

Introduction

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Preliminary Remarks

On this page, the subsequent chapters and their sub pages we are providing the documentation of Namirial's eSignAnyWhere Workflow product. Within the documentation, we are following the story-telling approach, starting to explain the product from a beginners level and getting more into details in later chapters. In addition, in the WebUI Application Reference, we are following an explanatory approach where we are structuring the information as you find them within the user interface of the product.

Target Audience

The documentation should satisfy all audience, from business level to technical integrators. It covers both sides, the envelope sender view and the signer view. Also the system integrator's view is contained, including API documentation and sample integration scenarios. Some documentation (mainly administrative content required only in case of On-Premise installation, or for complex integration scenarios) will be invisible for readers that are not logged in or do not have an account. When accessing the documentation via the servicedesk platform, the content presentation will be filtered for the most relevant functionality in the SMB scenarios.

What is eSignAnyWhere?

The eSignAnyWhere Platform is offering signature workflow capabilities based on the signing features of SIGNificant Server Platform combined with the eSignAnyWhere Workflow components.

Users of Namirial eSignAnyWhere can

- create envelopes containing one or more PDF documents to be signed in a transaction
- upload PDF documents from local drive
- add form fields to enter free text, radio buttons, checkboxes, etc.
- add signature fields according to ISO standard
- enable signers to upload attachments (files which might be required to support a transaction)
- orchestrate their signing processes: sending signing request to one or more signers (sequentially or in parallel),
- setting reminders for signers and receive notifications on signing progress and having signed document(s) and audit trail sent to signers into their email inboxes
- create templates for frequently used documents types – e.g. non-disclosure agreements (NDAs) or standard contracts.
- monitor signature acquisition progress in a real-time dashboard
- ... (there are many additional features available; those are covered in the next chapters)

Signatories are enabled to review, fill and sign documents from anywhere anytime on any device. They do not require to open an account with Namirial. They will be authenticated using their email address (and optionally additional authentication methods) and, if available, their local digital certificates are enabled to sign in typing their name or pasting their signature as an image into the document. Signatories may also delegate signing requests in case they are not entitled to sign a particular document.

Namirial eSignAnyWhere is delivering complete evidence of a legally binding digital transaction. Any interaction is looplessly documented in an audit trail file: Who was signing which version of a document at which point in time. eSignAnyWhere can be integrated in enterprise business applications via its REST API and callback (webhook) mechanism.

The platform is available as On-Premise deployment option, as Private SaaS or as Shared SaaS offering.

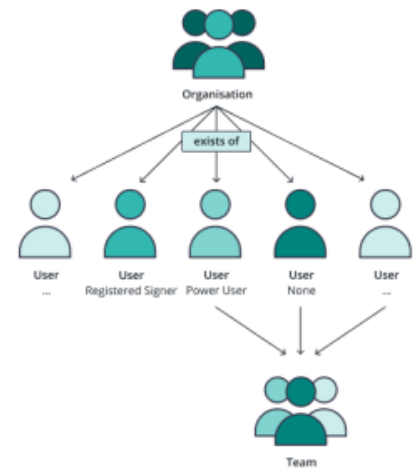
Basic Concepts

Organization and other Core Data

When creating an account or trial account on eSignAnyWhere, you are already creating an organization entity (i.e. a tenant). The first user account is created within that organization. This is a design principle of eSignAnyWhere Workflow solution, as it is designed as a multi-tenant platform.

Within that eSignAnyWhere organisation, following administrative objects exist:

- **Organisation:** The organization itself typically reflects the legal entity for which the sender is collecting signatures. The first user's name is used as organization name by default, but the organization name can be configured later on. The organization is also the unit for which the license applies, at least in the SaaS deployment scenarios.
- **User:** As mentioned above, during account registration, the user is created within a generated organization structure. Remember that a user is always part of an organization. But within one organization, additional users (depending on your license and select plan) can be added by the organization administrators.
- **Roles & Permissions:** We already mentioned above the role "organization administrator". In general, the roles assigned to a user define the permission set of the user, and it is possible to assign more than one role to a user. The role "Administrator" belongs to an administrator of the organization and is automatically granted to the first user of an organization. The "Power User" is a user, who can send envelopes to request signatures. The "Registered Signer" can use eSignAnyWhere as a signing platform to sign his/her documents and can use it as an document inbox. Beside registered signers, unregistered signers (which do not have an account on eSignAnyWhere) can be invited to sign a document; but they cannot log in and don't get e.g. an envelope overview. Beside this three primary roles, the predefined roles "Api User", "Automatic Sealing Sender" and "Developer" can be assigned to a user to use specific product features. In the [roles and permissions guide](#) we go more into details and also explain how to define and use custom roles.
- **Teams:** Teams, if included in the purchased package, can be used to group users within an organization. Teams are used to share templates and envelopes in between team members and the teamlead, or within team members.



Envelopes

Basic Idea: Send a document via eSignAnyWhere to a signer (recipient) and collect the signed document later.

With eSignAnyWhere you are creating envelopes, which define the signing workflow. An envelope can contain one or many documents (all related to the same business case). Those documents are sent to the recipients to collect signatures, to get a receiving confirmation or just to deliver a copy. The workflow can contain sequential or parallel activities. This allows to design your own signing workflows from very basic to complex. In addition, the product supports sending bulk envelopes - a concept where copies of the same envelope are sent to a list of recipients, and all need to sign their independent copy. Also the use of automatic remote signing certificates (stored in an HSM in the premises of the trust service provider) or hiding certain documents from some recipients within a workflow is supported.

The simplest possible signing workflow would be sending one document to one recipient, who has to sign the document.

You can use eSignAnyWhere for simple signing tasks and for complex tasks e.g. signing a project order, which has to be signed by some managers. A lot of features allow you to design many different signing ceremonies and use cases. In addition you can use our SIGNificant product suite to extend your use case possibilities (e.g. use native iOS/Android apps and SDKs, Signature Pads or even biometric signature verification options).

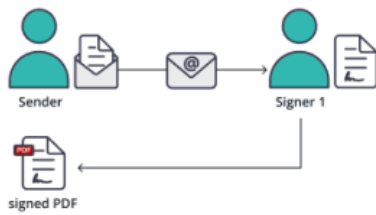
Workflow Capabilities:

- We call an item within a workflow an **activity** - similar to the use of this term in other workflow solutions.
- Sequential/Parallel Activities
 - Sequential activities: The sequence of how actions have to be performed
 - Parallel activities: all recipients of parallel activities get the invitation to perform the action at the same time. There is no predefined order.
- The type of the activity is called the **action**. We support following actions:
 - Sign: the recipient has to sign the document (or can reject it). This action can also be used for form filling and approval steps, even without signature fields involved.
 - Receive a copy: the recipient receives a copy of the document. We also call it "Cc".
 - Needs to view: the recipient must open and view the document. No interaction on the document, beside clicking the link, is required to proceed.
 - Automatic Remote Signers: via Namirial TSP an automatic signature/seal is applied to the document*
 - P7M (PKCS#7) Signing: a specific feature to sign with a PKCS#7 signature*
- Bulk sending*: each recipient will get a unique copy of the envelope (e.g. if you want to send out a new company policy, first signed by the responsible manager and then each employee gets a separate copy of the envelope for signing)
- Document Hidding*: hide certain documents from specific recipients
- Meta Information: allow to store meta information per envelope (e.g. for hybrid integration; sending envelopes via UI and automated post processing [auto-archive] via finish callback)

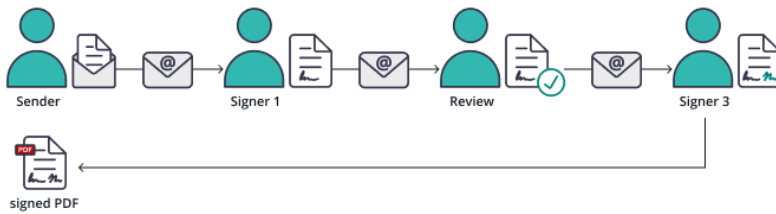
* optional feature

Examples of Signing Workflows

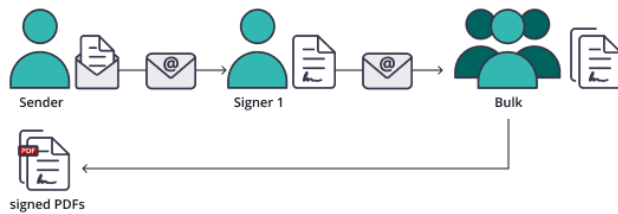
Simple Workflow (1 Signer):



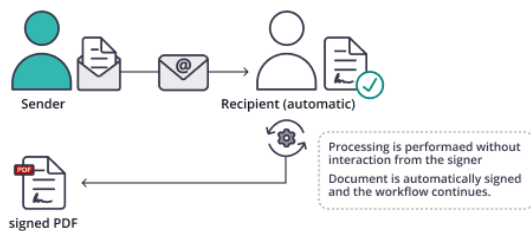
Workflow (1st Signer, Reviewer, 2nd Signer)



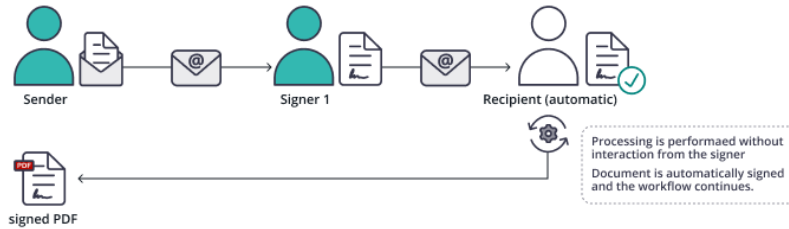
Bulk Workflow (1st Signer, Bulk Signers)



Simple Automatic Workflow (1st Automatic Signer)



Automatic Workflow (1st Signer, 2nd Automatic Signer)



Quick-Start Guide


With this basic introduction of the quick-start chapter you should be able to register for a trial account, send your first envelope and collect the signed document. Please see the Web UI Guide for more information about how to create and send an envelope [here](#).


Registration and Login


The login page requires your email address and your password to login. If you have too many false login attempts an additional captcha ("i am human") will appear due security reasons. If you have forgotten your password, you can reset it via the "Forgot your password?" link.

Moreover, you have the link for the registration page to create a new account/organization. On-Premise and private SaaS customers will see the LDAP /SAML option for login if it is configured.

Welcome to eSignAnyWhere



Email

Password

[Forgot your password?](#)

LOG IN

Sending your first Envelope

Use Case Summary: In this example, we are sending a new insurance contract for internal review (just needs to open it), and then to your client to collect a signature. We are therefore using the Web User Interface.

(1) Prepare an example insurance contract and upload the document to eSignAnyWhere to create a new envelope.

Therefore, use your preferred word processing software, prepare some example contract or letter-style document. No requirement for this example to put any specific notation into the document; just add some text. Export the document in .PDF format, or use the Print-to-PDF capabilities.

Log in to eSignAnyWhere with the account just created, and press the button "NEW DOCUMENT" to create a new envelope. In the envelope creator wizard, on the first page, use the file chooser to upload your PDF file.

(2) Design the structure of the signature workflow, by adding recipients.

Therefore, add your line-manager as a first recipient (defined by mail address and given name / surname). As the line manager is defined as reviewer, select the recipient type "Needs to view".

Add a second recipient (the customer), and keep standard recipient type "Needs to sign".

Proceed to the next page in the envelope creator by pressing the NEXT button on bottom-right. The 2nd page is the "Designer" page. Use Drag&Drop to place a signature field on the document.

Proceed to the third page in the envelope creator, which is the summary page. Review the configuration and press SEND to send an invitation to the first recipient via mail.

As a sender, you see in the envelope list that the envelope is waiting for the first recipient to open the activity.

(3) After the line manager has approved the document, the client gets invited to sign. Details about the signer UI are explained in the Signer Guide, but for the basic scenario we expect the UI does not require big explanations.

Once the client has signed the document and pressed the FINISH button, you as a sender receive a notification about the finished document.

(4) As a sender, refresh the UI with the REFRESH button within the Web UI. Now you should see that the status was updated to "Completed". Click on the row to enter the details view. Here you can download the signed document and also the audit trail document, which is the process evidence. Usually, when using the Web UI, you would store both the signed document and the audit trail to your electronic documents archive for storage.

There are of course integration options available to collect the signed documents automatically at the end; those are described in the integration chapter.



In this example, we focused on the very basics. We start from a PDF document to avoid complexity of all the different document conversions available. We did not consider that a document can already be prepared with form fields or signature field locations, we did not explain the differences between various signature types and we did not explain the legal implications based on choice of the proper signature method. Those topics, beside many others, will be covered in the next chapters and subsequent pages.

Further Reading

In the next chapters, especially the user guide, the signature guide and the signer guide, we are explaining how to use the product in typical usage scenarios - which are often making use of features not covered in the quickstart guide. In the later chapters, the [Application Reference - Web UI](#) contains a documentation about the UI elements and how to use the various configuration options. Sales Partners and customers with their own on-premise installation will find chapters about system configuration. For system integrators, the Integration Guide and the API Reference will give deep insights into possibilities to integrate eSignAnyWhere in enterprise business applications that create, prepare and preprocess documents, or that postprocess and store signed documents.