CYGNATURE
authenticate • sign • protect

USER GUIDE
2. SETTING UP DOCUMENT FOR SIGNING

Cygnature User Guide

2

Setting up document for Signing

Cygnature Dashboard

Once you login, you will be able to access the Cygnature Dashboard

Cygnature Dashboard

1. When you login to Cygnature, you will be first redirected to Cygnature Dashboard.

2. The Dashboard has shortcuts to several options which makes easy to navigate and control
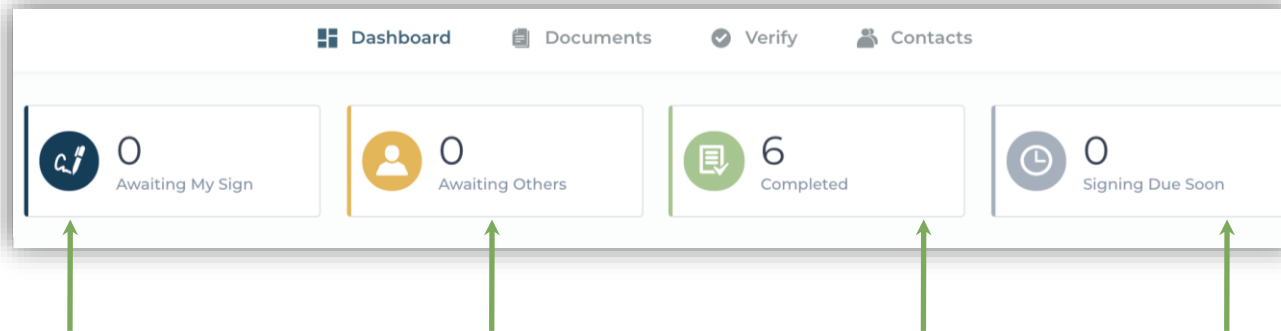
- Awaiting My Sign : With this shortcut you can view the documents that are sent by other users and are awaiting your signature.

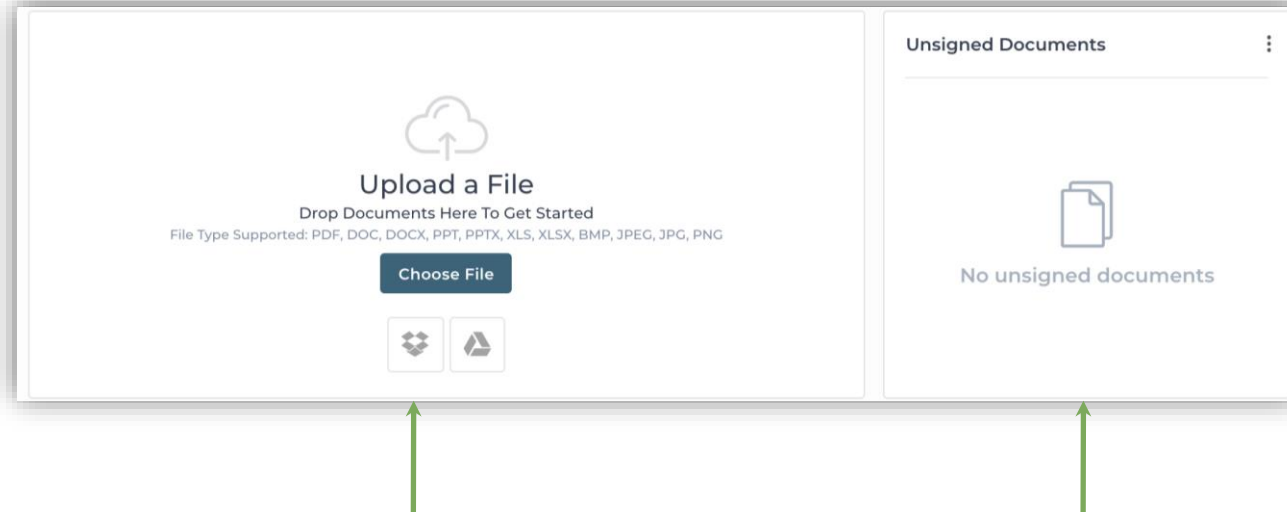- Awaiting Others : With this shortcut you can view the that are sent by you to other users and are awaiting for their signature.

- Completed : With this shortcut you can view the completed signed documents.

- Signing due soon : With this shortcut you can view the documents that are due for signing and can expire in a stipulated time.

Cygnature Dashboard

- From here you can upload documents using the button "Upload document" from Local Drive, Google Drive or Dropbox. The file types supported are PDF, DOC, DOCX, PPT, PPTX, XLS, XLSX, BMP, JPEG, JPG, PNG

- Next to the Upload document box, is the shortcut "Unsigned documents" you can view the documents that are left unsigned.

Cygnature Dashboard

Recent Drafts
Draft 0 of 0

No recent draft

Signers Calendar ⓘ ⋮

‹ **MAY 2020** ›

SU	MO	TU	WE	TH	FR	SA
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Subscription Details
Starter Edition

📅 Subscription Type
Monthly

💲 Subscription Price
$10.00

📅 Days Remaining
22

📅 End Date
05/27/2020

📄 Documents size
15 MB

📄 Documents Left
5

Details   Upgrade

Benefits | Privacy Policy | Cygnature Utility

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• Recent Drafts : In this shortcut you can view all the documents that are saved as drafts during creation

• Signers Calendar : This Calendar displays scheduled Due signatures & Live signatures details for quick response and action.

• Subscription Details : A quick view of your Subscription details like Subscription Type, Days Remaining, Document size, Subscription Price, End date and Documents Left.

Setting up document for Signing Workflow

Dashboard   Documents   Verify   Contacts

1 Initiate Signing   ✓ Signature Needed   ✓ Placeholders   4 Review & Send

PDF

Document Name *
SOW sample

Version *
1.0

Category/Tag

Document Description

Supporting documents
+ Attach supporting documents

📝 Signers * ⓘ   ➕ Add

2 Signer(s) Selected   ☐ Optional signing mode

Select Signers ⌄

Add Observers
An observer is a passive witness who is or might be interested in observing the entire signing process

👤 View Signers and Set order | Parallel Order | Sequential Order |

Signers	Is Approver?	Actions
SV Shruti Vishnupurikar shrutivishnupurikar@yahoo.com	☐	🗑 Remove
YL Yogesh Lokhande yogesh.lokhande@cygnetinfotech.com	☐	🗑 Remove

Setting up document for Signing Workflow

- Select the Category for the Document whether it is Sales document, HR Document , Purchase Order, Agreement etc. You can create your own category by typing it.
- Now give the document a description , For eg. This is Agreement for New Joint Venture between ABC Info and XYZ Info
- Attach a supporting document if required, this is not mandatory . Applicable in cases like Cover Letter or Receipts etc.

Setting up document for Signing Workflow

Signers *

2 Signer(s) Selected

☐ Optional signing mode

Select Signers ⌄

Add Observers

An observer is a passive witness who is or might be interested in observing the entire signing process

- If a Signer is not present in your contact list, you can Add the signer using the button " +Add" with their Email Id and other details.

- From Here you can select Signer, whom you intend to send the document for Signing using the dropdown

- You can add an Observer to the document signing process if you want someone to Observe the signing process and keep a track off it. It works like cc in the Mail

Setting up document for Signing Workflow

- You can also send document to multiple signers in Group.
- You can create a group using above button

- Give the group a Name For eg. Sales Team
- Select the Participants from the contact list
- Click the button Create
- Once Group is created it will appear in dropdown and you can select it for signing

Setting up document for Signing Workflow

👤 **View Signers and Set order** | Parallel Order | Sequential Order |

Signers		Is Approver?	Actions
SV	Shruti Vishnupurikar shrutivishnupurikar@yahoo.com	☐	🗑 Remove
YL	Yogesh Lokhande yogesh.lokhande@cygnetinfotech.com	☐	🗑 Remove

- You Can Set the Signing order for Signing Process as per your requirement whether it is a Parallel Order like when signers can sign document anytime or a Sequential Order where User 1 signs the document first and then only User 2 can sign the document post User 1 signs it

- Also you can select any one signer as an Approver to the document
- Note that all the signers cannot be approvers

Types of Signatures to select for Signing documents

Select Signature Types

E-Signature ✓	*Premium* **Certified Sign**	*Premium* **Hardware Key**
Premium **Finger Print**	*Premium* **Iris**	*Premium* **Face Recognition**

National ID

Premium **Aadhaar ESign**	*Coming Soon* **Emirates ID**

Premium **LIVE Cygnature**	**Location Binding**	**Enable Co-Signing** (Sign In-Person)
Live Cygnature enables users to sign over a live session with screen sharing, video & audio recording as if signing in person without having to be present physically.	Enabling this feature will enforce all signers to mandatorily share location details before the signing can be completed.	Co-signing enables signers to sign in person from one account with an OTP Authentication to verify the identity of signers.

Types of Signatures to select for Signing documents

Select Signature Types

E-Signature ✓

Premium — **Certified Sign**

Premium — **Hardware Key**

- You can send document for Signing with Simple Electronic signatures like draw a signature, upload a image of signature or simply type signers name using a font.

- You can send document for signing with software tokens procured from trusted digital signature certificate providers.

- You can send document for signing using hardware based digital signature dongles provided by certificate authorities.

Types of Signatures to select for Signing documents
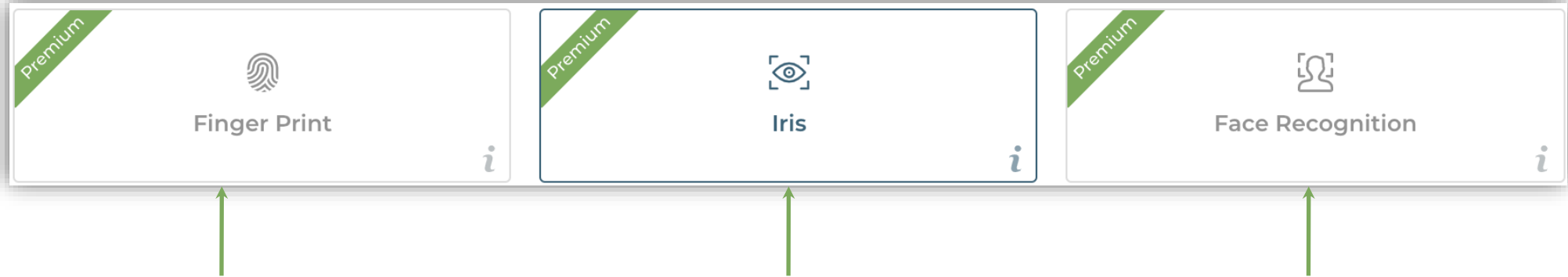
Premium — Finger Print	Premium — Iris	Premium — Face Recognition

- You can send document for signing to other signers using Fingerprint as identity.
- The Fingerprint Signing requires Fingerprint device and Cygnature Utility that can be downloaded from Cygnature Application.
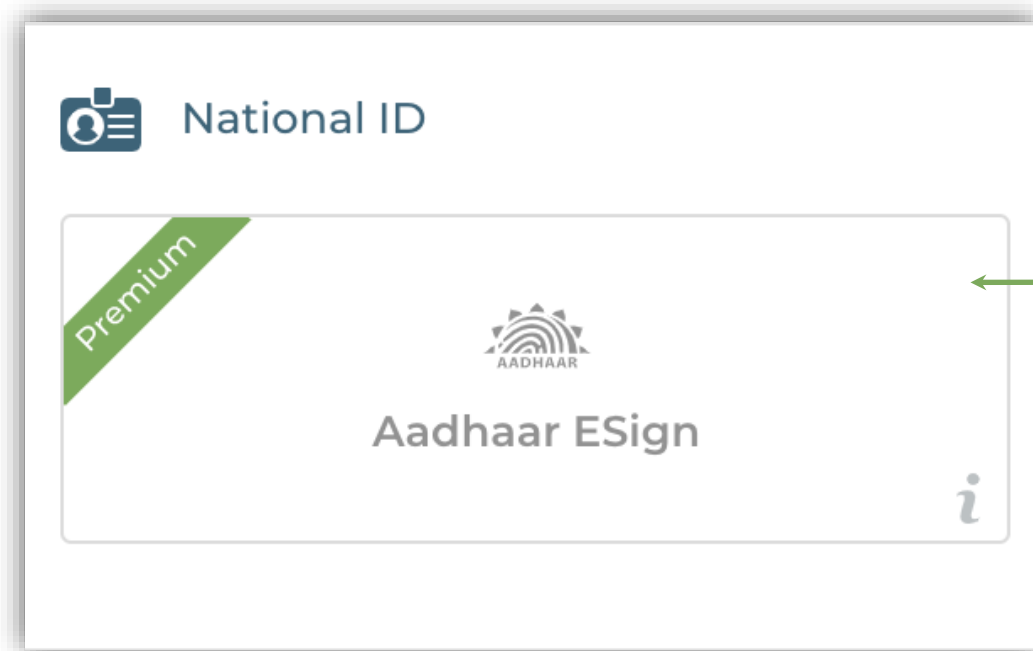
- You can send document for signing to other signers using IRIS as identity.
- The IRIS Signing requires IRIS device and Cygnature Utility that can be downloaded from Cygnature Application.

- You can send document for signing to other signers using Face as identity.
- The Face Signing requires Front Camera on the signing system like Laptop, Desktop.

Types of Signatures to select for Signing documents

National ID

Premium

AADHAAR

Aadhaar ESign

i

- Aadhaar Number is a unique number issued by UIDAI to the residents of India.
- An AADHAAR e-sign is applicable only in India.
- You can send document for signing to other users using Aadhaar number which is issued by UIDAI.
- For Aadhaar signing, Signers need to authenticate themselves using Aadhaar Number and OTP that is generated on Mobile Number that Is linked to Aadhaar Number

Types of Signatures to select for Signing documents

LIVE Cygnature
Premium

Live Cygnature enables users to sign over a live session with screen sharing, video & audio recording as if signing in person without having to be present physically.

Location Binding

Enabling this feature will enforce all signers to mandatorily share location details before the signing can be completed.

Enable Co-Signing (Sign In-Person)

Co-signing enables signers to sign in person from one account with an OTP Authentication to verify the identity of signers.

- LIVE Cygnature is a signing option that you can use when you cannot physically see other signers when signing the document
- During a LIVE Cygnature session Both signers will be able to see each others screen using LIVE Screen Sharing
- Both signers will be able to talk to each other using Microphone
- Signers will also be able to See each other using Webcam
- And you will have the whole signing process recording available with you

- If you enable Location binding when sending a document for signing, the signer will have to sign the document in specified location and its radius which you can determine.
- If the signer goes beyond that location and tries to sign the document he/she won't be able to.

- If you enable Co-signing, then you and the other signer can sign from your account.
- Whereas the other signer must authenticate using OTP on Mobile Number.
- The advantage of this is both signers can sign from one system itself.
- You need to enable this option during setting up document for signing.

Setting up Placeholders and other other fields for Signing

Previous

Signers/ Approvers

Yogesh Lokhande ▼

Signature Type

E-Signature ▼

Placeholder actions

| Draw/Set | Move |
| Clear all | Clear selected |

Page Controls

☐ Apply placeholder to all pages

Additonal Fields

[Aa] [👤] [📅] [📍] [T] [🏢]

💬 Add Comment

- Signers Approvers list is visible and you can see who all are the signers for the document
- You can view the signatures types you have selected when setting up the document for signing for each user

- Draw/Set : You can set or draw Placeholders for Signers anywhere on the document
- Move : You can Move the Placeholders in the document from one place to another
- Clear All : This option will clear all the placeholders on the document after your approval
- Clear Selected : This option will let you clear specific Placeholders on the document

- By Enabling Placeholder to all pages, for specific signer the placeholder will be generated on all pages of document on the specific location

- With these options you can request your signer to Add additional fields like Name Initials, Job Title, Company Name, Date, Location etc.

- With this option you can add comment anywhere in the document to address a specific point.

Setting up Placeholders and other other fields for Signing
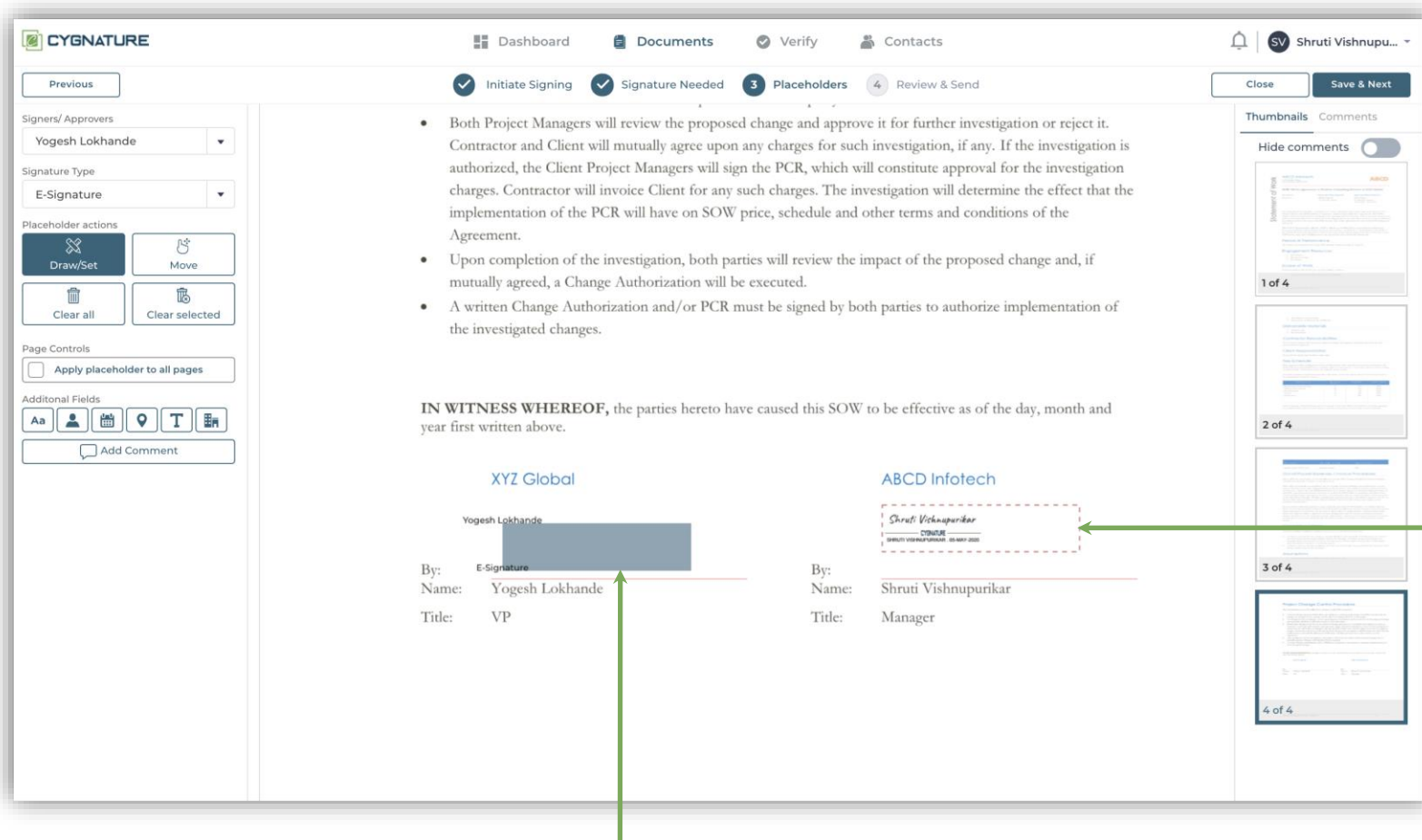
- You can set the placeholder easily through just dragging the box when the sign has to be done for respective intended signer.
- This Placeholder is movable at any place on the document.
- This placeholder is for the document uploader as he/she is also one of the signer to the document.

- This Placeholder is for the signer 2 whom you intent to send the document for Signing.
- You can select the signer name from dropdown of "Signer/Approver" which is on top left.
- After that easily you can drag a box as the Placeholder for that respective signer

Reviewing the document and sending for Signing

- Signing due date : You can set a due date for signing the document , so that after the due date the document expires and your signer won't be able to sign it post that date.
- With this option you can enable Automated reminder to be sent to the signer before document expiry. Reminder will be sent before number of days that you decide.

- You can review all the details of the Signing process before actually sending it for like Version, Signatures you requested, Observers if any, Number of Placeholders set ,Signers and Order of Signing.

Reviewing the document and sending for Signing

Append Verification QR Code

Remove Signed document from
Cygnature *

- When you enable the Append Verification QR code option your document post signing will generate a QR code on the last page of the document
- This QR code can be used when document is available in physical Copy and you want to verify the details of document like Certificate of Completion, Signers details and all other Vital Information of the document
- This can simply be done by scanning the QR code of the document from with an option available from Cygnature Website

- If you enable this option then after the Signing process is successfully completed , the document will be removed from Cygnature Platform permanently and you won't be able to view or download the document again

Reviewing the document and sending for Signing

- After Reviewing all Signing options and document options you can click Finish and send the document to intended signer for signing.

CYGNATURE

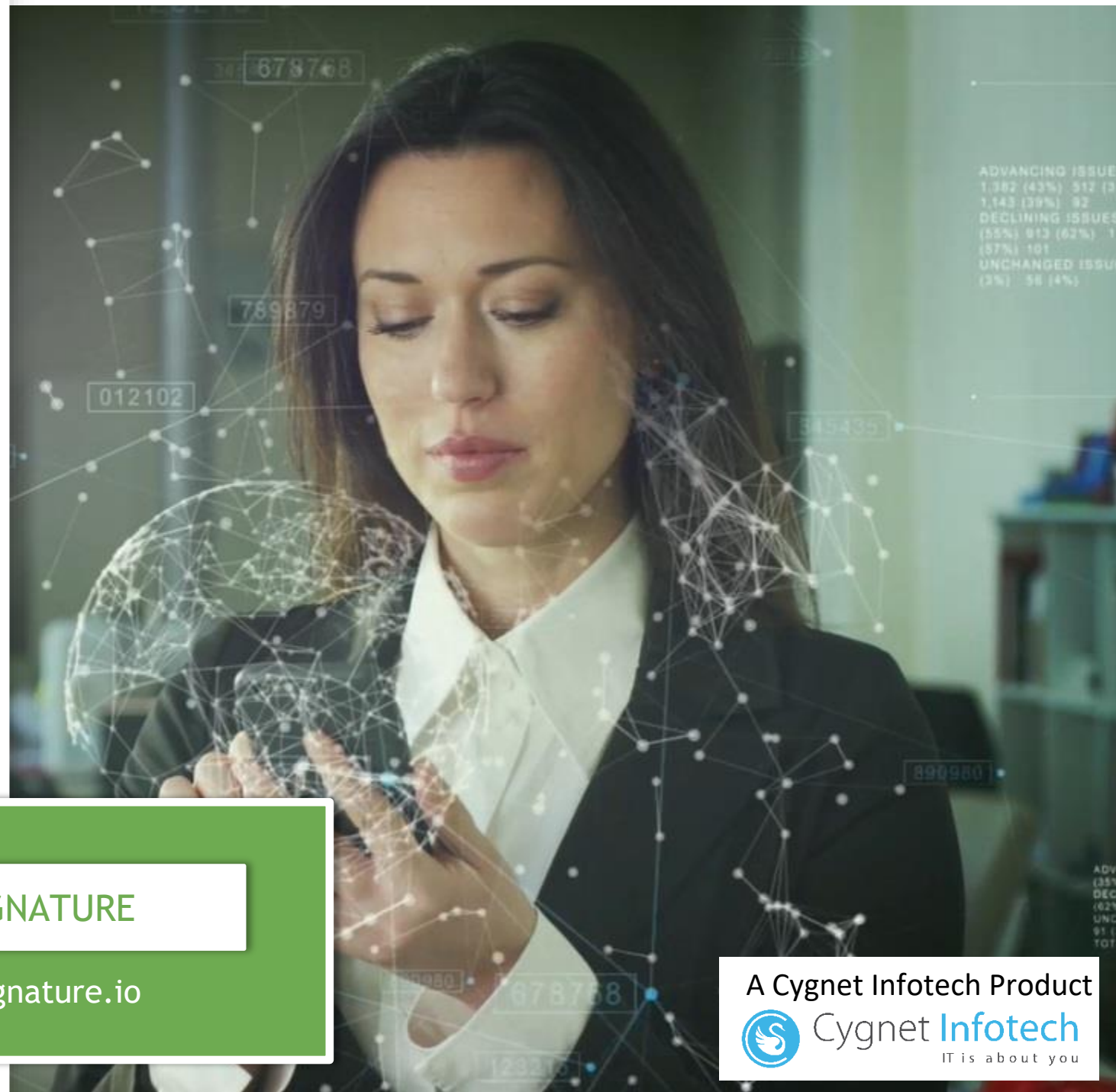authenticate • *sign* • protect

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