

GOSIGN BUSINESS MANUAL (MOBILE)



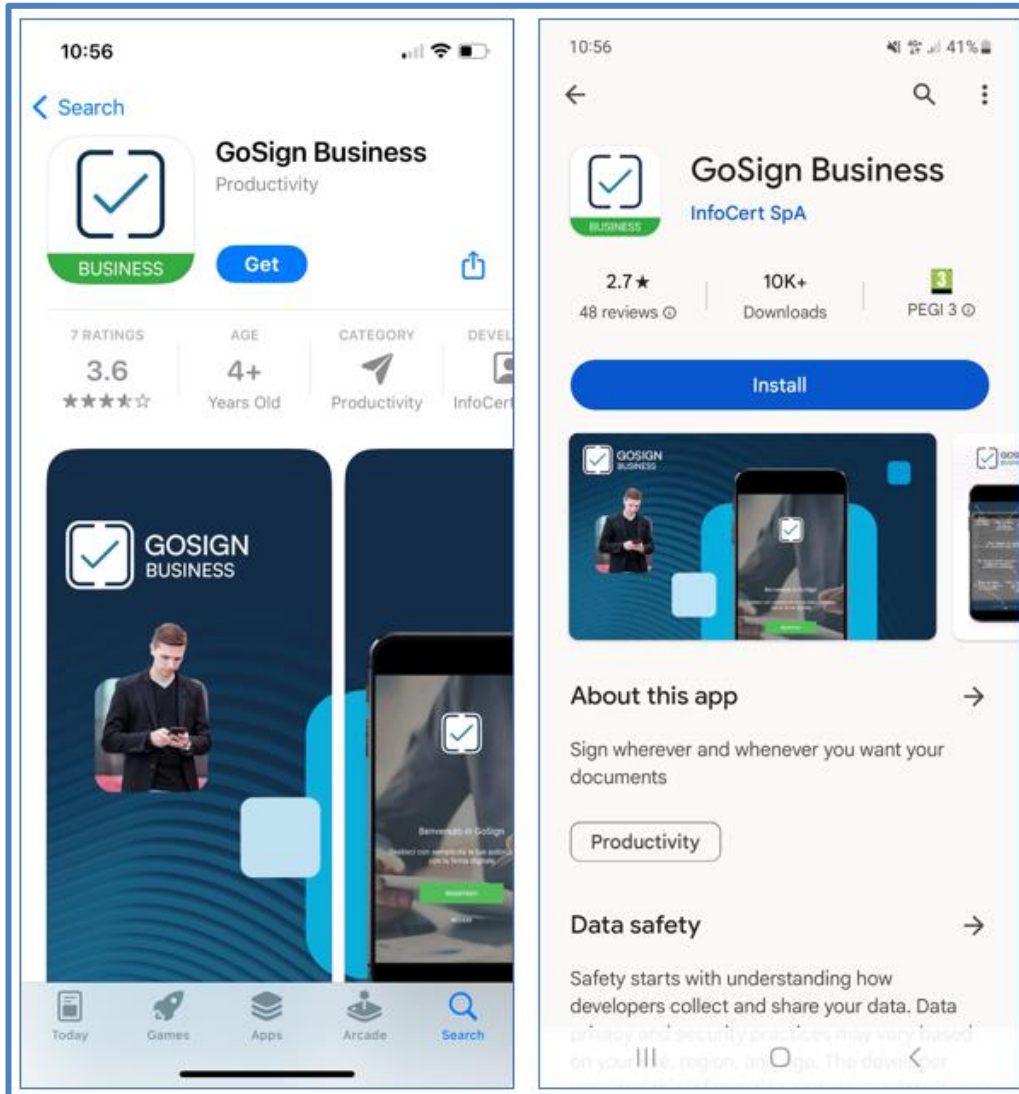
TINEXTA GROUP

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Introduction

Once **Google Play**, **Apple Store**, or **Microsoft Stor** are launched, you need to enter "*GoSign Business*" as a search item. A click on the *Install* or *Get* button (depending on the phone's system) allows you to go ahead and install the App.



Through the application, you can consult your signed documents and apply the required actions on them.

In particular, it is also possible to upload documents, in **PDF or MS Office format** (*Word, Excel and Power Point*) and sign them with one of your signatures.

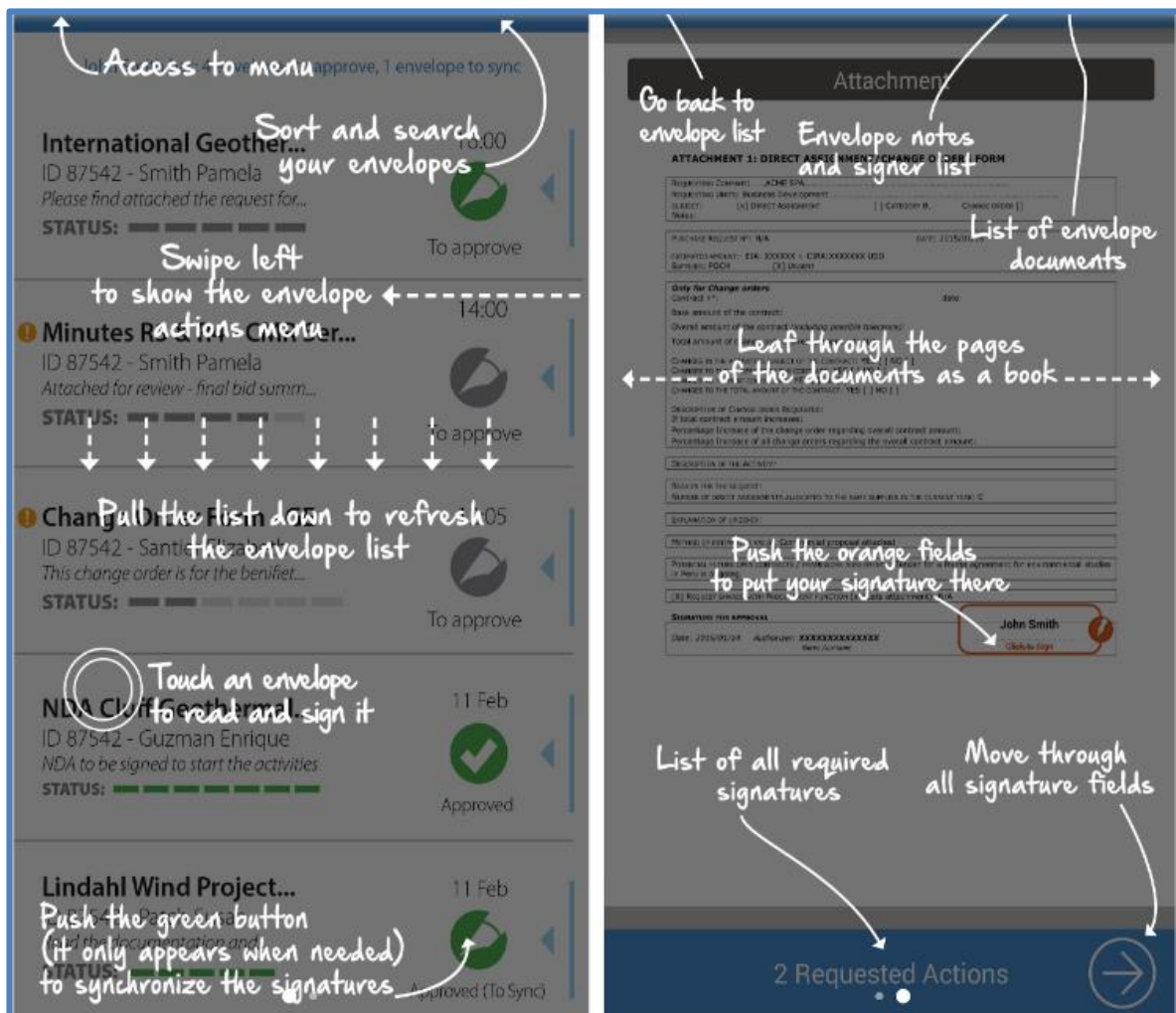
Tutorial

A graphical tutorial has been introduced for the two main pages of the application (Home page and document view).

The tutorial consists of a transparent slide superimposed on the pages of the application, with graphic indications on the use.

The tutorial is active during the first use. Once you read the instructions, you can close it with a tap on the screen: on iOS devices you have to touch the video and then press the Finish button; on Android devices you have to press the Return button.

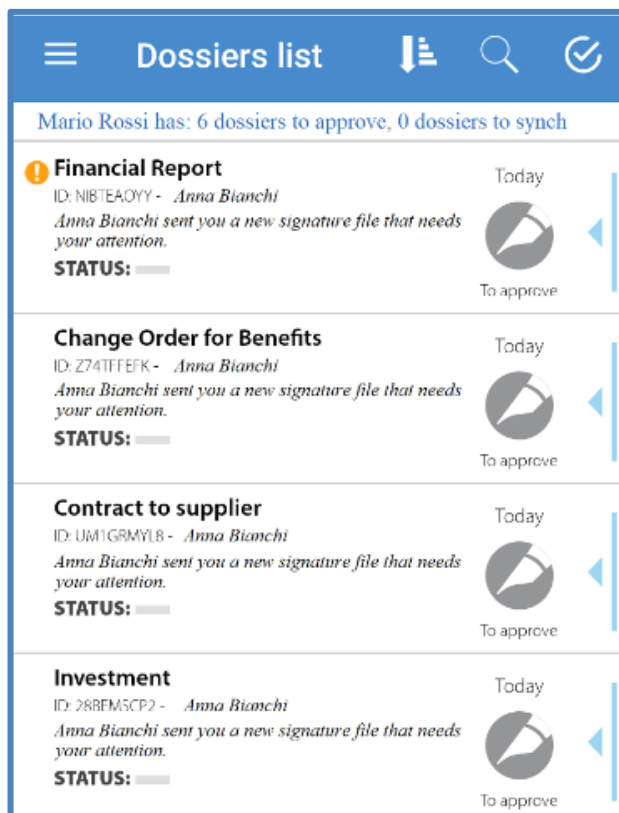
You can review the tutorial by entering Settings in the menu of accessory functions of the application (see next paragraphs).



Home Page

The figure shows the main page of the App with the list of documents received waiting for processing.

Urgent documents are identified with a yellow icon to the left of the object of the file.

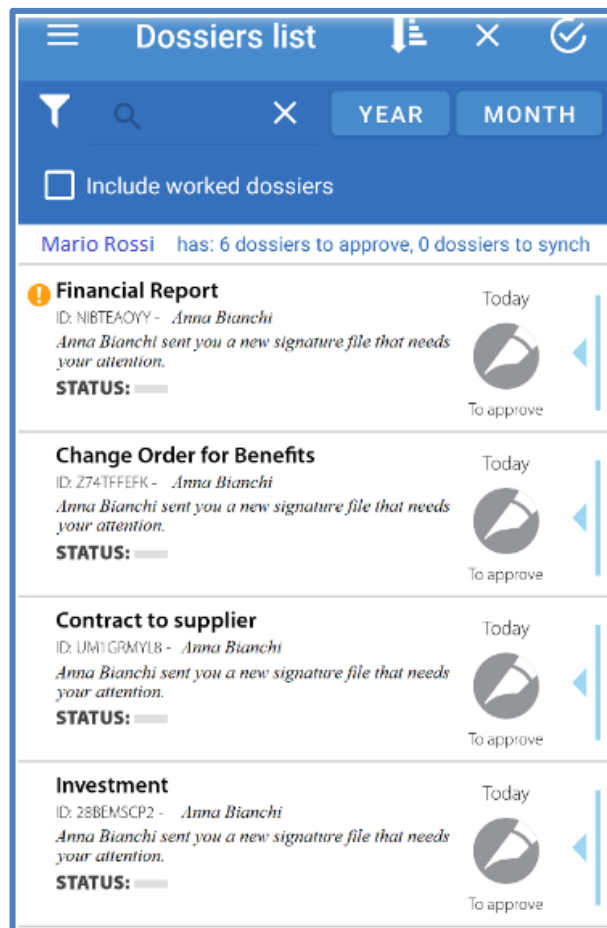


The structure of the screen and the information presented are as follows:

- The application controls area is located at the top of the page, with the following functions (from left to right):
 - Accessory functions menu: the accessory functions (profile, settings, tutorials, etc.) are collected in a single retractable panel (description of the individual functions in the following paragraphs).
 - Button for multiple confirmation: gives the possibility to a signer to bring all the actions of one or more packages / documents to the "To be synchronized" status with a simple check on the list.
 - Practices list sorting button: by selecting the different sorting criteria proposed, the list of documents will update with your request. The system also considers the expiry date in the document sorting criterion (where set in the files). By default, the sorting gives priority to expiring or expired documents (expired documents have higher priority, ordering by expiration date). - For each case, the "expiration date" information is visible in the detail section, with the other attributes and information

on the signature process. The same information is displayed in the list of practices in progress.

- Text for search filter: the search bar appears when the relative button is selected. By selecting the different search parameters, the list of documents will update. Filters available:
 - Search for the entire text within the fields of practice.
 - Dropdown list to filter based on the date of the practice (year and month).
 - Check Box to also consider completed documents in the search.
- Selection of custom filters.
 - If the search is active, selecting the close key stops the search and the search bar disappears. The search bar allows you to completely delete the archive page (you access the archive by activating the search and selecting the check box of completed documents).
- Header List, summarizes the actions required of the user: number of practices to be approved, number of practices to be synchronized.
- Under the Header are listed the practices received by the user with their processing status. For each practice it is indicated:
 - Any urgency;
 - The object;
 - The date of creation;
 - The ID;
 - The name of the person who sent it;
 - The number of attached documents (when there is more than one document);
 - Any notes sent together with the file;
 - A graphic indication of the completion of the requested actions and the processing status (referring to the activity in charge of the user).

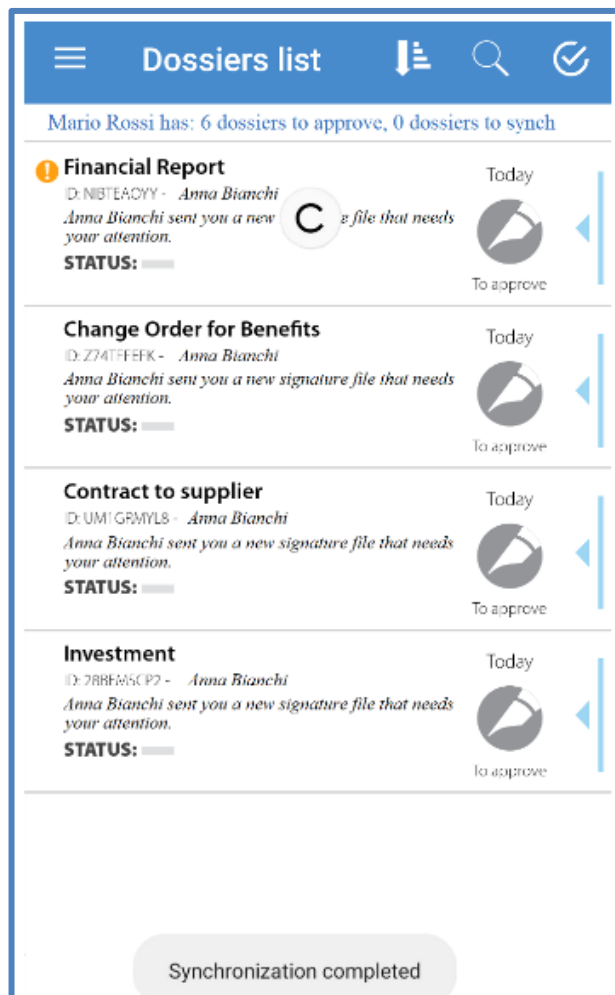


Synchronization takes place with a *swipe downward* (drag down) of the list.

At the end of the synchronization, the manager list is populated with the documents on the server. If the user connects for the first time, the result is the download of all documents received on the date.

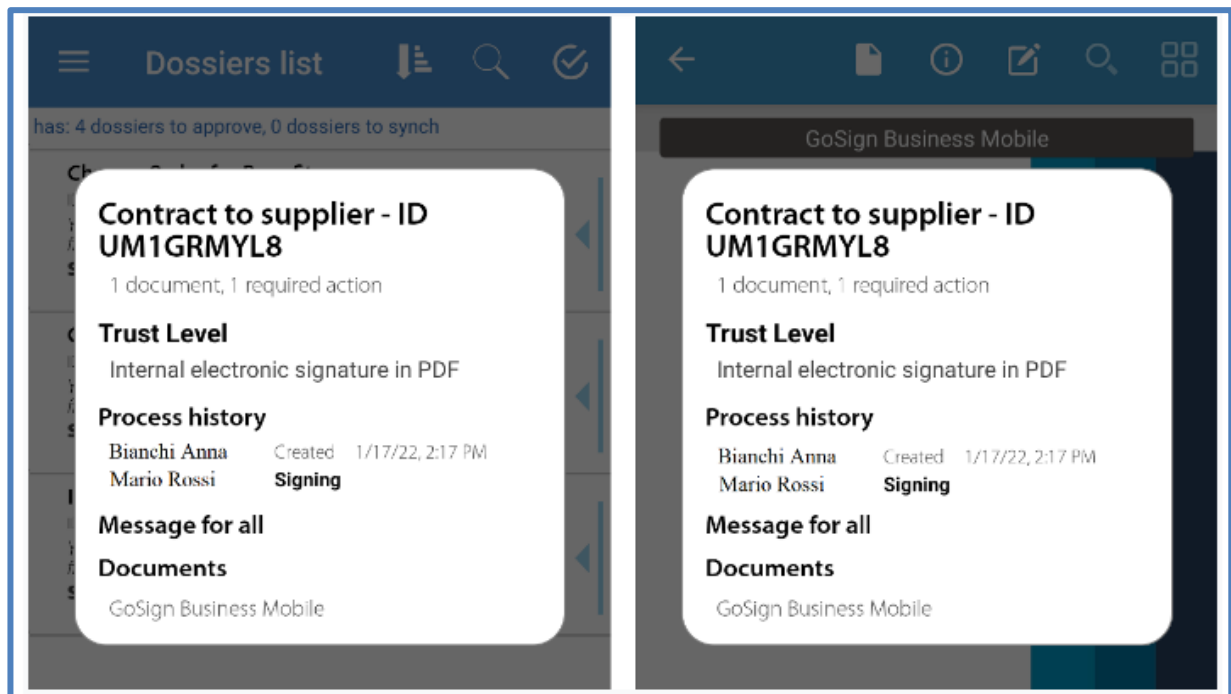
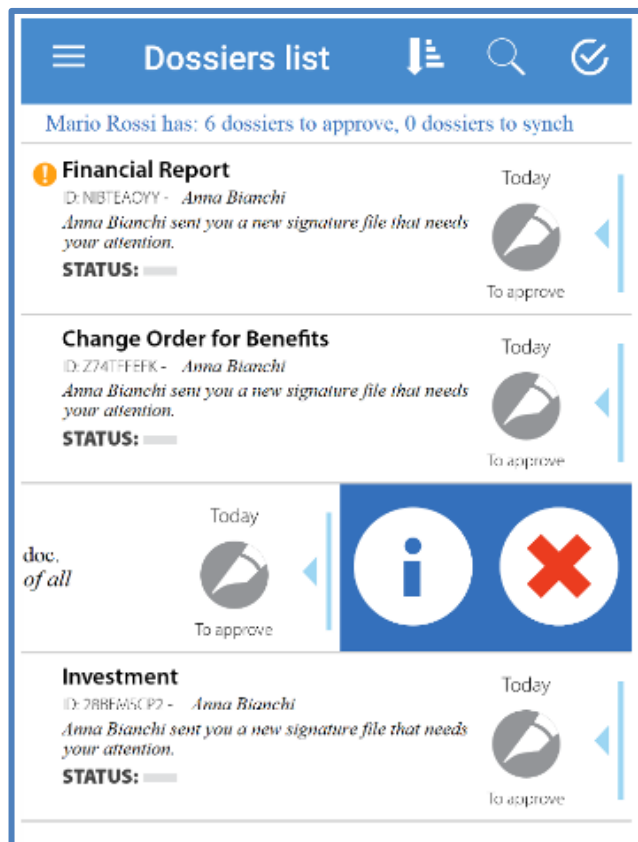
If the user repeats the synchronization again, the list is updated with any new practices to be worked (documents received in the interval between the two synchronizations).

During synchronization, the system shows the user information about the time interval elapsed since the previous synchronization.



"Swiping on left" on a practice, the following functions are available:

- *Reject/Restore Praticce* (Icon "X") – if you consider the content of the file is incorrect or not all the information to authorize the signing process is available. The rejection of a file requires the insertion of a note to justify the refusal action. A previously set rejection action can be undone by pressing "Restore Practice" (button that appears in place of "Reject Practice").
- *Info Praticce* (Icon "i") – is a page that presents the summary of the working process of the practice. Information about the signing process of the file is summarized: who created it, what actions are required, who are the recipients, what documents and the practice progress.



Practical processing

By selecting a specific practice (tap on the line), you access the processing page of the practice (page confirming the required actions).

The system displays the page of the first document of the file in which the user is called to perform an action (signature, approval or viewed).

The user can browse all the documents of a practice simply by flipping through the pages in sequence (once a document is finished, the next one is presented).

In the header of the page there are some function keys (from left to right):

- Back to the list;
- List of documents (to consult the different documents of the file or go to the detail);
- Practice info (to access the practical detail);
- Notes of the folder (where you can view the notes inserted and possibly add them);
- Search (to search for any words/texts in the document);
- Display of the document through the "thumbnails" of the pages (by default the display is for a single page).

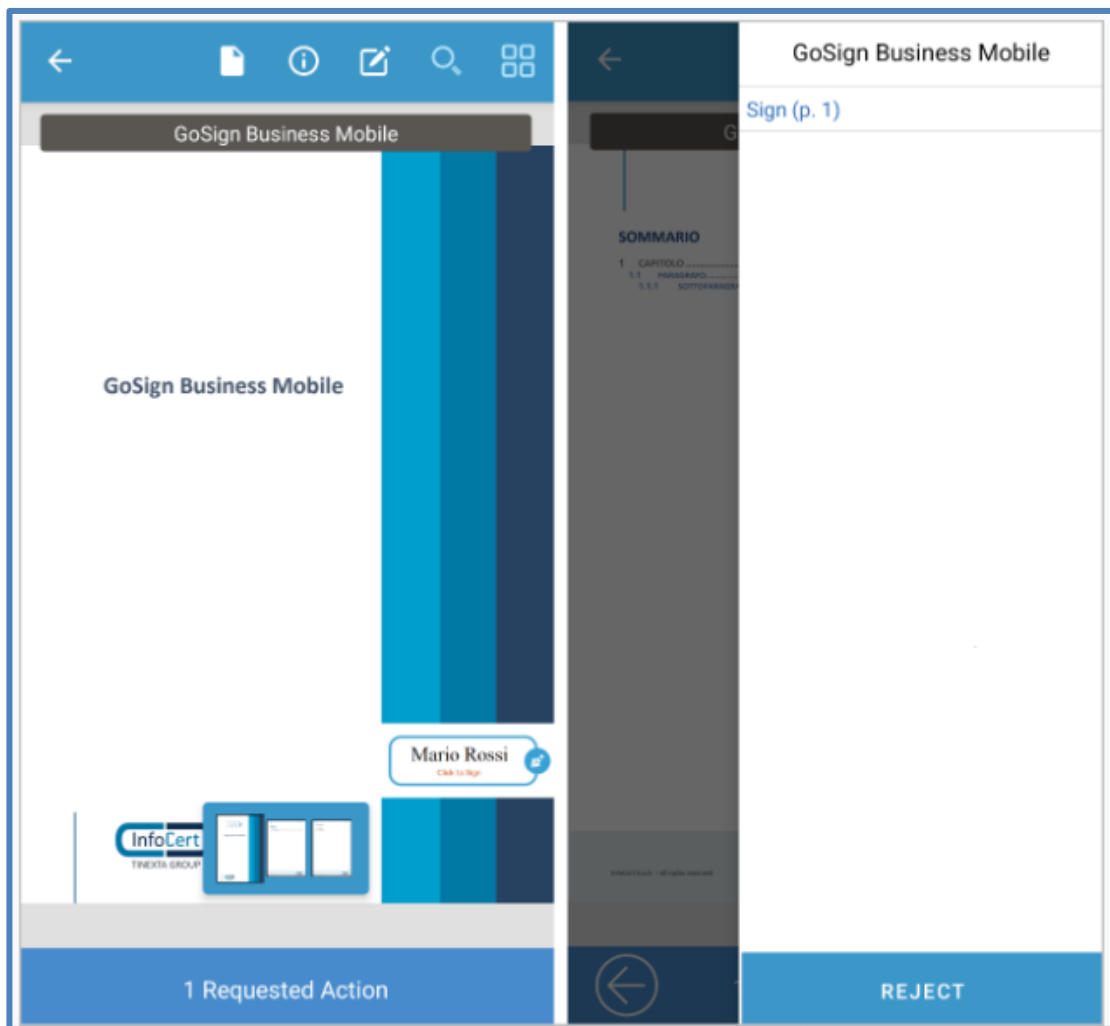


Below is the number of actions already confirmed compared to the total present in the practice.

Using the arrows on the sides, always at the bottom, the user can quickly move from one action to another without need to browse all the documents of the practice.

Pressing on the above inscription a further detail appears: the list of actions to be by the manager on the documents of the practice. For each action, the references of the document and the page that contains it are indicated. By selecting a particular action, the system opens its page.

There is also the "Reject practice" option, similar to what was described above.



The signing mode is "*Tap to Sign*": on the document page, the point where the manager must affix his signature is highlighted with a colored tag that shows the name of the signatory, with the indication "Press to sign".

By selecting it (tap on the tag), the user confirms his will to sign.

The field changes shape, the user's signature loaded on the system (if available) or the name written in italics appears, with the indication "press to cancel" (pressing again the confirmation is cancelled and the action returns to its original status).



The signature action is currently in the "prepared" status: the actual affixing of the signature takes place at the time of synchronization, when the recognition procedure is required based on the set authorization level.

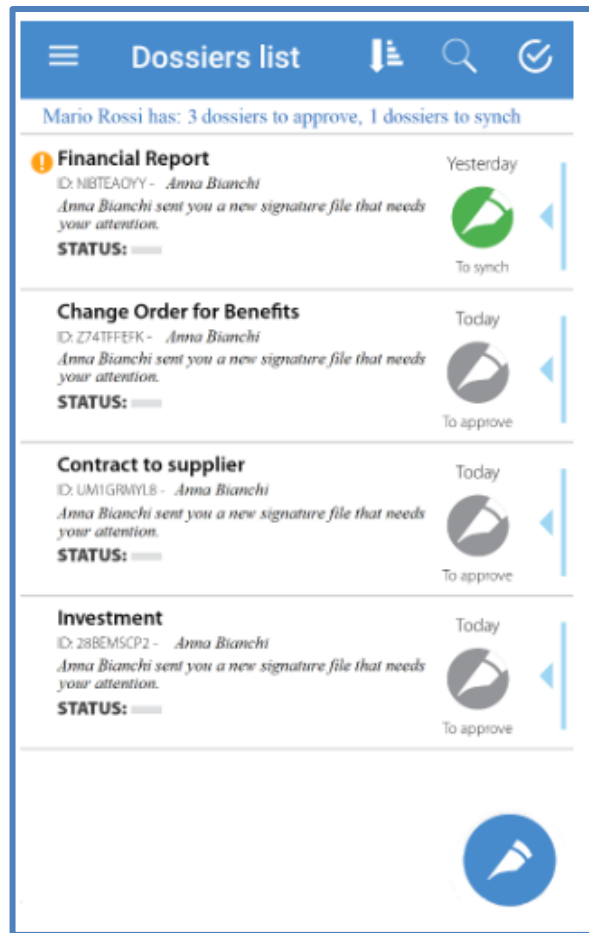
The signatures entered, until a synchronization is performed, can be deleted and re-inserted in case of error.

The collection of signatures can take place in a single session or at different times. It is also possible to synchronize the application on the tablet with the Server without necessarily having finished the process of subscribing to a practice. The server hosts the actions performed up to the time of synchronization.

Confirmation of Practical processing (signature)

When the user has "prepared" all the actions, the practice is ready to be confirmed (the next action makes the manager's actions definitive, and the practice moves on to the next step of the process).

In the list of practices, the practice in question changes status: from "To be approved" to "To be synchronized".



Synchronization without signature (for approvals and visas) takes place when you open the application (if the automatic update option has been set at startup) and /or with a vertical swipe on the list of practices.

To confirm the signature affixed to the document it is necessary to synchronize GoSign through the pen's icon button (*Floating Action Button*) that appears in the list of documents at the bottom right.

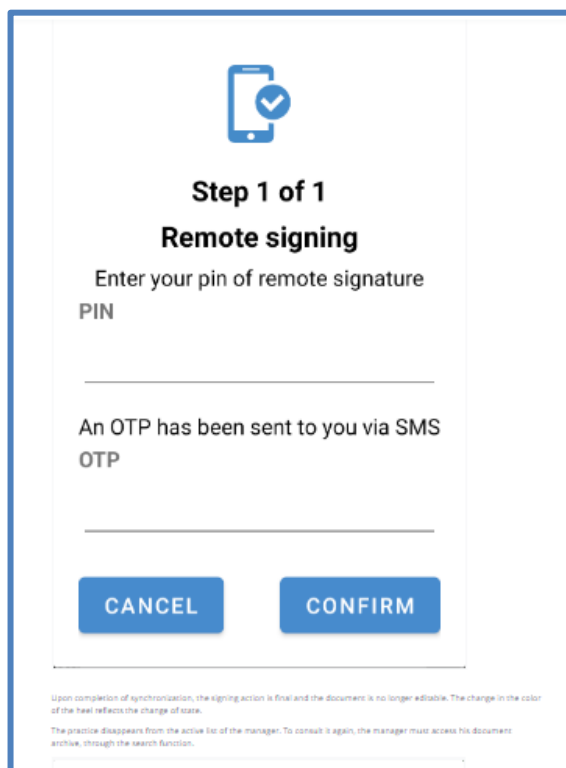
- The button appears only if there are signatures to be synchronized with the Server;
- Pressing the button activates the signature and synchronization dialog;
- At the end of the operation, at the top of the application, the indication of the outcome of the operation appears;
- In case of successful synchronization, the button disappears after a few seconds.


This different mechanism is necessary to highlight to the signatory that the operation he is about to perform is not a simple synchronization / approval but the signature of the document.

You can sign multiple documents within a single synchronization session.

Based on the authorization level defined for the practice, the system requests the user's PIN as confirmation of recognition or the PIN and OTP of the digital certificate.

If there are different practices to sign, with different levels of authorization, the system requires credentials for the different signing methods.





Step 1 of 1
Remote signing

Enter your pin of remote signature
PIN

An OTP has been sent to you via SMS
OTP

CANCEL **CONFIRM**

Upon completion of synchronization, the signing action is final and the document is no longer editable. The change in the color of the heel reflects the change of state.
The practice disappears from the active list of the manager. To consult it again, the manager must access his document archive, through the search function.

Upon completion of synchronization, the signing action is final and the document is no longer editable. The change in the color of the heel reflects the change of state.

The practice disappears from the active list of the manager. To consult it again, the manager must access his document archive, through the search function.



Step 1 of 1
Remote signing

Enter your pin of remote signature
PIN

.....

An OTP has been sent to you via SMS
OTP

.....

CANCEL

CONFIRM

Confirmation of Practical Processing (other actions)

The actions for which a manager is called to confirm are different. In addition to the signature, we have:

- *Approval*, indicates a less strong authorization request than the signature (in a signature process it can be requested at an intermediate step in the process).
- *View*, actually requires a confirmation to read the document.

For each action described above, you can find one or more heels to "work" on the documents of the practice received.

The procedure for processing is the same as described above for signing the document.

When the user has "set up" all the actions, the document is ready to be confirmed.

Synchronization without signature takes place when opening the application and / or with a vertical swipe on the list of practices.

Upon completion of synchronization, as before, the action is final and the document is made unchangeable. The change in the color of the heel reflects the change of state.

Reject Practice

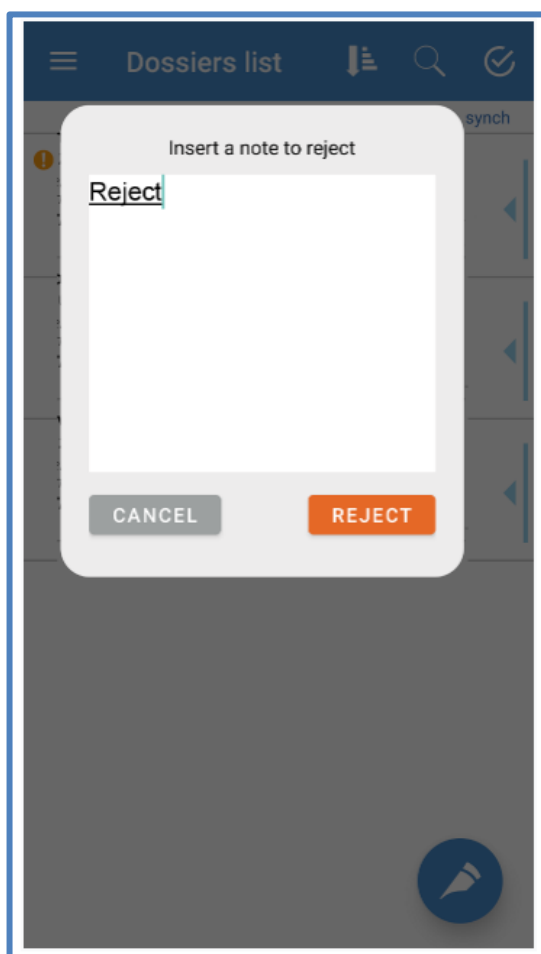
A practice can also be rejected by one of the managers involved in the signing process.

This can happen when the signatory finds that there are no conditions for signing (documents are missing, important content is missing in documents, etc.).

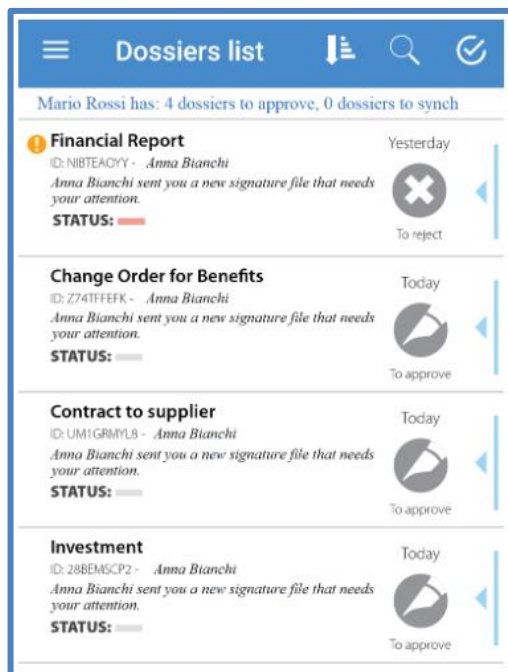
Rejection of the practice can occur in two ways:

- By pressing the "Reject practice" button, which is accessible from the Home page;
- By pressing the "Reject Practice" button, which is accessible from the Actions List.

To refuse a practice it is necessary to insert a note with the reason for the refusal as shown in the figure.



Once the note is inserted, the practice changes status ("To reject").



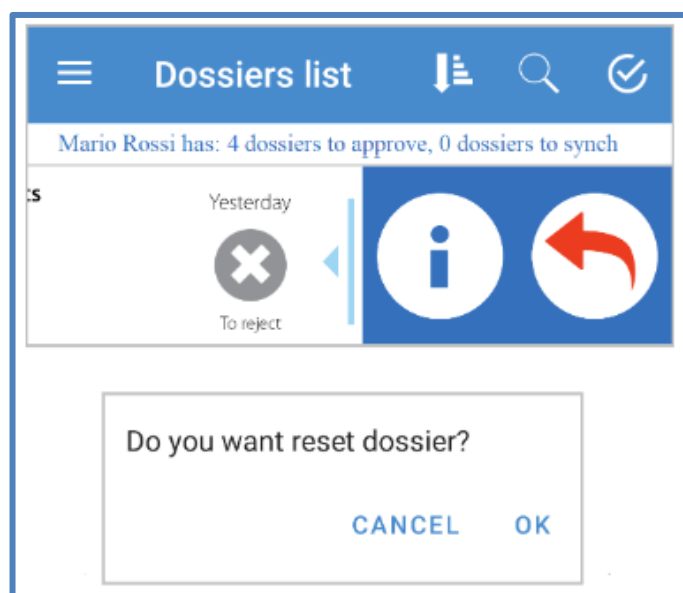
With the next synchronization, the document is frozen in the "Rejected" state. The signing process stops and the practice disappears from the working list of all participants.

The system notifies users via email of the change of status.

A practice in the state "To reject" (set up but not confirmed), can be restored.

The restore operation can be performed (as long as you have not already finalized the action) using the "Restore Practice" button, accessible in the same way as previously seen to set the rejection.

By confirming the restore, the file returns to the "To be approved" state.



Confirm All

The "Confirm All" function allows a signatory to bring all the actions of one or more packages/documents to the status from "To be synchronized" with a simple check on the list.

As a rule, any file can be prepared for signature in this way, except in the case where the practice is part of a document class for which the use of this function is explicitly inhibited.

"Generic" practices, not belonging to any document class, can always be selected for the use of the function.

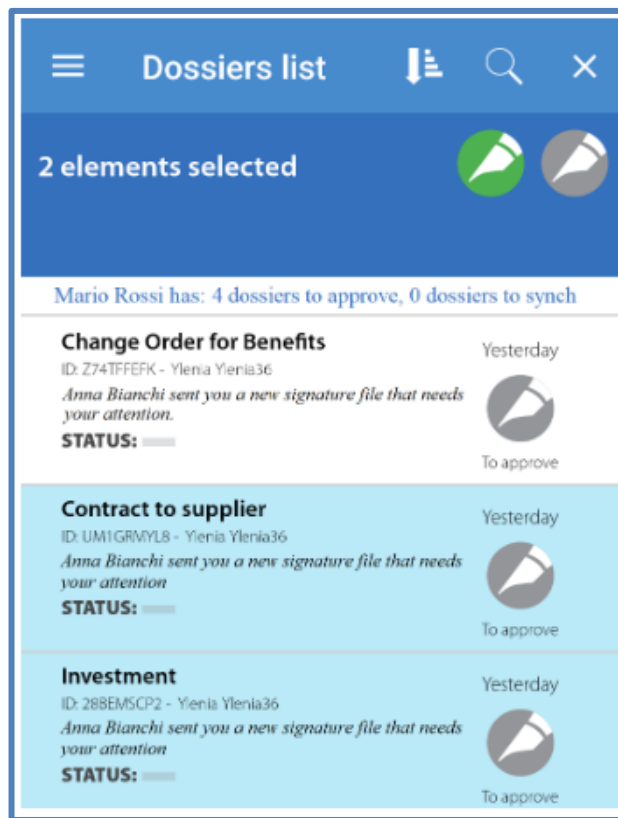
At the top of the page that presents the list of packages in progress, after the menu icon, there is a new button with which you can:

- Select one or more packages.
- Confirm for all practices in a massive way the actions present and bring all the practices in the state "signed (To be synchronized)".

When this button is pressed, the button changes icon to an "X", shown in Figure 23. Pressing it cancels the operation and restores the list to its original state. A bar also appears that indicates to the user that it is possible to select one or more packages.

Once the multiple selection mode has been activated, it is possible to select the practices to be prepared for signature.

- Unselected practices are shown with a white background.
- The selected practices are shown with the blue background as visual feedback of their selection.
- Practices that cannot be prepared for signature are shown with a light gray background, so they are not selectable.



Once the selection of the practices for which you want to prepare for the signature in a massive way completed, you have two choices:

- Press the "confirm" button (green pen), which automatically sets the selected practices as "To be synchronized";
- Press the "reset" button (gray pen), which resets all the signature settings of the documents within the files (return the file to its original state).

Actions in documents are "labeled" by the application as "massively signed ready". The documents are then available for signature following the normal procedure, together with any other practice that may have already been prepared for signature.

If you prepare for signature, through multiple selection, a document already partially or totally prepared for signature, this is re-processed and prepared for signature by marking all the actions of all documents as "predisposed to signature massively", regardless of their previous state.

At the time of synchronization / signature, the user is warned that at least one of the practices he is signing / approving has been set up for signature in massive mode. The user declares, in this way, to have read the documents that he has prepared for signature in a massive manner.

Attention

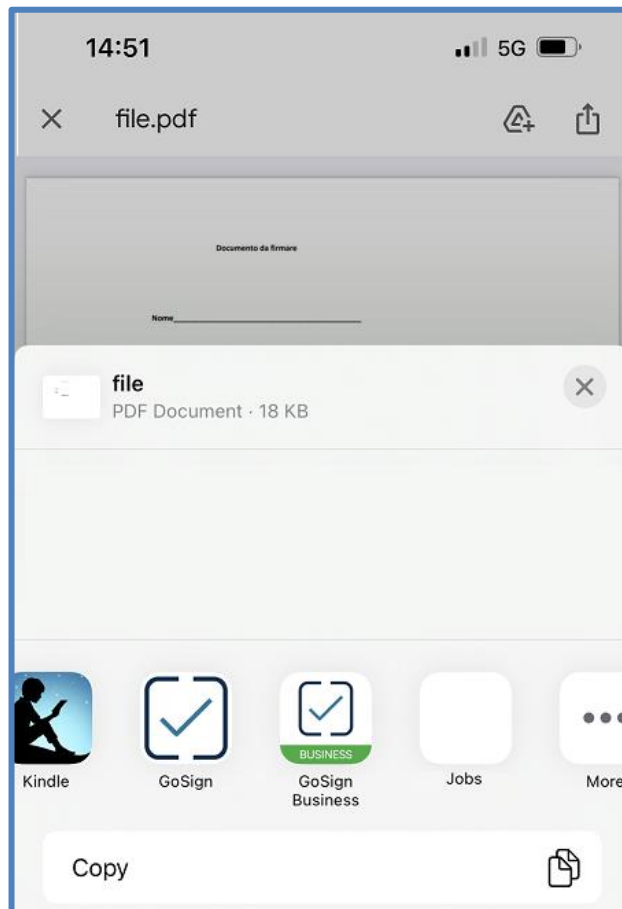
At least a dossier has been prepared with an automatic procedure.

By proceeding I declare that I am aware of the content of documents

OK

Sign & Send

You can choose a file to sign from your device and open it with Go Sign Business Mobile by directly activating the sign and send function.



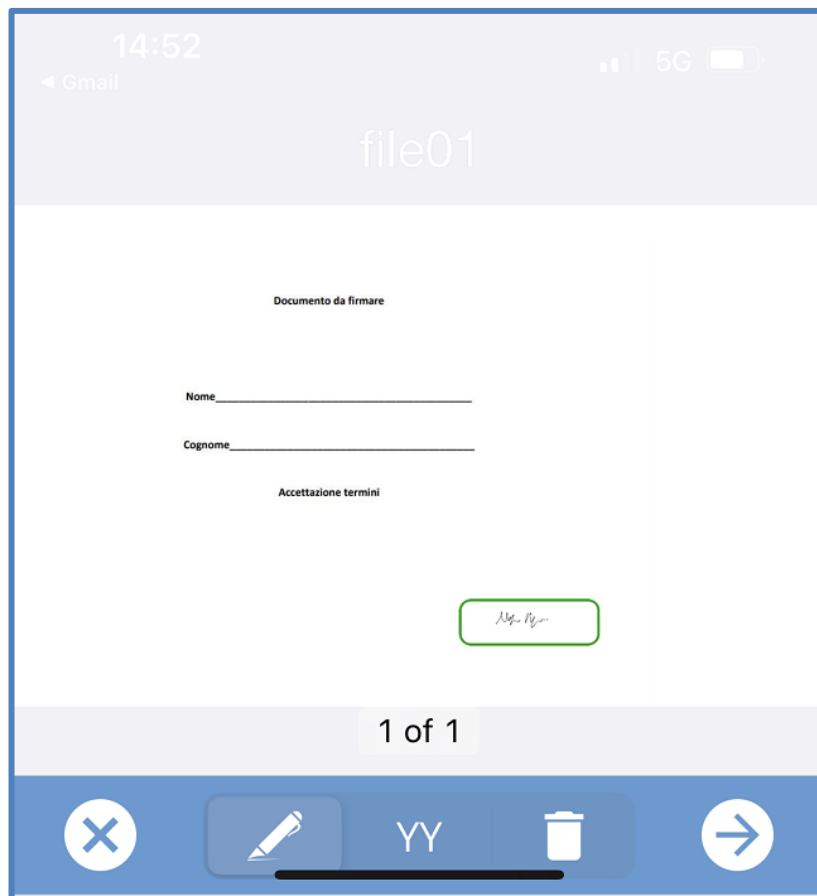
The page allows the user to:

- Cancel the operation of "Sign and Send" by returning to the list of practices to his attention.
- Insert one or more signatures/initials on the document.
- Delete a signature/initials action that may have been inserted by mistake.

To cancel the insertion of the document and the signature, the user selects the cancel key (bottom left).

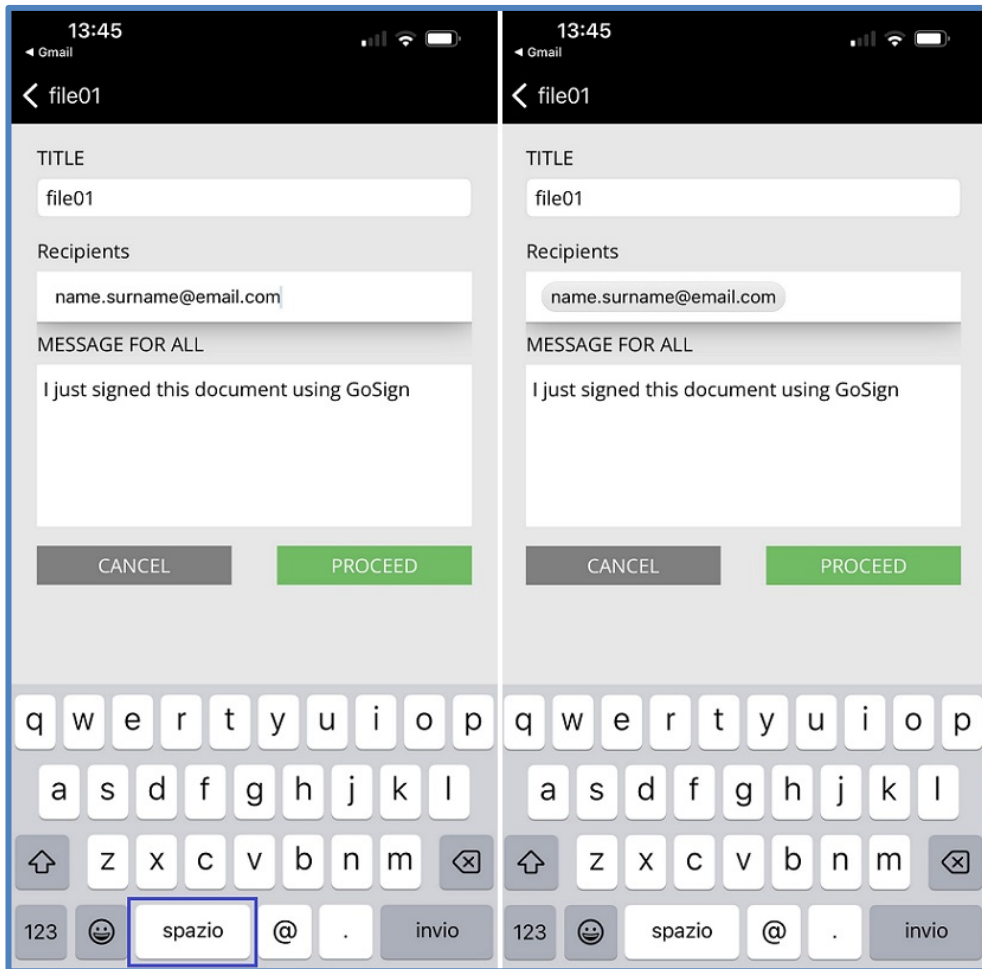
To insert a signature into the document, the user selects the signature or initials key at the bottom of the screen, and then taps the place in the document where they want to insert their signature. To delete a signature inserted by mistake simply select the trash can icon and then tap on the action you want to remove.

The signature feed appears on the document. The same is already in the state "To be confirmed" since the user who entered it is the user who must sign.



By clicking on the arrow icon at the bottom right, you can proceed to enter the file's:

- Title
- E-mails from Participants in the signing process
- Message

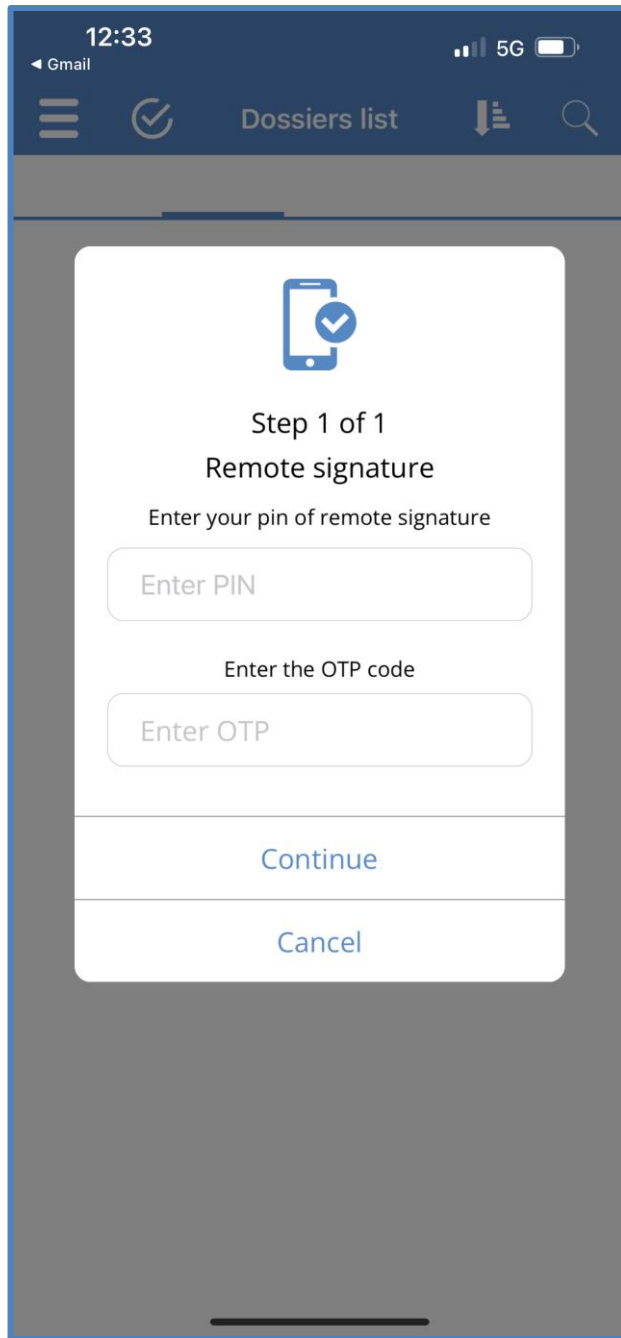


After entering the recipient's e-mail, you will need to click on the space/tab button to validate the email address.

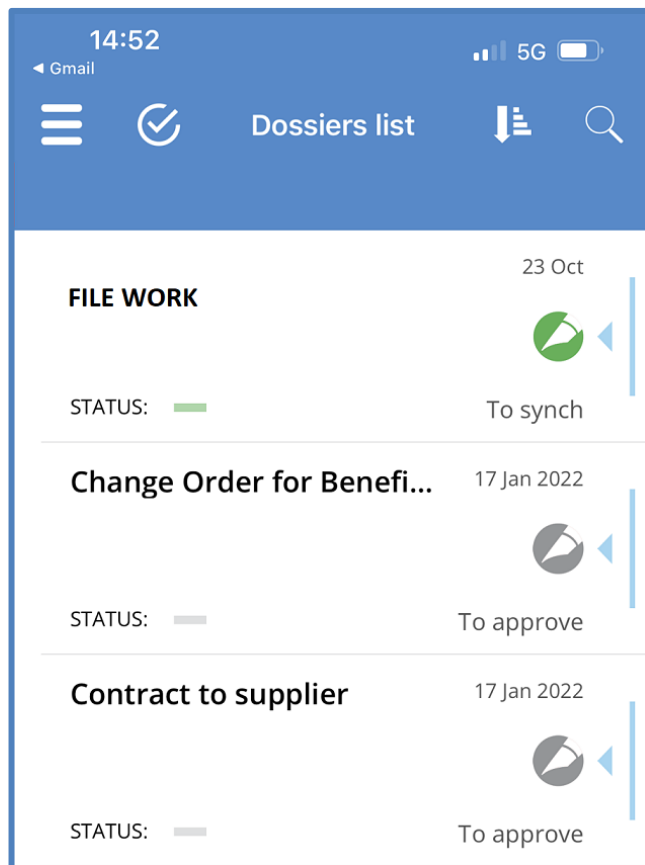
A click on the *Proceed* button will allow you to confirm the operation.



A tap on the *Continue* button will allow you to add your Signature PIN and the OTP received via SMS.



The file will then be sent and synchronized automatically, disappearing from the list of cases still pending.

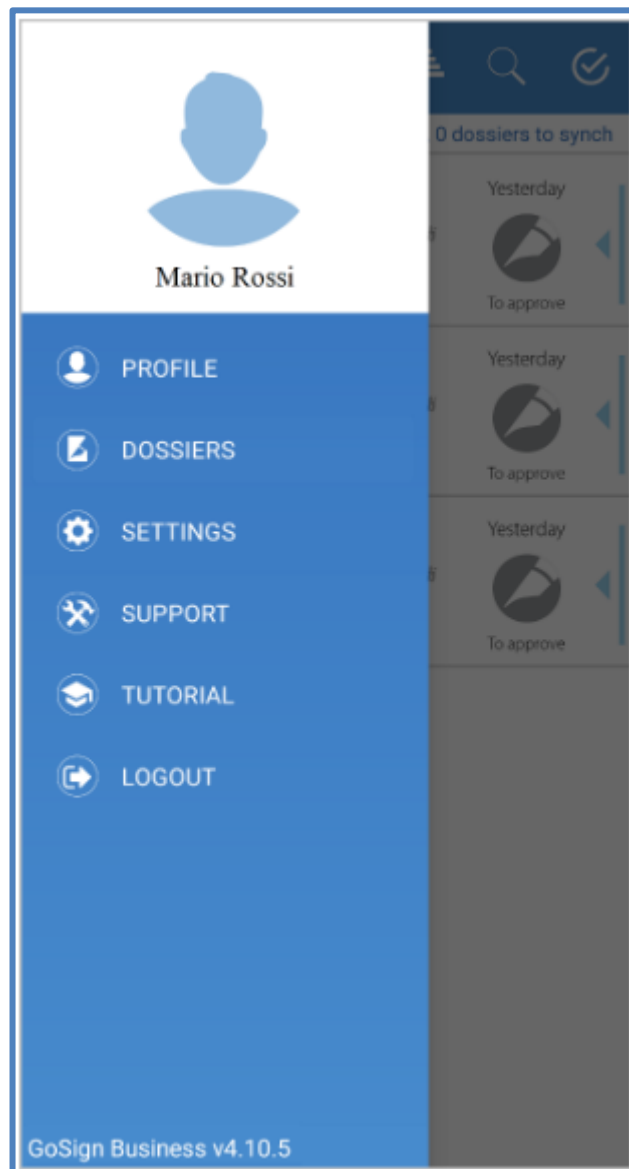


Accessory Functions Panel

The panel groups all the accessory functions previously accessible in different modes on other pages.

Especially:

- User profile.
- Dossier list.
- Technical configuration information.
- Mail to application support service.
- Review the tutorial.
- Logout.



Profile

The profile summarizes all the features related to the user's signature.

The information displayed are:

- *Signature image* – the user can view the electronic image of his signature to be placed on the documents. To upload/edit the image, the user must access the profile via web client or tap on the image and create a signature directly from the device.
- *Initials images* – the user can view the electronic image of their initials to be placed on the documents. To upload/edit the image, the user must access the profile via web client or tap on the image and create a signature directly from the device.
- *Remote signature credentials account* – These are the access credentials to the remote digital signature certificate. In order to sign with a remote digital certificate from the APP, you must enter the UserID and password of your certificate. The information entered is used to call for the remote digital signature service and receive the OTP on your mobile device. OTP that, along with the PIN, is required to confirm the digital signature action.
- *Authentication type (for synchronization)* In GoSign there are 3 conditions in which the user can be required to authenticate:
 - When accessing the application, via the web or using the App mobile (**case 1**).
 - When signing a document, via web or App mobile(**case 2**).
 - When synchronizing the local store of the App with the GoSign server (**case 3**).

For the first case, GoSign login credentials are required: UserID and Password.

For the second case, the request changes depending on the type of signature assigned to the document:

- *electronic standard signature*: the PIN is required (the one received during registration via email / SMS)
- *Qualified digital remote signature*: the insertion of OTP and PIN of the remote digital signature certificate is required.

For the last case it was decided to leave the user the possibility to choose the level of authentication to be used at the time of synchronization.

The user can, by accessing his configuration page (Settings) via web application, choose the type of authentication to be activated during synchronization between Server and APP among the following alternatives:

- *Standard authentication* - no additional authentication
- *Basic authentication* – the user must enter their signature PIN also as identification to activate synchronization

- *Strong authentication* – to activate synchronization a strong authentication is required: the user must enter their credentials of the remote signing certificate, OTP and PIN as identification. This authentication mode can be activated only if the user is configured to use a remote digital signature.

The screenshot shows a mobile application interface for 'Profile Settings'. At the top, there is a blue header with a back arrow and the text 'Profile Settings'. Below this, the 'User details' section contains several fields: 'Name' with the value 'Mario Rossi', 'Title', 'Company', and 'Organization'. The 'Time Zone' field is set to 'UTC'. The 'Signature image' section displays a handwritten signature and a 'Change the signature image' button. The 'Signature Initials image' section displays the initials 'MB' and another 'Change the signature image' button. The 'Username' section has the label 'Username' and the instruction 'Insert your remote digital signature username', followed by an empty input field. At the bottom, there is a blue footer with a back arrow and the text 'Back', and a 'Settings' button.

Settings

These are advanced configurations that may be required to manage special conditions (iOS devices only):

- *Log Level* – sets the level of information that the application records during operation (by default trace). The change of the parameter is required to analyze anomalies detected in the use of the APP.
- *Server Proxy* – if the Internet connection is made through a connection to a proxy server, this section is used to enter the connection parameters.

LOG LEVEL	
Trace	<input checked="" type="checkbox"/>
Debug	<input type="checkbox"/>
Information	<input type="checkbox"/>
Warning	<input type="checkbox"/>
Error	<input type="checkbox"/>

SERVER PROXY	
Host	
Port	3128
User	
Password	

Support

By selecting the option, the system prepares an email for application support with the log of the activities carried out attached (only for iOS devices).

This function can be requested by the application support to analyze anomalies detected in the use of the App.