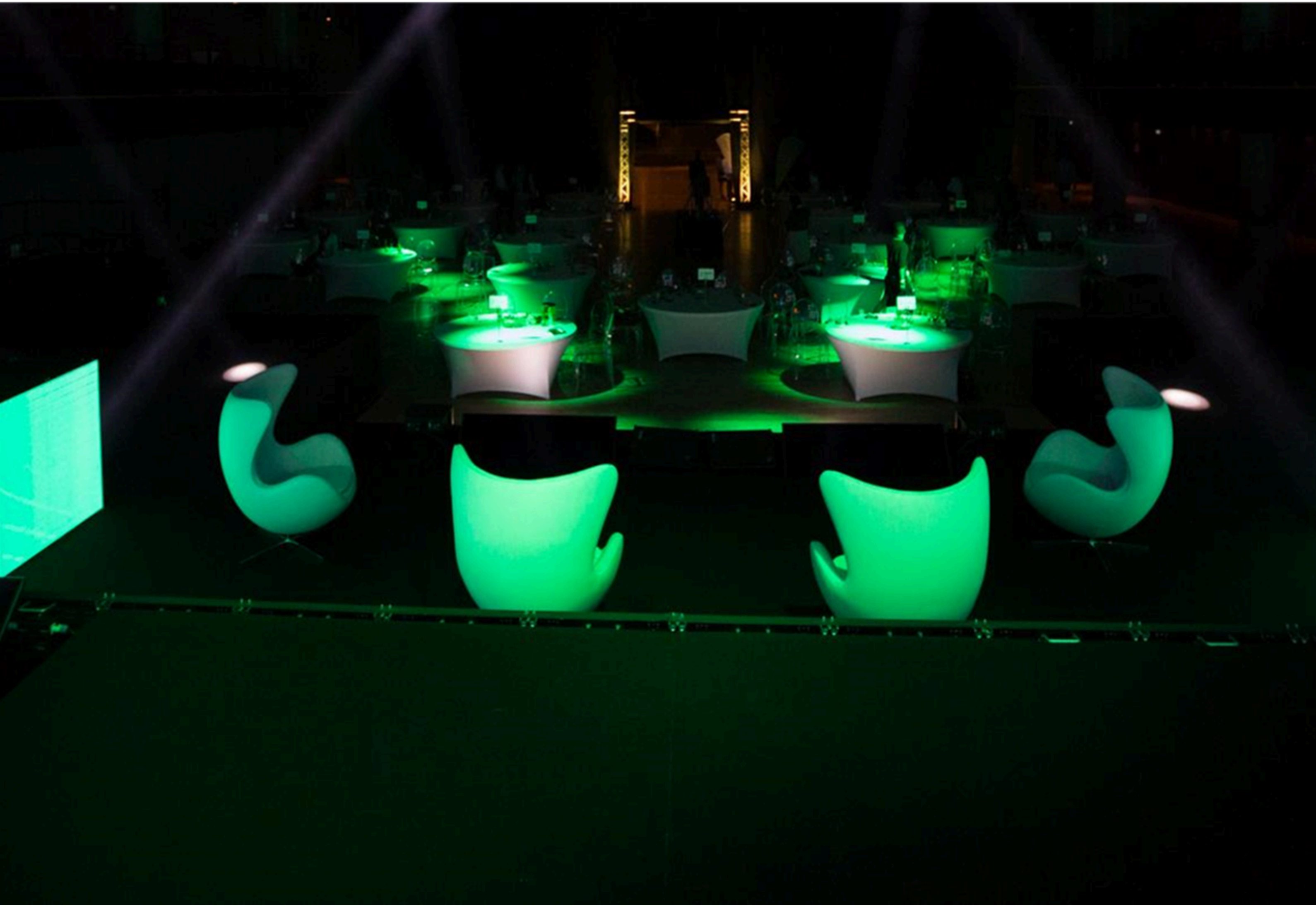
e. Test the created PDF Template:
   i. Create a document from Template Suite "PDF Template example"
   ii. Fill in all elements:
      - Name
         - Jane
      - Surname
         - Smith
      - Address
         - Grove Road, 814, Apt. 238, EC40 3YQ, London, Britain
      - Phone
         - +4402030484377
      - Email
         - jane.smith@acme.com
      - Date of Hire
         - 15.7.2024
      - Department
         - Law
      - Employment Status
         - Contractor
      - Salary
         - 6 000$
      - Certifications and licence
         - The Certificate in International Law and Diplomacy
      - Previous Work Experience
         - 2019-2024, Lacme, inc. Lawyer
      - Signing Date:
         - 16.7.2024
   iii. Save document
   iv. Document "Form for PDF" not available for download
   v. Download PDF "EMPLOYEE INFORMATION FORM"

vi. Check if all data has been exported from the Legito Template to the PDF
    - *Not sure? Look at the solution.*

3. **Signing PDF Template**
    a. Create another PDF template
        i. The template type will be "PDF".
        ii. The name of the template will be "EMPLOYEE INFORMATION FORM - Electronic Sign".
        iii. Upload this PDF PDF Template example (hand sign)..pdf
            - *In this PDF there is an additional Legito Annotation for electronic signature compared to the previous PDF. Thanks to the Annotation, it will be possible to have the fields for electronic signature automatically set when signing.*
            - Learn more about Annotation.
        iv. Start editing "EMPLOYEE INFORMATION FORM - Electronic Sign" Template.
        v. Assign the tags you created in the "Questionnaire" template to the correct fields.
        vi. Set the "Document Condition" to display this PDF Template if the question "Will the document be signed manually or electronically?" is answered "E-sign".
            - Learn more about PDF Template Conditions.
            - *Not sure? Look at the solution.*
    b. Test new PDF Template and if the correct PDFs are generated
        i. Create a document from Template Suite "PDF Template example".
        ii. Select to generate a document for electronic signature.
        iii. Fill in all elements:
            - Name
                - John
            - Surname
                - Doe
            - Address
                - Grove Road, 814, Apt. 238, EC40 3YQ, London, Britain
            - Phone
                - +44025630484355
            - Email
                - john.doe@acme.com
            - Date of Hire
                - 25.10.2022
            - Department
                - Administration
            - Employment Status
                - Full Time
            - Salary
                - 4 000$
            - Certifications and license

            - Office Administration Management Professional Certification
        - Previous Work Experience
            - 2020-2022, Administrative
    iv. Save document.
    v. Document "Questionnaire" not available for download.
    vi. Document "EMPLOYEE INFORMATION FORM - Hand Sign" is not available for download.
    vii. Download PDF "Foersom - Electronic Sign".
    viii. Check if all data has been exported from the Legito Template to the PDF.

c. Signing the document
    i. Open Template Suite "EMPLOYEE INFORMATION FORM - Electronic Sign".
    ii. Assign option to sign Template "Questionnaire" with Legito Sign.
        - Learn more about how to activate Signatures for Templates
        - *Not sure? Look at the solution.*
    iii. Create a new document "EMPLOYEE INFORMATION FORM - Electronic Sign".
    iv. Select to generate a document for electronic signature
    v. Fill in all elements.
        - It doesn't matter what data you put in. For example, you can use previous data.
    vi. Save the document and start signing.
        - The “Questionnaire” will not be signed (untick it).
        - Click on "Sign" in the Document Editor .
        - Fill in your name and email.
            - Learn more about signing.
        - Enter a field for the place of signing and the date of signing.
            - Learn more about Legito Sign.
            - *Not sure? Look at the solution.*
        - The space for the signature should already be settled automatically thanks to the annotation used in the PDF.
            - Learn more about Annotation.
    vii. Sign the document
        - You will receive a message in your email with a document to sign.
        - Open the signing link in the anonymous window.
        - Sign the document.



Day Six

In this tutorial, we will learn how to format a Legito-exported document using Word styles if Legito styles are insufficient. We will also learn how to export data to a Word document using tags to provide flexibility in text placement and more graphical layout options.

Note: Individual stages may have continuities. We recommend that you complete all steps in a stage so you can complete the next stage

Tasks:

Documents:

- Legito-Training-Document-05-(doc. without styles).docx
- Legito-Training-Document-05..zip
- **Acme logo.png**
- **Tag document.docx**
- **ACME black logo.png**
- **ACME white logo.png**

Prerequisites:

i. Completed Previous Training
ii. Microsoft Word account
iii. Basic Knowledge of MS Word formatting

I. Document formatting using Advanced Layout Design (ALD)

Using Legito styles we can format most documents with no issues. However, there may be situations where we need to use special formatting only offered by Word. We can do this by using Advanced Layout Design (ALD), where we create a Word template with pre-made styles, images, etc., and then Legito documents can be generated from this template. In this training, we will demonstrate how to do that.

Task:

1. Create a new Template suite with the name “Loan Agreement”
   i. Download Legito-Training-Document-05-(doc. without styles).docx
      - The document formatting is incomplete. We will format it in the next steps using ALD.
      - The Word document already contains annotations, so elements are automatically imported. You can now concentrate on formatting, and document automation will be minimal.

   ii. Import the document to Template Editor.
      - Without Styles, Numbering, Restart Numbering Settings.
      - We do not save Word as an Advanced Layout Design.

      - This way we can transfer the content of the Word document into Legito without importing formatting we don't want or won't use.

      ➢ Learn more about Import from Word.
      ➢ *Not sure? Look at the solution here and here.*

   ii. Automate the document by following the instructions in the document. Legito-Training-Document-05 .zip.
      ➢ Learn more about Template Automation.

- ➢ *Not sure? Look at the solution.*

2. Format the document using ALD.
   i. Create ALD Styles.
      - In the first step, we will create styles in the Word document so that we have a ready template according to which the document will be generated.

      a. Create a new Word document.
      b. Make the Word styles the same as those used in the document including number lists Legito-Training-Document-05..zip:
         - Title ALD
         - Small Title
         - Article with numbering ALD
         - Article without numbering ALD
         - Paragraph with numbering ALD
         - Paragraph without numbering ALD
         - Subparagraph with numbering ALD
         - Postal detail ALD
         - Space ALD
         - TOC Heading
         - Small character ALD
         - Signature ALD
         - Footer ALD
         - Header ALD
         - ■ Learn More about Word Style Creation
         - ➢ *Not sure? Look at the solution*
      c. Annotate the Word document.
         - ■ Learn More about annotation document
         - ➢ *Not sure? Look at the solution*
      d. Save the Word document and upload it to Legito as an Advanced Layout Design.
         - ■ Learn More about uploading Word documents as ALD
         - ➢ *Not sure? Look at the solution first here and then here*
      e. Assign the uploaded ALD to the "Loan Agreement" Template.
         - ■ Learn More about assigning ALD to Template
         - ➢ *Not sure? Look at the solution first here and then here*
   ii. Connecting Word styles to Legito styles.
      a. Create a new set of Legito styles for each style you created in ALD.
         - Learn More about Legito Styles
         - ➢ *Not sure? Look at the solution here*
      b. Assign to each Legito style a Default Style from the Advanced Layout Design you made.
         - Learn More about Legito Styles
         - ➢ *Not sure? Look at the solution here*
      c. Open the Template "Loan Agreement" and assign the correct Legito styles to each clause so that the resulting document is the same as Legito-Training-Document-05 .zip.

- Learn More about Legito Styles
  - ➢ *Not sure? Look at the solution*

d. Save the template, open it in the Document Editor, fill in all the fields, and test that the generated document is 1:1 with Legito-Training-Document-05.zip.

- If some of the formatting is not correct, the ALD needs to be modified. So open the Word template, edit the style, and update the ALD in Legito so that the changes are reflected. Then generate the Legito document again and check if everything is ok.

II. Export data using tags to the exported document.

In this step, we will demonstrate how to export data to an exported document using tags. We can use this function, for example, if we need to have non-standard text in the document, or if we have specific graphic requirements for the document.

Task:

a. Open the Loan Agreement Template and set the tags for:
   i. Debtor´s name
   ii. Debtor´s signing date
   iii. Title “Loan Agreement”

b. Create a new Advanced Layout Design.
   - In this step, we will annotate the document with tags so that the resulting document looks like Tag document.docx

   i. Upload a background image for the first page. Document Background.jpg
   ii. Put the Logo on the first page ACME white logo.png
   iii. Insert the Logo into the header of the document. It will be displayed on the second page ACME black logo.png
   iv. On the first page, set the tags for export:
      a. Customer name
      b. Contract name
      c. Signing Date

      - You can use the text box to place the Tags correctly.
        - Learn More about Tags and Annotation
        - ➢ *Not sure? Look at the solution here and here*

   v. The customer name will also be in the header from the other side of the document.
   vi. Contract name will be in the footer from the other side of the document.
   vii. The content of the document will be written on the second page of the document.

viii. Save the Word document and upload it to Legito as an Advanced Layout Design.
   - Learn More about uploading Word documents as ALD
   - ➢ *Not sure? Look at the solutions here* and *here*

ix. Assign the uploaded ALD to the "Loan Agreement" Template
   - Learn More about assigning ALD to Template
   - ➢ *Not sure? Look at the solutions here and here*

c. Testing data export from Tags.
   i. Create Legito document “Loan Agreement”.
   ii. Fill in the document, save, and export with ALD to export from Tags.
   iii. Check that all tag data has been written into the resulting document.
      - ➢ *Not sure? Look at the solutions here and here*

Day Seven

In this training stage, you will learn the basics for creating document record properties, extracting data from a document, creating a simple workflow and approvals, and creating a simple dashboard.

Note: Individual stages may have continuities. We recommend that you complete all steps in a stage so you can complete the next stage.

Tasks:

Documents:

- None

Prerequisites:

i. Completed Training Day 2

1. **Data extraction to document record properties via Tags**
   a. Open the Form Template “Form for Employment Contract” that you created on the previous training day (point 1. in Training day 2)
   b. Create and set Tags for the following fields:
      i. Name and Surname (first representative employer)
         - The tag will be named "Name_Surname_Employer”
      ii. Function (first representative employer)
         - The tag will be named "Function_Employer”
      iii. Name (employee)
         - The tag will be named "Name_Employee”
      iv. Surname (employee)
         - The tag will be named "Surname_Employee”
      v. Date of birth (employee)
         - The tag will be named "Birth_Employee”
      vi. Address (employee)
         - The tag will be named "Address_Employee”
      vii. Employee Compensation
         - The tag will be named "Employee_Compensation”
      viii. Creator
         - The tag will be named "Creator”
      ix. Rights and Obligations clauses
         - The tag will be named "Rights_and_obligations”
      x. PhD Student
         - The tag will be named "PhD_yes_no”
      xi. Annexes included?
         - The tag will be named "Annexes_yes_no”
      xii. List of attachments
         - The tag will be named "List_of_attachments”
      - Learn more about how to set Tags
      - Learn more about how to create your Tags
      - *Not sure? Look at the solution*
   c. Create document record properties for all tagged fields
      - All properties will have the following settings:
         - Show in the management area.

        - we set this to see all properties always in the document record.
    - Allow filtering.
        - we set this so that we can search by/in properties.
    - All the Employee data properties should be assigned only to relevant Templates (that consist of the extraction tags).
    - Unless otherwise specified, property options are default.
    - [Learn more]about property settings.
- List of properties:

i. Employer Name and Surname
    - Property type: Single-line text
    - Set template tag: Name_Surname_Employer

ii. Employer Function
    - Property type: Single-line text
    - Set template tag: Function_Employer

iii. Employee Name
    - Property type: Single-line text
    - Set template tag: Name_Employee

iv. Employee Surname
    - Property type: Single-line text
    - Set template tag: Surname_Employee

v. Employee's Date of birth
    - Property type: Single Date
    - Set template tag: Birth_Employee

vi. Employee Address
    - Property type: Single-line text
    - Set template tag: Address_Employee

vii. Salary
    - Property type: Financial Value
    - Set template tag: Employee_Compensation
    - This value could be Modified after extracting and extracted back if modified manually

viii. Creator
    - Property type: Single User Select
    - Set template tag: Creator

ix. Rights and Obligations clauses
    - Property type: Single Choice Select
    - Two Options:
        - Yes
        - No
    - Set template tag: Rights_and_obligations
    - Don’t show this in Form

x. PhD Student
    - Property type: Single Checkbox
    - Set template tag: PhD_yes_no

xi. Annexes
    - Property type: Single Choice Select
    - Two Options:

            - Yes
            - No
        - Set template tag: Annexes_yes_no
    - [Learn more]() about how to create document properties.
    - *Not sure? [Look at the solution]():*
        - *[Where can I find the settings for document record properties?]()*
        - *[What is the correct property setting?]()*

d. Test the created properties:
    i. Open the template suite Employment Contract in Document Editor which you formed in the previous training.
    ii. Fill in form.
    iii. Save document.
    iv. Go to the document management area.
    v. Open a document record for a created document.
    vi. Check that all data is automatically extracted to the document record properties.
    - *Not sure? [Look at the solution]().*

2. Workflow & Approvals

a. Create a new workflow.
    i. Set name “Employee flow”
    - [Learn more]() about how to create a new workflow.
    - *Not sure? [Look at the solution]()*

b. Create workflow stages for employee approval with the following stages:
    i. Interview.
    ii. Final round.
    iii. Employee for approval.
    iv. Employee hired and active.
    v. Maternity/Parental leave.
        - Option to switch from the "Employee hired" stage to this stage.
        - Option to switch from this stage to the "Employee hired" stage.
    vi. Long-term illness.
        - Option to switch from the "Employee hired" stage to this stage.
        - Option to switch from this stage to the "Employee hired" stage.
    vii. Working relationship terminated.
        - Option to switch from the "Employee hired" stage to this stage.
    - Each stage will have a different color.
    - [Learn more]() about how to create and connect workflow stages.
    - *Not sure? [Look at the solution]()*

c. Approval setup
    i. For the "Employee for approval" stage we will set approval.
    ii. Set the name of approval as “Employee approval”.
    iii. Approval will be “Modifiable”.
    iv. Approval needs only a Single approval.
    v. Set yourself as an Approver.
    - [Learn more]() about how to set approval.
    - *Not sure? [Look at the solution]()*

d. Assign workflow to template suite Employment Contract from training day 2.
    - Learn more about how to create and connect workflow stages.
    - *Not sure? Look at the solution.*

e. Create a new document from the template suite Employment Contract and test the created workflow.
    i. Open Document.
    ii. Save.
    iii. Go to the document management area.
    iv. Open a document record for a created document.
    v. Go through the workflow:
        1. Interview
        2. Final round
        3. Employee for approval
        4. Start the approval and approve it
        5. Employee hired and active
        6. Long-term illness
        7. Employee hired and active
        8. Working relationship terminated

3. **Dashboard**

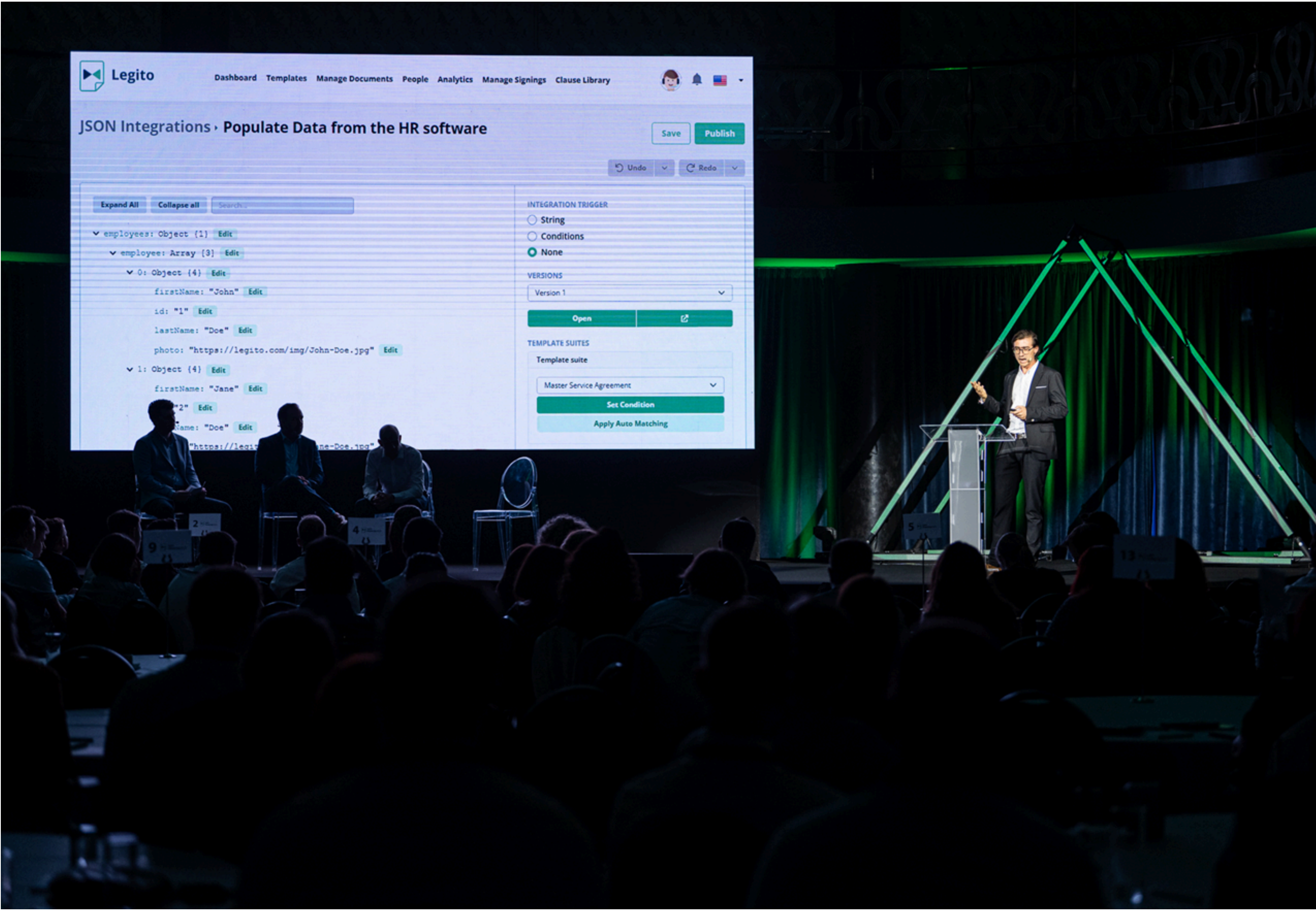
a. Edit the default dashboard.
    - Learn more about how to edit the dashboard.

    i. In the dashboard will be the following widgets:
        - Counters:
            - Total number of Employment contracts.
            - Number of employees in the final round.
            - Number of hired and active employees.
            - Percentage of employees with terminated cooperation concerning all employees.
            - Learn more about Counters widgets.
        - There will be no timeline.
        - Overview of documents that have been created by the logged-in user.
            - Learn more about Document records grid object.

b. Create a new none private dashboard.
    i. Learn more about how to create a new dashboard
    ii. In the dashboard will be the following widgets:
        - Drop Areas:
            - File upload area.
            - Area to upload a file to be signed with Legito Sign.
            - Area to upload a file for signature with AdobeSign.
            - Learn more about how to create a drop area.
        - Timeline.
            - Learn more about the Timeline widget.
        - Signatures in progress.
            - Learn more about Signatures in the progress widget.

        - Overview of all documents in kanban.
    - Learn more about how to edit the dashboard and create new widgets.

c. *Not sure? Look at the solution.*



Day Eight

In this tutorial, we will learn how to format a Legito-exported document using Word styles if Legito styles are insufficient. We will also learn how to export data to a Word document using tags to provide flexibility in text placement and more graphical layout options.

Note: Individual stages may have continuities. We recommend that you complete all steps in a stage so you can complete the next stage.

Tasks:

Documents:

- Legito PDF example .pdf

Prerequisites:

i. None

I. Workflows for Document Records

Workflow for Document Records helps us maintain a proper document lifecycle. We can ensure that the document doesn't get stuck anywhere, goes through the right approvals, and allows us to take action at the right time.

Task:

1. Create the following test users and user groups:
   i. John Doe
   ii. Jane Smith
   iii. Elisabet Wits
   iv. “Legal Department” User Group
      - Join users in this group:
         - You
         - Elisabeth Wits
   v. “Management” User Group.
      - Join users in this group:
         - You
         - John Doe
2. Creation of workflow stages and their settings.
   - Unless otherwise stated, the default setting remains.
   i. Draft
      - Cannot be shared
      - Cannot share externally
      - No signature option
   ii. Legal Review
      - Cannot be shared
      - Cannot share externally
      - No signature option
      - Approval process:
         - Automatic switch to the next stage after approval.
         - Automatic switch to stage "Draft" after rejection.
         - Only users in the group can approve. Only one approval is needed.
   iii. Internal Review - CEO

- No signature option.
- Automatic switch from the previous "Legal review" stage based on the value of the contract if the contract amount is over 1 000 000$.
- Automatic switch to the next stage “Approved” after approval.
- Automatic switch to stage "Denied" after rejection.
- Only Jane Smith can approve.

iv. Internal Review - Management
- No signature option.
- Automatic switch from the previous "Legal review" stage based on the value of the contract if the contract amount is from 100 000 $ to 999 999$.
- Automatic switch to the next stage “Approved” after approval.
- Automatic switch to stage "Denied" after rejection.
- All users in the "Management" group must approve.

v. Internal Review - Standard
- No signature option.
- Automatic switch from the previous "Legal review" stage based on the value of the contract if the contract amount is up to 99 999$.
- Automatic switch to the next stage “Approved” after approval.
- Automatic switch to stage "Denied" after rejection.
- Any user can be selected for approval.

vi. Approved
- Locked document editing.
- Unable to download the document.
- Option to switch to "To be signed" stage.

vii. Denied
- Locked document editing.
- Unable to download the document.
- Final stage if rejected.

viii. To be signed
- It is not possible to edit the documen.t
- Signing with LegitoSign is enabled.

ix. Executed
- Automatic activation if the document has been signed.

x. Signing Canceled
- Automatic activation if the document hasn't been signed.

3. Workflow design

i. Each stage will have a different color for a better overview.

➢ Learn more about how to create a workflow.

➢ *Not sure? Look at the solution*

II. Document records properties

Document record properties are a great tool for managing document details. With properties, we can have all the important details in one place for quick access. We can use them to extract data from a smart document (more in Training day 3) or to *manage information about uploaded documents (Word, PDF, Excel, Scan, etc.). In this training, we will focus on managing uploaded documents.*

Task:

1. Create the following document record properties:

➢ [Learn more](#) about creating Document Record Properties.

- All properties will have the following settings:
    - Show in the management area.
        - we set this to see all properties always in the document record.
    - Allow filtering.
        - we set this so that we can search by/in properties.
    - Export to CSV.
    - Unless otherwise specified, property options are default.

i. Supplier Name
- Property type: Object property Select (single item).
- Linking to the supplier name from the "Suppliers" object.

 These properties allow us to quickly and easily list the approved supplier in the record.

ii. Represented by
- Multi-line Text.

 In this property, we will manually write a representatives

iii. Contract Type
- Multiple Select.
- Options:
    - Cos Contracts
    - Labor-hour contracts
    - Implied Contract
    - Bilateral Contract
    - Contractor Agreement
    - Licensing Agreement

iv. Contract Owner/s
- Multiple User Select.
- Auto sharing: Manage Documents.

 In this property, we will select the owner of the record. We can select the owner from the existing users who can manage the record. "Autosharing" will ensure that the record will be automatically shared with the selected user with permission to edit and manage.

v. Contract ID
- Identifier.
- The numbering will be "Contract-Year-Month-XXXX".
- Subordinate documents will have "XX" after the numbering. Thus, the numbering will be "Contract-Year-Month-XXXX/XX".

- In this way, we can create our numbering, in the format that is most suitable for the company's needs.

vi. Contract Expiration Date.
   - Single Date

vii. Value of Contract.
   - Financial Value.
   - Set Tag “Total Value”.

   - In this property, we will specify the value of the contract. It will also allow us to automatically trigger in the workflow.

viii. Confidential
   - Single Checkbox.

ix. Create agreement
   - Associated Templates.
   - Associated Template Suites:
     - Contractor Agreement
     - Loan Agreement
       i. If you have completed Training Day 6.

   - These properties will allow us to create selected Smart Documents directly from the recording. We can easily specify which documents can be created for specific records. Also, the documents created in this way will be automatically linked and become "Related Documents" with associated numbering.

   ➢ Learn more about how to create document properties.
   ➢ *Not sure? Look at the solution*

x. Test the document record properties and Workflow.
   i. Create a Document Record in the “Management Documents” Area.
      ➢ Learn more about how to create a document record.
   ii. Upload example PDF.
   iii. Check that the doc. record contains all created properties.
   iv. Fill all properties.
   v. Go through the entire workflow created in step 1.
   vi. Test that the approver is correctly assigned based on the Contract Value.
   vii. Perform Legal department approval.
   viii. Try signing the document with Legito Sign.
   ix. Test if the stage is automatically switched after signing/rejecting the signature.

   ➢ Learn more about Legito Signing.

III. Workflow for Object records

Objects also have their own workflow. Thanks to this we can, for example, approve new suppliers, maintain the status of an order, or have a perfect overview of any database.

In this task, we will create a Workflow for approving new suppliers. In the next task, we will create a supplier database using the workflow.

Task:

1. Create a Workflow with the name “Supplier´s Workflow”.
   i. Create
      - New
      - Send Supplier Statement
      - Statement Confirmation
        - Approval process.
        - Anybody can approve.
      - Supplier Confirmed
        - If the Statement has been approved go on this stage.
      - Supplier Declined
        - If the Statement has been declined go on this stage.
        - It will be possible to go to the "New" stage to go through the approval round again.
      - Supplier Deleted
        - It will be possible to go to this stage from the "Supplier Confirmed" stage.

IV. Objects and object record properties

1. Objects

Objects can be used for easy data management or list creation. Thanks to objects we can maintain different categories of information up to the last detail. Objects can be used as, for example, Customized case management tools, Client and vendor management lists that align with their records, and Real Estate property reports.
It depends on the creativity and requirements of the client.

Task

i. Create a new object called "Employees.
   - Learn more about Object Administration.

ii. Create the following object Properties for this object:

- All Object properties will have the following settings:
  - Show in the management area.
  - Allow filtering.
  - Unless otherwise specified, property options are default.
  - Learn more about property settings.

I. Employee Name
   - Property type: Single-line text
   - Use as a name for Records
   - Employee Surname
     - Property type: Single-line text
     - Use as a name for Records
   - Employee's Date of birth
     - Property type: Single Date
   - Employee Address
     - Property type: Single-line text

- Work
  - Property type: Single-line text
- Salary
  - Property type: Single-line text
- Employee ID
  - Property type: Identifier
  - 5 Decimals Values
  - Month and year in Identifier number
  - Restart value after the year
  - Use as a name for Records

- Learn more about properties

iii. Create 3 object records for employees:
- Elisabeth White
  - Name: Elisabeth
  - Surname: White
  - Date: 17.8.1996
  - Address: 104 Grover Via, South Brett, WA 47435
  - Work: Lawyer
  - Salary: 2 800 USD
- John Doe
  - Name: John
  - Surname: Doe
  - Date: 4.12.1987
  - Address: 77071 Mohr Springs, Marvinshire, OH 39435-8166
  - Work: HR
  - Salary: 1 500 USD
- Nick Adams
  - Name: Nick
  - Surname: Adams
  - Date: 25.9.1973
  - Address: Apt. 621 6783 Kyle Lights, Onabury, SD 16994
  - Work: Marketing Specialist
  - Salary: 2 250 USD

V. Dashboard

1. Edit the default dashboard.
   - Learn more about how to edit the dashboard.

i. In the dashboard will be the following widgets:
- Counters:
  - Total number of Employment contracts.
  - Number of employees in the final round.
  - Number of hired and active employees.
  - Percentage of employees with terminated cooperation concerning all employees.
  - Learn more about Counters widgets.
- There will be no timeline.

        - Overview of documents that have been created by the logged-in user.
            - Learn more about Document records grid object.
2. Create a new none private dashboard.
    i. Learn more about how to create a new dashboard.
    ii. In the dashboard will be the following widgets:
        - Drop Areas:
            - File upload area.
            - Area to upload a file to be signed with Legito Sign.
            - Area to upload a file for signature with AdobeSign.
            - Learn more about how to create a drop area.
        - Timeline
            - Learn more about the Timeline widget.
        - Signatures in progress
            - Learn more about Signatures in the progress widget.
        - Overview of all documents in kanban.
    - Learn more about how to edit the dashboard and create new widgets.
3. *Not sure? Look at the solution.*

Day Nine

This training will focus on setting up a Legito Smart Workspace, making the environment as user-friendly as possible and matching the settings to your needs. We will look at Workspace setup options, how to ease the first steps of a new user, and how to configure Legito to your requirements.

Note: Individual stages may have continuities. We recommend that you complete all steps in a stage so you can complete the next stage.

Tasks:

Documents:

- None

Prerequisites:

i. Alternative Email Address

I. Announcements

Announcements allow Workspace Admins to send information to all users in a Workspace. A common application of announcements is to send a Workspace-wide message announcing that the Workspace may be unavailable due to system maintenance.

Task:

1. Create a notification in Legito that will alert users to an update.
   i. The title will be “Legito Update”.
   ii. The text of the notification will be *"On XX.XX.202X at 08:00 pm there will be a Legito outage due to the deployment of a new version of Legito."*
   iii. The text of the Button will be *“Noted".*
   iv. The update will be within 1 day from the creation of the Announcements.
   v. Display time will be 1 day before (1 440 min).
   vi. The notification will be informative.
   vii. It can be closed with a button.

➢ Learn more about how to create an Announcement.
➢ *Not sure? Look at the solution*

II. Onboarding

Onboarding is a great tool for new users starting in the Legito workspace. Administrators and advanced users can go through all the tools and setup options. A simple and short onboarding session can then be set up for users to help them quickly get oriented in Legito.

Task:

1. Insert your video into the Onboarding.
   i. Use this Video Embed link:

- <iframe width="893" height="372" src="https://www.youtube.com/embed/QRKM2PflLng" title="Legito PowerUp 2022 - Aftermovie" frameborder="0" allow="accelerometer; autoplay; clipboard-write; encrypted-media; gyroscope; picture-in-picture; web-share" referrerpolicy="strict-origin-when-cross-origin" allowfullscreen></iframe>

- There is a basic Legito video in the user onboarding. However, you can insert your own and thus, for example, create your video manual for working in Legito. However, you need to insert the video embed code.
- Learn more about user onboarding.
- *Not sure? Look at the solution*.

2. Turn off Workspace Onboarding.
   - You can disable Workspace Onboarding if needed and leave only User Onboarding enabled.
   - ➢ Learn more about Workspace Onboarding.
   - ➢ *Not sure? Look at the solution*
3. Insert link to Google doc with manual for new users.
   i. Insert this embed link:
      - https://docs.google.com/document/d/e/2PACX-1vR9qjeuhbURNBKHrNik-ZP5MP1R-Pv_Ov9fndXCF6uWlg8uQJdyGeTwlJqDuj1dPPdZ4yA_2arftzd-/pub

   - In this way, text manuals or links to other essential documents can be easily passed on to new users.

   - ➢ Learn more about user onboarding.
   - ➢ Not sure? Look at the solution.

III. Signatories

If electronic signatures are used, it is possible to create your database of addresses from which the signatories' details are automatically added.

Task:

1. Create three signatories:
   i. John Doe; doe@acme.com
   ii. Jane Smith; smith@acme.com
   iii. Your name and address

   - ➢ Learn more about Signatories.
   - ➢ Not sure? Look at the solution.

IV. Template Categories

Template Categories are a useful tool for organizing your templates into groups. This gives the user a better overview and makes it easy to find the Template Suites they need.

Task

1. Create four Template Categories:
    i. HR
    ii. Law
    iii. Sales
    iv. Archive
- ➢ Not sure? Look at the solution
2. Assign Template Suites to the correct categories:
    i. Employment Contract to HR Category.
    ii. Loan agreement to Law Category.
    iii. Contractor agreement to Sales Category.
    iv. Archive.
- ➢ Not sure? Look at the solution
3. Add the ability to create templates in DE and FR country.

- ➢ Learn more about Template Categories.
- ➢ Not sure? Look at the solution.

V. Workspace Footer

Footers can be used to make important information available across your Workspace, including a company name, external links, disclaimers, or terms and conditions.

Task

1. Create workspace footer:
    i. The footer will have a light color scheme.
    ii. Create Title:
        - Content type: Title
        - Title: *Workspace Footer*
        - Width: 4
- ➢ Not sure? Look at the solution.
    iii. Create welcome text in Footer:
        - Content type: Text
        - Text: *Welcome I no code automation platform designed for compliance, HR, legal, operations, procurement, sales, and sourcing teams.*
        - Width: 4
- ➢ Not sure? Look at the solution
    iv. Create a link to the Knowledge base.
        - On the new row
        - Content type: Link
        - Link: https://www.legito.com/knowledge-base/workspace-footer/
        - Link Text: *How to create a Workspace Footer?*
        - Width: 2
    v. Create a link to G- drive.
        - To the right of the box "*How to create Workspace Footer?”*
        - Content type: Link

- Link: ACME - manuals
- Link Text: *Manuals*
- Width: 2

➢ Not sure? Look at the solution

2. Test the Workspace Footer:
   i. Go to Dashboard.
   ii. Scroll to the bottom of the page.
   iii. Check that the text is correct in the Footer and you can click on the links.

➢ Learn more about Workspace Footer.

➢ Not sure? Look at the solution

VI. Workspace and Document Localization

Workspace admins can set formats of dates, numbers, and financial values for all Workspace areas except for the content of Templates and Documents which have a separate setting (Document Localization).
In addition to the above, Workspace Localization contains default units (imperial or metric) for the Template Editor and default paper size for Templates.

Task

1. Update Document Localization:
   i. Preferred Localization: Unified Across All Workspace Templates.
   ii. Date:
      - Date Format (Numerical): 2024.01.30.
      - Date Format (alphanumeric) 30. January 2024
   iii. Numerical:
      - Thousands Separator: None
      - Decimal Separator Type: Comma
      - Minimum Decimal Places: 2
      - Maximum Decimal Places: 5
   iv. Monetary:
      - Thousands Separator: Period
      - Decimal Separator Type: Period
      - Minimum Decimal Places: 1
      - Maximum Decimal Places:8
      - Currency Position: After Amount
      - Currency Symbols (Local): ISO Code
      - Currency Symbols (Foreign): Official Name

   ➢ Learn more about Document Localization.

   ➢ Not sure? Look at the solution.

2. Update Workspace Localization.
   i. Region: United States
   ii. Date format: 22-05-2024
   iii. Thousands Separator: Space
   iv. Decimal Separator: Period
   v. Units: Imperial

vi. Paper size: A4

- ➢ Learn more about Workspace Localization
- ➢ Not sure? Look at the solution.

VII. Other Workspace Settings

Workspace has many other settings. Let's try out the customizations.

1. Set anonymization for documents.
   i. Documents older than 250 days will be anonymized.

   Many countries around the world have adopted personal data protection laws to protect an individual's privacy. Some require that all electronic data on an individual be deleted upon that person's request.

   - ➢ Learn more about Anonymization.
   - ➢ Not sure? Look at the solution.
2. Change the default view.
   i. Edit document records view in the Document Management Area on Kanban.

   Workspace admins can customize the Document Management area layout.

   - ➢ Learn more about Document Management Area View.
   - ➢ Not sure? Look at the solution
3. Set password requirements for the user:
   i. Min. 8 characters
   ii. Must contain a number
   iii. Must contain a special character

   Workspace Admins can define a minimum password length and the types of required characters a user must incorporate into their password for users newly invited to register to a Workspace.

   - ➢ Learn more about Password settings.
   - ➢ Not sure? Look at the solution
4. Modify the top workspace menu to show:
   i. Templates First.
   ii. People Second.
   iii. Dashboard Third.
   iv. Clause Library Fourth.

   - ➢ Learn more about Workspace Navigation.
   - ➢ Not sure? Look at the solution.
5. Signatures
   i. It is only possible to use Legito Sign.

- ➢ Learn more about Signatures.
- ➢ Not sure? Look at the solution.

Day Ten

First, we will go over the user permissions and notifications options to configure what a user has access to in Legito and notifying them of Legito activity. Next we will focus on integration possibilities and feature extensions beyond the standard Legito tools. Then we will explore how to use API calls, JSON connections, and Script applications.

Note: Individual stages may have continuities. We recommend that you complete all steps in a stage so you can complete the next stage.

Tasks:

Documents:

-

Prerequisites:

i. Completed training day 9.
ii. Zappier Account.

I. User Permissions

In this task, we'll look at user permissions and how they can help us optimize access and user overviews.

1. Create dummy account:
    i. Full Name will be “John Doe”.
    ii. Use an alternative functional email (other than the one you already have in Legito).
        - You need to be able to log in with this account to verify that the settings in the tasks on this training day are correct.
    iii. The role is “Administration”.
    iv. The user Custom ID is “22455”.
    v. Upload profile picture.

2. Give the user the following permissions:
    i. Unless otherwise specified, the default settings remain.
    ii. No Workspace Admin.
    iii. Can create a new Template Suite.
    iv. Access Clauses.
    v. Can see Confidential documents.
    vi. Can only export documents to "docx" and "pdf".
    vii. Can export documents.
    viii. Cannot see Timeline.
    ix. Can upload files.
    x. Can edit Styles.
    xi. Can see Track Changes, can approve them, but cannot control them.
    xii. Can sign with LegitoSign.
    xiii. Can manage Signatures.
    xiv. Automatic sharing is enabled, but can only see the Document record.
    xv. Can share documents with users in the Same User Group.
    xvi. Can only see Template Suites from the HR category.
    xvii. Cannot see any Clause Library.

xviii. Cannot access any Objects.

3. Invite a dummy account into your workspace.
4. Check that the permissions are set correctly:
   i. Login in an anonymous window under a dummy account.

➢ Learn more about Users and Permissions.
➢ Not sure? Look at the solution here

II. User Notification

Legito Notifications provide alerts based on certain document events. Including Expiration, Payment, Delivery, and Signing dates. Notifications can be received via email or inside Legito. For notifications received in Legito, an alert appears in the Notification bell in the top right corner of the main landing pages.

1. Notification update:
   i. Log in with a dummy account.
   ii. Set up notifications so that the user is only notified of:
      - Owner changes (in the app and by email, all documents).
      - Start of approval (in the app and by email, only own documents).
      - Approvals denied (in the app, only own documents).
      - On completion of document signing (in-app only, own documents).
      - Expiration Date reminder (all documents, and only by email.
      - Set Deadline reminder 14 days before.

   ➢ Learn more about Notifications.
   ➢ Not sure? Look at the solutions

III. API

Thanks to the API, we can connect different applications (which have their own API) with Legito. This allows us to connect Legito with databases and other tools to extend Legito's functionality.

Task:

1. Create API connection:
   i. Create a Push API that is activated on the Template when it is approved.
      - You can use the Template "Employment Contract" if you have completed TD7 and TD2.
   ii. Push must send a PDF document.
   iii. The endpoint for sending Push is https://hooks.zapier.com/hooks/catch/9107724/3ar8cbr/

iv. This will send the document as a PDF via our Zapier integration to GDrive. you can check to confirm this action here:https://drive.google.com/drive/folders/1CwPbVXXt9NN8xr7NIQHwaZis6FKh-YAt?usp=sharing .

- ➢ Learn more about PUSH API
- ➢ Not Sure? Look at the Solutions here, here, here, here and here

IV. Scripts

Scripts allow us to extend and modify Legito functions. This gives us almost limitless possibilities to customize Legito for our requirements.

Task:

1. Create a new template with a table:

i.

Value:	[Textinput_Value]
Total Value:	[Textinput_Total]

ii. The "Value" row will be repeated using the button.

iii. In the "Total Value" line, all values from the repeated lines will be added (using the script in the tag).

iv. Create the Template tag **Sum** and attach this tag to Value Textinput.

v. Create the Template tag GetSumValue and attach this tag to the Total Text Input.

vi. Publish Template.

vii. Open script Editor in Workspace Settings and Insert the below-mentioned script to the Sum tag:

○

```
const Tags = LEGITO.documentBuilder.getTagsByName("Sum");
var finder = LEGITO.documentBuilder.event.createElementFinder();
var sumValues = finder.findElementsByTagsAuto(Tags);
const Results = LEGITO.documentBuilder.getTagsByName("GetSumValue");
var resultElement = finder.findElementsByTagsAuto(Results)[0];
let valuesArray = []
for(var i in sumValues) {
if(sumValues[i].getValue() !== null) {
valuesArray.push(sumValues[i].getValue());
}
}
let arrSum = valuesArray.reduce((a,b) => parseInt(a) + parseInt(b),
0);

resettlement.setValue(arrSum.toString());
```

○ Publish Script.

➢ Learn more about Scripts

- ➢ Learn more about SUM Scripts
- ➢ Not Sure? Look at the Solutions: (Tags) (Script Editor)

2. Test the script.
    i. Open template with table.
    ii. Use the button to create 3 rows of "Value".
    iii. Insert the value "1000" into each Value Textinput.
    iv. In Textinput Total Value, the value 3000 appears.
    - ➢ Not Sure? Look at the Solution

V. JSON

The JSON Integration feature exponentially increases the integration capabilities between Legito and any third-party software.

With the JSON Integration feature, you can create new Documents from Templates based on data from received JSON files with no coding required.

Task

1. Connect JSON
    i. Map legito-example.json via JSON integrations function to form LTD02 (map all the relevant inputs for the Employee).
    ii. Map the Array (number of employees) directly to the button that repeats the Employees.
    iii. Testing Guide and more info on JSON integration are below, but they are written for localhost, it's necessary to use production.
    iv. Send a request from Postman that will produce the given document with all the Employees.

- ➢ Learn more about JSON Integration, it also hints the Solution
- ➢ JSON Integration Testing Guide

What next?

First of all, **congratulations**! Our whole team applauds you for completing these challenging tasks. We know it was not easy, and you were probably frustrated on many occasions, but we firmly believe it is all worth it!

We have some tips for useful resources:

New Releases

Legito always innovates. Each month, we release new features you can leverage to improve your automation projects continuously. Explore New Releases

Blog

Articles on back office innovations, document automation, document lifecycle management, new releases and more. Explore Blog

Webinars

Live presentations introducing Legito's new features and useful insights featuring various speakers. Past recordings available. Explore Webinars

Success Stories

In depth case studies about the benefits of implementing document automation and other Legito features. Explore Success Stories

Events

Meet the community and attend our conferences, workshops or meet-ups full of inspiration, interaction, and action. Explore Events