

# Signer Guide

Documentation for signers using eSignAnyWhere. It covers explanations of different electronic signature types and guides you through signing your first document with eSignAnyWhere.

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## Introduction

We are distinguishing two types of signers:

- **Non-registered Signer:** Users that have no account on the eSignAnywhere Platform
- **Registered Signer:** Users that have an account on the eSignAnywhere Platform

For most of the chapters within the signer guide, there is no big difference. The user experience, when starting from an e-mail invite, is very similar. We will therefore not mention in all the next paragraphs that it applies for both; we will just highlight in case something is available only for one of the signer types.

## How to sign a document

In a standard scenario, the use case is very simple:

- (1) The signer receives an email with a link to the document.
- (2) The signer opens the contained link
- (3) The signer gains access to the document, reads the content and performs the signature
- (4) The signer performs an explicit Finish operation on the document.
- (5) The signer can optionally download the signed document

The signer gets guided through these steps by the signing web application.

## Get invited to sign

The eSignAnyWhere Platform is sending an e-mail to invite signers. This e-mails can be configured by the sender organization, including full logo and color adoptions and layout changes. By default, it would look like the following e-mail:

## Document Signing Request

**OPEN DOCUMENT**

Dear Manuel Gierlinger

Please sign the envelope Test.pdf

Envelope will expire at 03/01/2024

This message was sent by Manuel Gierlinger.



Do not share or forward this Email. Please have a look at the [Signer Guide](#) if you need help signing the document.  
Powered by [Namirial eSignAnyWhere](#).



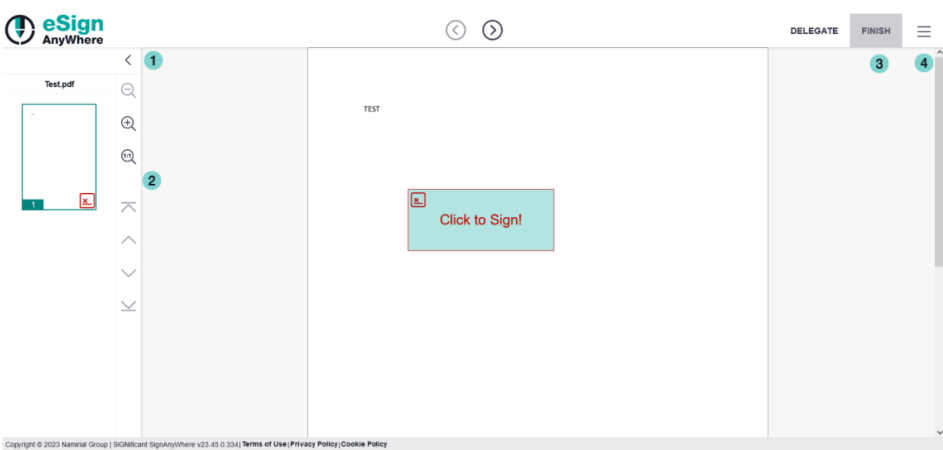
## Get access to the document

When clicking the "OPEN DOCUMENT" link or button in the e-mail, the web browser will open and load the web application to collect the signature(s).

Following steps may be shown, depending on how the sender configured the envelope:

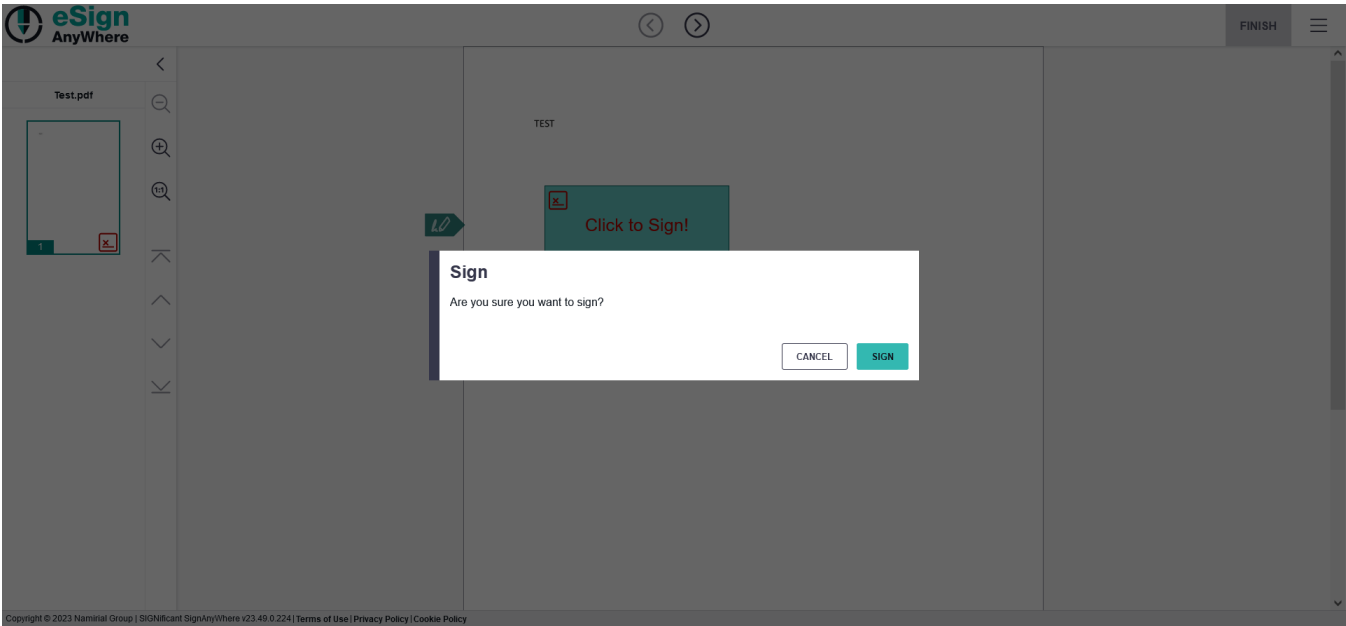
- Authentication or Identification  
with different methods such as a static access code communicated upfront, an One-Time-Password (OTP) delivered via SMS, Log-In through another platform (the sender's portal application, Log-In with Google or LinkedIn, etc.) or even an Identity Provider Platform asking to identify in a video session or other method. When being logged in via another platform, pay attention to the URL to be sure you don't get victim of a phishing mail, and ask the sender via a well-known channel in case you didn't expect a document signature request before you proceed with the authentication.
- Terms & Conditions  
A Terms & Conditions ("Agreements") dialog can be displayed before gaining access to the document.

After both steps completed (in case they have been configured), the signer's view will be shown. We call that web application "SignAnyWhere Viewer". The layout is responsive, so that the available area is used dynamically and filled efficiently.

Figure	Description
	<ol style="list-style-type: none"><li>1. Open and close overview</li><li>2. Page control</li><li>3. Finish the document</li><li>4. Menu</li></ol>

## Read, Fill and Sign the document

As a signer, you can now read the entire document content. If the sender requested it, you can (or have to) perform form filling activities. By clicking on the signature field, or by field activation through the step-by-step guiding, the signature task can be executed. Note that the screen below is showing one of the simplest signing experiences the software is offering; we are explaining the different signing experiences in detail in chapter "Signature Types" of this guide.



After the signature has been performed, a representation of the signature will be shown instead of the interactive signature field. Even if the signature does not look like the handwritten signature and may be just a technical representation of the consent, depending on requested or selected signing experience, the signature is embedded into the PDF document according to the "PDF Advanced Electronic Signatures" Standard and based on the ISO 32000. In addition with a process protocol ("audit trail"), or with some signing experience even without that, the sender can give the proof that a document was signed, and also by whom.

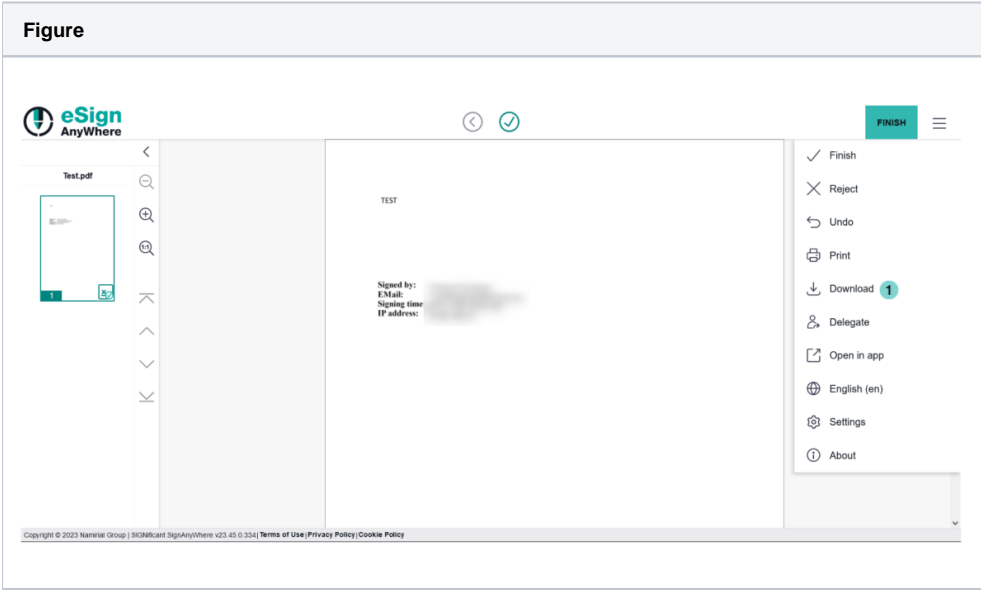
## Finish the document

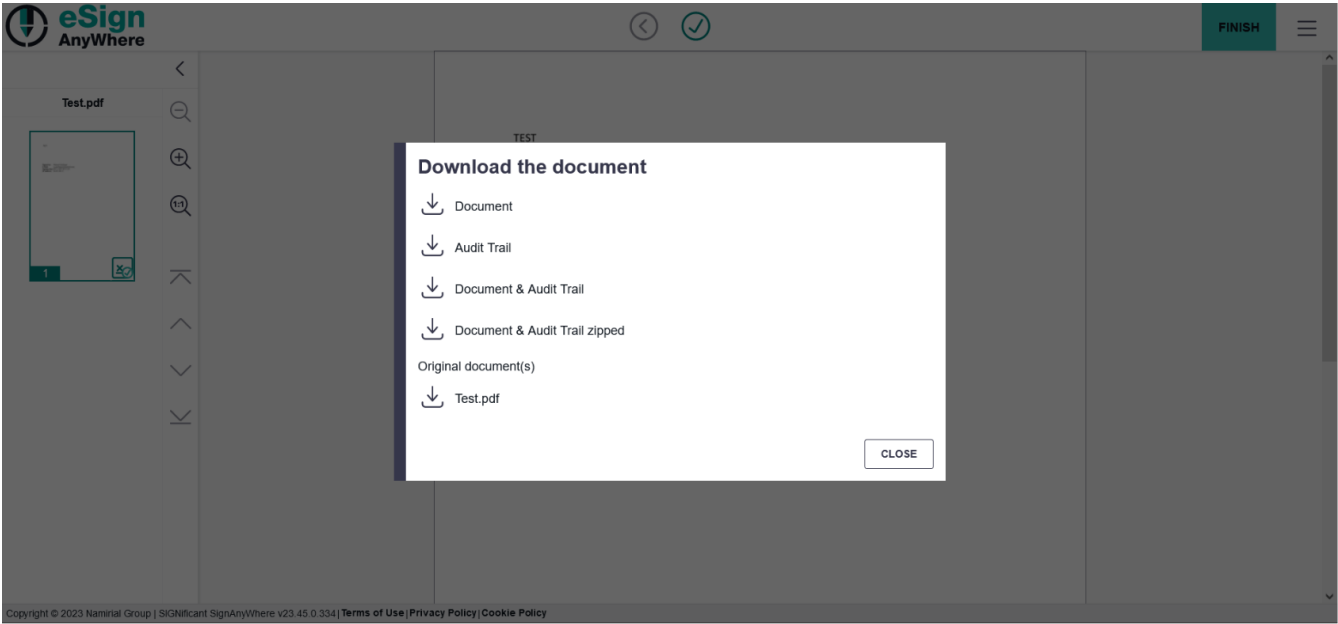
Figure	Description
The screenshot shows the eSign AnyWhere application interface after the signing process. The document 'Test.pdf' is displayed with the word 'TEST' and a signature field. A modal dialog box is centered on the screen, titled 'You can finish the document now!'. The document content shows 'Signed by: E-Mail: IP address:' followed by a red box labeled '1'. A green button labeled 'FINISH' is visible in the top right corner. The bottom of the screen contains a copyright notice: 'Copyright © 2023 Naminal Group   SIGNificant SignAnyWhere v23.45.0.334   Terms of Use   Privacy Policy   Cookie Policy'.	<ol style="list-style-type: none"><li>1. Signature</li><li>2. Finish the document</li></ol>

If the sender allows the recipients of the envelope to have access again after finishing and closing the envelope, you can open the finished envelope again and see all the signed signature fields and filled out form fields. **v 20.14**

## Download the document

Optional download of the document

Figure	Description
 The screenshot shows the eSign AnyWhere web application interface. On the left is a sidebar with a document thumbnail labeled 'Test.pdf'. The main area displays a document titled 'TEST' with a signature field. On the right, a menu is open, showing options: Finish, Reject, Undo, Print, Download (highlighted with a red circle and a '1'), Delegate, Open in app, English (en), Settings, and About. The 'Download' option is the focus of this figure.	1. Download the document



## Signature Types

### ClickToSign

This is the simplest signature type, with the most convinient user experience. The signer has just to click on the signature field to sign. As it is a pure browser-based signing experience, we consider the "ClickToSign" signature type as one of the "HTML5 signature types" - which doesn't make big difference for you as a signer, but requires careful consideration of configuration of the activity to reach the necessary expression of power.

Your browser does not support the HTML5 video element

**Signed by:** Charly Xyzmo  
**EMail:** [REDACTED]  
**Signing time:** 09-11-2023 09:56:09  
**IP address:** [REDACTED]

## DrawToSign

This type allows the signer to draw his signature by mouse, finger or pen. Just an image of his signature is created and embedded into the document. In this case, only the flat picture of the signature and technical parameters of the session are recorded, but no biometric data. We consider also the "DrawToSign" signature type as one of the "HTML5 signature types".

Your browser does not support the HTML5 video element



**Signed by:** Charly Xyzmo  
**EMail:** [REDACTED]  
**Signing time:** 09-11-2023 10:00:47  
**IP address:** [REDACTED]

## TypeToSign

With this type the signer has to type in his name to sign the signature field. The signature itself is printed in a computer font that may look like someone's handwriting, but actually isn't the signer's handwriting itself. It's the third and last one of this guide which we consider as one of the "HTML5 signature types".

Your browser does not support the HTML5 video element



**Signed by:** Charly Xyzmo  
**EMail:** [REDACTED]  
**Signing time:** 09-11-2023 10:04:20  
**IP address:** [REDACTED]

## SMS-OTP v 3.0


First of all there are two different ways to configure SMS-OTP. The first case (Phone number entered when signing) shows that the recipient can choose the phone number on which he/she wants to get the SMS. The second case (Phone number is already defined) shows that the sender define the phone number on which the recipient gets the sms.

### SMS-OTP (Phone number entered when signing)

The SMS-OTP signature field is similar to the Click2Sign but with a different process (Receiving a SMS with a one-time-password). The following figures guide you through the process of the SMS-OTP signature.

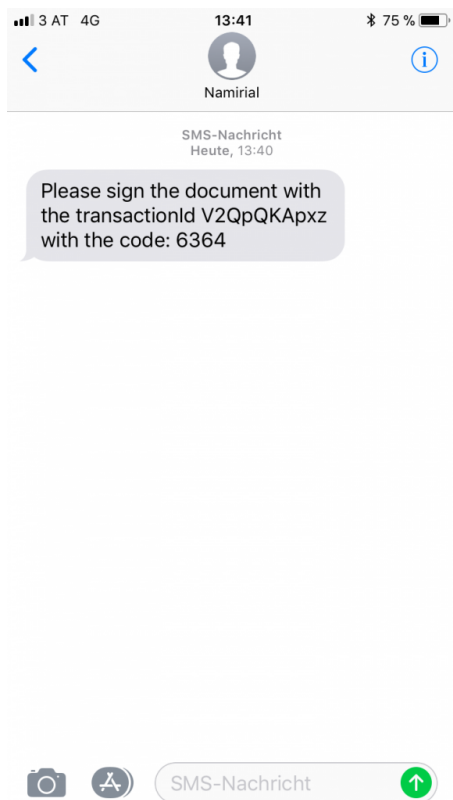
After you have opened the envelope and clicked on the signature field, the following window appears:

The screenshot shows the eSign AnyWhere application interface. On the left, there is a sidebar with a document titled 'Test.pdf' and a list of navigation icons. The main area is dark gray with a 'TEST' label. A white dialog box titled 'Sign With Transaction Code' is centered. It contains the text 'Do you want to send the transaction code to start the signing process?'. Below this is a 'Phone number' field with a dropdown menu showing a flag and the number '0664 123456'. At the bottom of the dialog are 'CANCEL' and 'SEND' buttons. The footer of the application shows 'Copyright © 2023 Naminal Group | SIGNificant SignAnyWhere v23.45 0.334 | Terms of Use | Privacy Policy | Cookie Policy'.

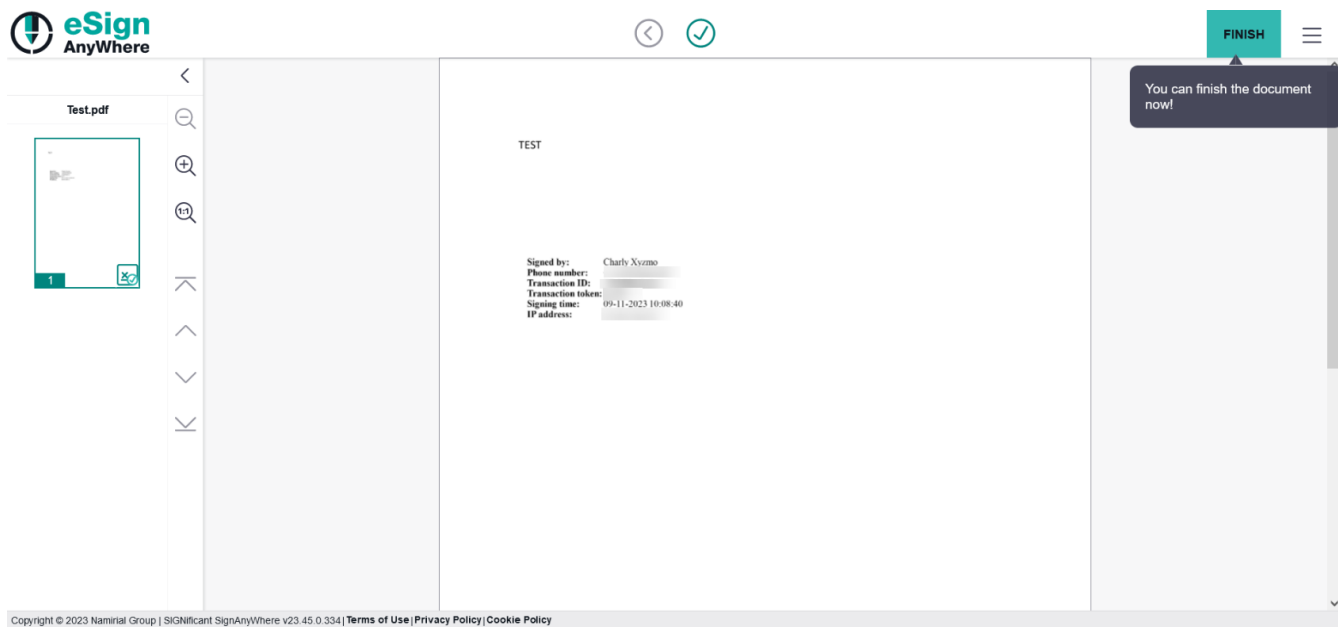
 You can select your country by clicking on the flag. Then you can see how you have to write the phone number.

After entering your phone number you get a sms and the following window appears. There you have to fill in the code which you got via sms. Please have a look at the following figures.

The screenshot shows the eSign AnyWhere application interface. On the left, there is a sidebar with a document titled 'Test.pdf' and a list of navigation icons. The main area is dark gray with a 'TEST' label. A white dialog box titled 'Sign With Transaction Code' is centered. It contains the text 'Please enter the secret code to confirm the signature.' Below this is a 'Transaction code' field. Underneath the field, it says 'Your transaction (ID: Z7aNXqLr2) expires in 4:55'. Below that is a box containing the following information: 'Signed by: Charly Xyzmo', 'Phone number: [redacted]', 'Transaction ID: [redacted]', 'Signing time: 09-11-2023 10:07:37', and 'IP address: [redacted]'. At the bottom of the dialog are 'CANCEL' and 'SIGN' buttons. The footer of the application shows 'Copyright © 2023 Naminal Group | SIGNificant SignAnyWhere v23.45 0.334 | Terms of Use | Privacy Policy | Cookie Policy'.

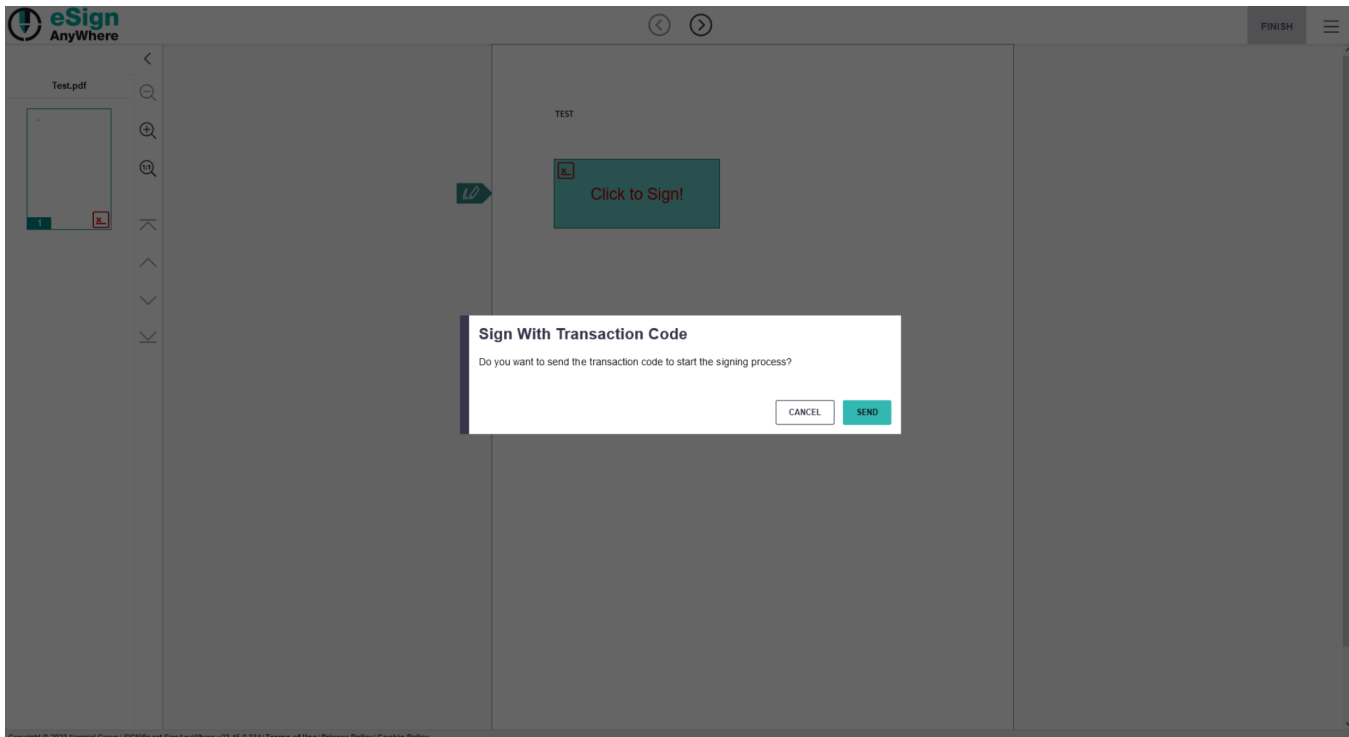


Once you have filled in the code the document is signed.



## SMS-OTP (Phone number is already defined)

In this case the recipient has just to accept the sending of the transaction code and automatically receives a SMS on the phone number which has been chosen by the sender.



## Biometric Signature v 3.2

There are following options available to sign with a biometric signature in eSignAnyWhere:

1. SignAnyWhere Viewer (in a Web Browser) in combination with SIGNiFi Device Driver (on Convertibles directly on the screen, or on Desktop PC/Notebook with signature pads)
2. SignAnyWhere Viewer (in a Web Browser) in combination with the SIGNiFi SignOnPhone App for iOS, Android and Windows
3. SignAnyWhere App for iOS, Android or Windows (available in App Stores)
4. Kiosk SDK (to sign with signature monitor devices)

### (1) SignAnyWhere Viewer with SIGNiFi Device Driver

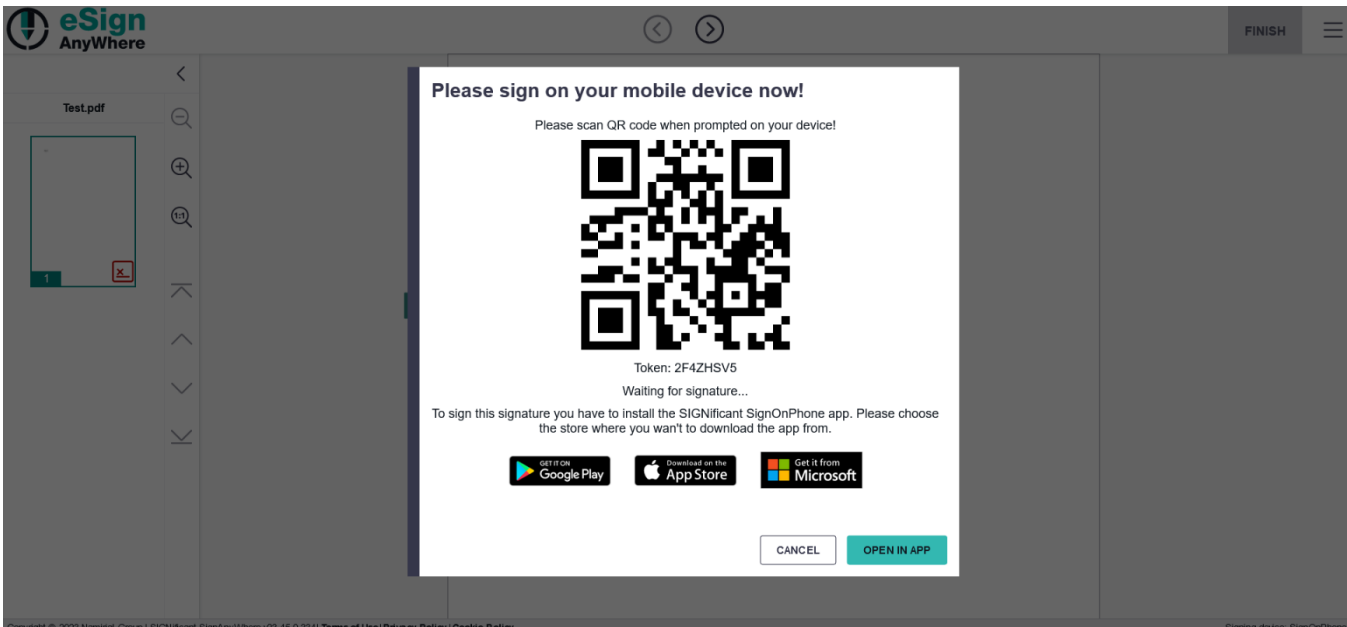
The SIGNiFi Device Driver is a local service which can be used for integrating signature capturing devices and smartcards into a webpage. It is an Add-On for WebSigningInterface, SignAnyWhere Viewer and SIGNiFi Biometric Server for the Enroll&Verify step in Web Applications. Does in addition provide the native access for SmartCard support in WebSigningInterface and SignAnyWhere Viewer.

### (2) SignAnyWhere Viewer with SIGNiFi SignOnPhone App

The Biometric Signature requires a smartphone or tablet with the **SIGNiFi SignOnPhone App**. The App is used to record the biometric signature. The smartphone or tablet is required because of security reasons to ensure high encryption and security of the biometric data. The App is available for free download in the App-Stores of iOS, Android and Windows.

Your browser does not support the HTML5 video element





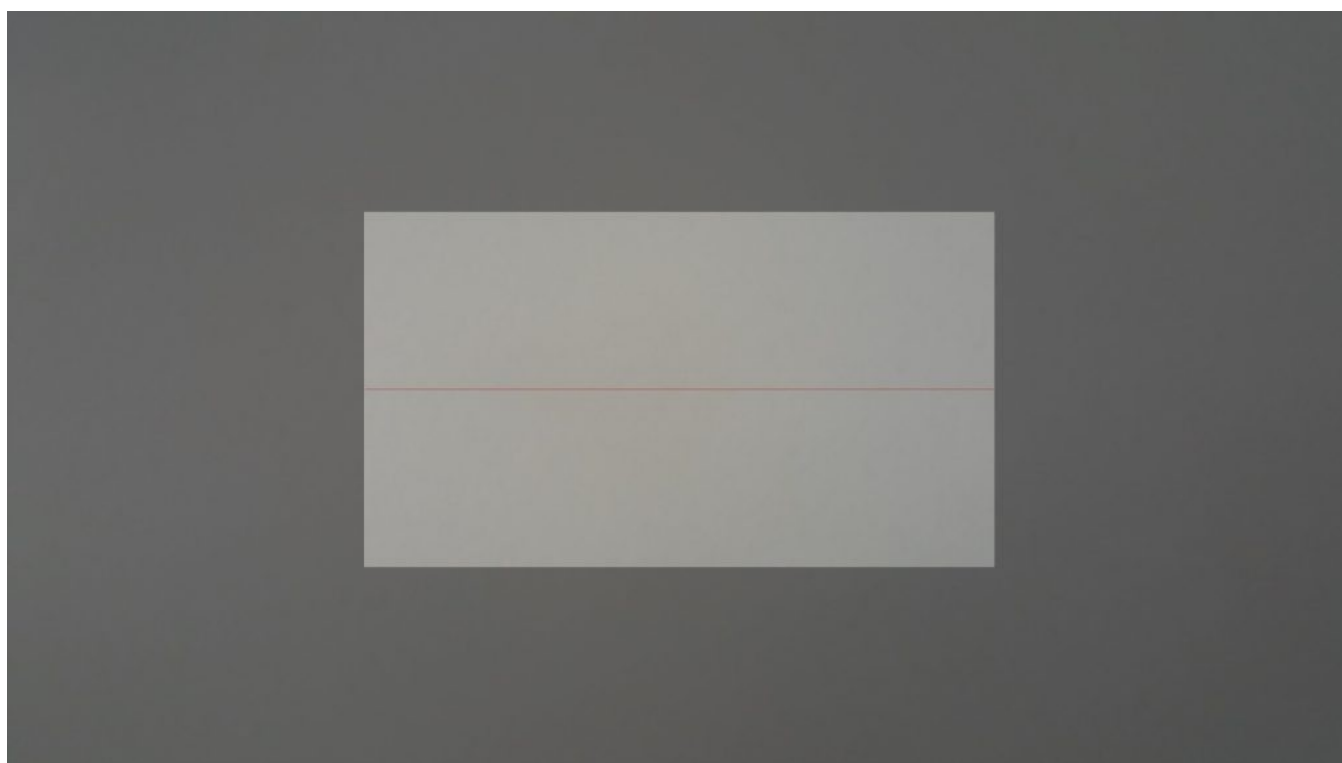
Web browser: When signing a biometric signature a QR Code is generated and displayed to record the biometric signature on a smartphone or tablet.

Figure	Description
	<ol style="list-style-type: none"> <li>1. Go to server selection</li> <li>2. QR Code</li> <li>3. Server</li> <li>4. Token (below Qr Code)</li> </ol>

SignOnPhone App: The SIGNificant SignOnPhone App. The signer has to select the correct server “eSignAnyWhere ([significant.com](http://significant.com))”. If you are using eSAW on premise you have to define the endpoint in the settings of the app. To change server settings the signer just selects it from the service provider list.

Figure	Description
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<div><div>WEB</div><div>Please choose your service provider:</div><div><div>eSignAnyWhere Europe (saas.esignanywhere.net)</div><div>eSignAnyWhere (significant.com) 1</div><div>eSignAnyWhere Demo (demo.esignanywhere.net)</div><div>eSignAnyWhere Canada (ca.esignanywhere.net)</div><div>VEI</div><div>SIGNificant (Beta4)</div></div></div> <div>1. Service provider</div>
--



SignOnPhone App: Scan the QR Code in the app.

Your browser does not support the HTML5 video element

SignOnPhone App: Sign the contract in the app. The biometric data are directly encrypted on the device.

### (3) SignAnyWhere App

The signer uses a smartphone or tablet with the preinstalled SignAnyWhere App. When the signer opens the SignAnyWhere App Link of the email the app will start automatically and load the document. The biometric signature is natively recorded and encrypted on the tablet or smartphone via the SignAnyWhere App.

Disposable certificate

The process of signing with a disposable certificate is different to the process of signing with the signature fields above. Therefore this explanation and figures will guide you through the process of signing with this signature type. First the signer receives an email to sign the envelope. After clicking on the signature field a new window appears that you have to accept the general terms and conditions. The next figure shows you how the agreement looks like.

The screenshot displays the eSign AnyWhere interface. On the left, a sidebar shows a document titled 'Test.pdf' with a thumbnail and a red 'X' icon. The main content area is titled 'Issuance of disposable certificate' and contains the following text:

**ISSUE OF DISPOSABLE CERTIFICATES - APPLICATION FORM - Mod NAM CA22D (Rev.07)**

You apply for a contract for the issuance of a disposable qualified electronic signature certificate to be concluded between you (the applicant) and Namirial SpA, an Italian company having its registered office in Senigallia (AN), Zip Code 60019, Via Caduti sul Lavoro No. 4, Italy, Trade and Companies Register of Ancona and Tax Code/VAT number No. 02046570426 (a Qualified Trust Service Provider under eIDAS Regulation). This application You are going to fulfill shall be forwarded to Namirial by the Local Registration Authority (as defined in Schedule A below) in order to provide You with a disposable qualified electronic signature certificate which allows You to electronically sign a contract within the limitations of use defined in Schedule C below (having the equivalent legal effect of a handwritten signature). According to definitions of this Issuance Contract, You are appointed as Holder of the Certificate.

**SECTION A - LOCAL REGISTRATION AUTHORITY DETAILS**

**SECTION B - HOLDER DETAILS**

**SECTION C - SUPPLY AND PRICING**  
Issuance of a Disposable Certificate, characterised by a limited duration of 60 minutes and which usage is limited within the following scope:  
L UTILIZZO DEL CERTIFICATO E LIMITATO AI RAPPORTI CON XYZMO DEMO/THE CERTIFICATE MAY BE USED ONLY FOR RELATIONS WITH THE XYZMO DEMO  
The cost of the service will be ensured by the LRA itself.

In order to sign with electronic signature the Application Form, you need to accept the terms and conditions by checking the boxes below:

- ☐ \*(1) I certify the content of **SECTION E - SELF CERTIFICATION BY THE HOLDER**
- ☐ \*(2) I accept the **General Terms and Conditions (Mod.NAMCA01D)** and the one-sided clauses set forth in **SECTION F - ONE-SIDED CLAUSES**

At the bottom right, there are 'CANCEL' and 'ACCEPT' buttons.

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After accepting all three points of the agreement you get a sms OTP. Enter the code which you got via sms and fill it in the field next to OTP. The next figure gives you an overview of the notification you get.

The screenshot displays the eSign AnyWhere interface. On the left, a sidebar shows a document titled 'Test.pdf' with a thumbnail and a red 'X' icon. The main content area is titled 'Sign with a disposable remote certificate' and contains the following text:

**Sign with a disposable remote certificate**

**OTP**

Your transaction (ID: u0VU7PTITC) expires in 4:51

**Signed by:** XYZMO CHARLY  
**Issued by:** [REDACTED]  
**Signing time:** [REDACTED]  
**IP address:** [REDACTED]

At the bottom right, there are 'CANCEL' and 'SIGN' buttons.

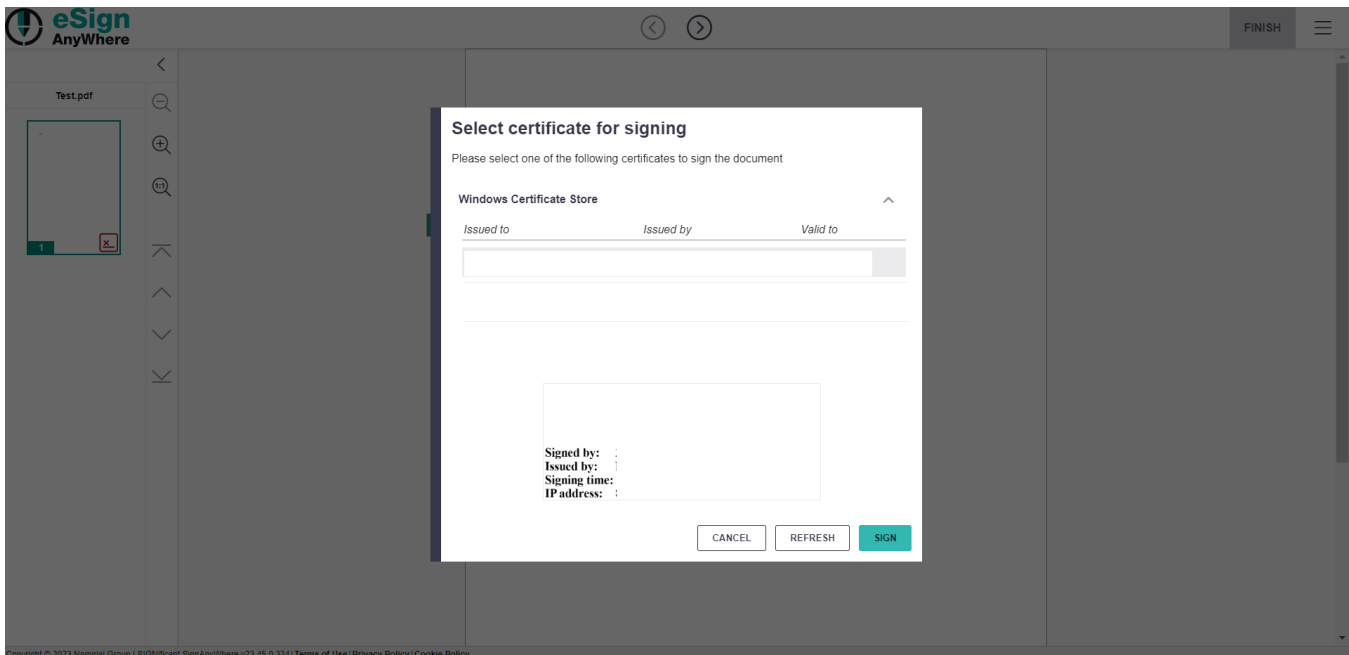
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After entering the correct code you have signed the document successfully.

## Local certificate

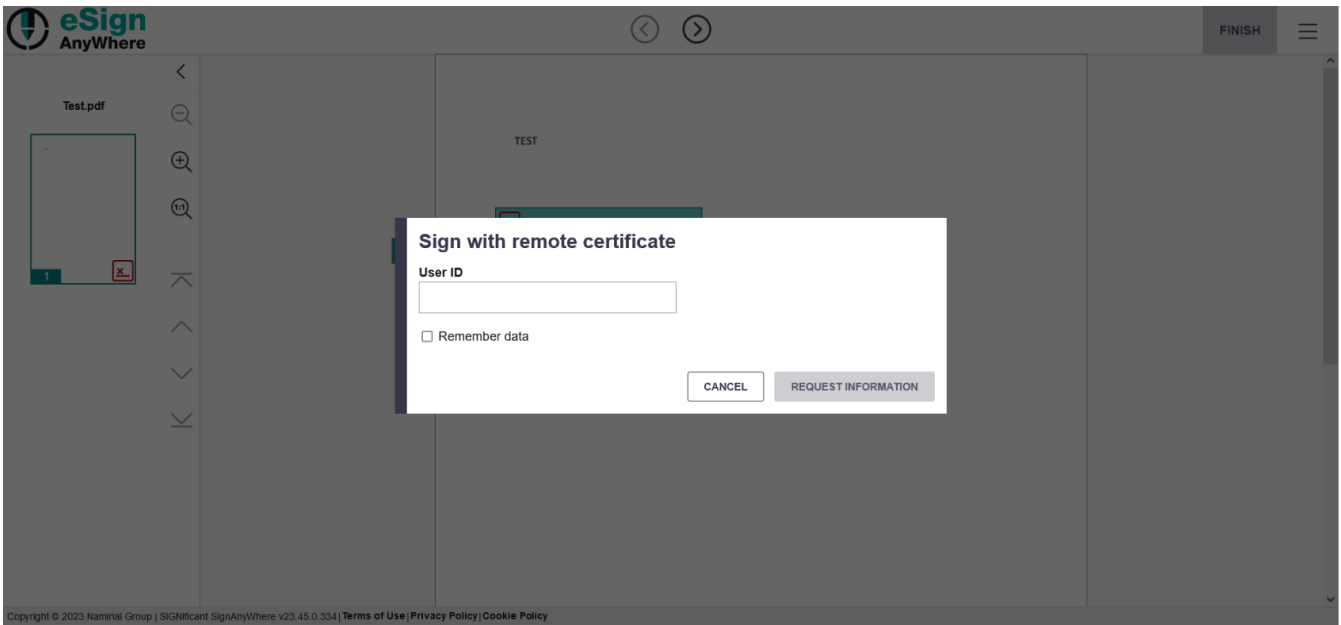
If the recipient gets an envelope with a local certificate signature following window appears after clicking on the signature field:



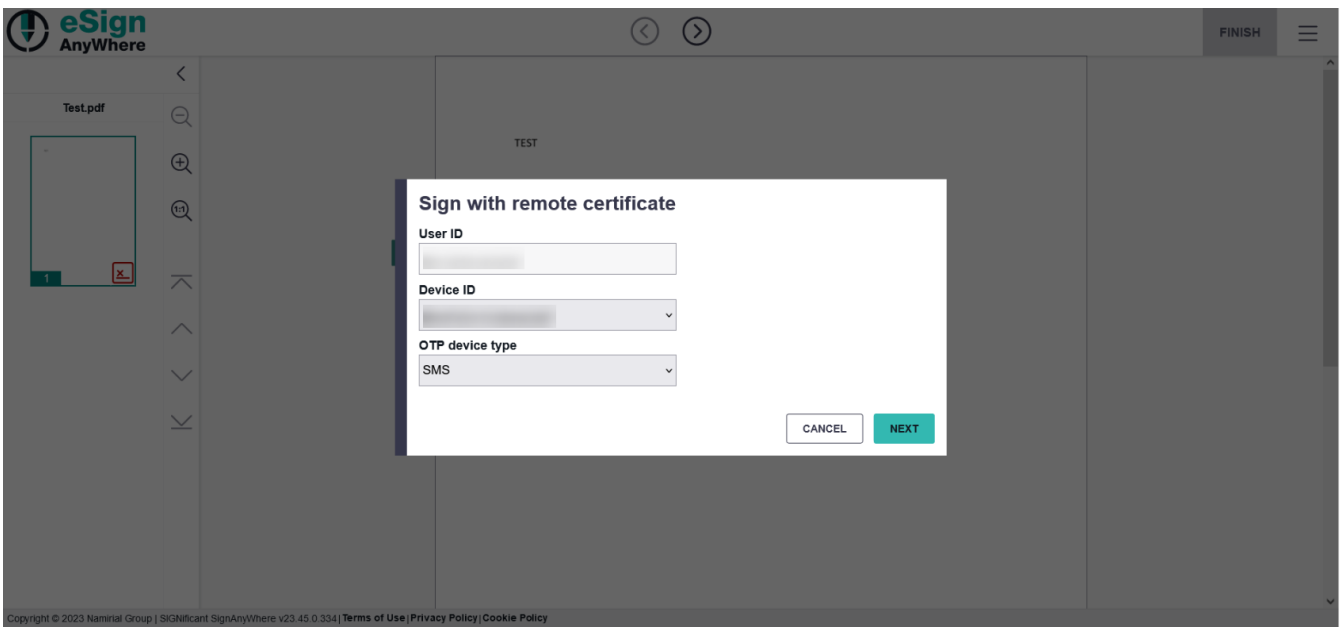
There, the recipient can choose between his/her certificates and sign with them.

## Digital remote Signature

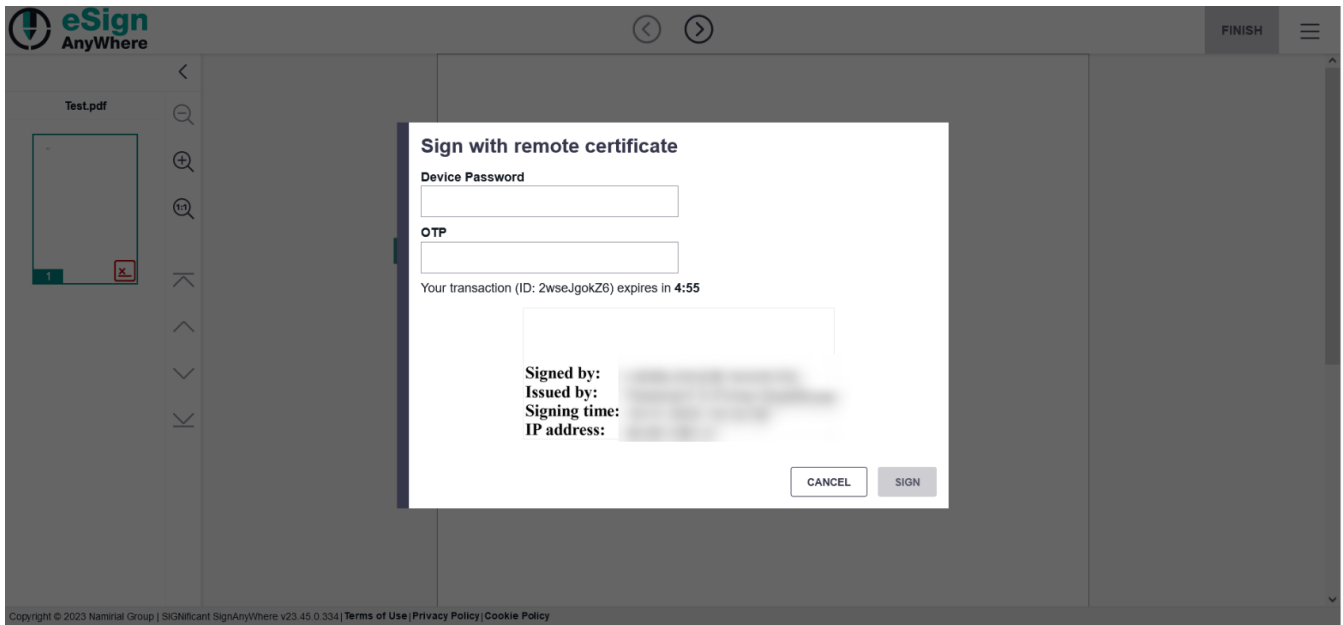
After clicking on the remote signature field following window appears:



After you filled in the user Id you can select the device id and OTP. The following screenshot shows the configuration:



After this configuration you can request a OTP:



Note: This is the configuration if the sender does not fill in the dates for the recipient. If the sender defines the user Id you just have to sign.

## Generic Signing Plugin v 20.42

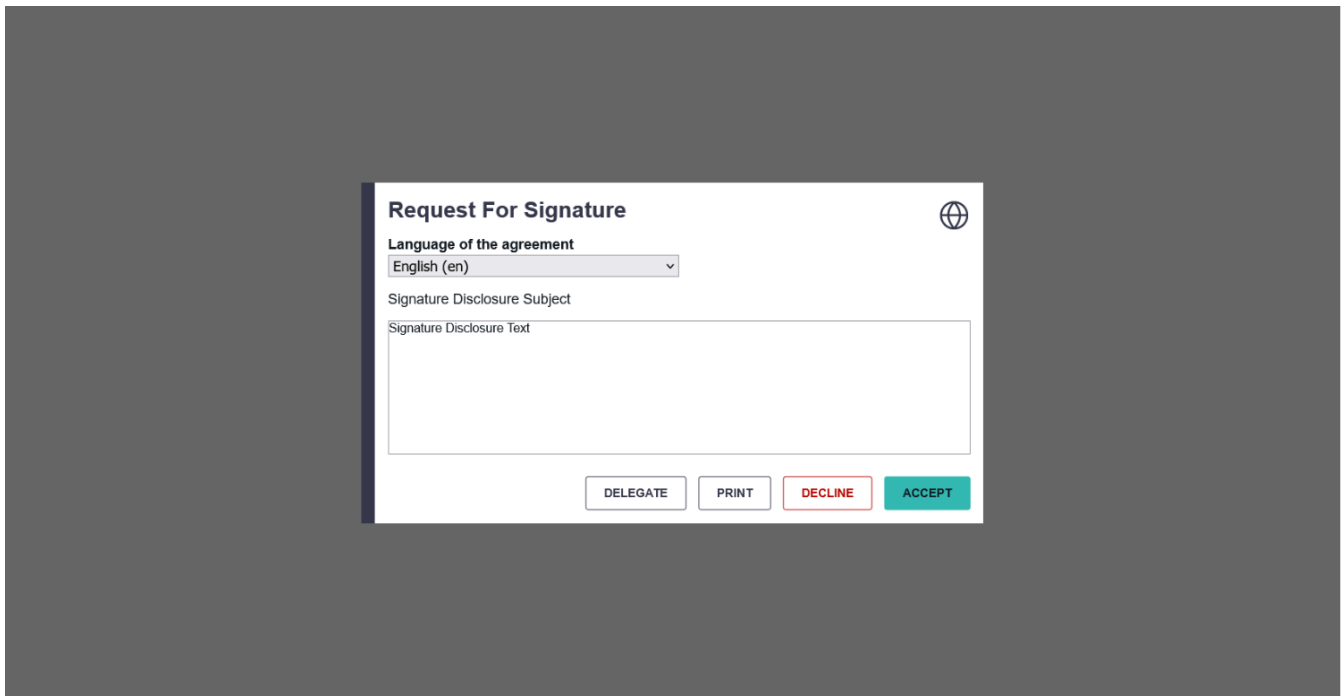
Please see the next video for more information about signing a generic signing plugin signature.

Your browser does not support the HTML5 video element

## Optional Features

### Signature Disclosure

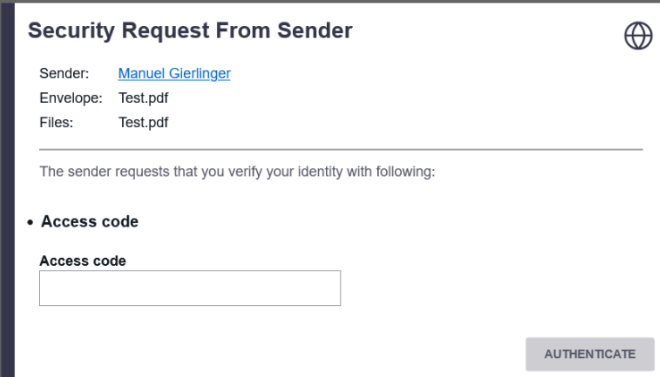
If the Signature Disclosure is used, the signer will just get access to the document if he accepts the Signature Disclosure.




## Authentication

When Authentication is used (e.g. SMS, PIN or Windows Live) the signer has to authenticate himself before he gets access to the document. So the content of the document is protected and access is just granted to the signer. If there are more than one authentication methods for the signer available, the signer can select the one he/she prefers.

### PIN



**Security Request From Sender** 

Sender: [Manuel Gierlinger](#)  
Envelope: Test.pdf  
Files: Test.pdf

---

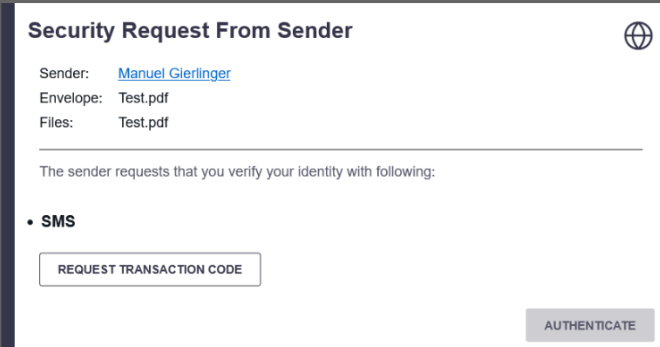
The sender requests that you verify your identity with following:


- **Access code**

Access code

**AUTHENTICATE**

### SMS



**Security Request From Sender** 

Sender: [Manuel Gierlinger](#)  
Envelope: Test.pdf  
Files: Test.pdf

---

The sender requests that you verify your identity with following:

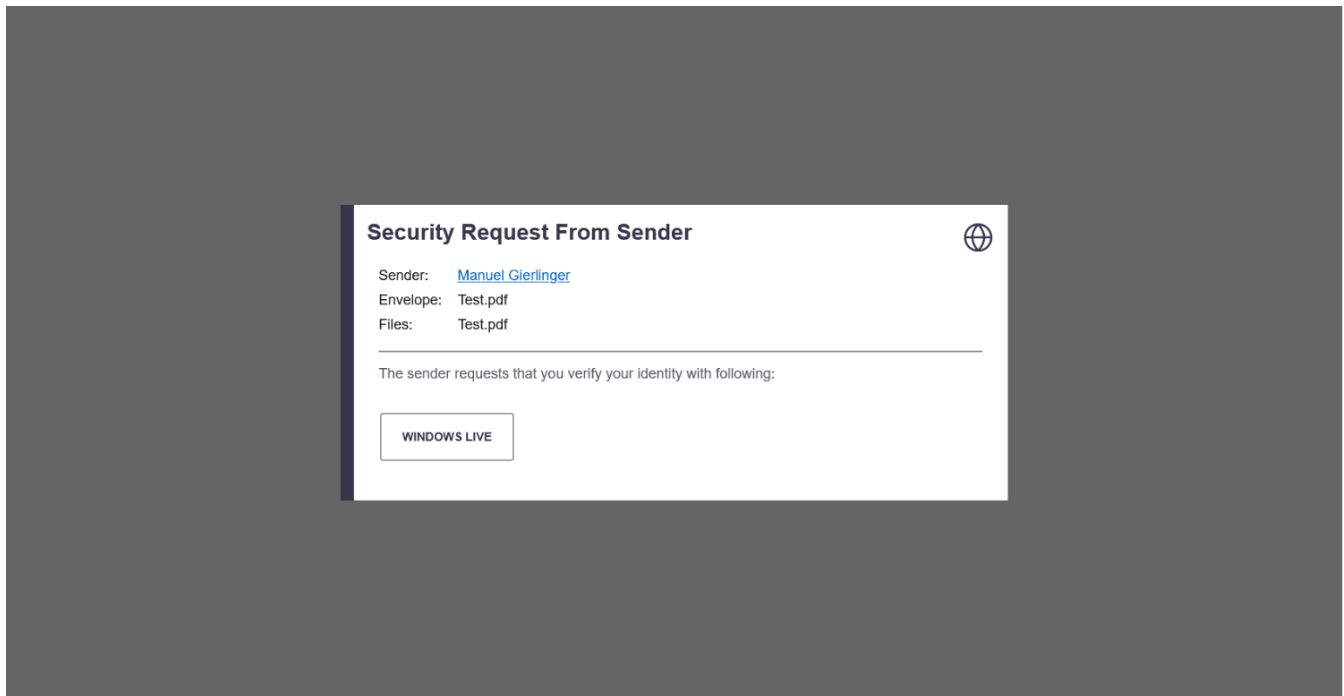
- **SMS**

**REQUEST TRANSACTION CODE**

**AUTHENTICATE**



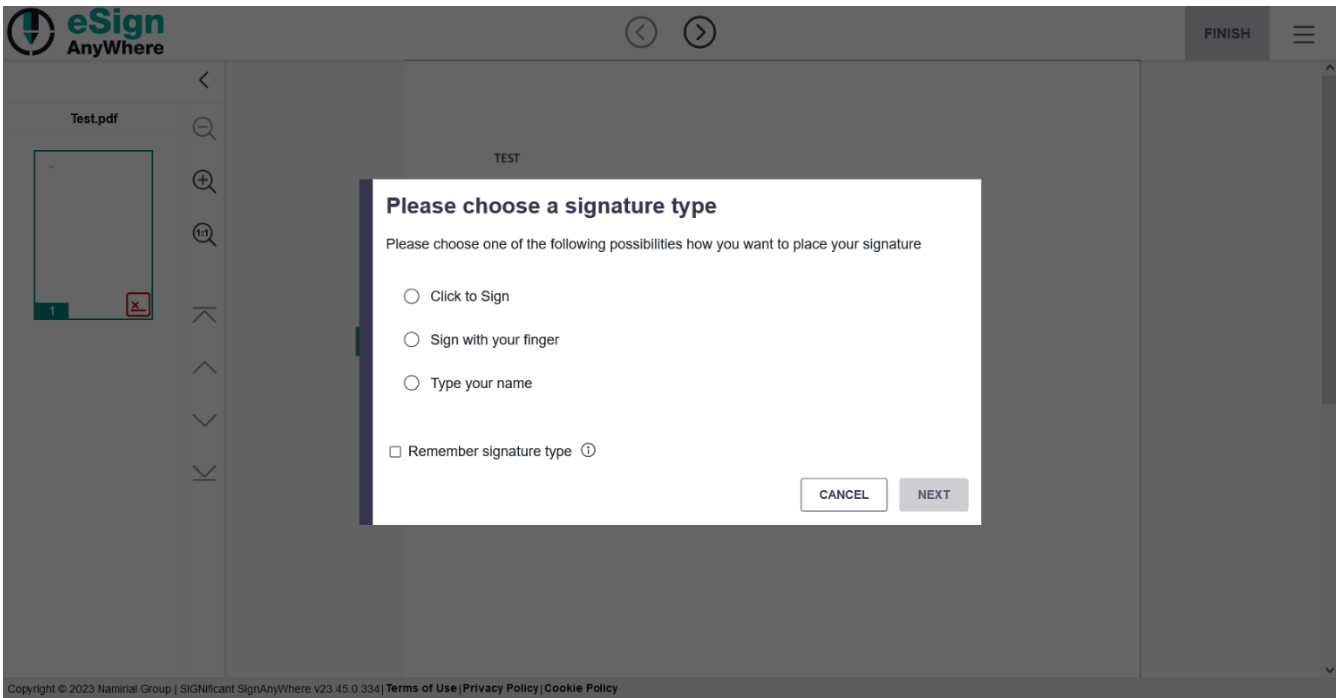
## Windows Live



## Multiple signature types

The sender of an envelope can select more than one signature type, so that the signer is able to choose his/her preferred type.





## Batch Signature

With the batch signing the recipient can decide if he/she wants to sign all signatures within a document at once or each by each.

Please see following options:

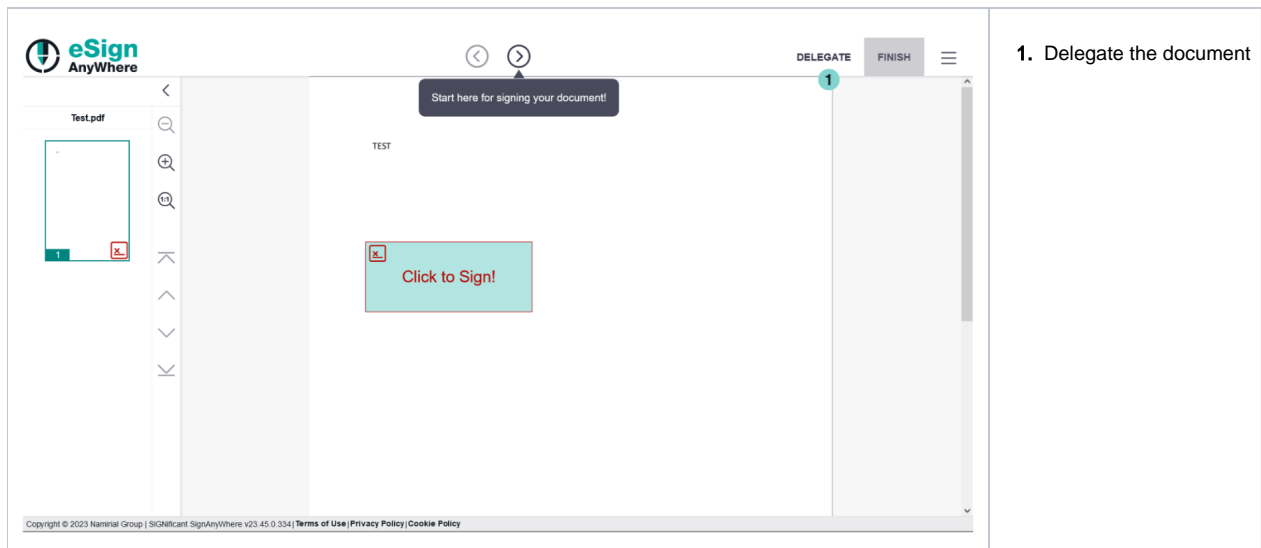
- preselected or **v 3.6**
- unselected **v 3.6**
- selected (required mandatory) **v 3.7**
- or unselected (required mandatory) **v 3.7**

For more information please see [Batch Signing Dialog](#)

## Delegation

If you allow recipients of an envelope to delegate the signing task (see envelope setting in Step3 or organisation settings), the recipient will see the following options:

Figure	Description
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**Delegation details**

Type in new recipient details

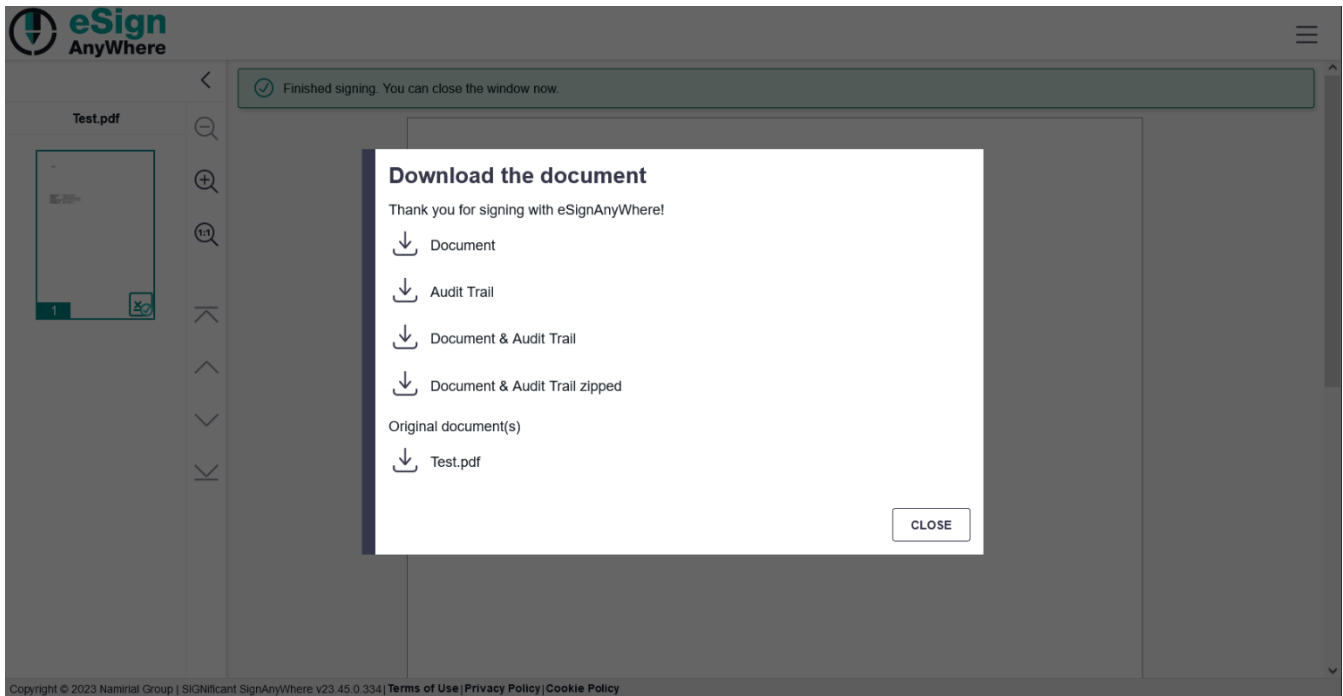
<b>First name: *</b>	<b>Last name: *</b>
<input type="text"/>	<input type="text"/>
<b>Email: *</b>	<b>Mobile phone:</b>
<input type="text" value="your.email@here.com"/>	<input type="text" value="+43 1234 56789"/>
<b>Reason for Delegation:</b>	
<input type="text" value="Your reason here ..."/>	

\* This field is required.

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## Download documents

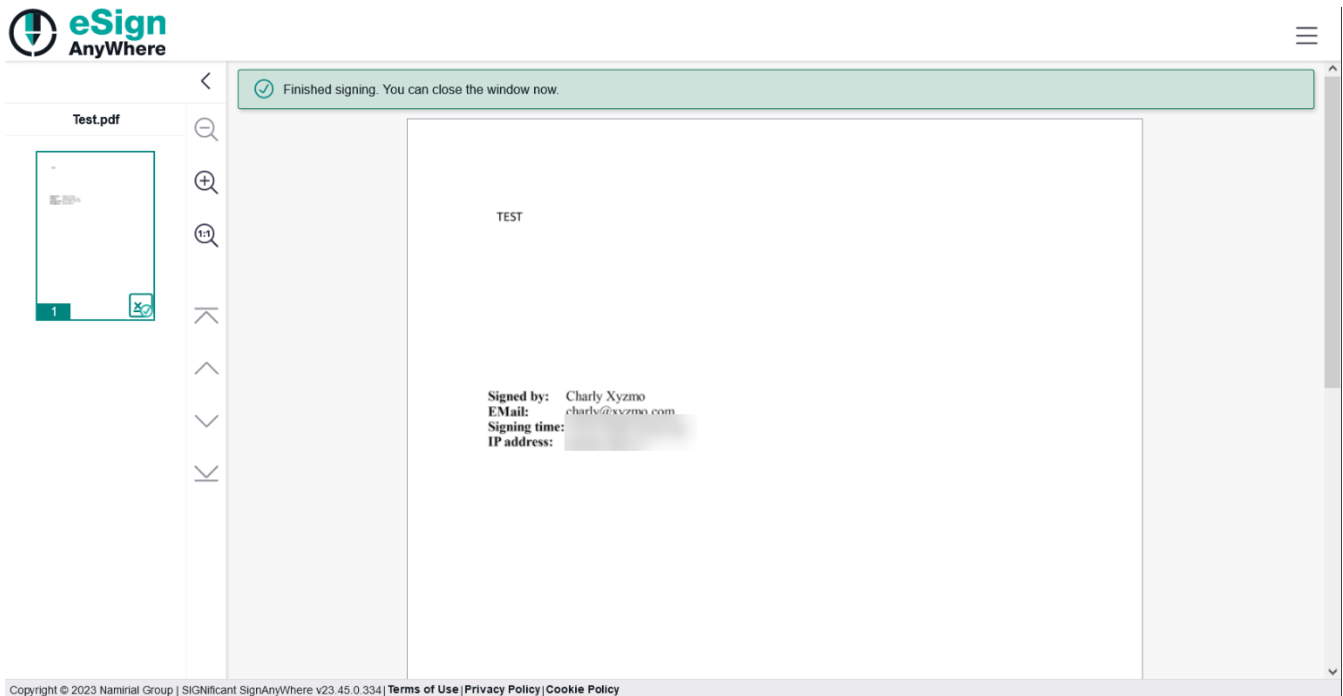
After signing and finishing the document you can download several documents which are shown in the next figure.



You can either download:

1. The Document (Flattened copy with just one sealing at the end)
2. The Audit Trail
3. The document and the Audit Trail (zipped and unzipped)
4. Or the original document (The signed original document)

## Document



## The Audit Trail

The Audit Trail shows you all information about the document (e. g. information about the signer, the workstep, download information and more)

Following figure shows an example of an Audit Trail:

Current status of transaction: Finished

Information about the documents contained in this transaction:

Document reference: #1

Name: Test.pdf  
Number of pages: 1  
Completed hash (SHA256):  
File size: 163213 bytes (159.39 KiB)

Sender: Manuel Gierlinger



Receiver: Charly Xyzmo

charly@xyzmo.com

The following agreement has been shown and accepted:

**Signature Disclosure Subject**

Signature Disclosure Text

Date & Time	Action	Description	Signer	IP Address	Geolocation
11/10/2023 11:48:55	Create workstep	SignAnyWhere workstep created			
11/10/2023 11:49:02	Log client settings	SignAnyWhere is using following settings: '1'	Charly Xyzmo		N/A
		Viewer preferences: 			
11/10/2023 11:49:03	Open workstep	SignAnyWhere v23.45.0.334 with language code 'en' loaded '1'	Charly Xyzmo		N/A
11/10/2023 11:49:04	Accept agreement	Agreement has been accepted by the user	Charly Xyzmo		<a href="#">48.27°/14.20° +23.934m</a>
11/10/2023 11:49:05	Change page view	Page 1 shown '1'	Charly Xyzmo		<a href="#">48.27°/14.20° +23.934m</a>
11/10/2023 11:49:43	Log client settings	SignAnyWhere is using following settings: '1'	Charly Xyzmo		N/A
		Viewer preferences: 			
11/10/2023 11:49:43	Open workstep	SignAnyWhere v23.45.0.334 with language code 'en' loaded '1'	Charly Xyzmo		N/A
11/10/2023 11:49:44	Change page view	Page 1 shown '1'	Charly Xyzmo		N/A
11/10/2023 11:51:39	Sign document	Signature (SigField 1f#XyzmoDuplicateIdSeparator#Signature_ 7337b52f-c7b4-4202-44e7-23f1e176c272) has been applied on page 1 of document #1 by Charly Xyzmo using signature type 'Picture'	Charly Xyzmo		<a href="#">48.27°/14.20° +23.934m</a>
		Signed by: Charly Xyzmo E-Mail: charly@xyzmo.com Signing time: IP address:			

Document and Audit Trail (zipped and unzipped)

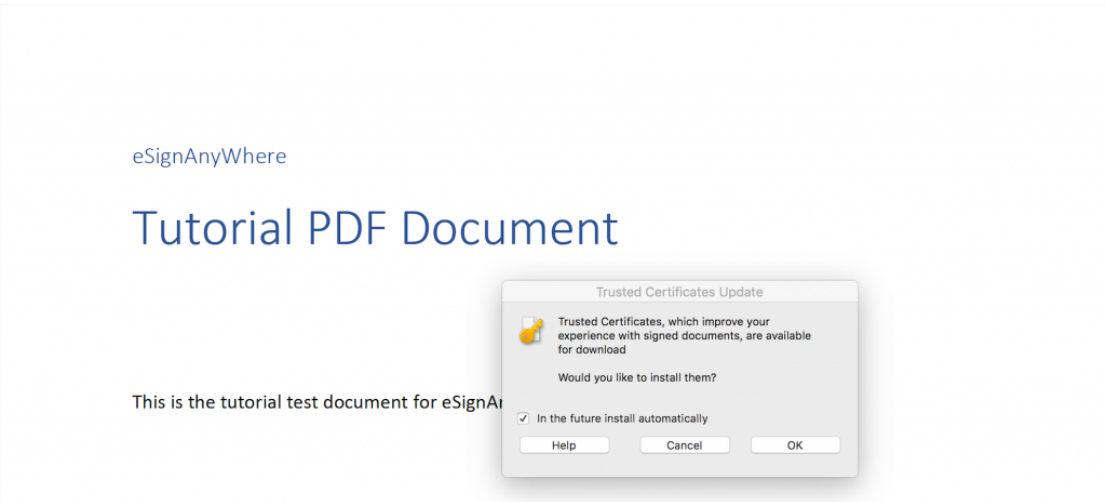
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## × Signatures



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