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INDIGO SIGNATURE SERVICE USER GUIDE

VERSION 1.0

GLOBAL HEADQUARTERS

41 University Drive, Suite 202
Newtown, PA 18940 USA

EU HEADQUARTERS

Corvin Offices I. Futó Street 47-53
Budapest, H-1082, Hungary

CIS HEADQUARTERS

9th Radialnaya Street, Building 2
Moscow, 115404, Russia
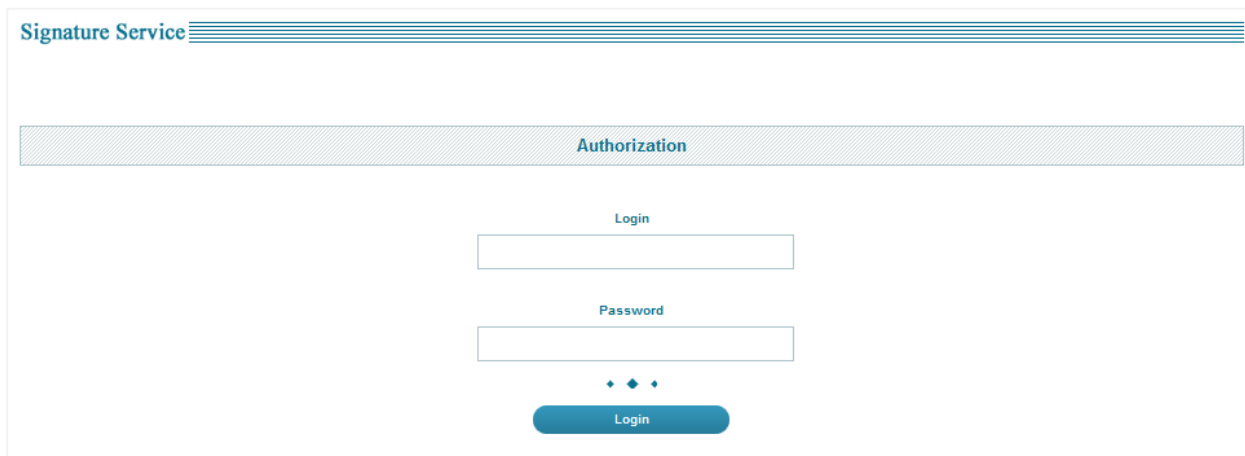
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1.   INTRODUCTION

Indigo Signature Service is a web-based service for signing documents. Indigo Signature Service is very helpful when:

- Several people must sign a document (even remotely).
- There are many different combinations of required signatures for different types of documents.
- There is a need for one central place for signing documents.

Indigo Signature Service`s signing method uses a certificate on the client machine. As an option, Indigo Signature Service supports the **SAFE-BioPharma® Digital Identity and Signature Standard** provided by Verizon.

2.   STARTING SIGNATURE SERVICE

To start the Service, navigate to the login page and enter your credentials:

In case the authorization is successful, the main page opens. The main page contains two tabs, *Documents* and *Templates*. When the Service starts, the main page displays the *Documents* tab.

See Section 3 for information about the *Documents* tab, managing and signing documents. See Section 4 for information about the *Templates* tab and using templates.

3.   MANAGING DOCUMENTS

Users can upload new documents to the Service (see Section 3.2) and sign them using the Service interface (see Sections 3.3 and 3.4).

Indigo Signature Service supports two types of signature – 1) using the local signing method and 2) using the SAFE-BioPharma® Digital Identity and Signature Standard. The signature type is defined during the Service installation. See the Installation Guide.

3.1. DOCUMENTS TAB OVERVIEW

The Documents tab displays the list of documents available for the current user.
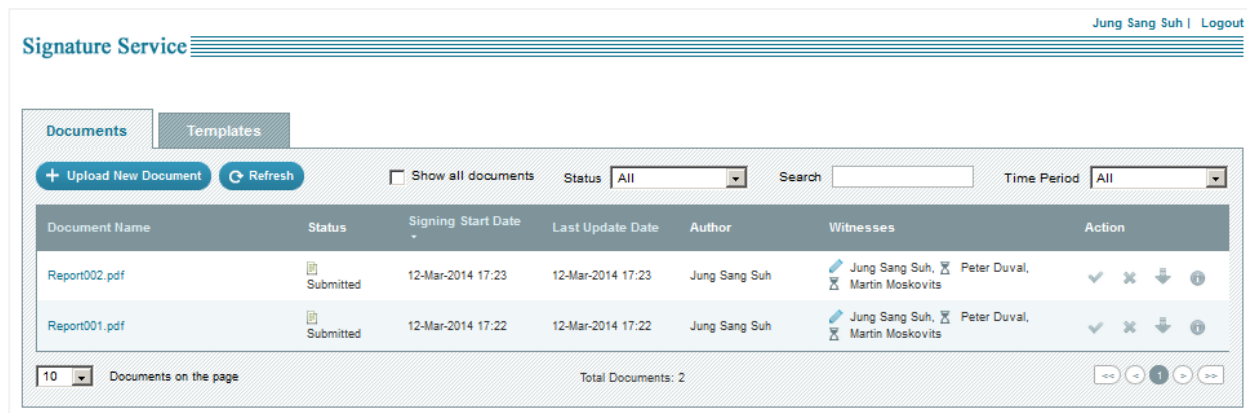
You can filter the list of documents by status and time period. To filter the documents, click ▾ in the *Status* or *Time Period* field, and then click the value in the dropdown list. Documents can have one of the following states:

- *Submitted* – new document just uploaded to Indigo Signature and having no signatures
- *Signing* – at least one signature is complete, but not all
- *Signed* – all signatures are complete
- *Archiving* – document is being archived
- *Archived* – document is archived
- *Rejected* – one of the signers rejected the document

When uploaded to the service, a document acquires *Submitted* status. When the signing process starts, the document's status changes to *Signing*.

Finally, when the last witness signs the document, it acquires the status *Signed*, then *Archiving*, and, finally *Archived*.
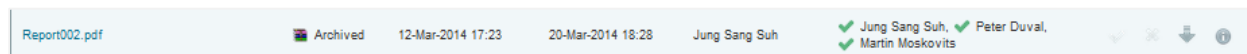
To see all documents that you have ever dealt with, including signed and archived ones, select the *Show all documents* checkbox. To see only those documents that are awaiting your signature, clear the *Show all documents* checkbox.

You can search documents by the file name. To search for a document, enter the file name into the Search field and press **Enter**.

For each document, the list displays its status, signing start date, the date of last update, the author, and Witnesses in the corresponding fields. The witnesses who is the next to sign the document has a pencil icon (✏) next to his/her name, the witnesses who are still in the queue have an hourglass icon (⧖) next to their names, while the witnesses who have already signed the document are marked with a green check mark (✔). If the first person in the template rejects the document, it acquires Rejected status, and the Service marks the signer who rejected the document with a cross (✘) while other signers in the list with a crossed pencil sign (✖).

The *Action* column contains clickable icons that allow users to perform the following actions:

- ✔ - Sign the document
- ✖ - Reject the document
- ⬇ - Move in the list
- ⓘ - Show information about the document

You need to refresh the list of documents in order to see new documents that might appear during your session. To refresh the list, click *Refresh*.

3.2.   UPLOADING DOCUMENTS

Before uploading a document, make sure there is a required template to link to the document. See Section 4.2 for information about creating templates.

To upload a new document:

1. On the *Documents* tab, click *Upload New Document*. The following dialog box opens:

2. Click *Browse* and select the document.
3. In the *Select Template* dropdown list, click the required template.
4. Click *Submit* to upload the document. Otherwise, click *Cancel*.

3.3.   SIGNING DOCUMENTS WITH LOCAL SIGNATURE

To sign a document using the Indigo Signature Service local method:

1. On the *Documents* tab, in the *Action* column, click the Sign icon (✔) next the document. The following dialog box opens:

2. Enter your Signature Service password into the *Password* field, click *Browse* and select the relevant certificate, and then click *View* to read the document before signing.

Note
You can perform these actions in any order. Viewing the document is a mandatory step. The Sign button is disabled until you view the document.

3. Enter comments into the *Comment* field, if necessary.
4. Click *Sign* to complete the signature, otherwise click *Cancel*.

The signed document appears in the documents list and becomes available for the next signer who receives an e-mail inviting him/her to sign the document.

The Service adds a page with a list of all persons who signed it at the end of the signed document:
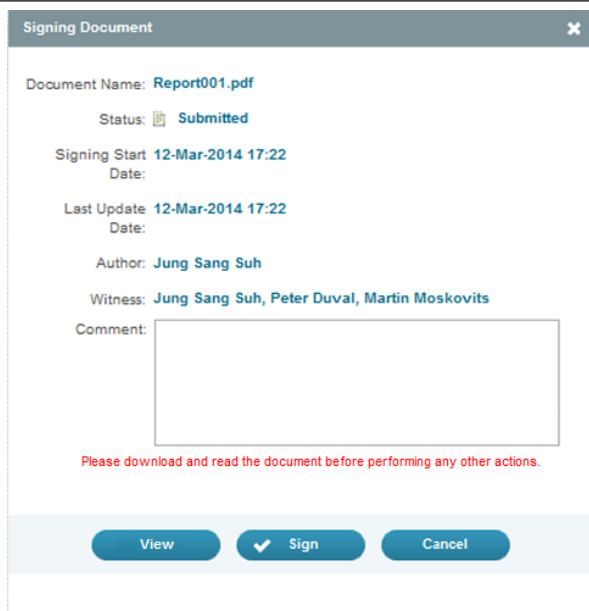
3.4. SIGNING DOCUMENTS WITH SAFE-BIOPHARMA SIGNATURE

The Indigo Signature Service delivery package does not include the signing service implementation integrated with Verizon signing service. Please contact EPAM if you are interested in this option.

To sign a document with Verizon SAFE-BioPharma® Digital Identity and Signature Standard:

1. On the *Documents* tab, in the *Action* column, click the Sign icon ( ) next the document. The following dialog box opens:

2. Before signing the document, click *View* to display the document in a PDF plugin.

Note

*This step is mandatory. The **Sign** button is disabled until you view the document.*

3. Enter comments into the *Comment* field, if necessary.
4. Click *Sign*. The Verizon login page opens:

5. Enter your credentials and click *Login*. The following message appears:

6. When prompted, obtain a one-time password either by e-mail or from a token device, enter it, and click *Login*:

11.   Confirm your permission to sign documents:

After you click *Allow*, the signing process starts:

If the signature is successful, the following message appears:

The signed document appears in the documents list and becomes available for the next signer who receives an e-mail inviting him/her to sign the document.

The Service adds to the document a page with the list of all persons who signed it:
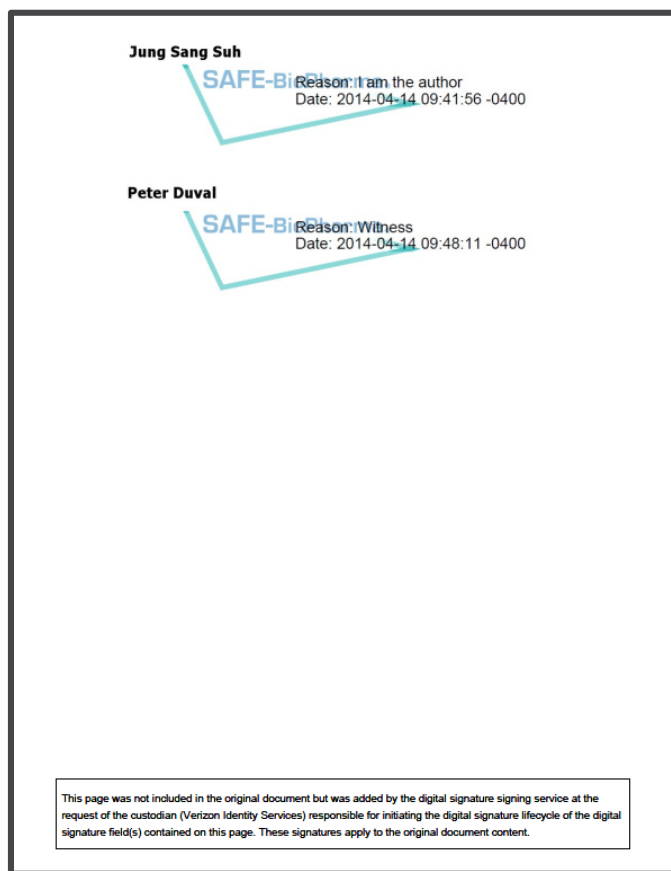
3.5. REJECTING DOCUMENTS

To reject a document:

1. On the *Documents* tab, in the list of documents, click the cross icon (✖) next to the document. The *Rejecting Document* form appears.

2. Click *View* to read the document before rejecting.

Note
*This step is mandatory. The **Reject** button is disabled until you view the document.*

3. Type comments into the *Comment* field.
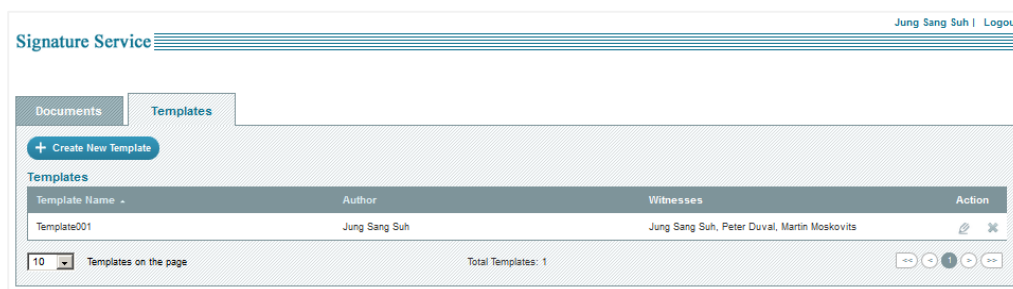
Note
This step is mandatory in the rejection case.

4. Click *Reject* to reject the document. Otherwise, click *Cancel*.
5. Click *Close* in the information message.

4.   MANAGING TEMPLATES

When loading a document into the system, you must assign a template to it. A template is a sequential list of persons who are to sign the document. All available templates appear in a list on the *Templates* tab.

4.1.   TEMPLATES TAB OVERVIEW

The *Templates* tab lists all templates available for the current user:

On the *Templates* tab, users can create, edit, and delete templates.

4.2.   CREATING TEMPLATE

If there are no templates suitable for a new document, you must create a new template before uploading the document to the Service.

To create a new template:

1. On the *Templates* tab, click *Create New Template*. The *Edit Template* form appears.
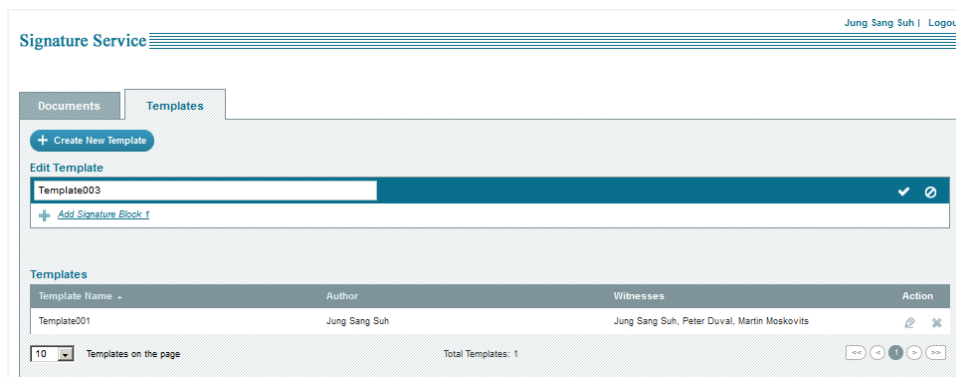
2. Type the template name into the editable field.
3. Click *Add Signature Block 1* to enter the first signer's name to the list. A signature block with editable fields appears.

4. Enter the first signer`s Username, first name or last name into the editable field.

Note

You can add only those users whose accounts exist in the Signature Service system.

5. In the **Reason** dropdown list, select one of the reasons for signing. Administrators configure the list of reasons during the system configuration. See the Installation Guide for details.

6. To move a Signature Block up or down in the list, click the arrows (⬆ and ⬇) in the right part of the block.

Note

The sequence of Signature Blocks corresponds to the order in which the signers receive the document for signing.

7. To delete a block, click the cross icon (✖) in the right part of the block.

8. Repeat steps 3 to 7 as often as needed to add more signers.
9. To save the new template, click ✔ in the upper-right corner of the template form. Otherwise, click ⊘ to discard the template.

4.3.   EDITING TEMPLATE

To edit a template, on the *Templates* tab, in the list of templates, click the Edit icon (✎) next to the template and then follow the steps in Section 4.2.

4.4.   DELETING TEMPLATE

To delete a template, on the *Templates* tab, in the list of templates, click the cross icon next to the template (✖) and then click *OK* in the confirmation dialog box.

5.   MANAGING USERS

This section is for users with Administrator privileges.

Administrators can manage other users in the system. Administrators can add, edit, and activate/deactivate users. Administrators cannot delete users.

To be able to manage users, you must login to the system as the default "admin" user or with your Administrator account. The main page displays the third tab, *Users*:
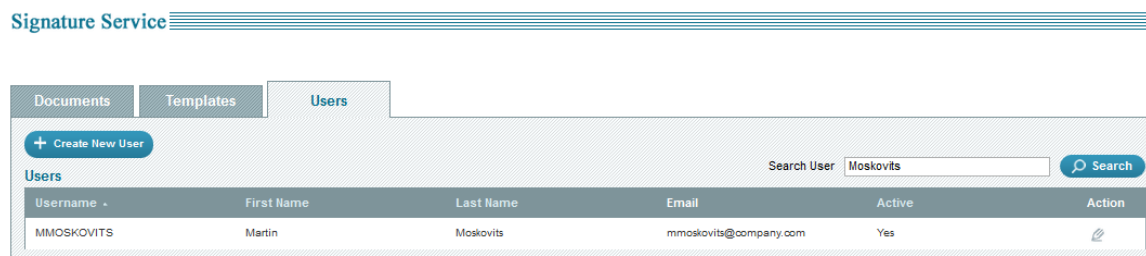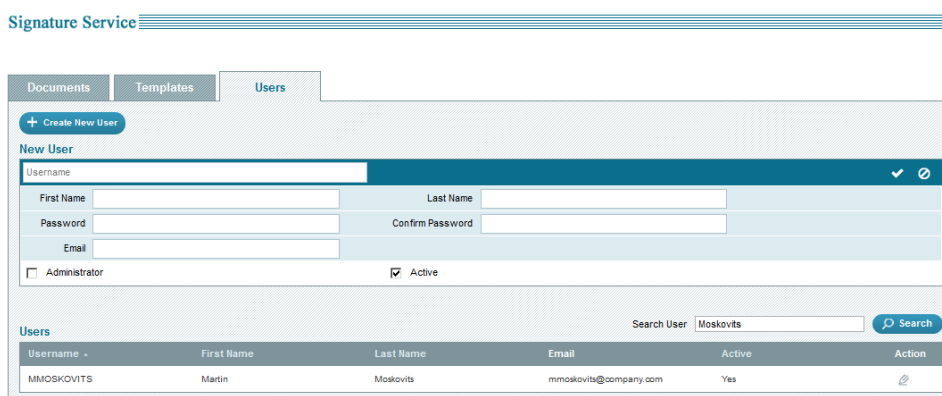

The Users tab lists all users in the system with their states and allows editing, activating and deactivating users.

5.1.   CREATING USERS

To add a new user to the system:

1. On the *Users* tab, click *Create New User* and fill in all the fields in the form that appears.

2. To assign the Administrator role to the user, select the *Administrator* checkbox. Otherwise, leave it clear.
3. To keep the user active, select the *Active* checkbox. To deactivate the user, clear the *Active* checkbox.
4. To save the new user, click the checkmark icon (✔) in the upper-right corner of the form. Otherwise, click ⊘ to discard the changes.
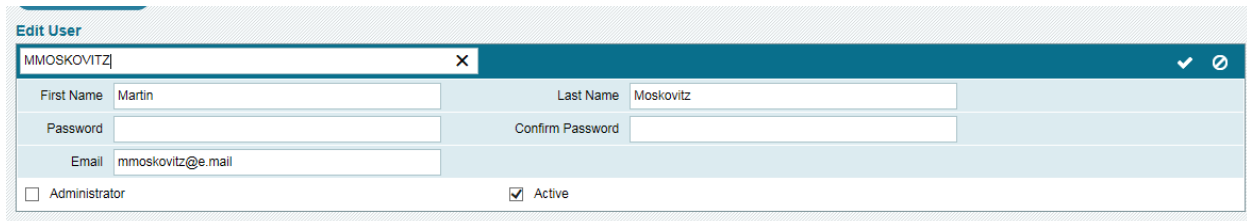
> *Note*
> *After creating a new user, you might need to click **Search** in order to see the new user in the list of users.*

5.2.   EDITING USERS

To edit a user, on the **Users** tab, in the list of users, click the Edit icon (✎) next to the user`s name. The user`s edit form appears above the list of users.

Then, follow steps in Section 5.1 to change the user`s personal data or password, assign or remove the Administrator role, or activate/deactivate the user.

5.3.   ACTIVATING/DEACTIVATING USERS

To activate or deactivate a user, open the user account for editing as explained in Section 5.2 and select or clear the **Active** checkbox, respectively.