SIGNiX

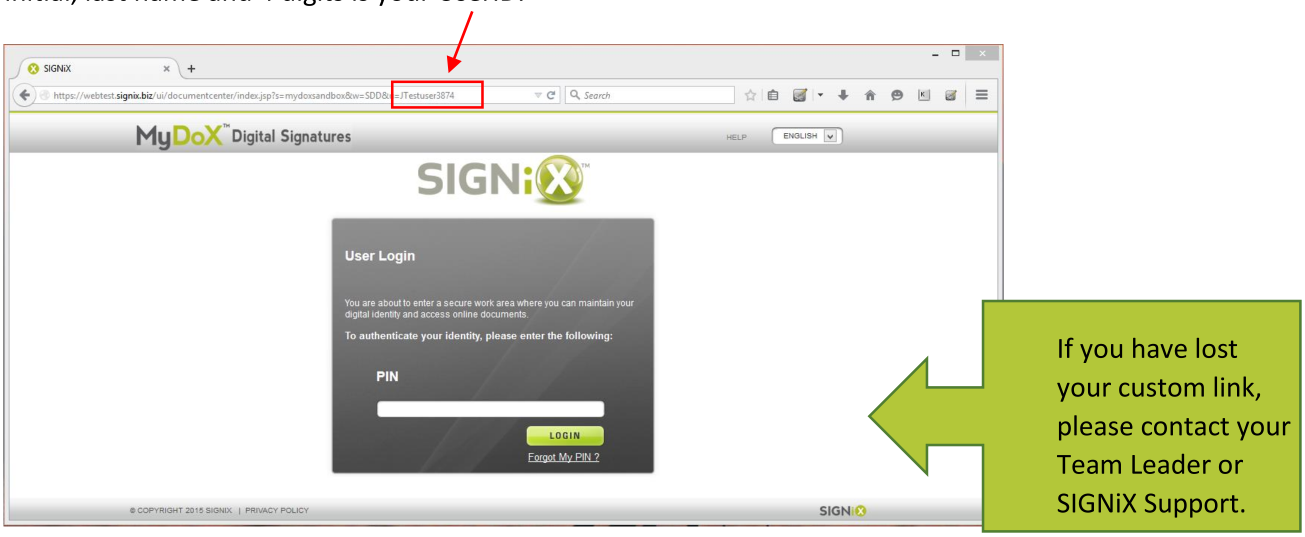
Complete Testing Guide

Table of Contents

Getting Started

Signing In to MyDoX

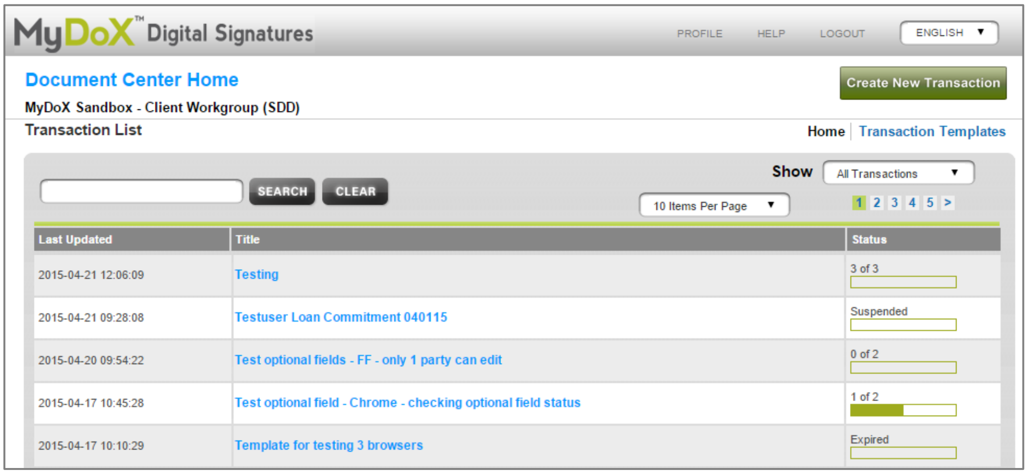
Submitting a document starts with logging in to the site using the custom link you received when you registered. You know it's your link by looking at the end of the URL in the webpage – the last section beginning with your first initial, last name and 4 digits is your UserID.



Enter the PIN/Password you created when you completed your workgroup registration.

Document Center

The **Document Center** is your Homepage, where you will land when you enter MyDoX. From here you can start a new transaction, find an existing transaction, and access your templates.



- **Profile** – This is where you can change your PIN/password (***Under Construction –Unavailable***)
- **Help**– Takes you to the SIGNiX Support Center
- **Logout** – Logs you out of MyDoX
- **Create New Transaction** – Allows you to create a new transaction or a new template
- **Transaction Templates** – Displays saved templates
- **Show** – Displays transactions grouped by: all transactions (except unstarted), completed, in process, expired, paused, cancelled, and unstarted
- **Search** – Searches title field for specified value
- **Clear** – Clears the search value
- **10 items per page** – Use this drop-down box to change the number of transactions that display on the Document Center Home page
- 

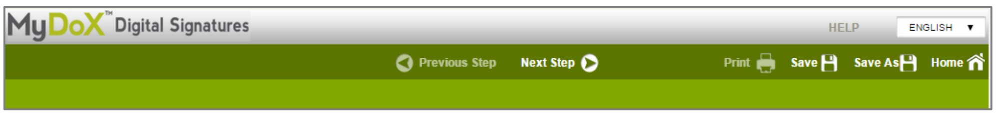
 - Use these buttons to navigate through pages of transactions
- **Title** Column – Click on a transaction name to view or edit

Begin Transaction

Begin by clicking on **Create New Transaction** in the Document Center Home.

Transaction Controls

The controls at the top of the page are available throughout the transaction.

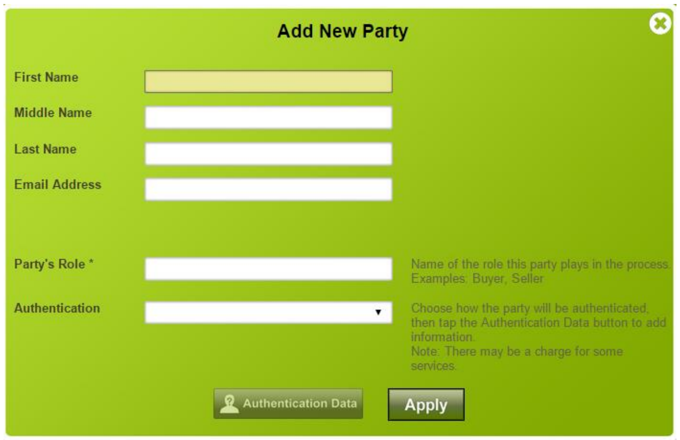


- **Help** – Takes you to the SIGNiX Support Center where you can search for answers to frequently asked questions and open a support case
- **Language Selection** – Allows you to choose between English (default), French, or Spanish
- **Previous/Next Step** – Click or tap either to move forward and backward in tab order to the previous or next step
- **Print** – Print the documents in view
- **Save** – Saves the current transaction. Transactions that have not been started can be viewed in the Document Center Home by changing the Show drop-down to Unstarted
- **Save As** – Saves the current transaction as a transaction in process or a template for re-use
- **Home** – Leaves the transaction/document preparation screens to go back to the Document Center or back to the screen that brought you here. If you have not saved before quitting, you will be prompted to do so

Add Parties Tab

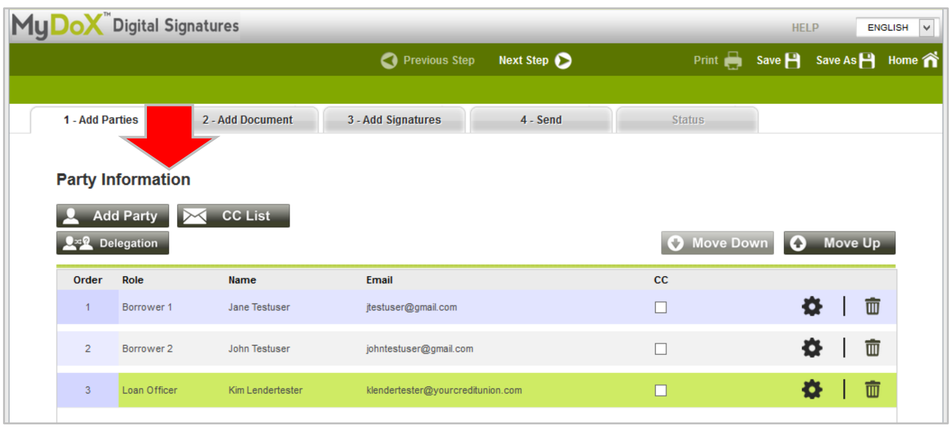
Adding Parties (Signers)

Clicking on **Create New Transaction** immediately starts you in the **Add New Party** screen. Input the First and Last Name, Email Address, Party Role and Authentication type for the first signer. For this example we will use **Email Only** authentication. Click **Apply** when complete.



Please see the "Authentication Types" documentation or contact your Team Leader/SIGNiX Support for questions on authentication types and fees allowable for your Company.

To add another signer, click on the **Add Party** button under **Party Information** and follow the steps above. Below we see all of our signers added:

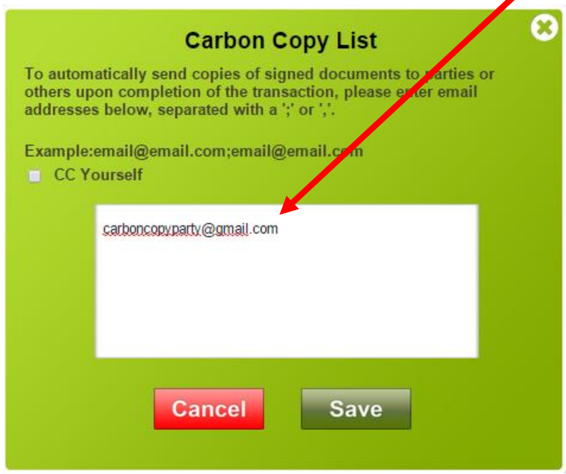


CC List

By default, all parties to the transaction will receive an email, at the conclusion of a transaction, with a link to their signed documents. By using the **CC List** button you can create a list of users that will receive an email once the transaction has been fully completed. The email received, by CCd individuals, will have attachments of all of the Documents in the Transaction.

PLEASE USE CAUTION when using this feature to avoid sending personal information to those who may not need it.

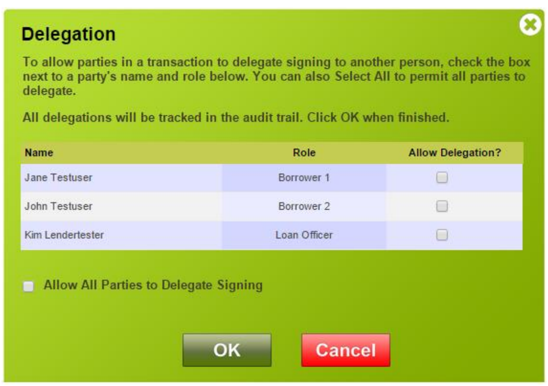
- Check the **CC Yourself** box to add your email address to the CC/distribution list for the completed transaction when you are not a signing party on the transaction
- Enter email addresses separated by a semicolon or comma to CC them
- Click **Save** to save your changes and continue or **Cancel** to exit without changes



Delegation

If your organization has opted to use this function, this button allows you to assign delegation (signature forwarding) rights to specific parties.

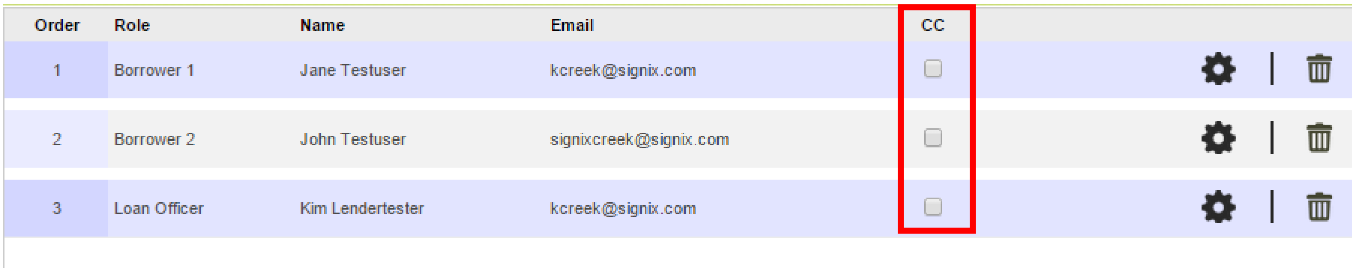
- Check the box under **Allow Delegation** to allow a signer to delegate their signing task to someone else
- Check the **Allow All Parties to Delegate Signing** box to allow delegation for all parties to the transaction
- Click **OK** to save changes and continue or **Cancel** to exit without changes



The original party must access the transaction in order to delegate to another party

CC Checkbox

If you would like parties to the transaction to receive email attachments of the completed transaction, check the box next to their name under **CC**. *******PLEASE USE CAUTION****** *This feature sends an attachment of the documents, not a link, and should not be used when personal information is contained in the documents.*



Editing Party Information

Clicking on the gear will allow you to edit party information. Please note that you cannot edit the party information after that party has entered the transaction and taken any action.

Deleting Parties

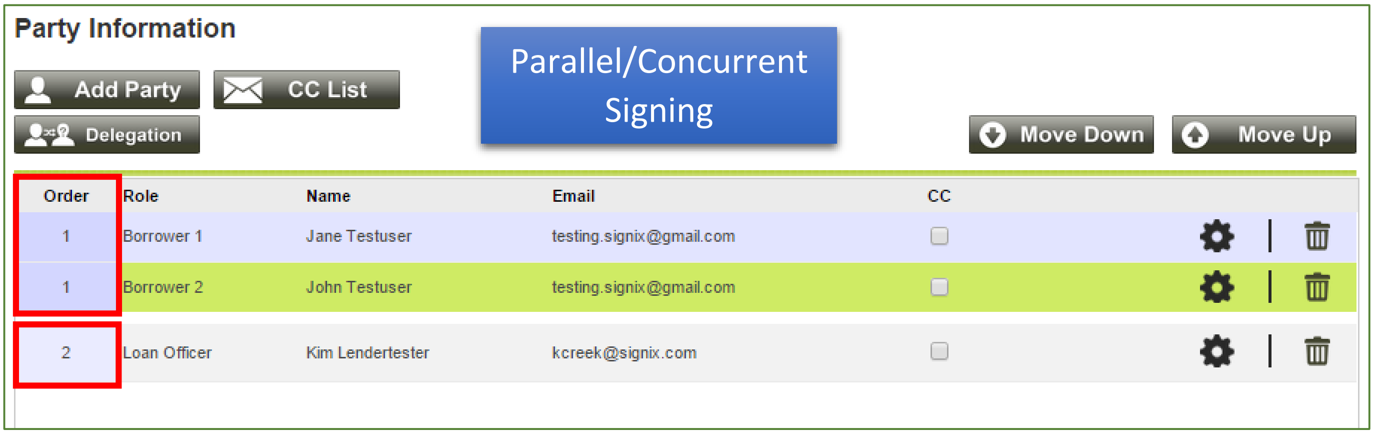
To remove a party and all tasks associated, click on the trash can next to their name. If party has already taken any action, they cannot be deleted. A new transaction would need to be started.

Move Up/Move Down

The **Move Up** and **Move Down** buttons can be used to change the order of the signers in the workflow. MyDoX defaults to **sequential signing**, meaning each signer (starting with #1) must complete all of their signings before the next person is notified and may start.

In the above example Jane will receive an email notification first and must complete signing before John will be notified and allowed to sign. The Loan Officer will only be allowed to sign after John and Jane are both finished signing.

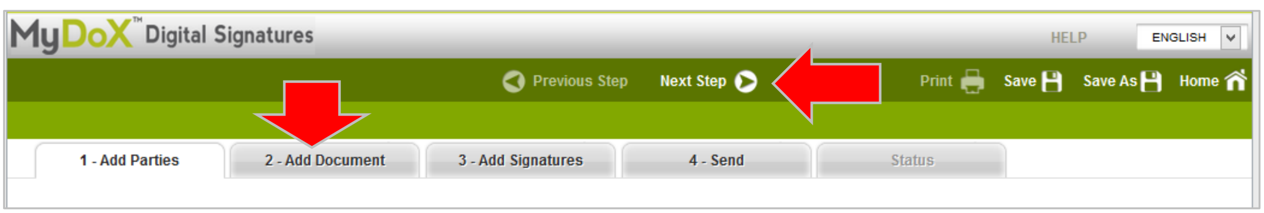
Use the **Move Up** button to create a **parallel or concurrent** signing. This means that everyone with the same order number will receive a notification at the same time and may sign without waiting on the other to finish.



In the above example, John and Jane will receive an email notification at the same time and either may sign first. If both parties try to sign at the same time, one of them will receive a message that the transaction is currently being signed and to come back in a few minutes. The Loan Officer will only be notified and allowed to sign after Jane and John complete their signing.

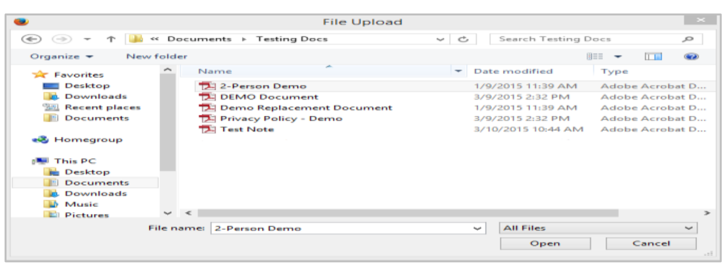
Add Documents Tab

When all signers (Parties) have been added, click on the **2 – Add Document** tab or click on **Next Step**.



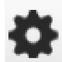
You will immediately be presented with a File Upload box.

- Select the file you wish to use and click **Open**
- Click **Add Document** to continue adding document



You can use the **Move Up** or **Move Down** buttons to adjust the order of the documents

 Allows you to view the uploaded document

 To change the document name

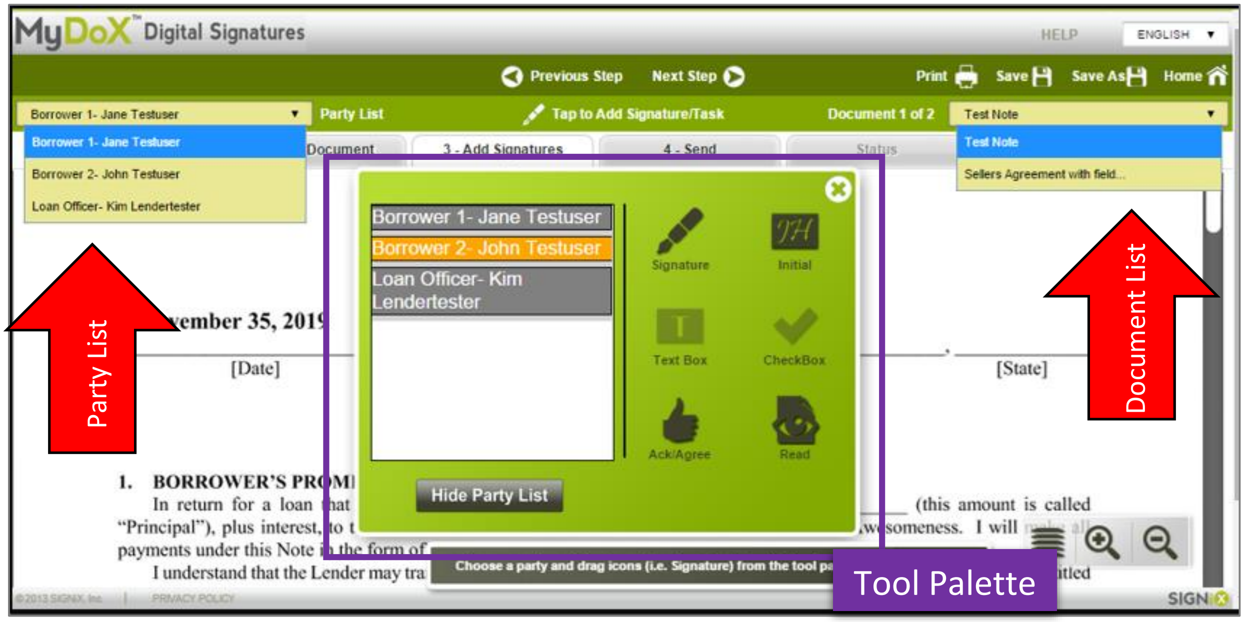
 Delete the uploaded document

Click on 3 - Add Signatures or Next Step to proceed to the next step.

Add Signatures Tab

Navigating the Add Signatures Tab

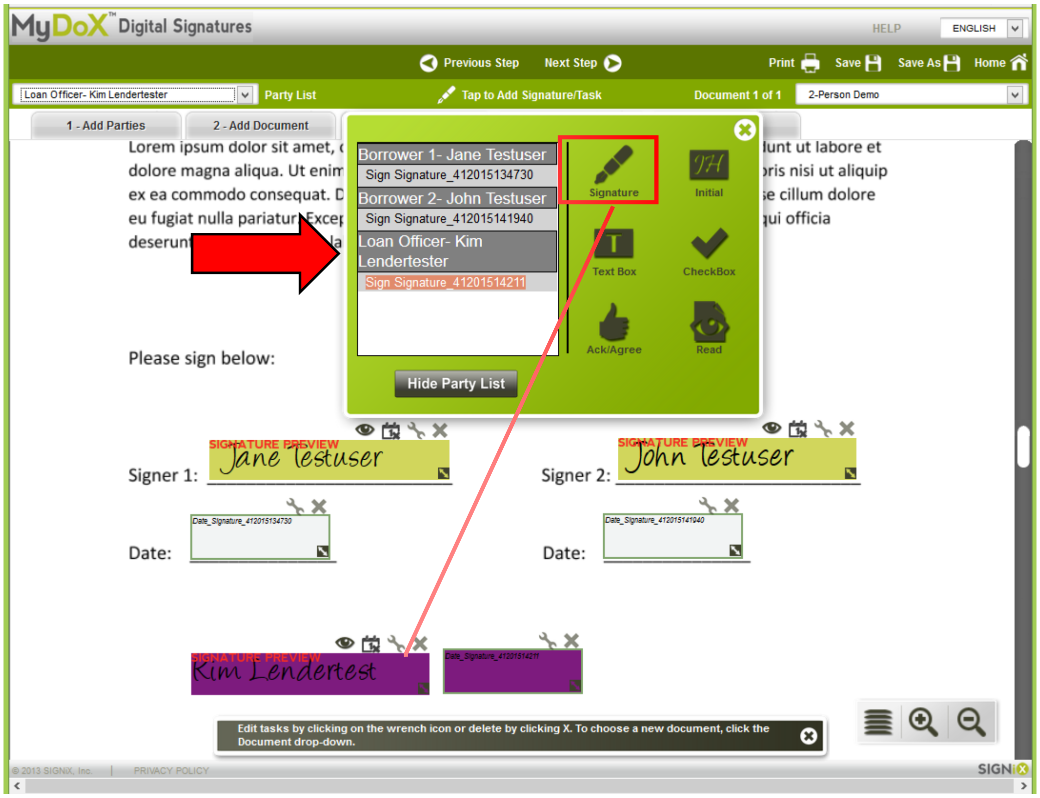
The **Add Signatures** tab is where tasks are associated with parties and added to documents. Tasks include “Signature”, “Initial”, “Acknowledge/Agree”, and “Read”. Parties will only see documents on which they have a task to complete.



- **Party List** – A drop down box that allows you to view and choose the party you wish to assign tasks to. Tasks are assigned using the Tool Palette
- **Document List** – A drop down box that allows you to navigate between uploaded documents
- **Tool Palette** – A floating palette that contains the party list and list of tasks that can be assigned. It can be moved around freely and closed by hitting the X in the upper right hand corner. Click Hide Party List to only display the task list if you wish to use the drop down Party List
- **Tap to Add Signature/Task** – Restores the Tool Palette when closed by clicking on the X in the upper right corner
-  - Displays the Tool Palette
-  - Zooms in on the document being displayed
-  - Zooms out on the document being displayed

Adding Signatures & Initials to Documents

- Use the document list to select the document to work with
- Locate the signature and/or initial lines on your uploaded document
- Select the appropriate signer from the tool palette by clicking on the name
- Click the Signature or Initial icon, hold, and drag to the signature line



- Resize the signature, initial, and/or date boxes by clicking on the arrow in the lower right corner and move the signature and date boxes by dragging and dropping
- Repeat 2 – 4 being careful to select the appropriate signer before adding a signature line or initial box

Task Controls

Each task will display controls above the field. These controls perform various actions based on the task they are associated with.

- Signature Preview Toggle. All signature and initial fields will display the simulated signature/initials of the party to which they are assigned to give the submitter a sense of how signatures will fit in the signature field itself

- Remove/Add Date Field. The date field is by default automatically added to all signature fields when dragged onto a document. To remove the date field (or re-add it if you've deleted it), simply click the calendar icon

- Edit Properties. This icon will open the **Edit Properties** screen for the field it is attached to

- Delete. Deletes the field it is attached to

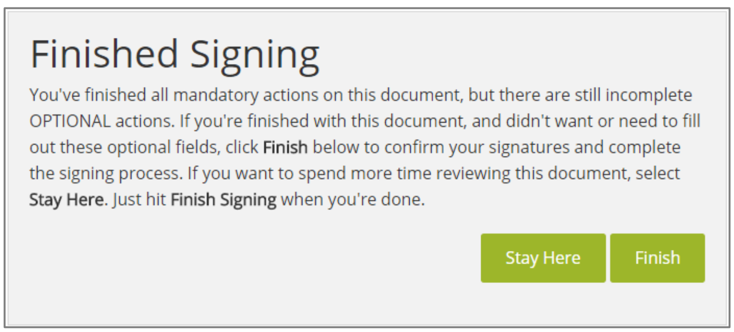
Edit Properties: Signature

Label – Changes the label shown on the signature field

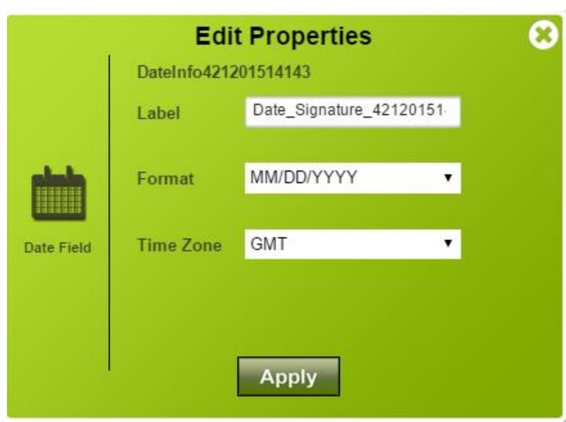
Signature Block – Optional, but allows the addition of text fields for printed name, title, and company name for the party associated with the signature field

Mandatory – The signer must sign this signature in order to finish the transaction

Optional – A signature will not be required to finish the transaction. The signer will receive the message below:



Edit Properties: Date

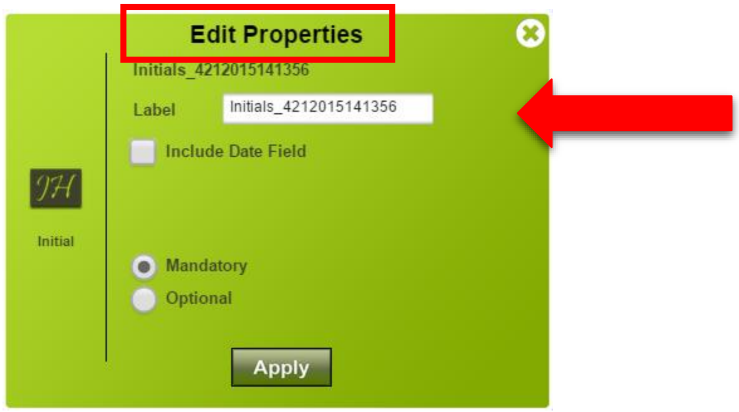


Label – Changes the label shown on the date field

Format – Choose the format of the date. The default format is MM/DD/YYYY. Other choices are Month DD, Year, DD Month Year, DD/MON/YYYY, DD/MM/YY, and DD/MM/YYYY

Time Zone – Allows the time zone to be changed for the signature date/time stamp. The default is GMT but other choices are EST, CST, MST, PST, AKST, HAST, HST

Edit Properties: Initials



Label – Changes the label shown on the initial field

Include Date Field – Adds a date field for the initialing task

Mandatory – The signer must click to initial in order to finish the transaction.

Optional – An initial will not be required to finish the transaction. The signer will receive a message as seen under Edit Properties: Signature.

Adding a Text Box

To add a text box, a signature must have been added to the document and be selected in the Tool Palette.

Click and drag the Text Box icon to the desired location on the form. After the field is placed an Edit Properties box is displayed.

Label – Changes the label shown on the text field

Mandatory – Signers will not see a Finish button until a Mandatory field has been completed. Mandatory fields are represented by a yellow bar during signing

Optional – Signers will be allowed to Finish a transaction without any value in this field. They will, however, see a message letting them know there is an optional field they can complete

Multiline – Changes the text field to allow multiple lines of text which will automatically wrap to fit the size of the text box set by the submitter. A scroll bar will show on the right side

Read Only – False indicates the field is NOT Read Only and a signer can input text in the field. True indicates the field IS Read Only and a signer cannot edit (should be used in conjunction with a Value)

Value – Input a default value for the text field if desired

Editing Rights – Choose who may edit the text field. Default is ALL allowing all parties to edit the field

To add a check box, a signature must have been added to the document first and be selected in the Tool Palette.

Click and drag the **CheckBox** icon to the desired location on the form.

After the field is placed an **Edit Properties** box is displayed.

Label – Changes the label shown on the text field

Mandatory – Signers will not see a Finish button until a Mandatory field has been completed. Mandatory fields are represented by a yellow bar during signing

Optional – Signers will be allowed to Finish a transaction without any value in this field. They will, however, see a message letting them know there is an optional field they can complete

Read Only – False indicates the field is NOT read only and a signer can check or uncheck the box. True indicates the field IS Read Only and a signer cannot edit (should be used in conjunction with a Value)

Value – Sets the default value for the check box. 0 = unchecked; 1 = checked

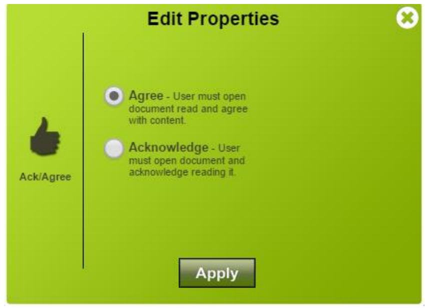
Editing Rights – Choose who may edit the text field. Default is ALL, allowing all parties to edit the field

Adding an Acknowledge/Agree Button

The **Acknowledge/Agree** button is an alternative to a signature or initial task. If you want the party to perform the Acknowledge or Agree task you must first remove all of this party's signature or initial tasks by clicking on the **X** icon given on the task field. This is on a per document basis. Note that no other tasks can be added to the document if this task is added.

Begin by selecting a party, clicking on the **Ack/Agree** button, and dragging the icon to your document.

After the field is placed, the **Edit Properties** dialog will pop-up where you can choose whether the party will be presented.

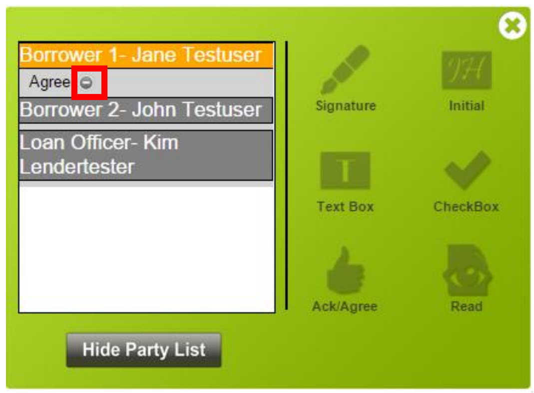


Select either **Agree** or **Acknowledge**.

Agree – The party must open the document, read, and agree with its content

Acknowledge – The party must open the document and acknowledge reading it

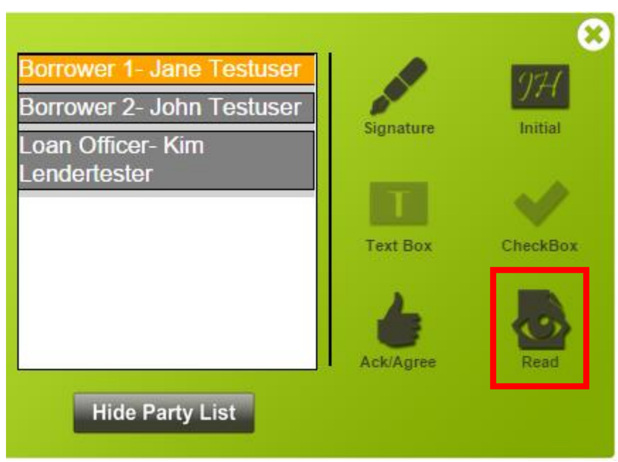
To remove an **Agree** or **Acknowledge** task, click on the symbol next to the task in the party list in the Tool Palette.



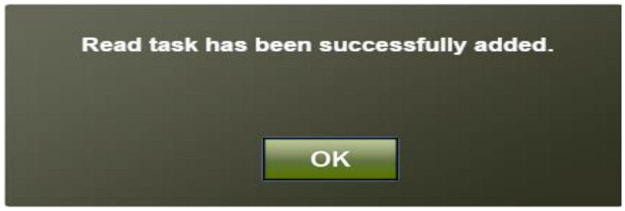
Adding a Read Task

This task will allow the selected party to read the document, even if the party does not have tasks assigned on that document. Note that this does not require the party to acknowledge reading or agree to its content. See Adding an Acknowledgment/Agree Button.

Begin by selecting a party, clicking on the **Read** button, and dragging the icon to your document.



A message will display when complete.



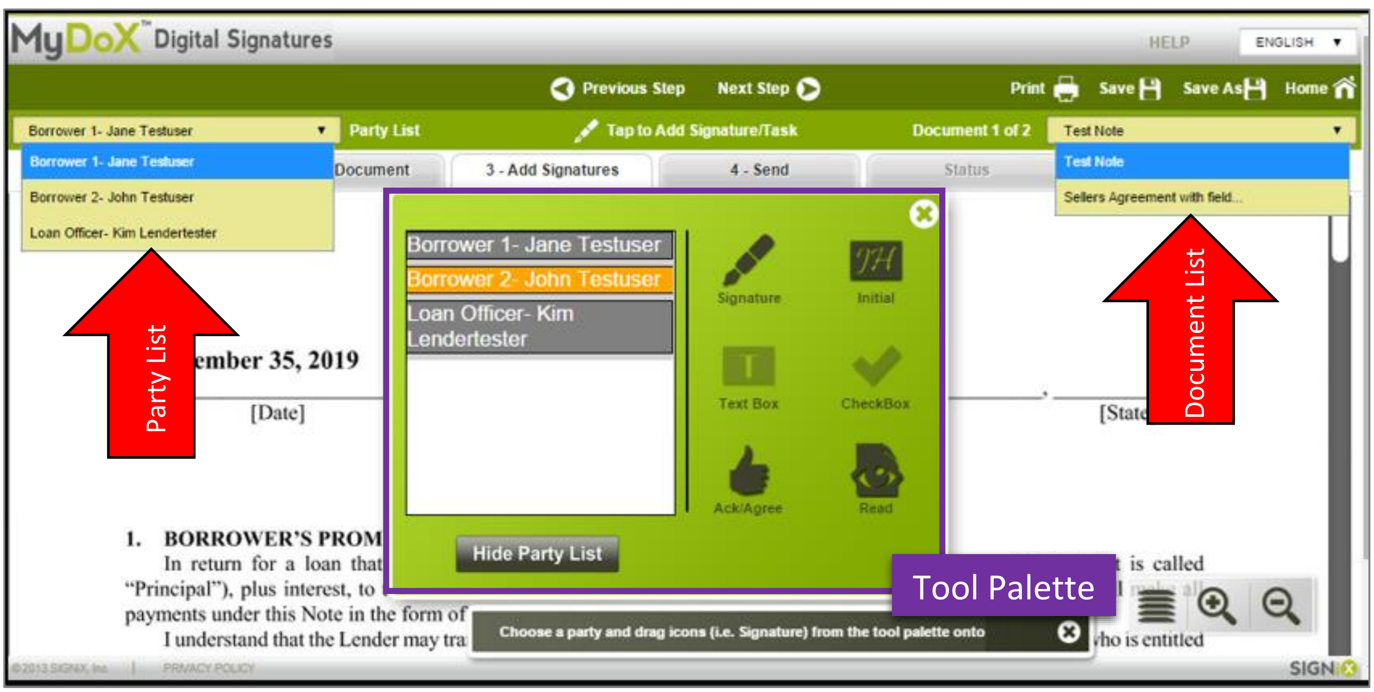
Click on 4 - Send or Next Step to proceed to the next step.

Add Signatures Tab - With Existing Tasks

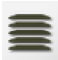
When adding a PDF document with existing fields, extra steps must be taken to associate tasks with the fields, however most functionality remains the same.

Navigating the Add Signatures Tab

The Add Signatures tab is where tasks are associated with parties and added to documents. Parties will only see documents on which they have a task to complete.

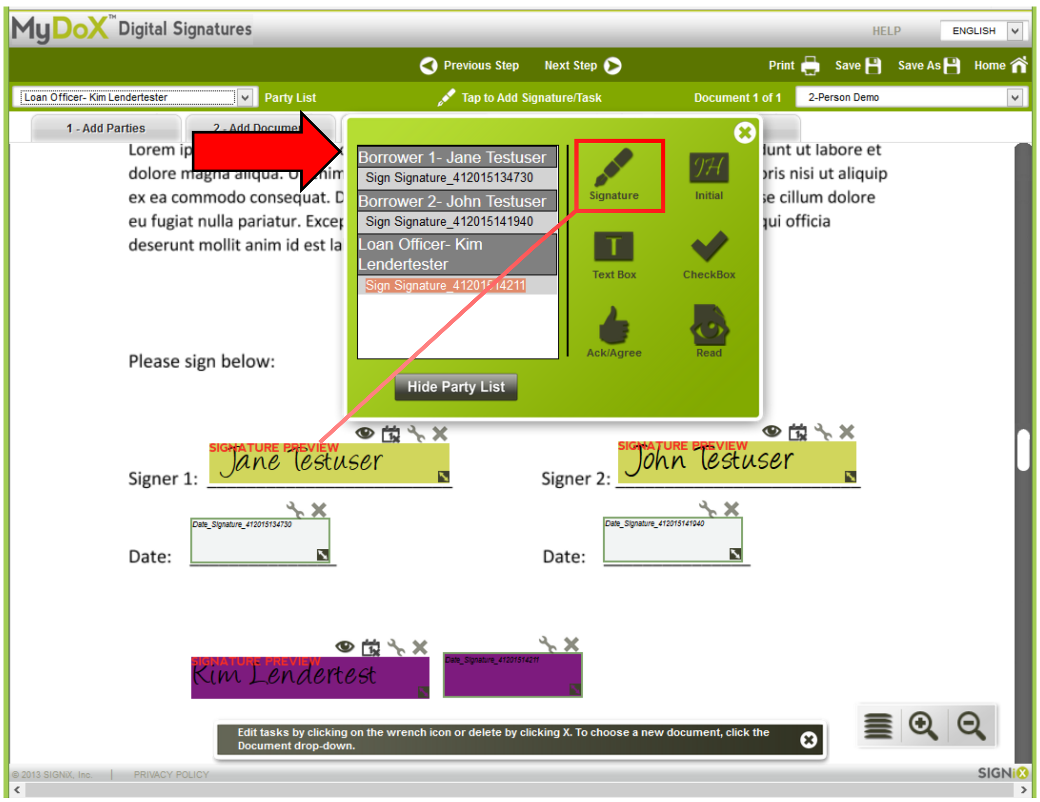


- **Party List** – A drop down box that allows you to view and choose the party you wish to assign tasks to. Tasks are assigned using the Tool Palette
- **Document List** – A drop down box that allows you to navigate between uploaded document
- **Tool Palette** – A floating palette that contains the party list and list of tasks that can be assigned. It can be moved around freely and closed by hitting the **X** in the upper right hand corner. Click **Hide Party List** to only display the task list if you wish to use the drop down **Party List**

- **Tap to Add Signature/Task** – Restores the Tool Palette when closed by clicking on the **X** in the upper right corner
-  - Displays the Tool Palette
- - Zooms in on the document being displayed
- - Zooms out on the document being displayed

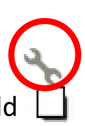
Adding Signatures & Initials to Documents

- Use the document list to select the document to work with
- Locate the signature and/or initial lines on your uploaded document
- Select the appropriate signer from the tool palette by clicking on the name
- Click the **Signature** or **Initial** icon, hold, and drag to the signature line

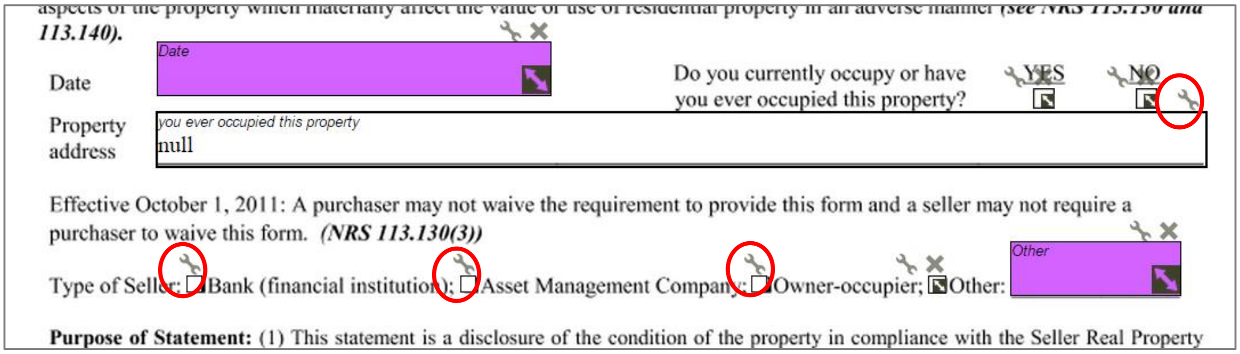


- Resize the signature, initial, and/or date boxes by clicking on the  arrow in the lower right corner and move the signature and date boxes by dragging and dropping
- Repeat 2 – 4 being careful to select the appropriate signer before adding a signature line or initial box

Assign Tasks to Existing Fields

- Click on the wrench icon next to the field 

- Edit the properties as needed (see the following sections for details on each type of task and their respective properties)
- Click **Editing Rights** (while still in Edit Properties) and assign editing rights to **All** or one party
- Repeat these steps for all exiting fields being sure to click **Apply** to exit **Editing Rights**



Each task will display controls above the field. These controls perform various actions based on the task they are associated with.

- Signature Preview Toggle. All signature and initial fields will display the simulated signature/initials of the party to which they are assigned to give the submitter a sense of how signatures will fit in the signature field itself

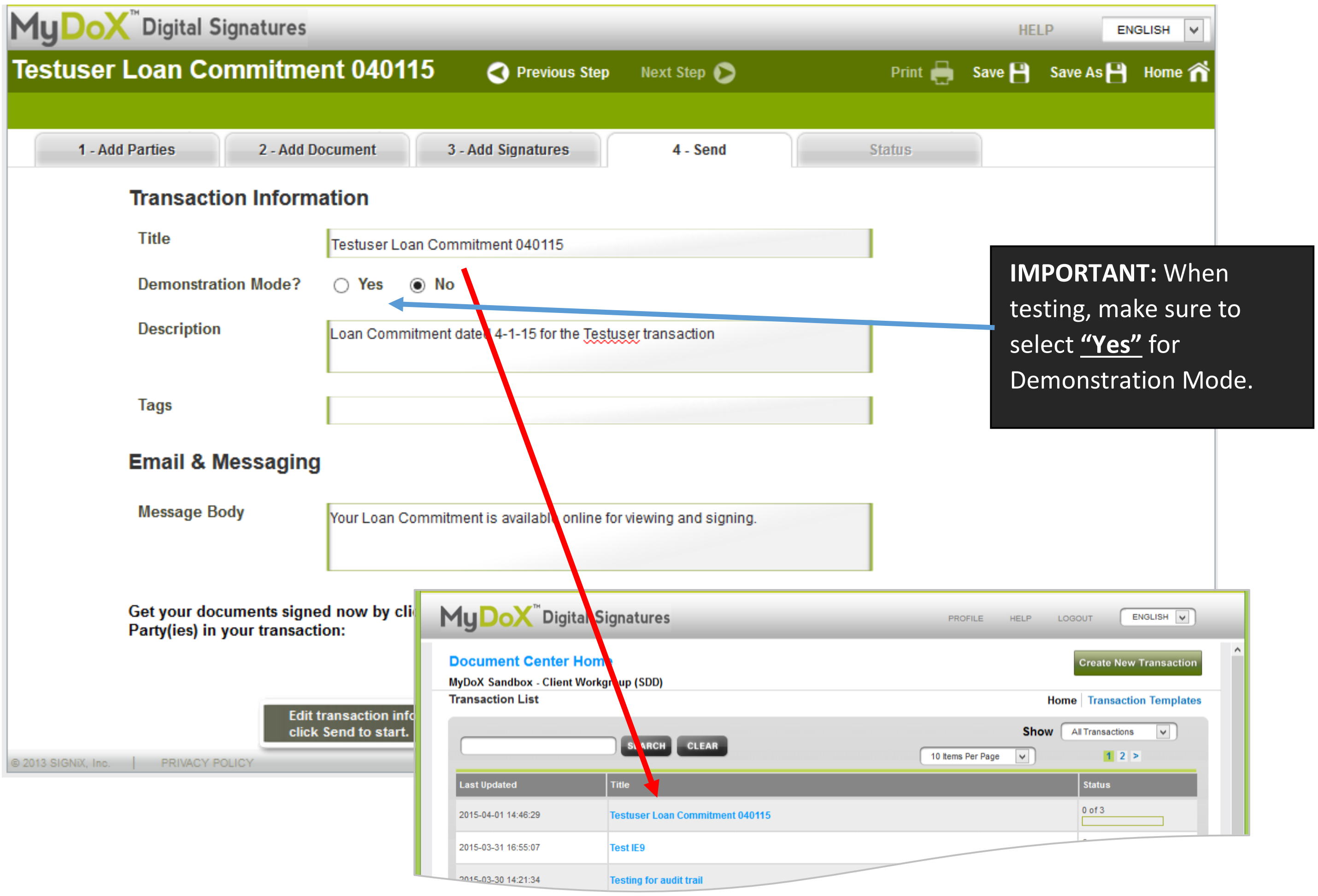
- Remove/Add Date Field. The date field is by default automatically added to all signature fields when dragged onto a document. To remove the date field (or re-add it if you've deleted it), simply click the calendar icon

- Edit Properties. This icon will open the Edit Properties screen for the field it is attached to

- Delete. Deletes the field it is attached to

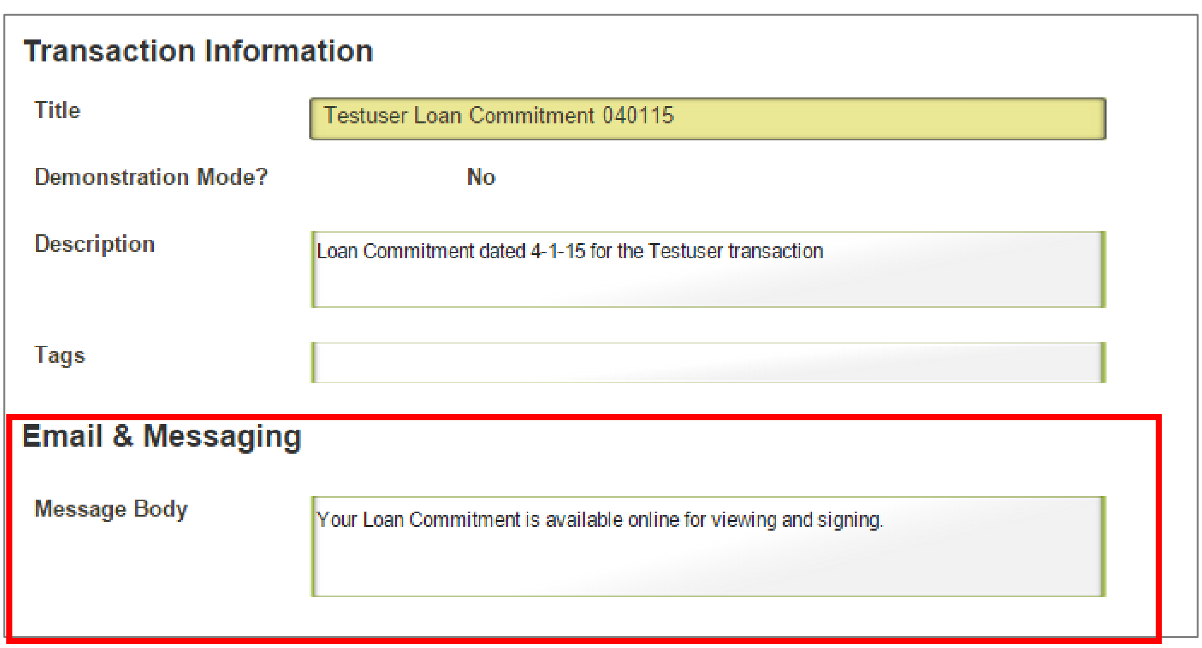
Send Tab

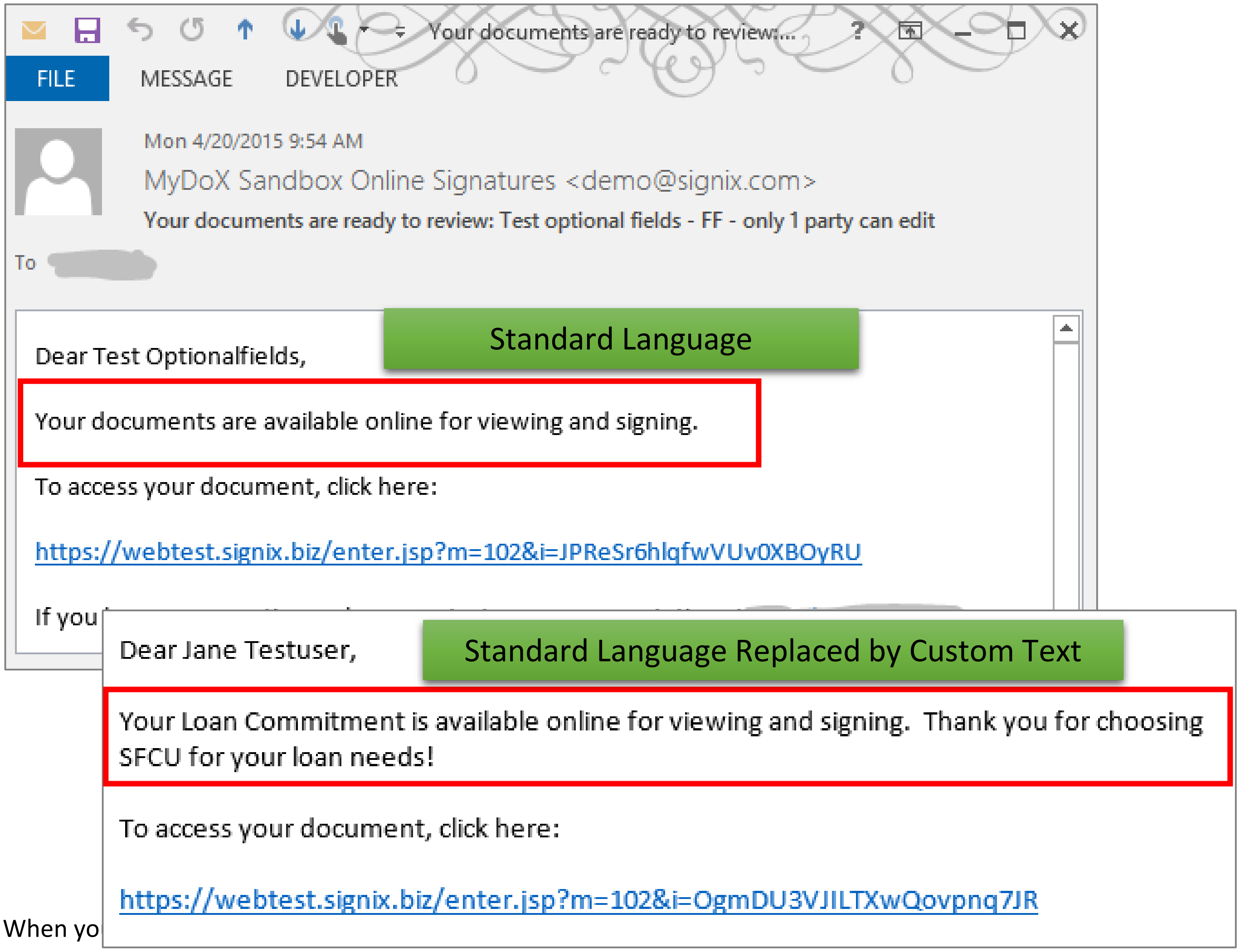
The **Send** tab allows you to give the transaction a title that is descriptive enough for you to recall the purpose of the transaction quickly and easily. This title shows on your **Document Center Home** page.



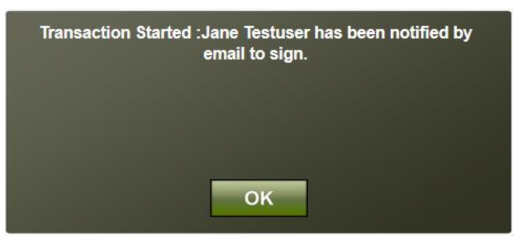
Email Message Body

You can change the message in the email that the signer receives by entering text under **Email & Messaging** in the **Message Body** field on the **Send** tab.

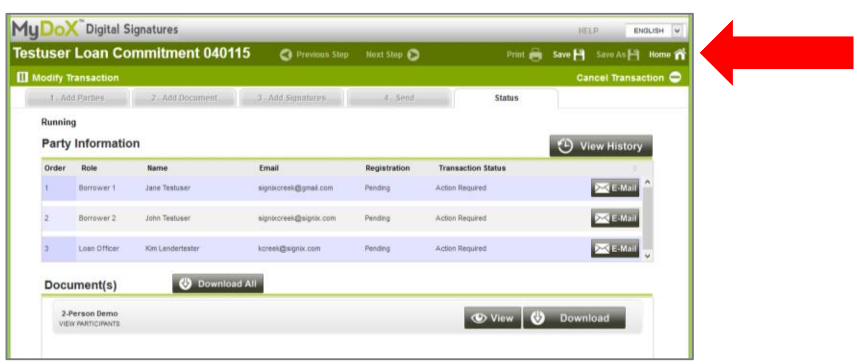




When yo
started and the first party has been notified.

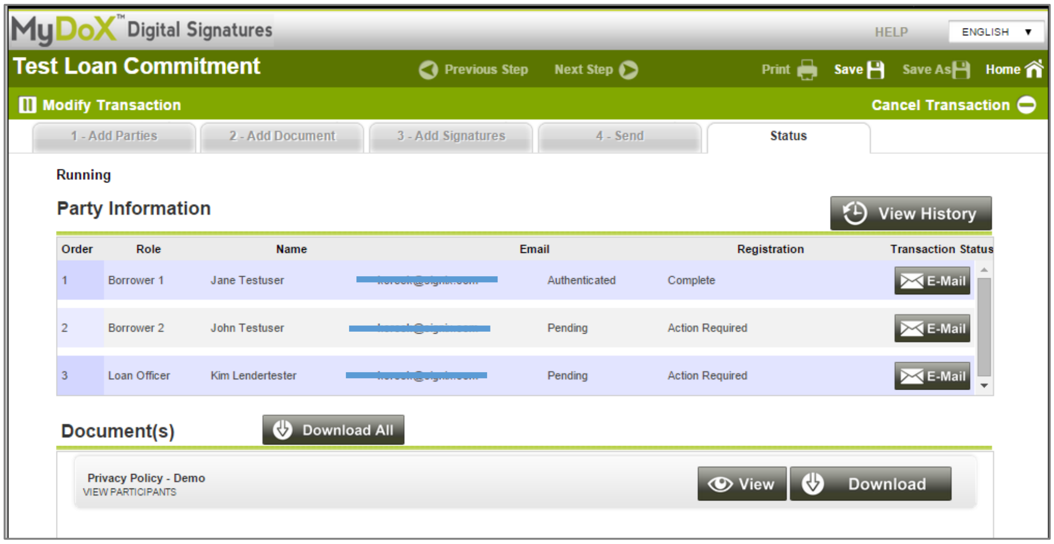


Click on the **Home** button to go back to the **Document Center Home**.



Status of In-Process Transaction

An In-Process Transaction is one in which all parties have not completed all required actions. The Status column on the **Document Center Home** page will show the number of parties that have completed signing and the total number of signers (# of #). You can access the transaction by clicking on the Title.

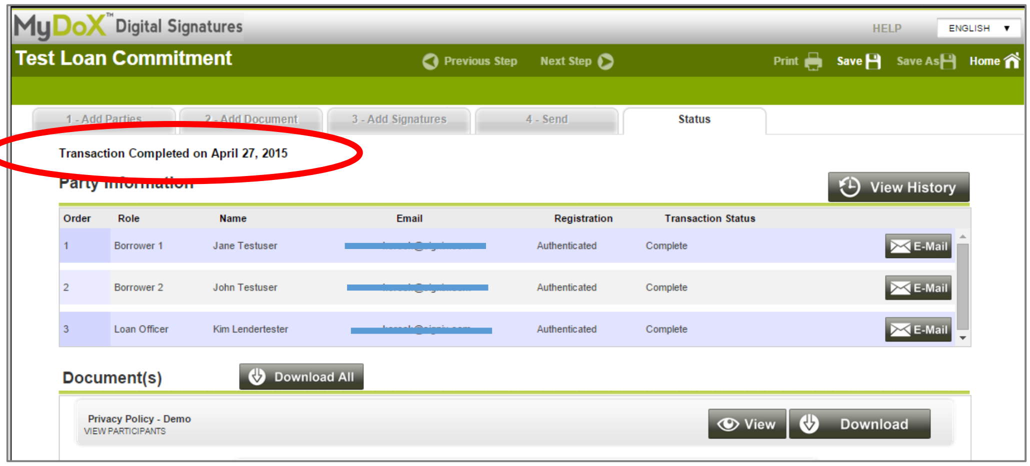


Once inside the transaction you are able to see which party(ies) have completed signing and who still has actions to complete.

E-Mail	Opens a dialog allowing you to send new emails to parties from within MyDoX. The subject and message of the email can be customized and a link to the transaction can be added to the email in the case of a lost or misplaced message
View History	Shows the history of the transaction. See *Viewing Transaction History* for more details
Download All	Downloads a ZIP file containing all of the documents (in their current state: signed, unsigned, partially completed) as well as a PDF version of the Transaction History/Audit Trail to that point in the transaction. If documents are downloaded for an in-process transaction they will need to be downloaded again when all parties have completed signing
View	Provides a view of the document without downloading it
Download	Downloads a PDF of that one document in its current state: signed, unsigned, partially completed, etc. Does not download other documents or the Transaction History/Audit Trail

Status of Completed Transaction

A Completed Transaction is one in which all parties have completed all required actions. The Status column on the Document Center Home page will show a status of "Complete". You can access the transaction by clicking on the title.

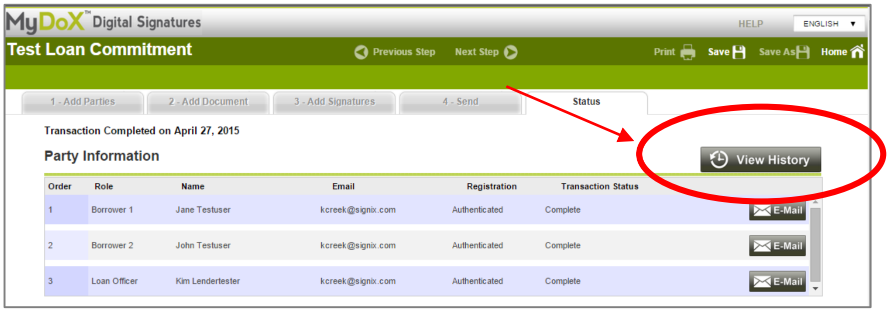


Once inside the transaction you are able to see the date the transaction was completed.

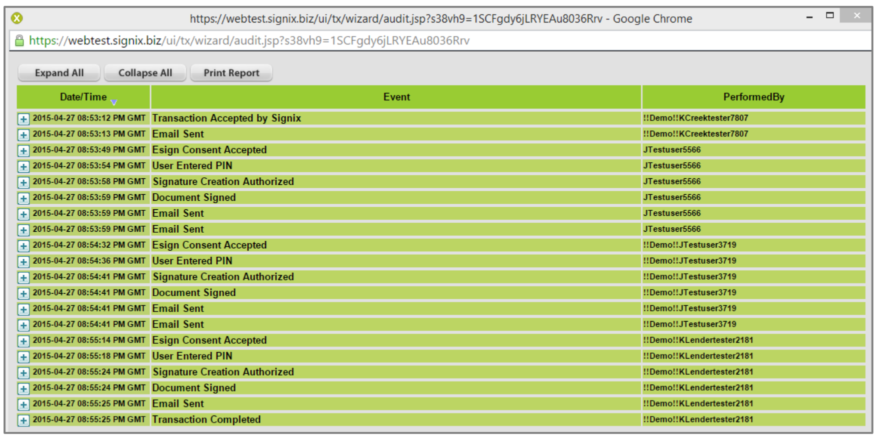
	Opens a dialog allowing you to send new emails to parties from within MyDoX. The subject and message of the email can be customized and a link to the transaction can be added to the email in the case of a lost or misplaced message
	Shows the history of the transaction. See *Viewing Transaction History* for more details
	Downloads a ZIP file containing all of the documents as well as a PDF version of the Transaction History
	Provides a view of the document without downloading it
	Downloads a PDF of that one document. Does not download other documents or the Transaction History

Viewing Transaction History

The Transaction History, or Audit Trail, shows everything that happened within a transaction. To access the Transaction History, access the transaction, and click on **View History** (on the Status tab).

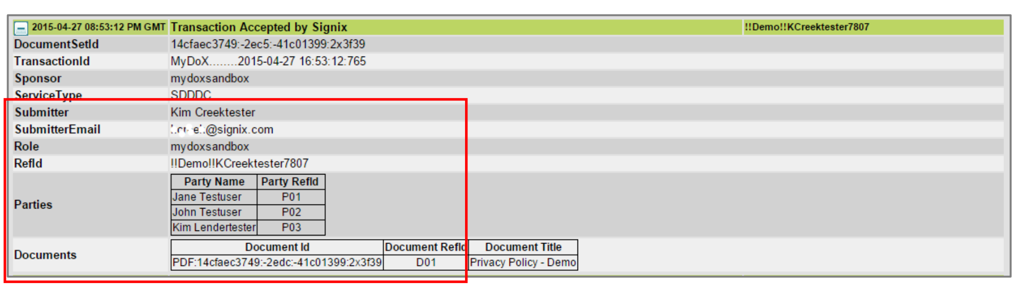


The Transaction History will open in a separate window and shows the date & time of the event, a description of the event, and who the event was performed by.



Each event can be expanded individually by clicking on the **+** next to the date or all can be expanded simultaneously by clicking on the **Expand All** button above the date column.

The "**Transaction Accepted by Signix**" detail shows information such as the submitter information and who the parties to the transaction are.



The "**Email Sent**" events show detail of email generated by the system. They show who the email was addressed to, the email address it was sent to, the subject and body of the email, and the reason the email was generated. In this case it was to send the transaction link (pick-up link) to the first signer.

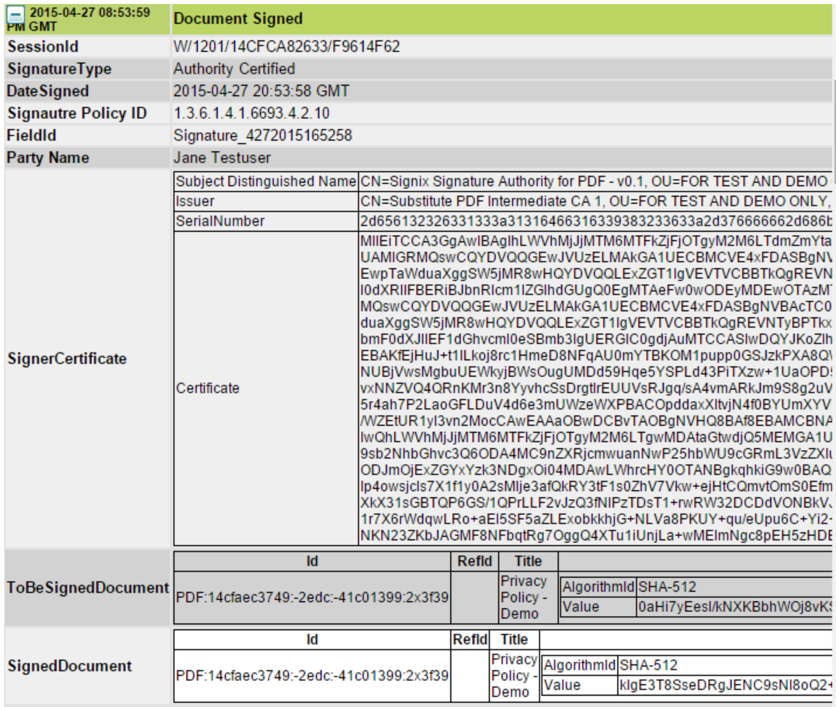
2015-04-27 08:53:13 PM GMT	Email Sent	!!Demo!!KCreektester7807
SessionId	W/1201/14CFCA66B92/F9614F62	
Email	Party Name	Jane Testuser
	Email Address To	[illegible]@signix.com
	Email Address From	"MyDoX Sandbox Online Signatures" <demo@signix.com>
	Body	Dear Jane Testuser, Your documents are available online for viewing and signing. To access your document, click here: https://webtest.signix.biz/enter.jsp?m=102&i=8K1GtDtW9X9MEdxHCU9Zr3 If you have any questions, please contact your representative at [illegible]@signix.com
Reason	PickUp link generated for P01	

Note that the email body contains the actual pick-up link for the signer. Caution – the pick-up link is specific to that signer (Jane Testuser in this example) and should only be given to that person!

The "**Esign Consent Accepted**" event shows the authentication method used by the submitter.

2015-04-27 08:53:49 PM GMT	Esign Consent Accepted	JTestuser5566
SessionId	W/1201/14CFCA82633/F9614F62	
ServiceType	SelectOneClick	

The "**Document Signed**" event shows where the signing certificate is issued. The details include the date and time of signing, the name (label) of the signature field this certificate applies to, the name of the signer, the issuer of the certificate, and the name of the document signed.



To print the Transaction History in its entirety, click on the **Print Report** button at the top of the window.

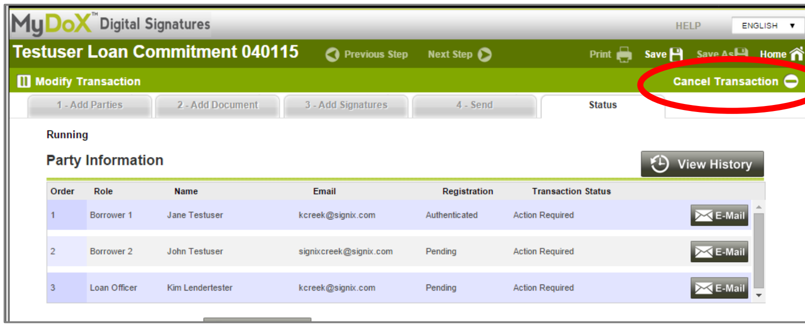
Cancel, Modify, and Resume Transaction

Canceling a Transaction

To cancel a transaction that has been started, sign in to MyDoX and locate your transaction in the **Document Center**. Click the title to enter the transaction.

Note: A transaction with a status of "Complete" cannot be cancelled.

Click the **Cancel Transaction** button in the upper-right corner.



Click **Yes** to cancel.

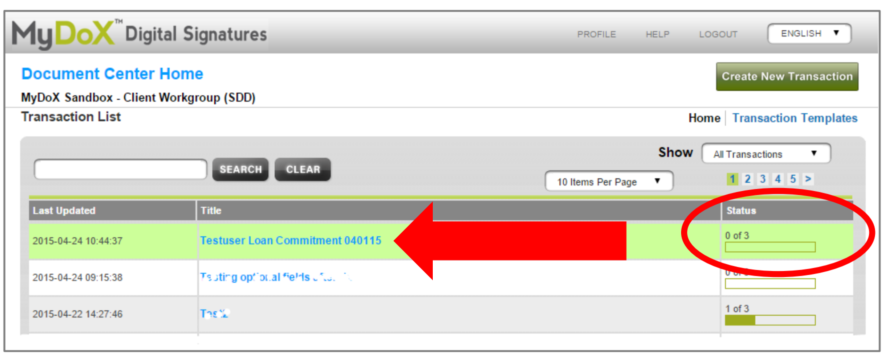
All parties to the transaction will receive an email stating "Dear /Party/, This online signing process to which you are a party is no longer available. Explanation: Transaction is now Canceled. If you have any questions, please contact your representative at /submitters email address/."

Modifying a Transaction

Some changes may be made to a transaction that has been started, such as

- Changes to party(ies) names, email addresses, and authentication method (if they have not completed tasks)
- Add/delete documents (that do not have completed tasks)
- Add/delete tasks

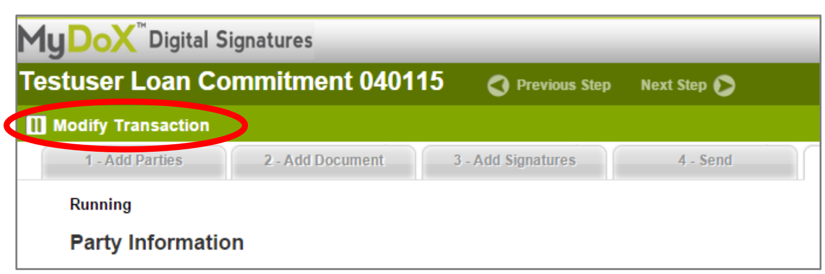
Sign in to MyDoX and locate your transaction in the Document Center. Click the title to enter the transaction.



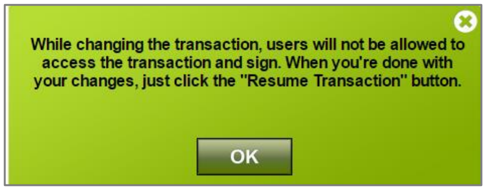
*Note: A transaction with a status of "**Complete**" cannot be cancelled.*

Click the **Modify Transaction** button.

This changes the status to "Suspended" on the **Document Center Home**.

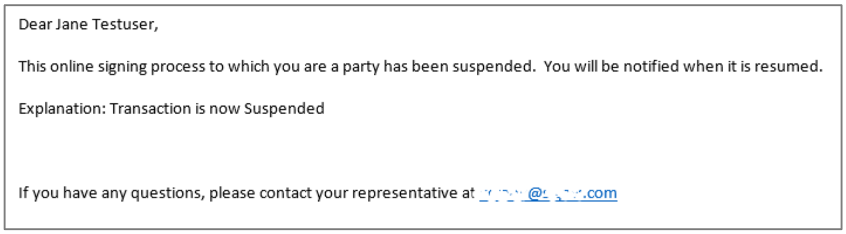


You will receive a message notifying you that:



Click **OK** to continue.

The first party (or next party requiring action) will receive an email notification


Dear Jane Testuser,

This online signing process to which you are a party has been suspended. You will be notified when it is resumed.

Explanation: Transaction is now Suspended

If you have any questions, please contact your representative at

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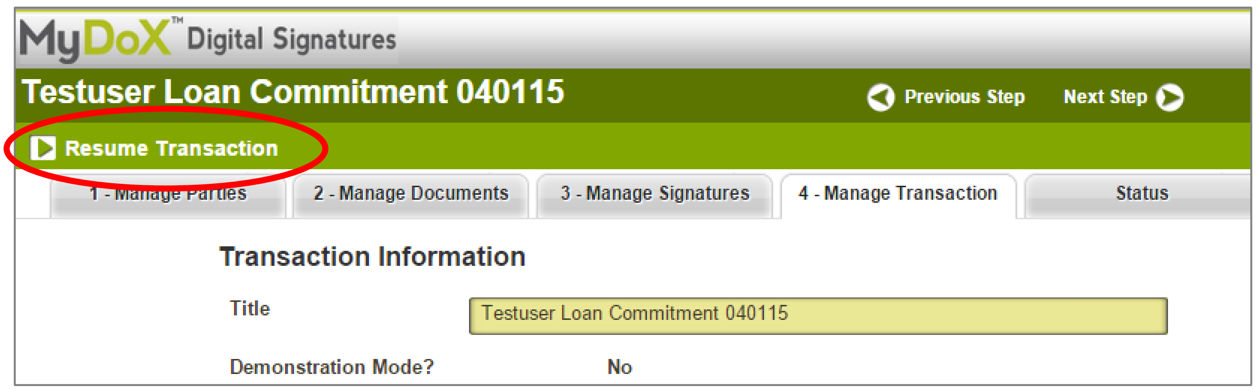
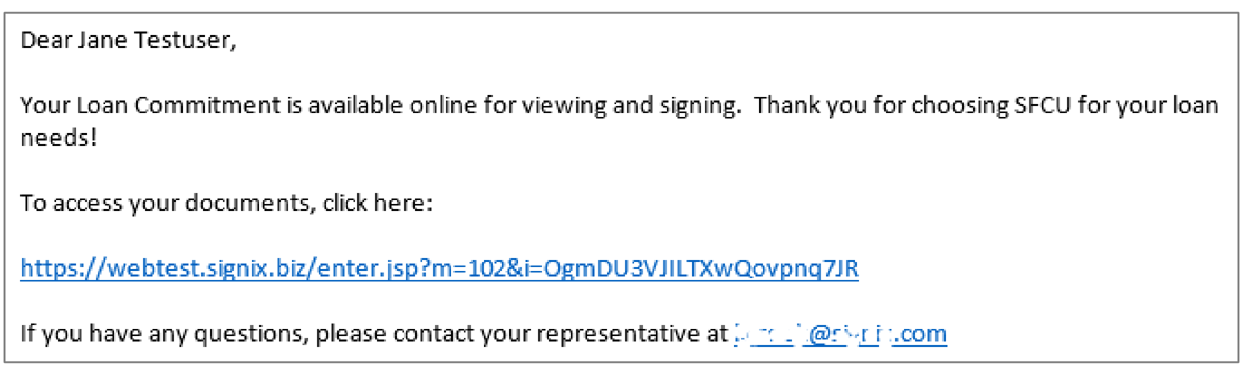
Click the **Resume Transaction** button to restart the transaction and click **Yes** in the pop-up box.



The first party(ies) will be notified that their documents are ready for signing. This notification contains the same language as the first email notification when the transaction was created and contains a link to the site to sign.


Dear Jane Testuser,

Your Loan Commitment is available online for viewing and signing. Thank you for choosing SFCU for your loan needs!

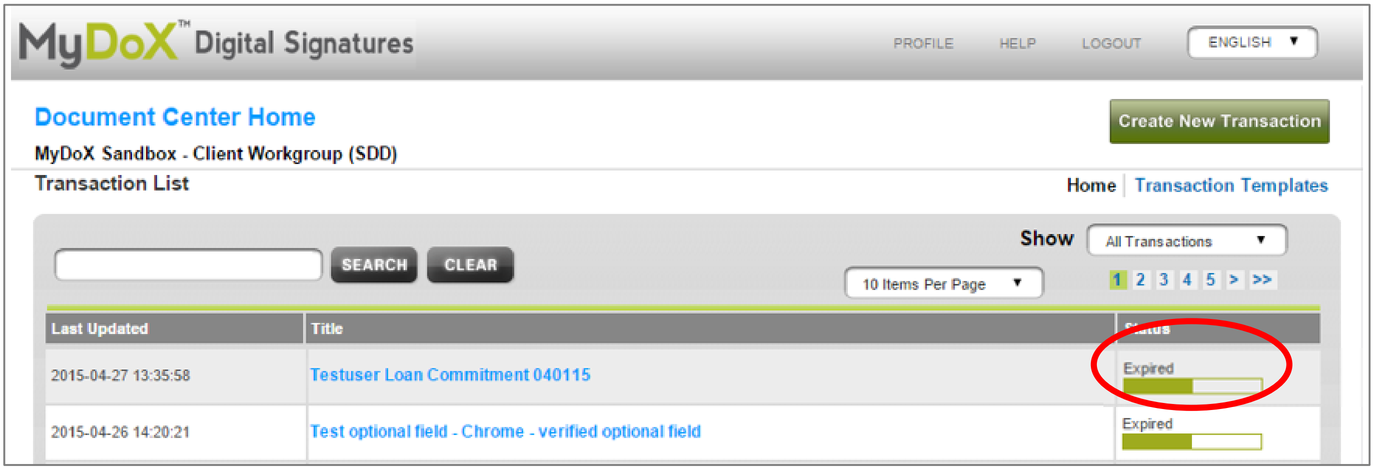
To access your documents, click here:

https://webtest.signix.biz/enter.jsp?m=102&i=OgmDU3VJILTXwQovpnq7JR

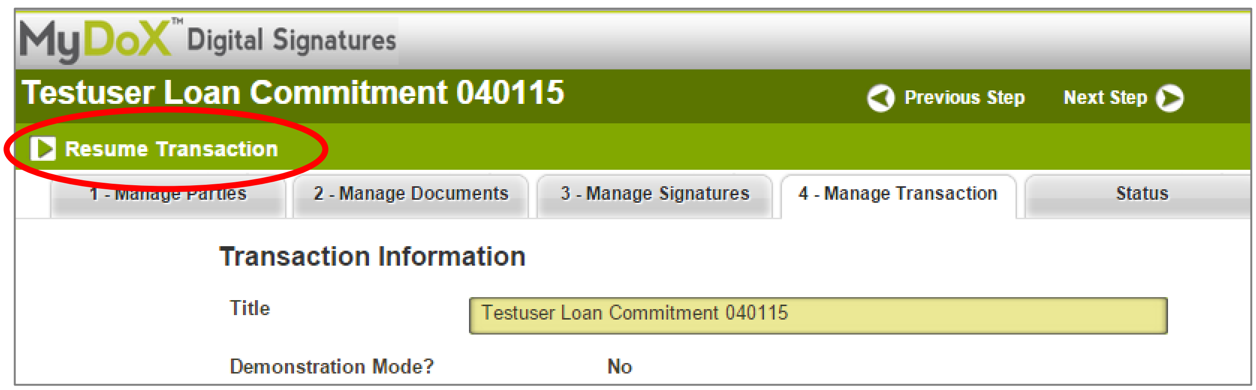
If you have any questions, please contact your representative at

Resuming a Transaction

It may be necessary to resume a transaction if it expires before completion (determined by your settings) or if the transaction is suspended. Begin by locating your expired or suspended transaction on the **Document Center Home** page and clicking on the title to open.



Click **Resume Transaction** to restart.

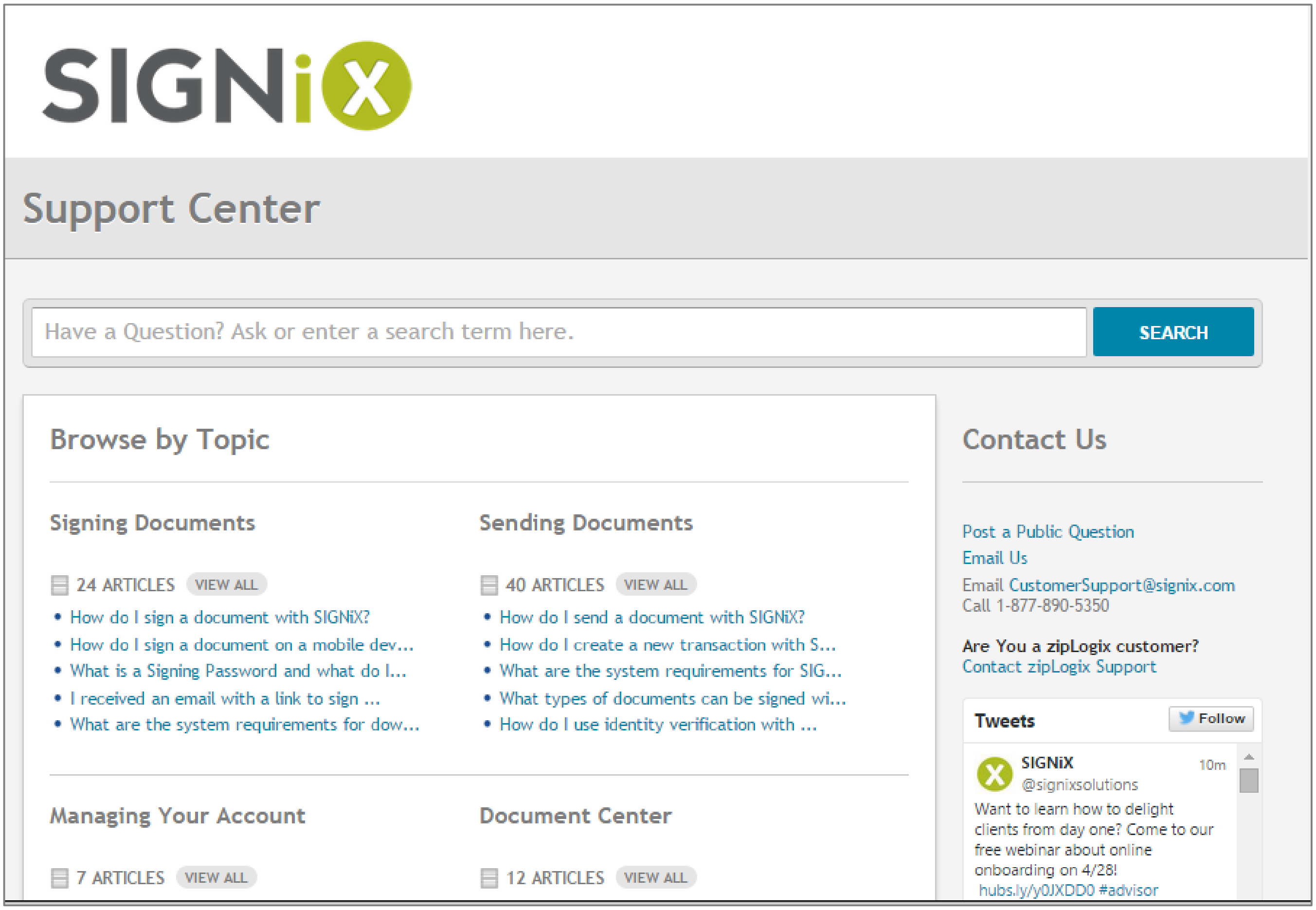


The first party(ies) will be notified that their documents are ready for signing. This notification contains the same language as the first email notification when the transaction was created and contains a link to the site to sign.

> Dear Jane Testuser,
>
> Your Loan Commitment is available online for viewing and signing. Thank you for choosing SFCU for your loan needs!
>
> To access your documents, click here:
>
> https://webtest.signix.biz/enter.jsp?m=102&i=OgmDU3VJILTXwQovpnq7JR
>
> If you have any questions, please contact your representative at [illegible]@[illegible].com

Support

SIGNiX's Support Center can be accessed at https://signix.desk.com/ anytime.



From here you can ask a question or enter a search term or browse articles based on topic.

SIGNiX How-To Videos

The links below provide you an easy step-by-step tutorial to help you through the creation of transactions.

http://www.signix.com/tutorials-and-videos/

Each tab demonstrated and described:

- Add Parties: http://www.signix.com/add-parties-in-mydox
- Add Documents: http://www.signix.com/add-documents-in-mydox/
- Add Signatures: http://www.signix.com/add-signatures-in-mydox/
- Send: http://www.signix.com/send-and-finalize-a-transaction-in-mydox/
- Status: http://www.signix.com/tutorials-and-videos/check-transaction-status/

SIGNiX Support FAQ

If you or your Clients/Signers encounter any issues or have questions, please direct requests to your Company's SIGNiX Team Leader.

Your Team Leader will filter questions/issues and contact SIGNiX when it can't be resolved or answered at the Company level. Your Team Leader will contact SIGNiX directly to get help in resolving issues not answered in the SIGNiX FAQ (access link below to view).

http://www.signix.com/support-faqs/

For issues, please send a descriptive email to your Team Leader including:

- Problem – the more descriptive, the better
- What happened
- Issue is for the Submitter
- Issue is for a Signer (which one)
- Name of the Transaction

FAQ

Q **How do a run a test transaction?**

A On the send tab, select "yes" for 'demo mode'.

Q **How do I do a test transaction using KBA or KYC authentication?**

A To use KBA or KYC in "demo" mode, you must use a fake SSN that begins with 00011XXXX (x=random numbers). The x's can be any random numbers you would like. Please also use a fake DOB that is at least prior to 1994.

Q **My Tool Palette disappeared, how do I get it back?**

A Click on "Tap to Add Signature Task" in the center of the green bar just above the document or the Palette control button next to the Zoom In/Out buttons in the lower right-hand corner.

Q **I saved a transaction that I haven't sent yet and now I can't find it.**

A On the Document Center Home page choose Unstarted from the Show drop down box.