

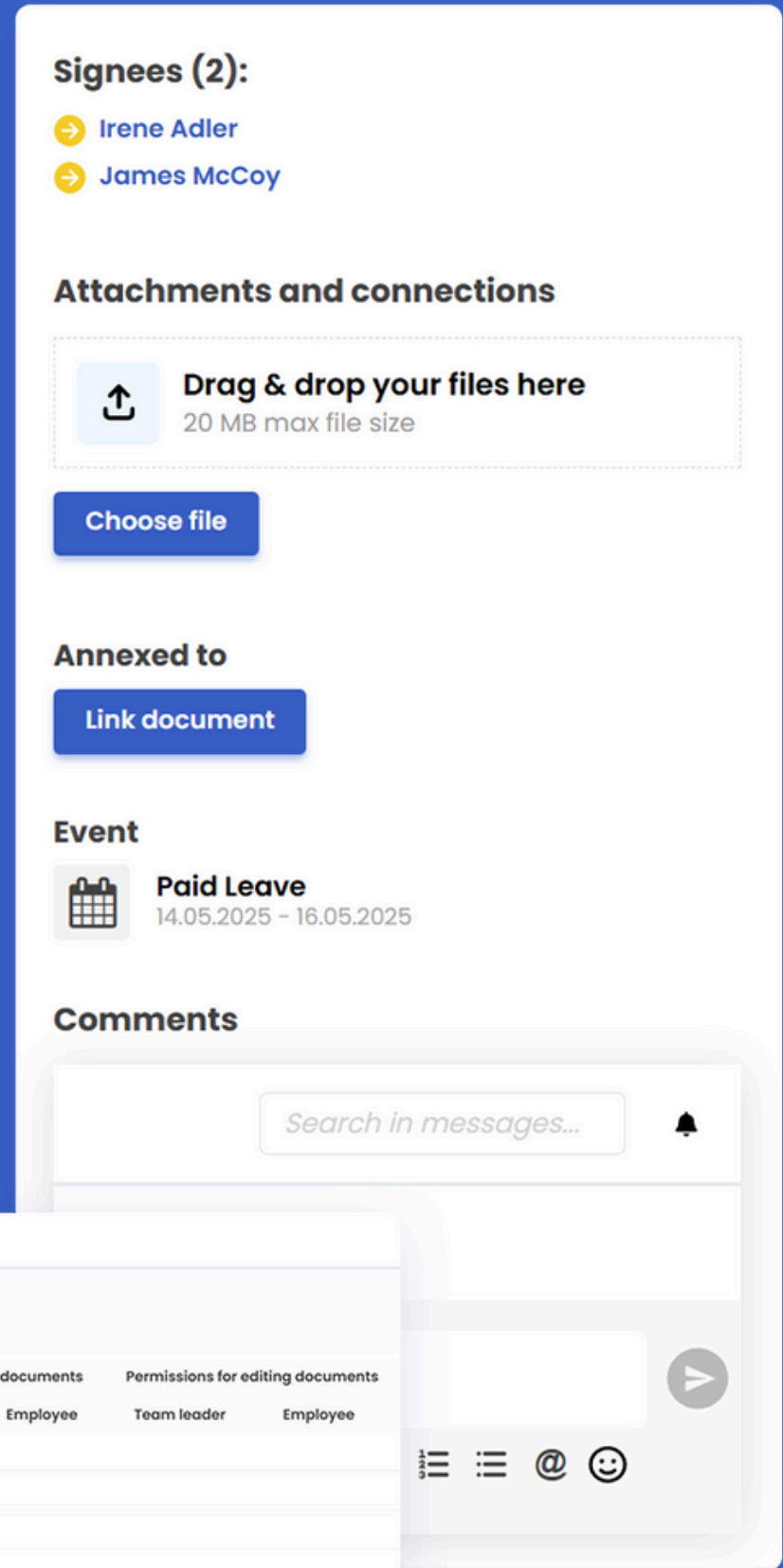
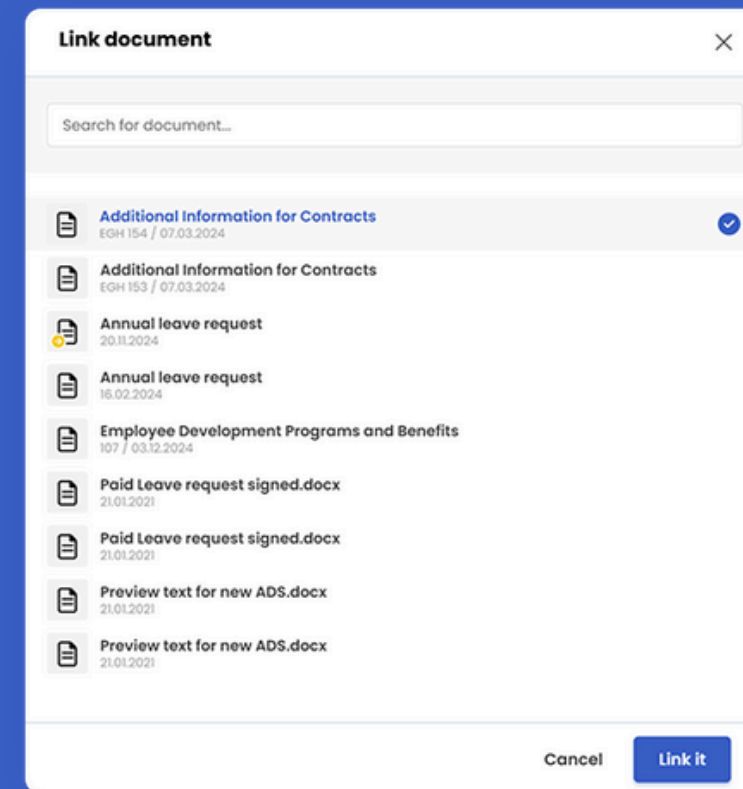
The background features a large, light blue circular graphic with a stylized 'i' shape inside, composed of several rounded rectangular segments. The text 'iDocs' is centered within this graphic.

iDocs

**Document Management
System**

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Name	Series	Options	Permissions for creating documents		Permissions for editing documents	
			Team leader	Employee	Team leader	Employee
Contracts						
Job descriptions						
Requests						
Certificates						
HR Reports						
Job application and CV						
Additional Information for Contracts	Contracts		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Annual leave request	Without series		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Employment contract	Without series		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Empty template	Registry		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Leave request	Without series		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Overtime request	Without series		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

iDocs overview

The **document management module** in the **HRiFlow** app is a complete set of tools designed to simplify the management of both internal and external company documents.

In the following pages, you will discover each feature explained in detail, along with practical usage examples.

Name

- Annual leave request
- Annual leave request
- Overtime request




Signees (2):

- Irene Adler
- James McCoy

Signatures

Add signature:

Employee Management New Signature

SIGNATURE NAME	SIGNEE
Employee signature 1	 Irene Adler
Management signature 1	 James McCoy
Management signature 2	 Zahid Krueger

Add signature


Label *

Placeholder Name

Cancel Add

Signatures

Write Draw Upload



Clear canvas

Cancel Save

 **Signed**

Document auto-completion

Documents in HRiFlow are automatically completed using placeholders.

How does it work?

Placeholders are elements that represent real information from the app, such as the employee's first and last name, job title, number of paid leave days, and more. This way, any document in HRiFlow can be automatically filled with this data, allowing the document to be generated and completed almost entirely. All that's left for you to do is review it and add your signature.

If this sounds complicated, don't worry — the app comes with a complete set of predefined documents, from various requests to job descriptions, all prepared with placeholders and ready to use.



{COMPANY_NAME}
 Fiscal code: {BILLING_CUI}
 Registration number: {BILLING_J}

{FULL_NAME}

{JOB_TITLE}

ANNUAL LEAVE REQUEST

Employee name: {FULL_NAME} Job title: {JOB_TITLE}, employed at: {COMPANY_NAME}. I wish to request leave from my annual entitlement as follows: from {EVENT_DATE_INTERVAL_START} until {EVENT_DATE_INTERVAL_END}. Total number of working days is: {EVENT_PAID_LEAVE_WORKING_DAYS}.

Available annual leave days: {EVENT_PAID_LEAVE_DAYS_BEFORE}
 Remaining annual leave days: {EVENT_PAID_LEAVE_DAYS_AFTER}

DATE:
 {EVENT_CREATED}

- In this period i will be replaced by: {EVENT}
- Replacements signature: email
- Annual leave will take place as scheduled
 Yes (period) No

EMPLOYEE

DIRECTOR

Irene Adler
 Marketing - team member

Paid Leave 3 Working days
Paid leave type: Annual leave
Paid leave for year: 2022
Interval: 14/05/2025 - 16/05/2025

Added by: [Zahid Krueger](#)
 Creation date: 20/03/2025 11:43:26

Approved by: [Zahid Krueger](#)
 Approval date: 20/03/2025 11:43:49

Overlapping with:

- Madison Grey - Paid Leave
- James McCoy - Time Off

Document
Regenerate document

Edit Delete
Reject
Approve

Folders, series & document number

We've simplified the document organization process.

Each document in HRiFlow can be organized into a **specific folder**, depending on the department, project, or document type (e.g., "Contracts," "Leave Requests," "Job Descriptions"). You can assign a unique identification **number** or a **series** to each document, ensuring you always have a clear and easy-to-manage archive.

This not only streamlines your work but also ensures that all documents are compliant and easily accessible whenever you need them.

Additionally, folders are protected with an extra layer of security through two-factor authentication (2FA), a mechanism that ensures documents are stored in complete safety.

Name	Options	Two-Factor Authentication	
		Company	User
Root folder		<input type="checkbox"/>	<input type="checkbox"/>
Contracts		<input type="checkbox"/>	<input type="checkbox"/>
Job descriptions		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Requests		<input type="checkbox"/>	<input type="checkbox"/>
Certificates		<input type="checkbox"/>	<input checked="" type="checkbox"/>
HR Reports		<input type="checkbox"/>	<input type="checkbox"/>
Job application and CV		<input type="checkbox"/>	<input type="checkbox"/>

Edit folder ×

Name *

HR Reports

Close

Description

Series name

Current number

Options

Registry

111



Contracts

EGH

154



Employee vs company documents

HRiFlow documents fall into two categories: **employee-level** and **company-level**. This means you can generate documents specific to an individual employee, such as an employment contract; to a team, like an activity report; or for the entire company, such as internal regulations.

When creating documents, you're not limited to predefined users — you can select the necessary individuals and generate documents quickly and easily, based on your needs, including documents that will be shared with external users.

The image displays two overlapping user interface windows from the HRiFlow system.

The top window, titled "New document", contains the following fields and controls:

- Document template ***: A dropdown menu with "Empty template" selected.
- Name ***: A text input field containing "Empty template".
- Series**: A dropdown menu with "Registry" selected.
- Folder**: A dropdown menu with "Root folder" selected.
- Password**: A text input field with a password icon.
- Confirm Password**: A text input field with a password icon.
- Use encryption**: A toggle switch currently turned off.

The bottom window, titled "Select users", is used for choosing recipients:

- Document for ***: A dropdown menu showing "Employees: None" with a right-pointing arrow.
- Select all**: A radio button option.
- Search by user name...**: A search input field.
- User List**: A list of users organized by department, each with a checkbox:
 - Company
 - Zahid Krueger
 - IT
 - Administration (1)
 - Zahid Krueger
 - Programming (4)
 - Daisy Montana
 - Landon Davison
 - Madison Grey
 - Zahid Krueger
 - Web Design (4)
 - Emily Watson
 - Katy Stevens
 - Matthew McCartney
 - Zahid Krueger
 - Marketing (4)
 - Irene Adler
 - James McCoy
 - Johnny Silverhand
 - Zahid Krueger
 - Stracker Ltd. (1)
 - Zahid Krueger
 - Support (4)
 - Mark Smith
 - Martin Luke
 - Thomas Brady
- Buttons**: "Cancel" and "Save" buttons at the bottom right.

Digital signatures

You've generated the document and everything looks good? The next step is the digital signature. Both administrators and employees can sign documents using three different methods:

- ✓ Typing
- ✓ Drawing
- ✓ Uploading

This makes document management even easier. Thanks to the status tracking associated with signatures, you'll always know which documents have been signed and which haven't.

Of course, you can also sign documents the traditional way — on paper. In that case, all you need to do in the app is confirm that the document has been signed.



View all Draft Waiting for signatures Signed Needs attention Archived

Signatures ✕

Write
Draw
Upload

✕

✕

↑

Drag & drop your files here

JPEG, PNG - 8 MB max file size

Choose file

Cancel
Save

Select signature

→ **Awaiting signatures (2)**



Document to sign

Annual leave request created by **Zahid Krueger** - Stracker Ltd. - admin

2FA security, password protection, and document encryption

If you need an extra layer of security, documents can be protected through **two-factor authentication**, a **unique password**, or even **encryption**.

This ensures that confidential information is protected at the highest level, and you maintain full control over access. Only authorized individuals will be able to view or sign the documents.



Add document

Document template *

Empty template

Name *

Empty template

Series

Registry

Folder

Root folder

Password *

.....

Confirm Password *

.....

Use encryption

Change password

Insert desired password

.....

Confirm password

.....

Use encryption

Save

Two-Factor Authentication

Company User

External documents


Need to send a document to someone outside the company? HRiFlow helps you with that too, through its document sharing feature.

All you have to do is select the desired document and share the generated link — simple and fast.

For extra security, you can set an access password and control what the recipient can do: just view the document or also edit it.

Share document ✕

General access


 **Restricted** ▼
Only people with access can open with the link

Restricted
Anyone with the link

[↪ Copy link](#)

Share document ✕

General access

 **Anyone with the link** ▼
Anyone with the link and internet access can view the document

View ▼

View
Edit

[↪ Copy link](#)

Custom fields

We know how challenging manual work can be when you have to process dozens of documents every day. That's why we introduced custom fields.

They're easy to use: simply add the required field (e.g., an external collaborator's signature), share the document, and once it's completed, you can automatically integrate the data into the official document — with a single click. It works just as well for field-completed forms, audit notes, or any other type of information, from numeric data to emojis.

The image shows a document editor interface for a document titled "Additional Contract". The interface includes a top navigation bar with a back arrow, document name, and options like "Without series" and "Root folder". A toolbar with various editing tools is visible. The main content area shows "Document content...".

An "Add field" dialog is open, allowing users to create a new field. The dialog includes the following fields and options:

- Field name ***: A text input field containing "Field name".
- Field type ***: A dropdown menu with a list of field types.
- Field description**: A text area containing "Field description".
- Multiple values**
- Required**
- Unique value**

The dropdown menu for "Field type *" is open, showing the following options:

- label
- subtitle
- numeric
- text
- long text area
- date
- select
- multiple_select
- rating
- file
- static_box
- emoji_select


Below the dialog, there is a section titled "Emoji select options" showing a list of options with corresponding emojis:

- sad → 😞
- neutral → 😐
- happy → 😊

Attachments and links

In addition to the documents generated in HRiFlow, you can also upload external documents directly into the system. For example, an employee can attach a medical certificate to a sick leave request.

Moreover, you have the option to create links between documents — such as between an individual employment contract and the job description — for quicker navigation and more efficient organization.




 **Irene Adler**
Marketing - team member

Paid Leave 3 Working days
Paid leave type: Annual leave
Paid leave for year: 2022
Interval: 14/05/2025 - 16/05/2025



Added by: [Zahid Krueger](#)
 Creation date: 20/03/2025 11:43:26

Approved by: [Zahid Krueger](#)
 Approval date: 20/03/2025 11:43:49



Overlapping with:

-  Madison Grey - Paid Leave
-  James McCoy - Time Off
-  Thomas Brady - Overtime

[Zahid Krueger](#) attached on 27/05/2025 14:26:37

 iflow logo mailchimp.png 


[Zahid Krueger](#) attached on 27/05/2025 14:26:25

 Cerere Concediu de Odihna.pdf 

[Document](#) [Regenerate document](#)



[Edit](#) [Delete](#) [Reject](#) [Approve](#)

Attachments and connections


 **Drag & drop your files here**
20 MB max file size

[Choose file](#)

Attached files

-  Annual Leave Request.pdf
-  ireneadlersignature.png

Event

 **Paid Leave**
14.05.2025 - 16.05.2025

HRiFlow transforms the way you manage documents in your company.

Whether it's about signatures, organization, or internal and external collaboration, you have full control over every step – exactly how document management should work in a modern company.

Want to see iDocs in action?

[Schedule a LIVE demo](#)