eformsign

Service User's Guide

eformsign user guide

v1.3

FORCS

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COMMON

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COMMON

00. Before using eformsign

Purpose of this manual
What is eformsign?
Document Version

Purpose of this manual

This manual is intended for the users who are new to eformsign, a cloud-based electronic document service, to understand cloud services and to introduce the basic process of creating electronic documents using eformsign.

What is eformsign?

eformsign is a **cloud-based e-Form service** that enables anyone to easily create all kinds of paper documents in an enterprise. Use documents for the entire business operations and store them securely.

Main Features

- Immediate Conversion from paper document to e-Form
- Full Mobile Support
- Manage business tasks quickly and conveniently
- Reliable e-Signature
- Store documents securely

Applicable Area

- Contracts
- Approvals
- Agreements
- Quality Assurance
- Facility Check
- Safety Check
- Field Inspection
- Process Control

Version	Date	History
1.0	2018.03.31	Original Version
1.1	2018.08.13	All image has been updated for 10,2018,0801,201 version
1.2	2018.10.05	All image/text has been updated and reflect slide master
1.3	2019.02.20	All image/text has been updated for 10,2019,0220,201 version

Glossary

Terms	Details	Remarks
Company	Organization for using service. Ex) company, school, etc.	
User	User who creates document and uses service ➢ Manager: A user (Member) of the company with authorities ① Administrator: The company's Administrator & key account. Performs all tasks such as company information management, group/Member management, Member Invitation, and payment management. ② Company Manager: A Manager who holds partial authorities (company management, integration) of Administrator's. ③ Template Manager: A Manager with template management access. ④ Document Manager: A Manager with document management access. ➢ Member: A user (Member) of the company. ➢ External user: A third party person/group who is not a member of the company.	
Form	An electronic form converted from Excel/Word/ or other document formats	
Form Builder	A tool which creates an e-Form from Excel/Word/ or other document formats. Ex) OZ in Excel, OZ in Word, etc.	
Template Deploy	An action which user executes to convert e-document to write-able e-Form	
e-Form	A form which user has created using e-Form	
Approval	An action which user approves or decline a request under review	

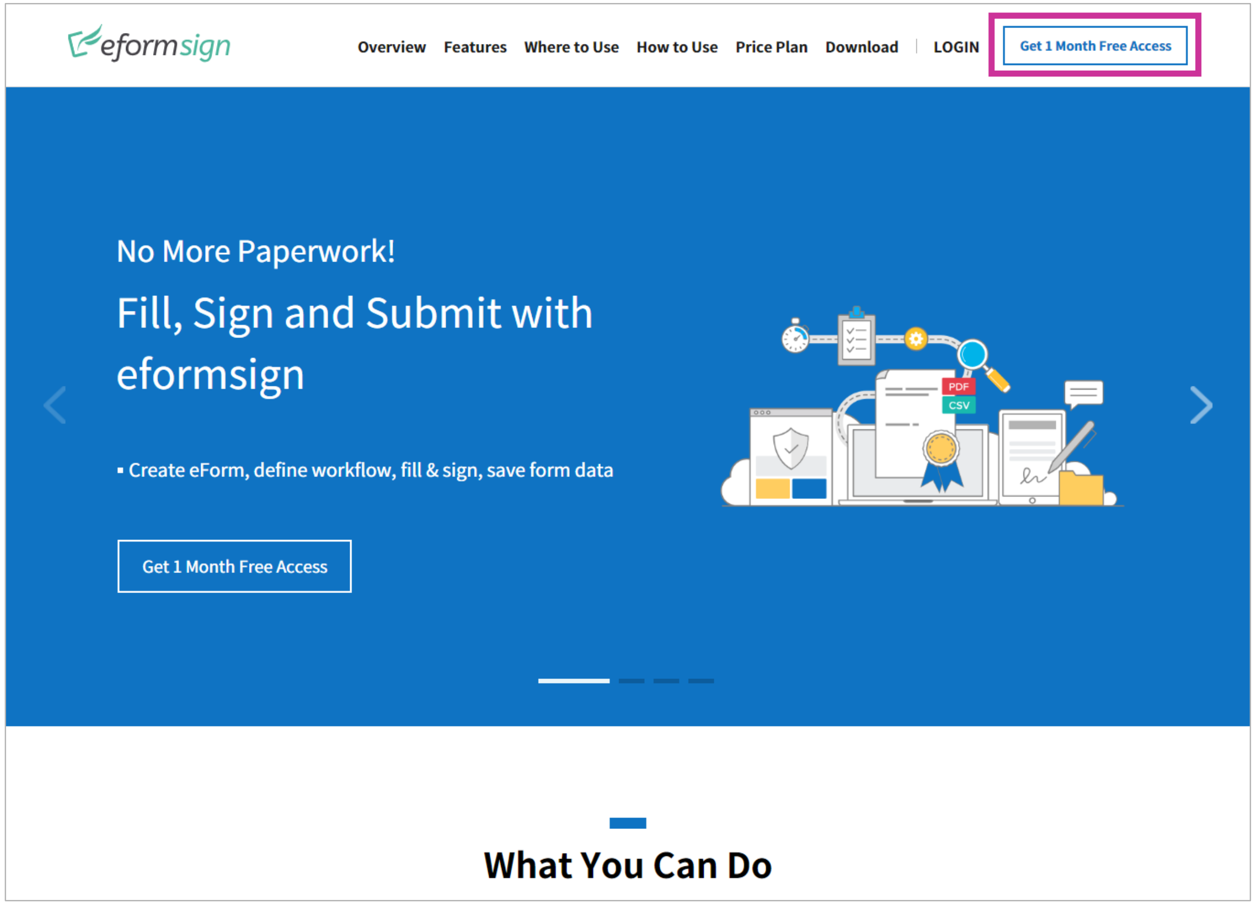
MANAGER

01. Organize Company

Create Administrator account & Company
Login
About Menu
Invite new member

Create Administrator account & Company

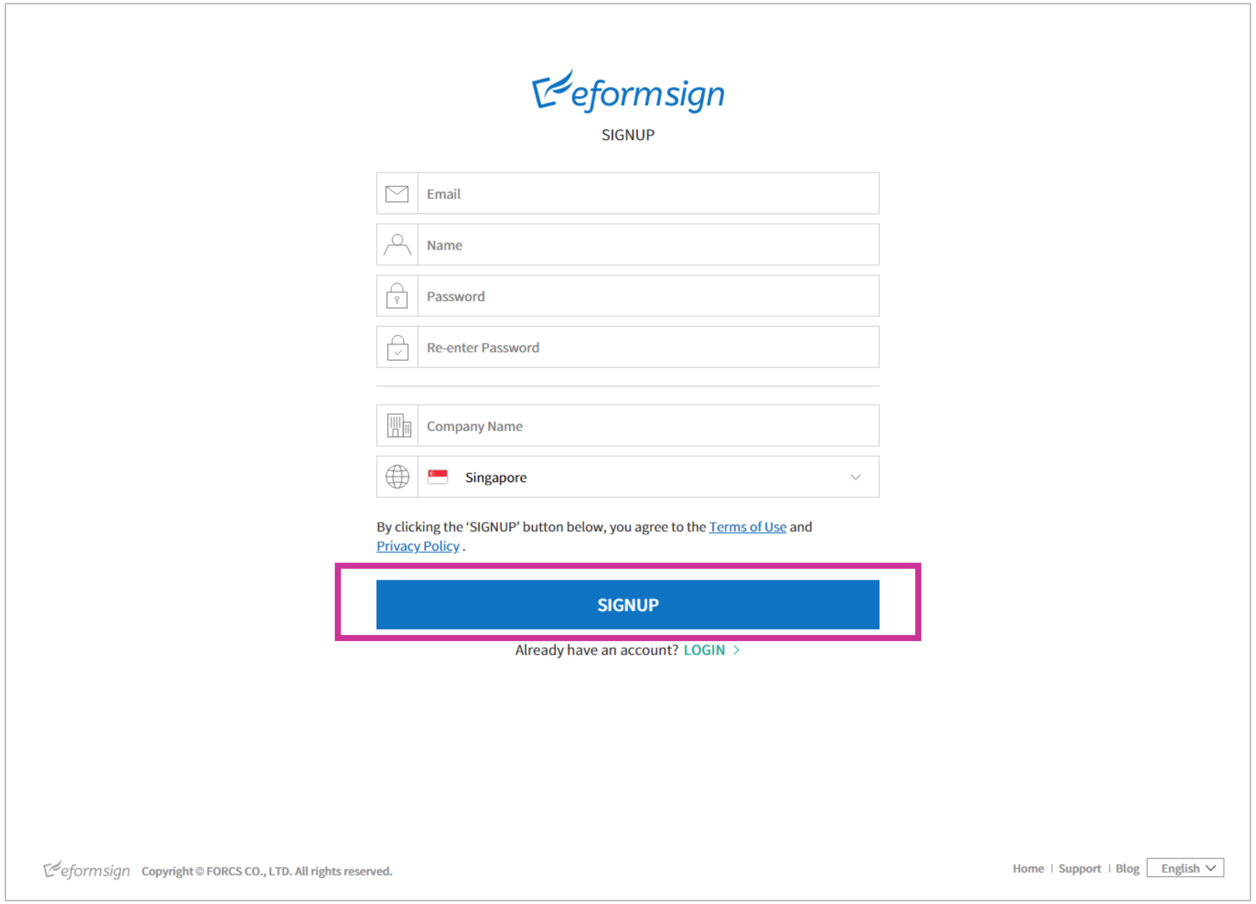
Administrator



- In order to use eformsign service, first, an Administrator must be registered.
- Main features, how to use, and price plans can be checked on eformsign main site or via the eformsign application.
- On eformsign page or on mobile app, please click [Get 1 Month Free Access] to go to the Administrator account and company creation page.

Create Administrator account & Company

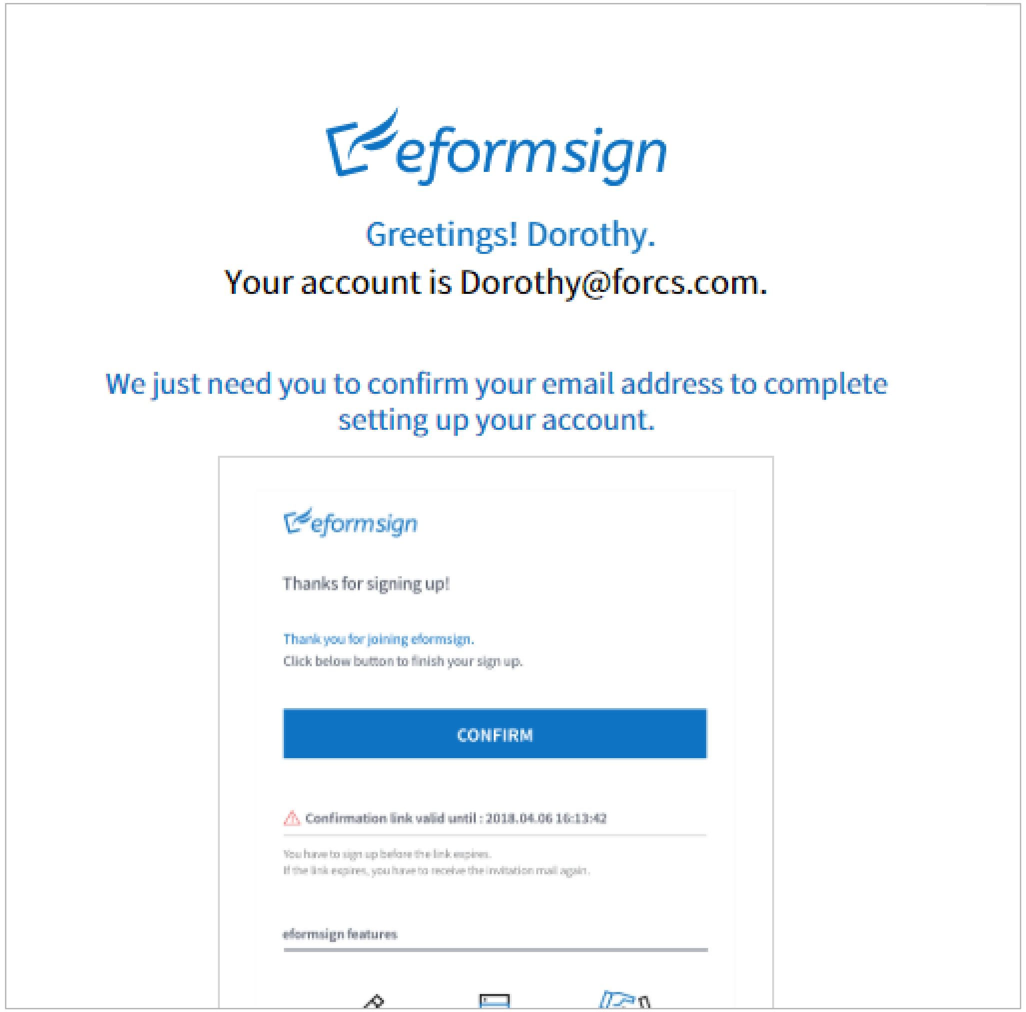
Administrator



- Enter account information such as E-mail, Name, Password, Re-enter Password.
- Choose the country and insert the name of the company.
- Select [SIGNUP] to finish creating the Administrator account.

Create Administrator account & Company

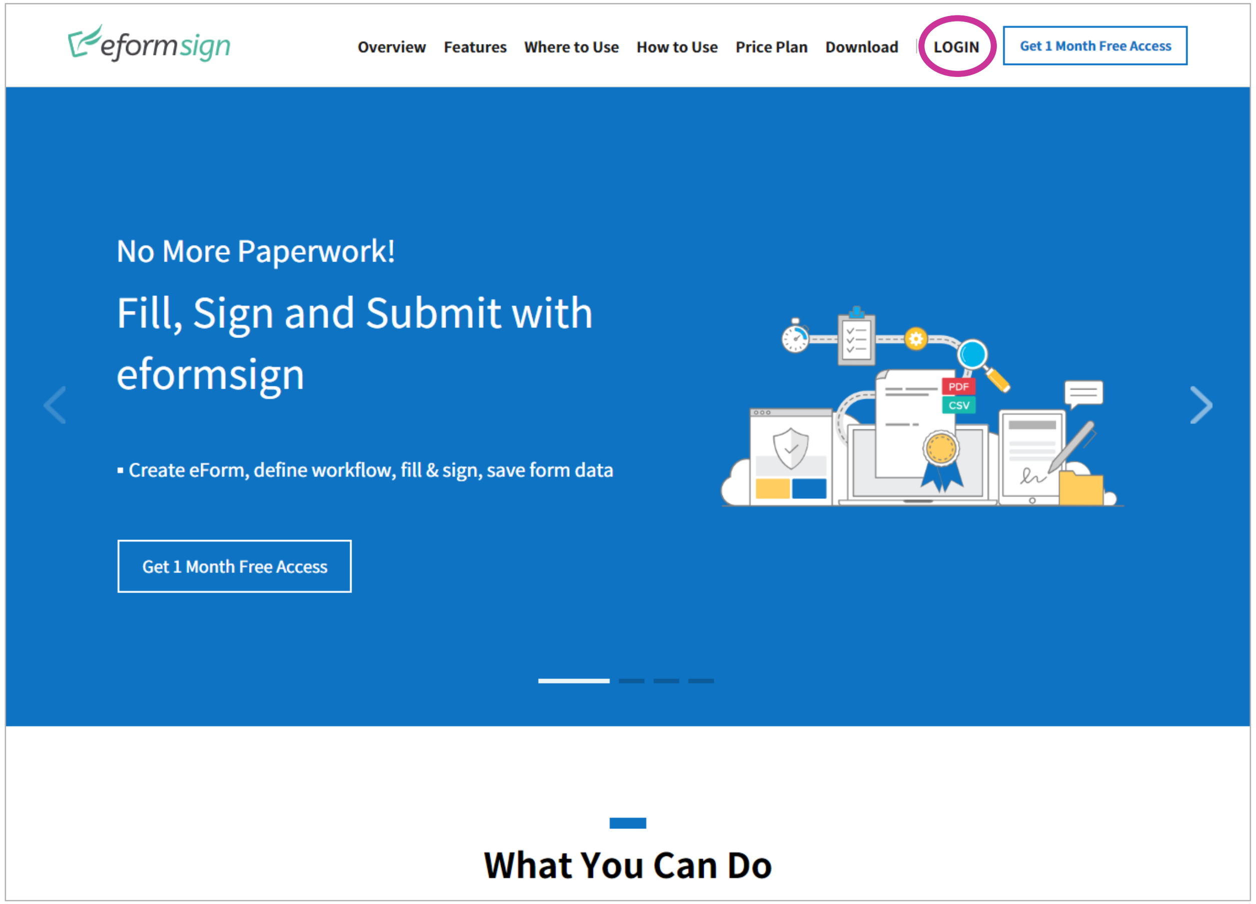
Administrator



- A verification mail gets sent to an inserted Email.
- The verification mail's validity only lasts for 30 minutes.
- If verification mail's validity expires, please select [RESEND] in order to resend the verification mail.
- Please check your eformsign account's mail inbox. In order to complete the verification, click [CONFIRM].
- It will redirect you to the login screen. Administrator account and company creation is All Documents once you log in using account information you used for registration. Start using eformsign by inviting group member.

Login

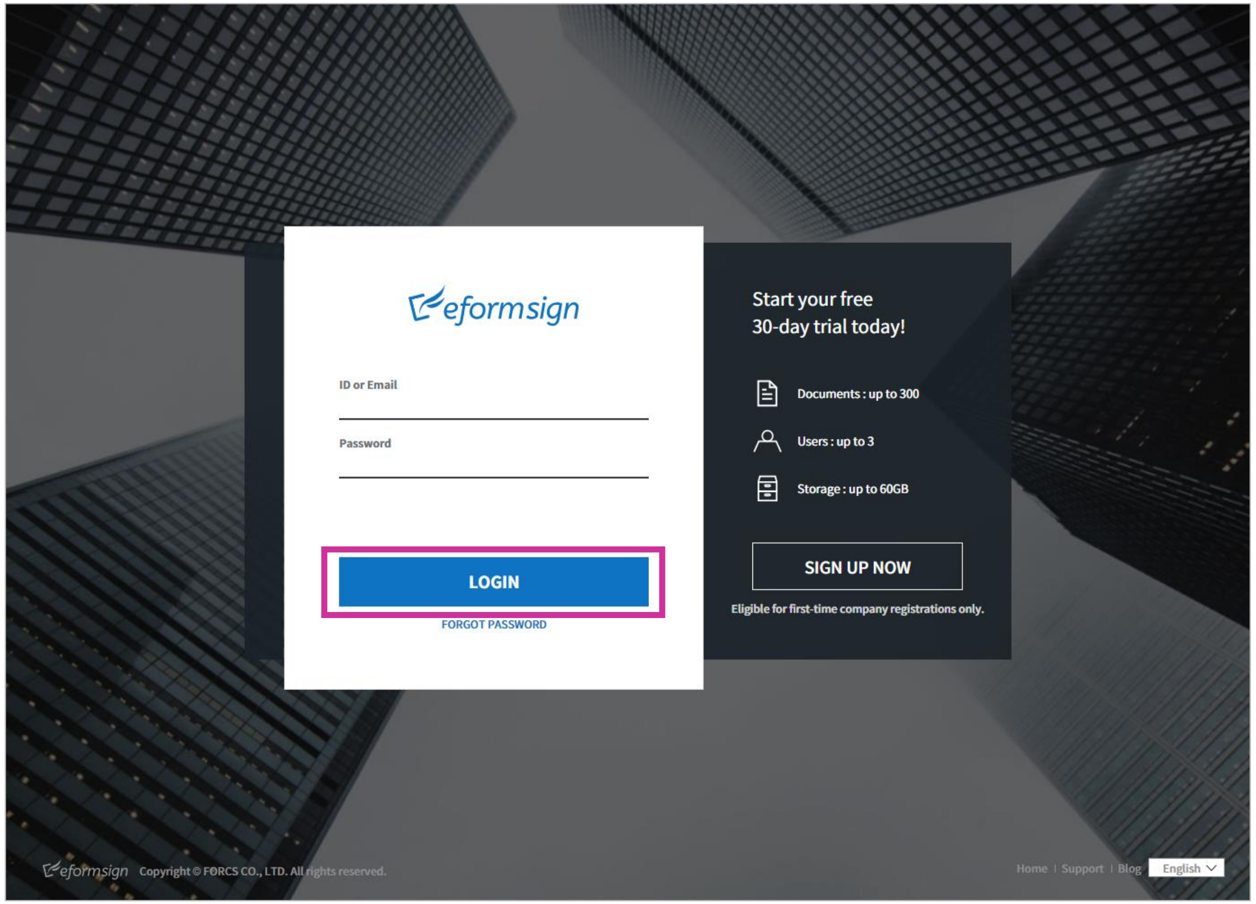
ALL



- On eformsign page or on mobile app, please click [LOGIN].

Login

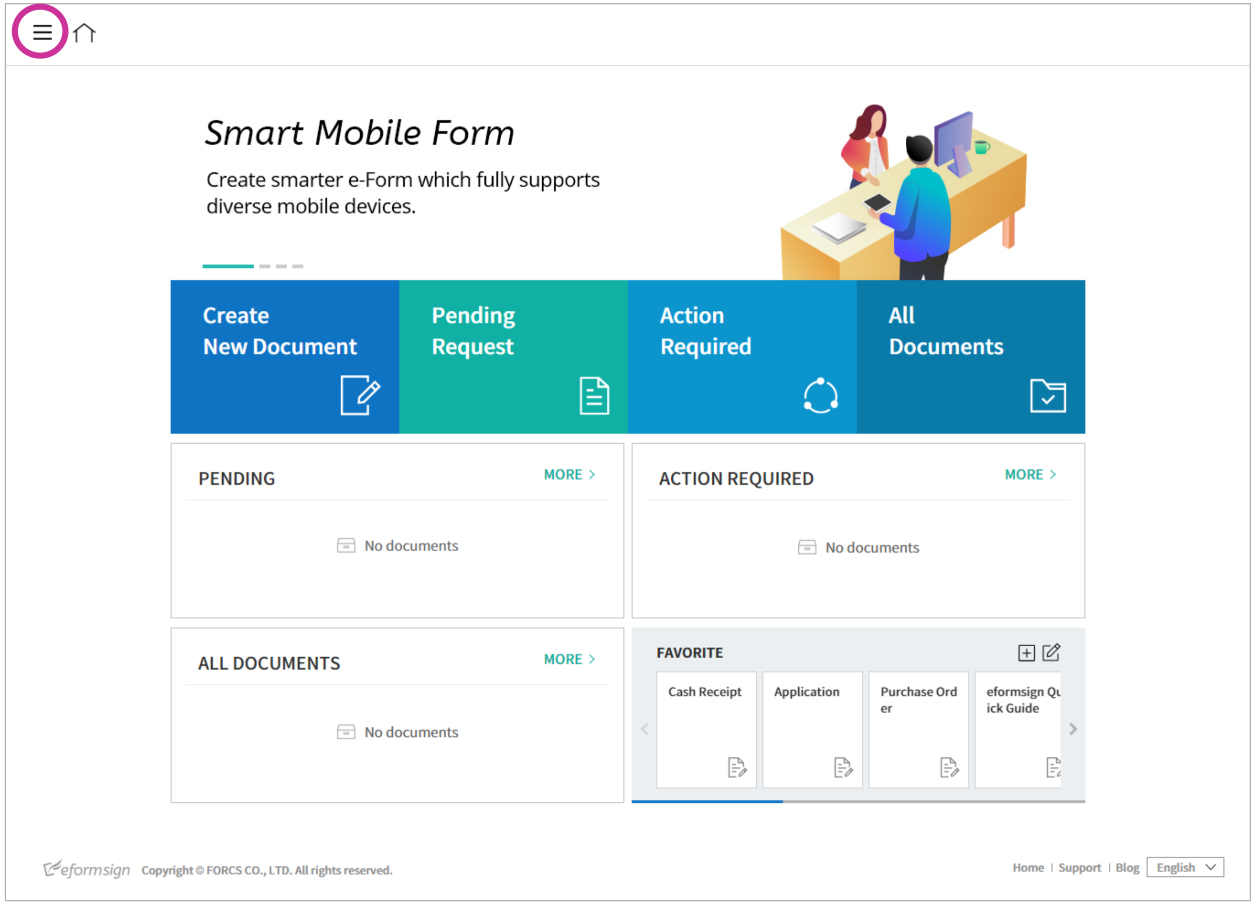
ALL



- Enter the ID or Email, Password of the Administrator account and please click [LOGIN].
- The password can be reset by clicking [FORGOT PASSWORD].
- This will redirect the user to the dashboard screen.

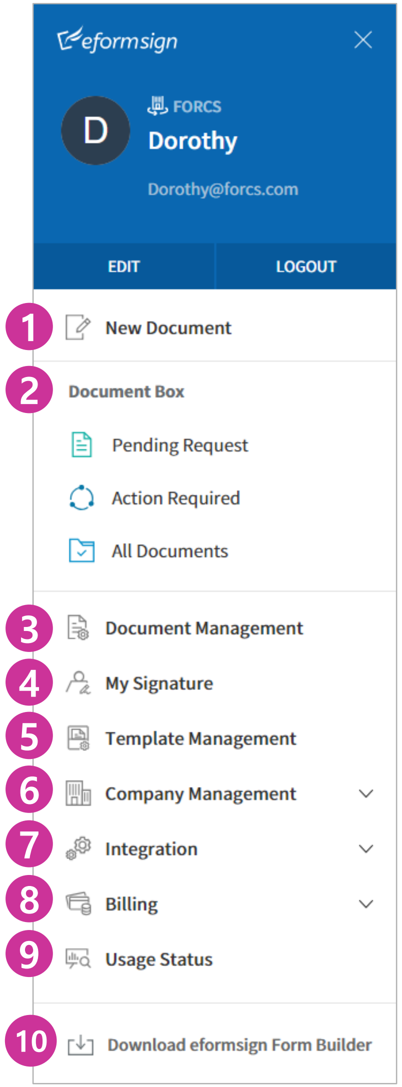
Login

ALL



- This is the first screen after the log in.
- Please select [≡] on upper left corner from dashboard screen.

About Menu



① New Document: Shows the template list where the user can click a template and start to create the e-form.

② Document Box: User can check your created e-forms.

- ✓ Pending Request: User can check the documents that are in progress.
- ✓ Action Required: User can check the documents that have been requested for approval from other members.
- ✓ All Documents: User can check the all documents.

③ Document Management: Manager can view and manage all the forms and documents.

④ My Signature: Can create and save the signature which can be used when signing an e-Form.

⑤ Template Management: User can check the template list.

⑥ Company Management: User can check and edit company information.

- ✓ Company Profile: Can check the company information.
- ✓ Group Management: Can create or edit the group or manage members of groups.
- ✓ Member Management: Can invite or manage members.

⑦ Integration: Can manage the Dropbox and Access key configuration.

- ✓ Cloud Storage Settings: Can integrate Dropbox or Google Drive for document backups.
- ✓ Access Key Management: Can create an Access Key to extract data and use it.

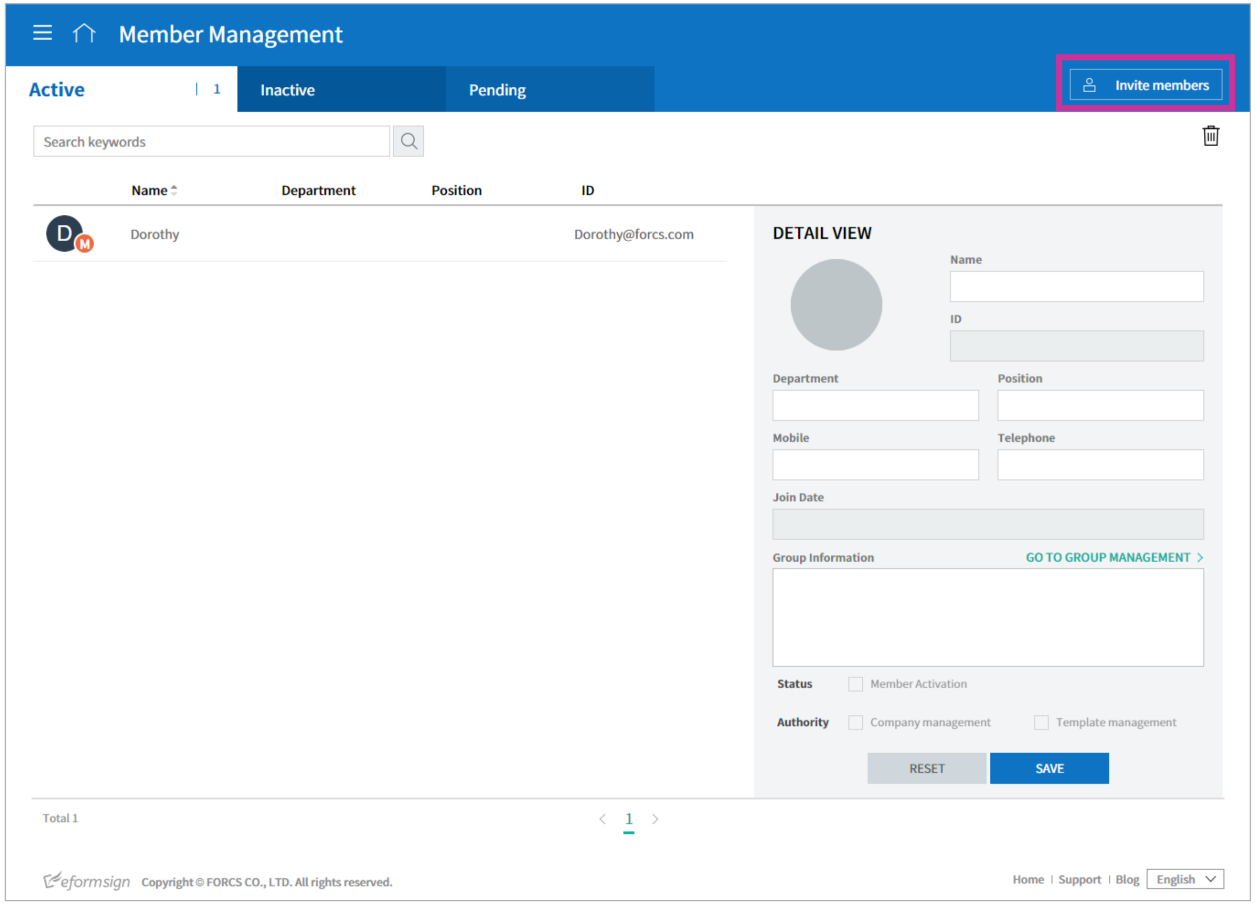
⑧ Billing: Can check and management price plans.

⑨ Usage Status: Can check weekly, monthly, and annual data & document usage status.

⑩ Download eformsign Form Builder: Office add-ons can be downloaded which is necessary to convert paper documents into e-forms.

Invite new member

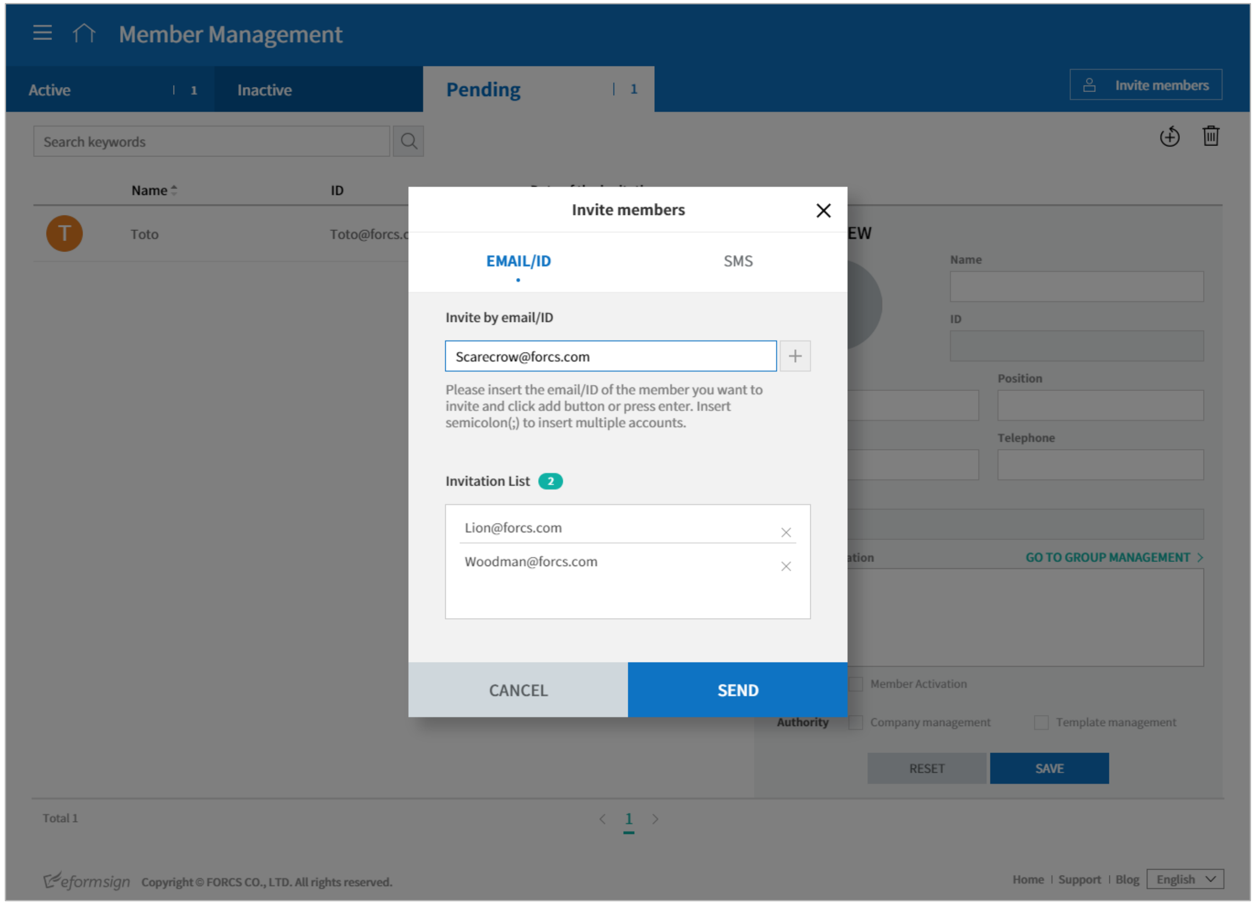
Administrator | Company Manager



- Register members whom to use eformsign service.
- The member registration is done when the Administrator invites users whom to be company members then users who received invitations accept the invitation.
- In order to invite new members, please click [Invite members] on upper right of the screen.

Invite new member (EMAIL/ID)

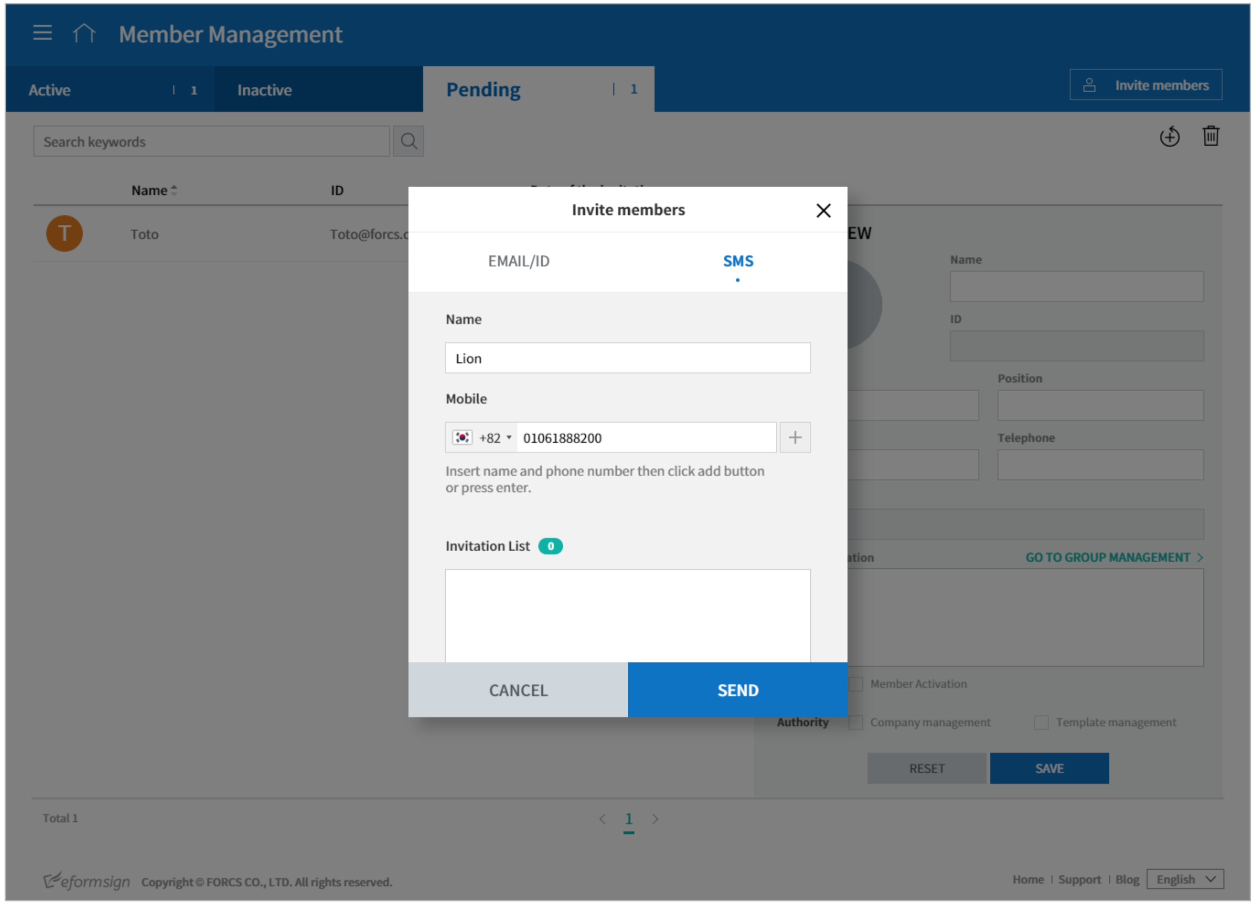
Administrator | Company Manager



- Administrator can invite users via EMAIL/ID or SMS.
- Click [+] after inserting email or ID of the member for an invitation.
- 'Unable to invite member due to user limit' popup shows up if the company owner tries to invite extra members when there is no vacancy on the current plan.
- 'This user is already a member of the company' popup shows up if the company manager tries to invite a user whom already have been added to the company.
- When trying to invite multiple members, ; acts as a division among the list of Emails.
- Press [SEND] in order to an invitation mail is sent.

Invite new member (SMS)

Administrator Company Manager

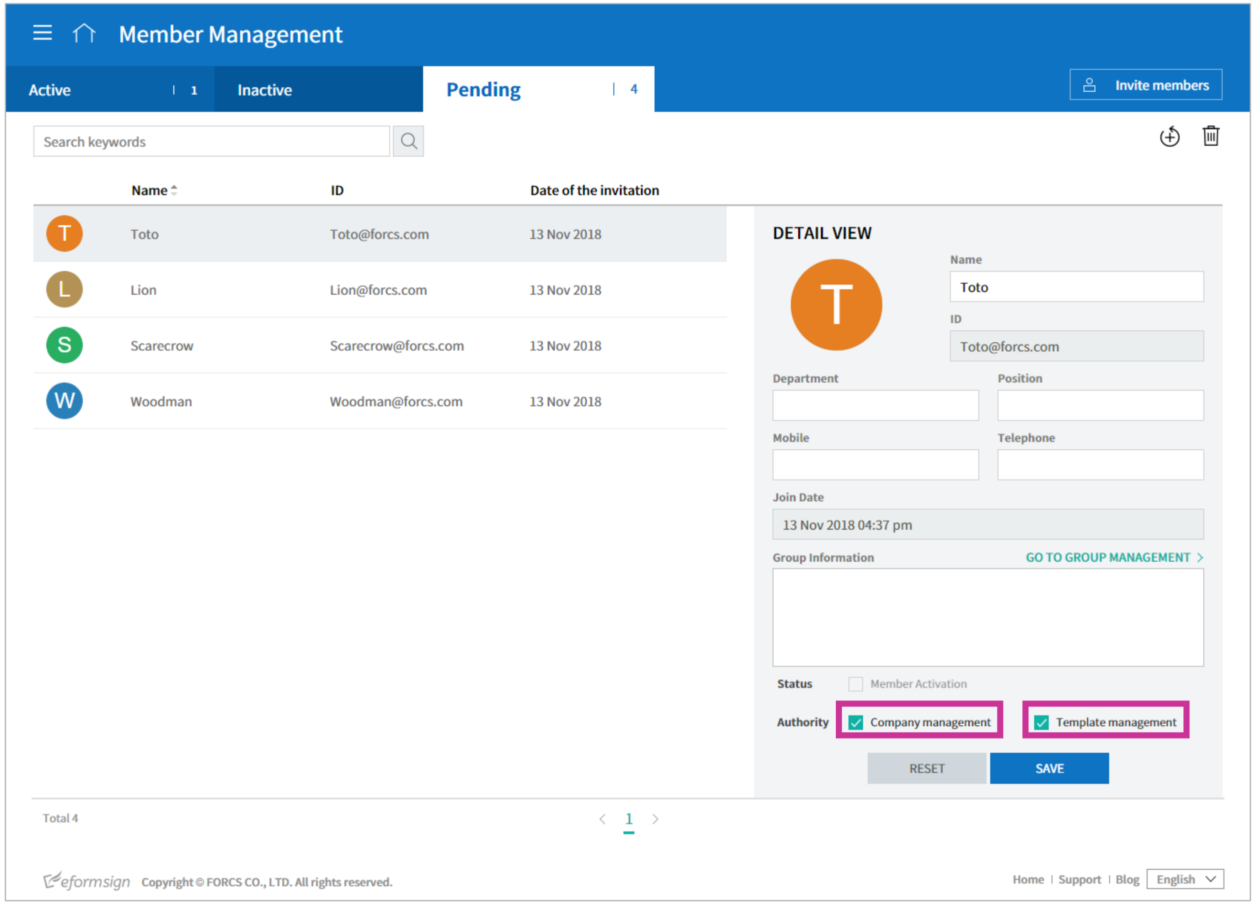


- Select [SMS] to invite members using text message.
- 'Unable to invite member due to user limit' popup shows up if the company owner tries to invite extra members when there is no vacancy on the current plan.
- 'This user is already a member of the company' popup shows up if the company manager tries to invite a user whom already have been added to the company.
- Click [+] after inserting phone number and the name of the member for an invitation.
- Press [SEND] in order to send an invitation URL to SMS.

Invite new member

Administrator

Company Manager



- Can view the list of invited members.
- The invitation can be sent again by clicking [ ] icon and can be canceled by clicking a [ ] icon.
- The admin may assign the user as manager on a DETAIL VIEW section, after selecting the user on member management. [Company management] option enables the user to become a company manager. [Template management] option enables the user to be a template manager.
- Press [SAVE] in order to save the settings after managing members.

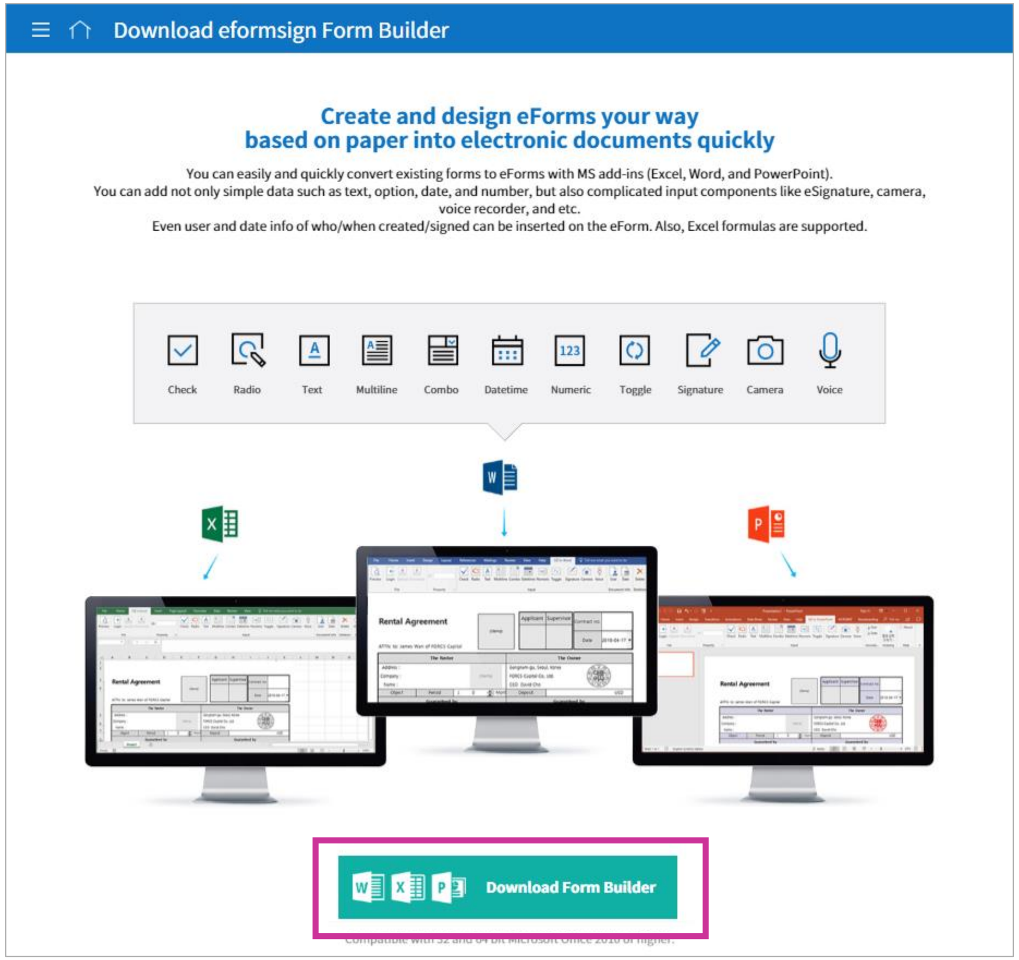
MANAGER

02. Create Template

- Create Template
- Check Template

Create Template

Administrator
Template Manager



- Already existing office files can be converted to e-Forms by using Download eformsign Form Builder.

- OZ in EXCEL, OZ in WORD, OZ in PPT and OZ Report Designer should be used when converting corporate’s paper documents to e-Forms. For further instruction, please contact Forcs. Co customer service.

- Please click [Download Form Builder].

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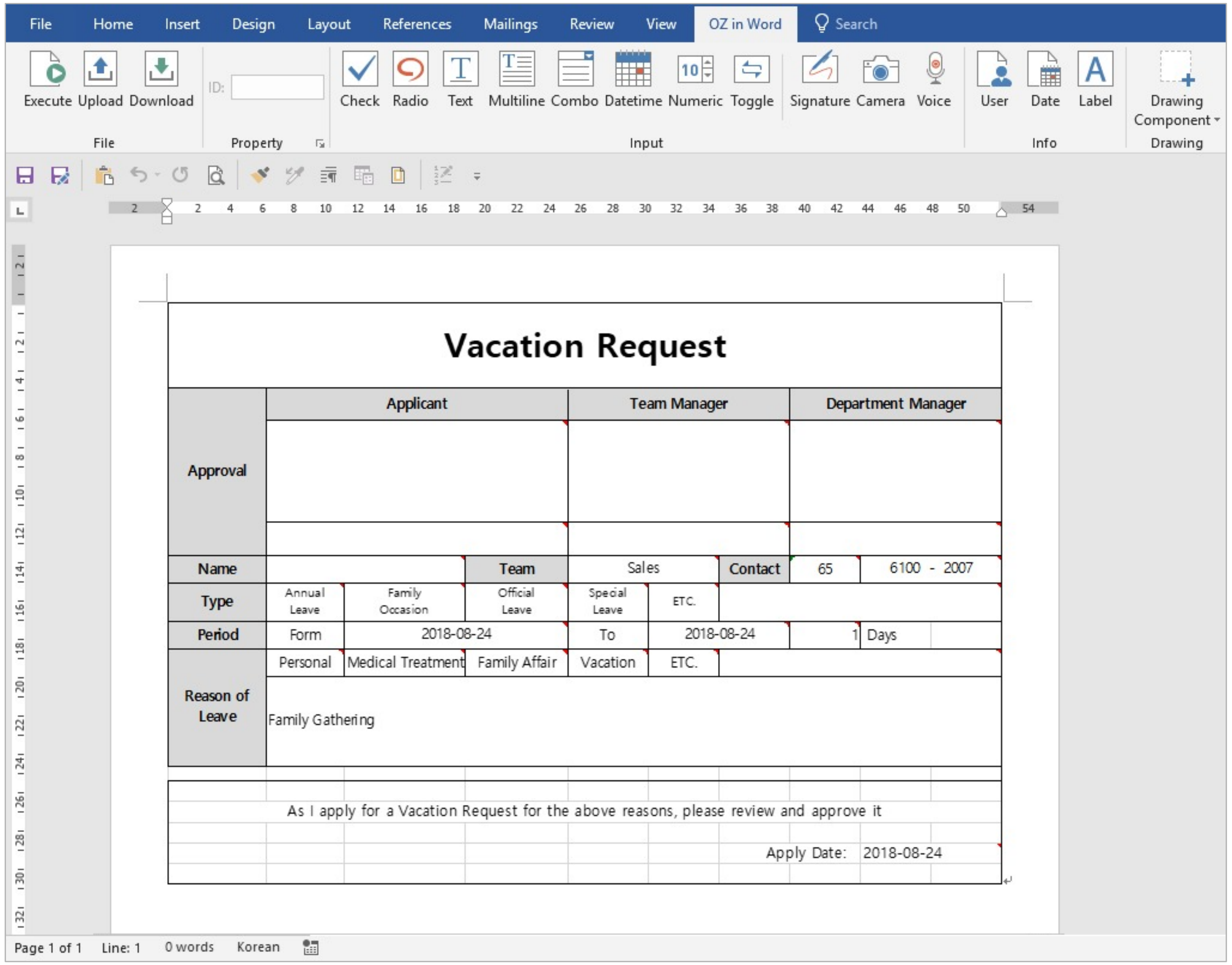
Create Template (OZ in WORD)

Administrator

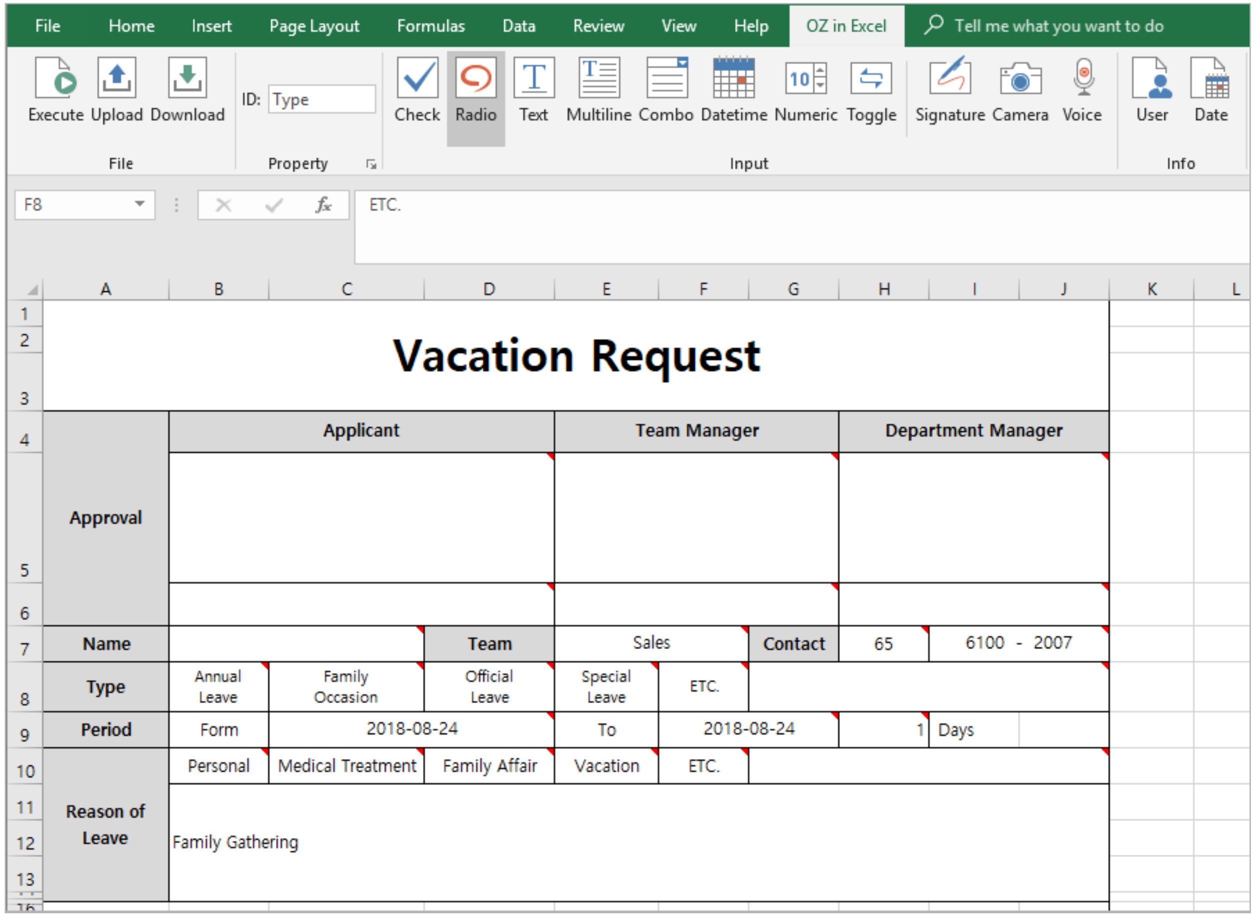
Template Manager



- In case of Word, the minimum system requirement is Microsoft Word 2010 in order to use eformsign form builder. Please use version 2010 or higher.
- Select the location for component insertion. Select the desired component from ribbon toolbar.

Create Template (OZ in EXCEL)

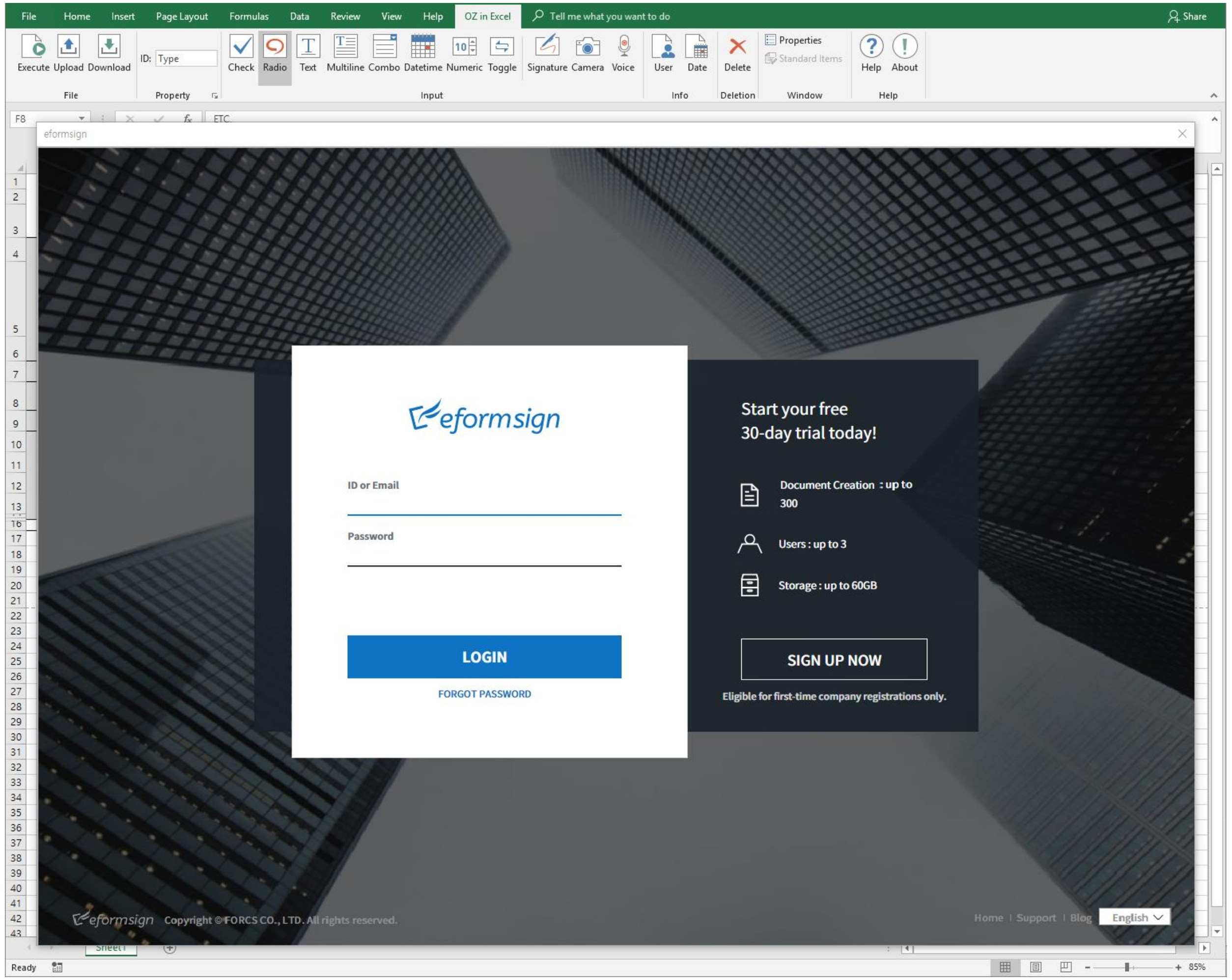
Administrator Template Manager



- In case of Excel, the minimum system requirement is Microsoft Excel 2010 in order to use eformsign form builder. Please use version 2010 or higher.
- Select the cell for inserting input component. Select the desired component from ribbon toolbar.

Create Template (OZ in EXCEL)

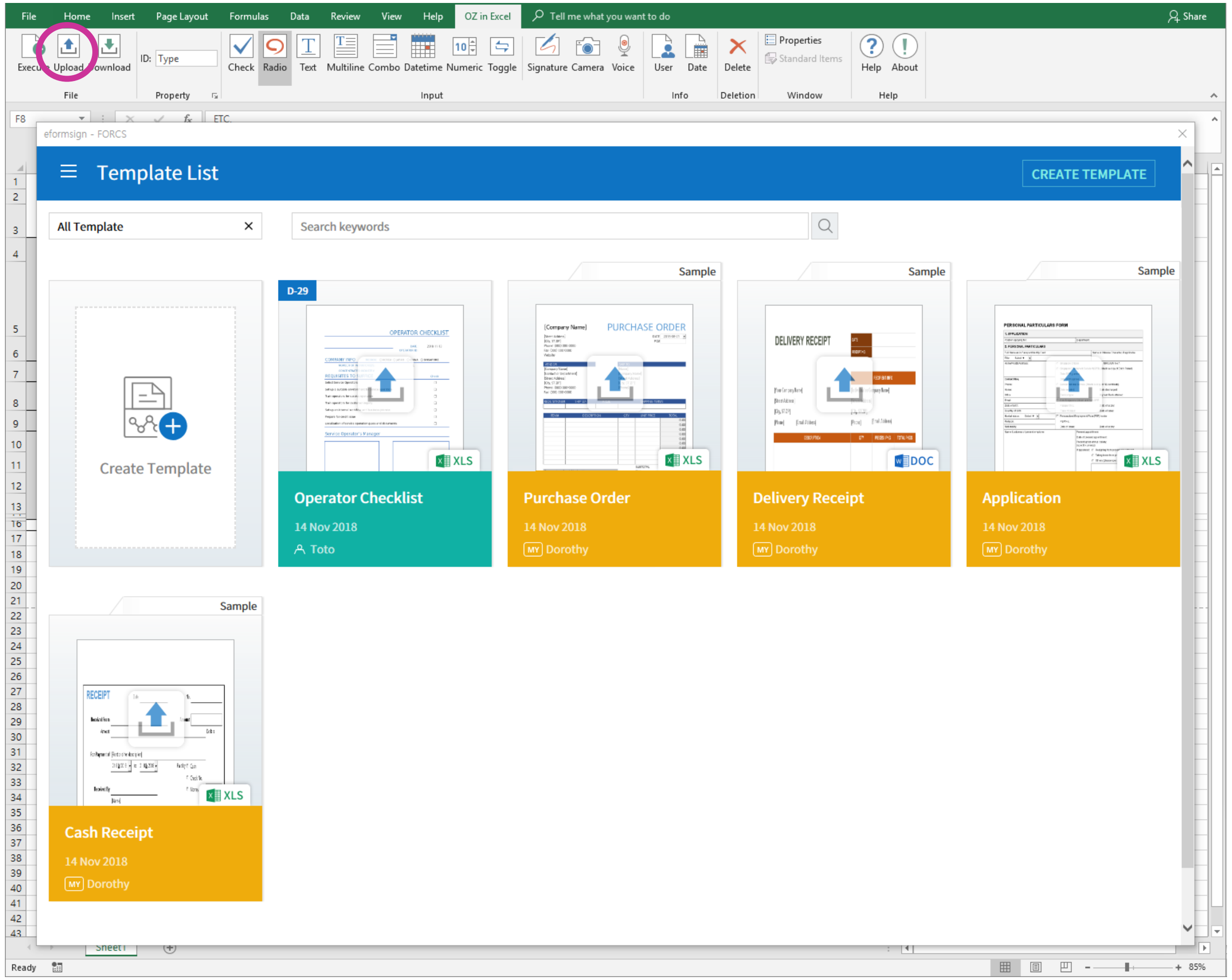
Administrator
Template Manager



- In order to create a template, the user must be logged into eformsign.
- If the user is not logged into the service, the log in screen automatically pops up when the user clicks [Execute], [Upload], or [Download] button.

Create Template (OZ in EXCEL)

Administrator Template Manager



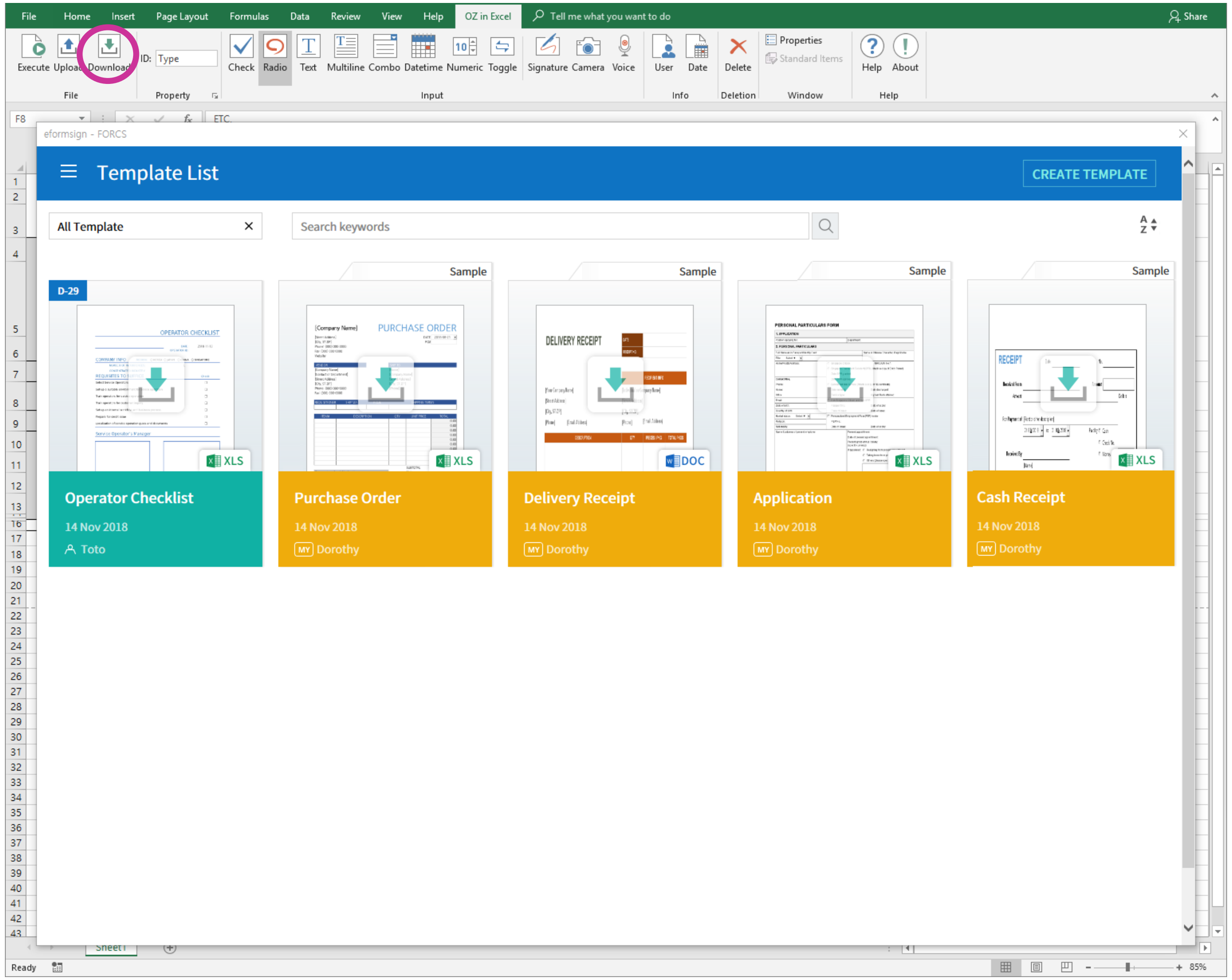
- Once logged in, the user can upload, download, or preview the document with eformsign.

- The user may view the created office document components applied by clicking [Execute].

- If the logged in account is either the Administrator or template manager account, the eformsign's template list will be displayed and the user may update the existing template or create a new template.

Create Template (OZ in EXCEL)

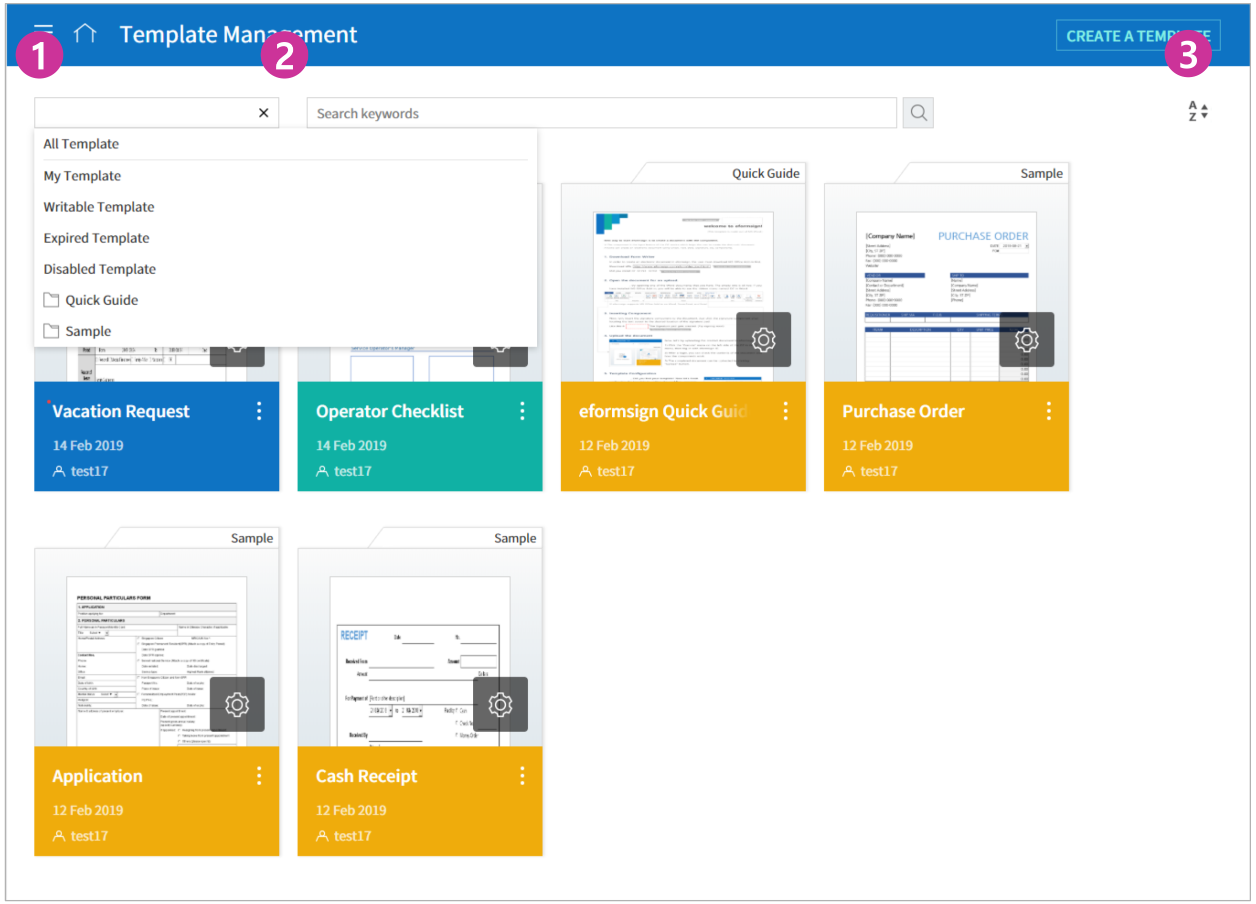
Administrator Template Manager



- The user may download the template's form file from the eformsign's template list by clicking [Download].
- All existing templates are displayed on Administrator's template list screen. However, other non-Administrator users would only able to see the templates which they own, or have access, or assigned as an approver or responder for the internal process.

Check Template

Administrator | Template Manager



- The user may access the template list via the upper left menu [≡] > Template Management.

- The sample templates are created in the Sample category when the company is created. For more information about document writing (access-related), please refer to **03. Template Management** section.

- The template management toolbar consists of:
  ① Template list can be viewed based on form name or category.
  ② Enter search terms of template names and preset keywords to display desired forms.
  ③ Template order can be sorted in ascending or descending order based on form name or category.

MANAGER

03. Template Management

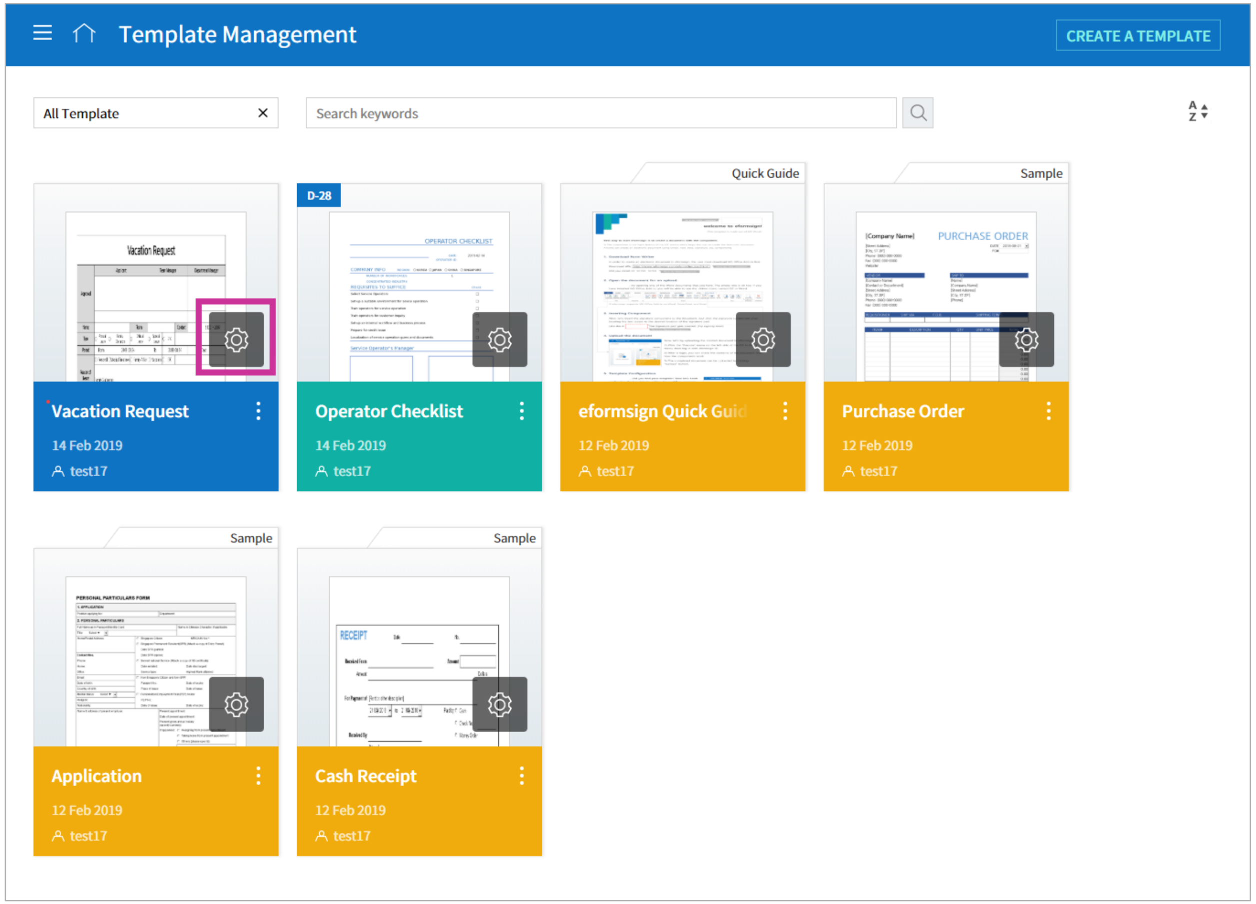
- Modify
- Duplicate
- Delete
- Download
- Deploy
- Deactivate
- Change owner
- Document manager
- Check settings

eformsign

Modify

Administrator

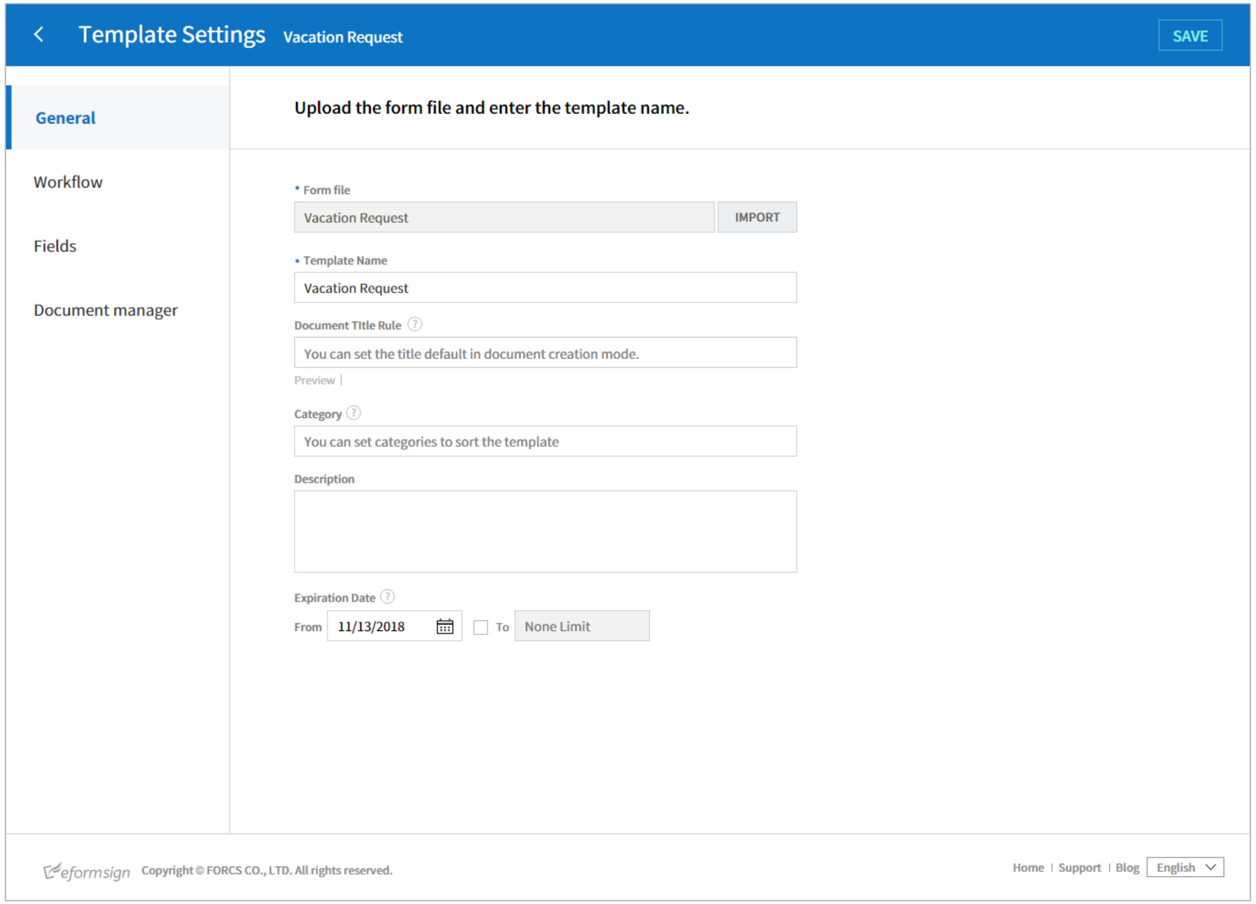
Template Manager



- Please select template's[ ] for its modification on template list.

Modify > General

Administrator
Template Manager

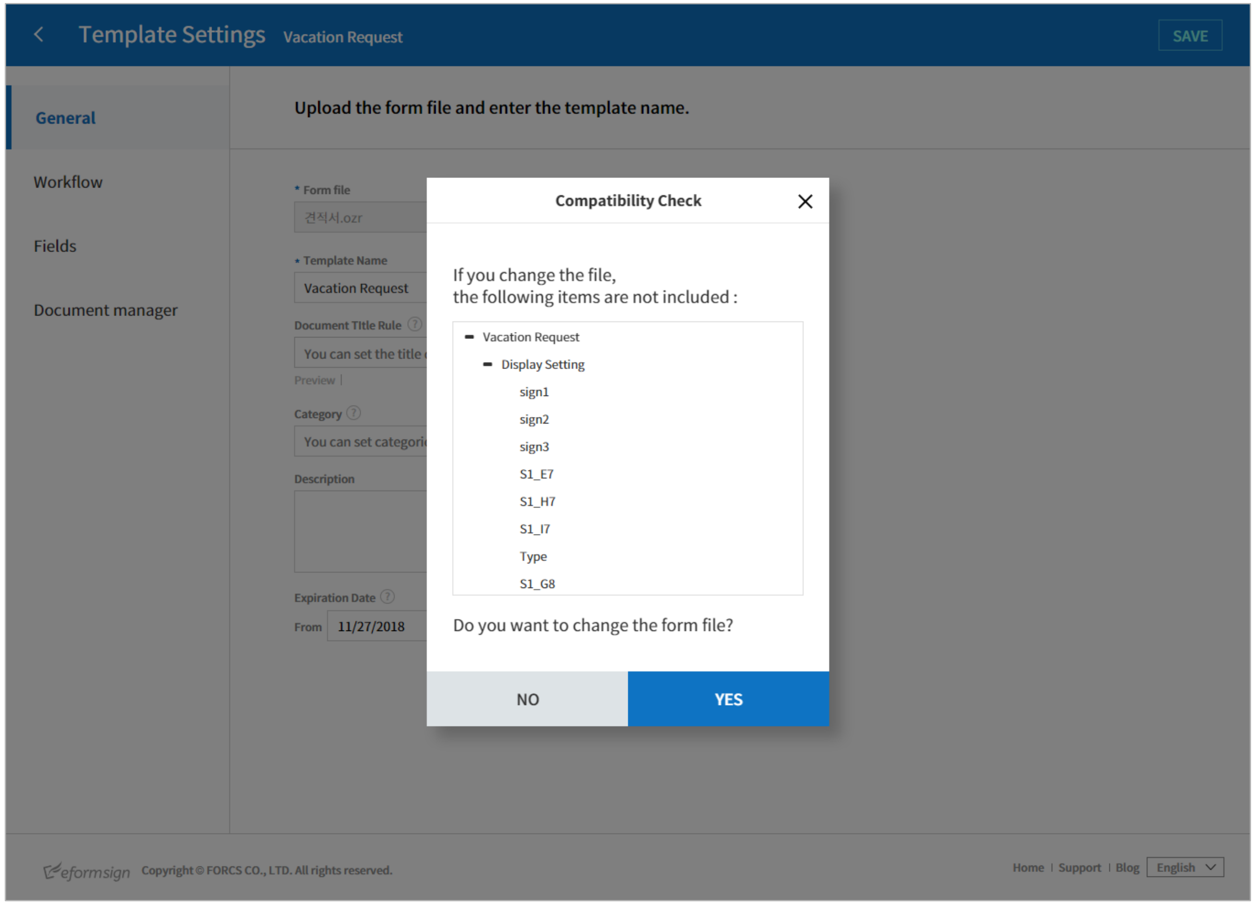


- Modify template's name and set period for template's availability.
- Document Title Rule, Category and Descriptions can be added.
- Can apply system fields as a naming rule for titles.
- Multiple categories can be used by using separator (/).

Modify > General

Administrator

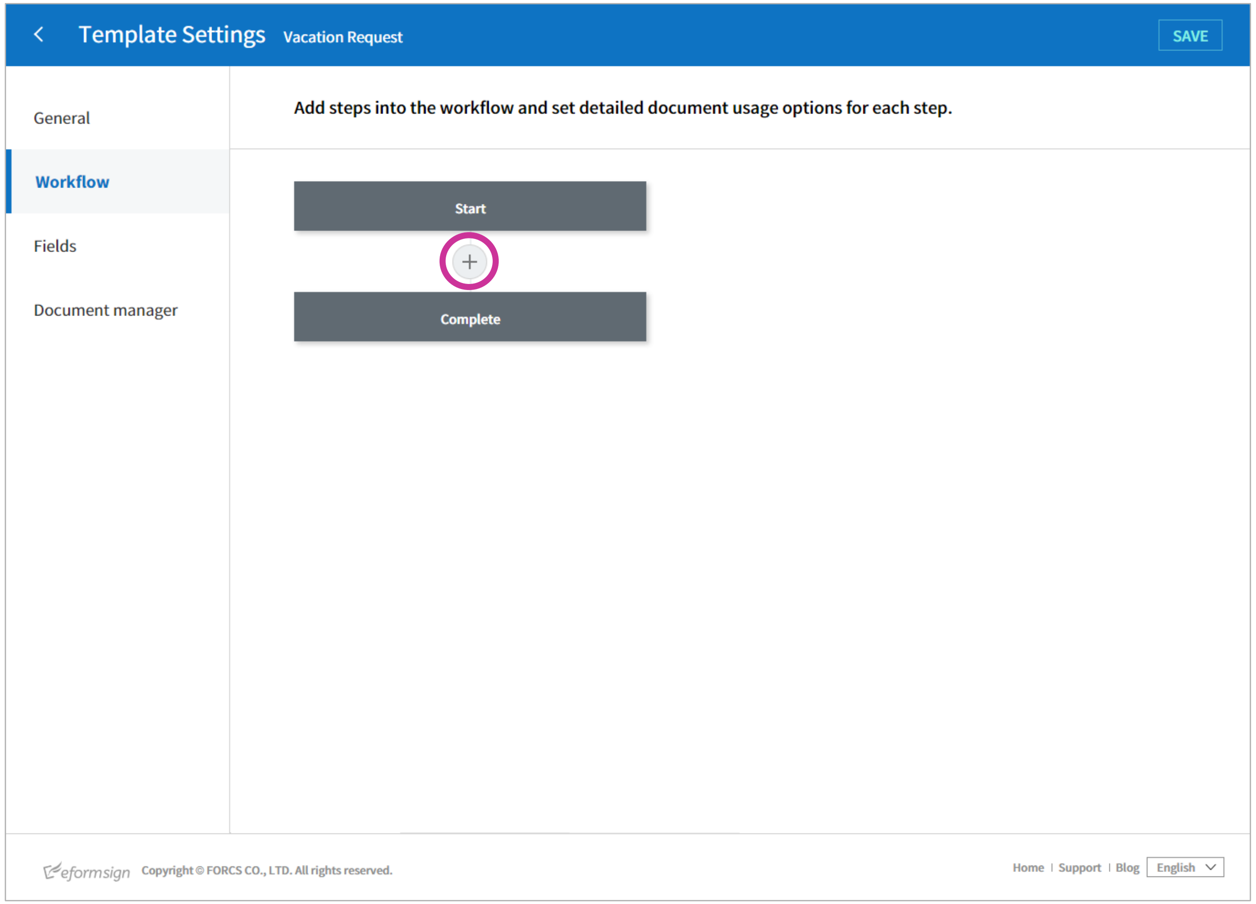
Template Manager



- Can change or update the original form file by clicking [IMPORT].
- If the form file gets updated the Compatibility Check pops up then the user may check the changed fields.

Modify > Workflow

Administrator Template Manager

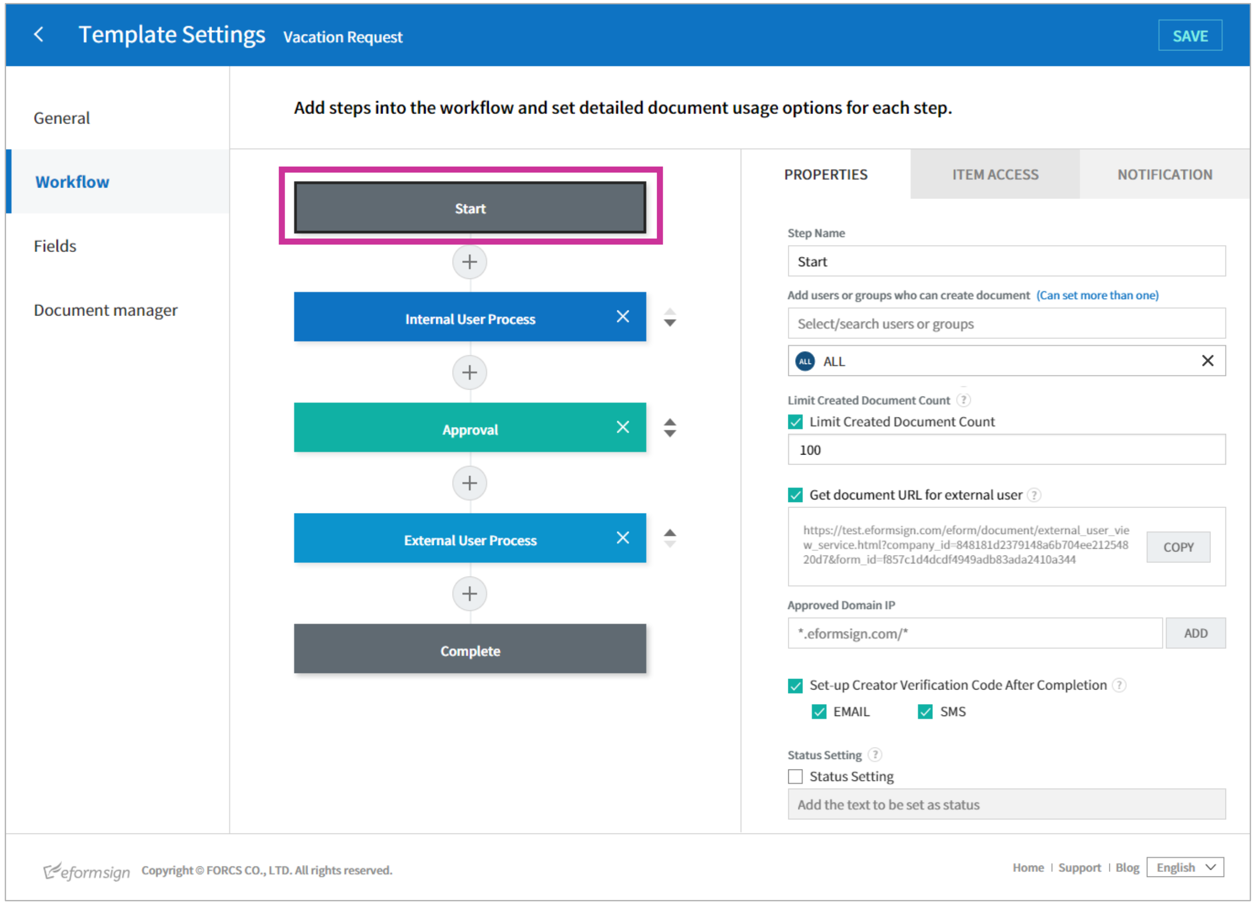


- Stages of the workflow get displayed when pressing [Workflow].
- Start and Complete are the basic steps. In addition, there are steps for Approval, Internal User Process, and External User Process. Press [+] between Start and Complete to add a step.

eformsign

Modify > Workflow

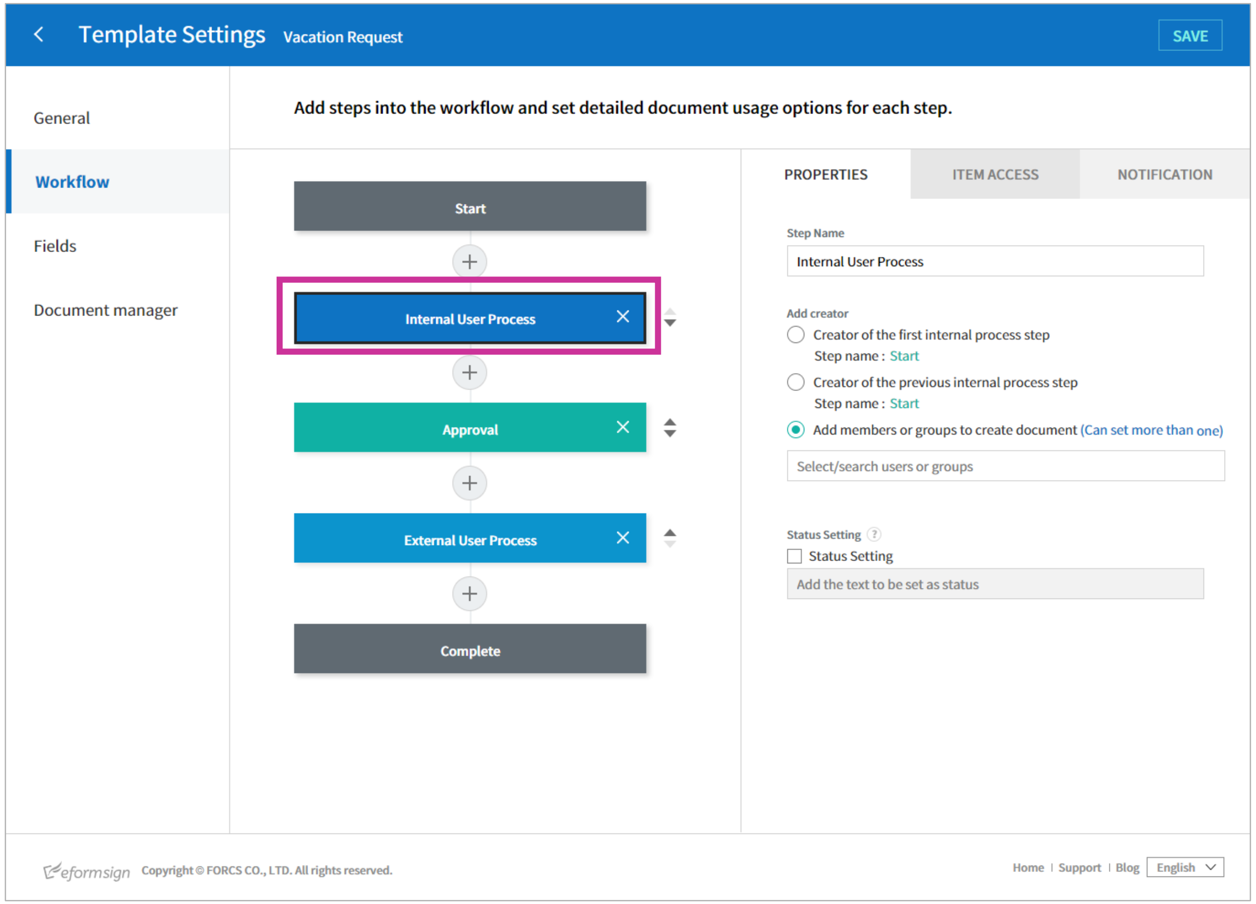
Administrator | Template Manager



- Basic settings can be configured on the Start step.
- The users whom to write/use this template can be added on "Add users or groups who can create document" option.
- The number of maximum documents for creation can be set on "Limit Created Document Count" option.
- The URL which the non-member of the company or any third party may access and write the document gets generated by enabling "Allow anonymous user access" option.
- The external user may come back to one's document if the 'Set-up Creator Verification Code After Completion' option is enabled.
- The writers creating a document via Anonymous User Access option must agree to the 'Non-Subscriber Agreement' of eformsign.

Modify > Workflow

Administrator Template Manager



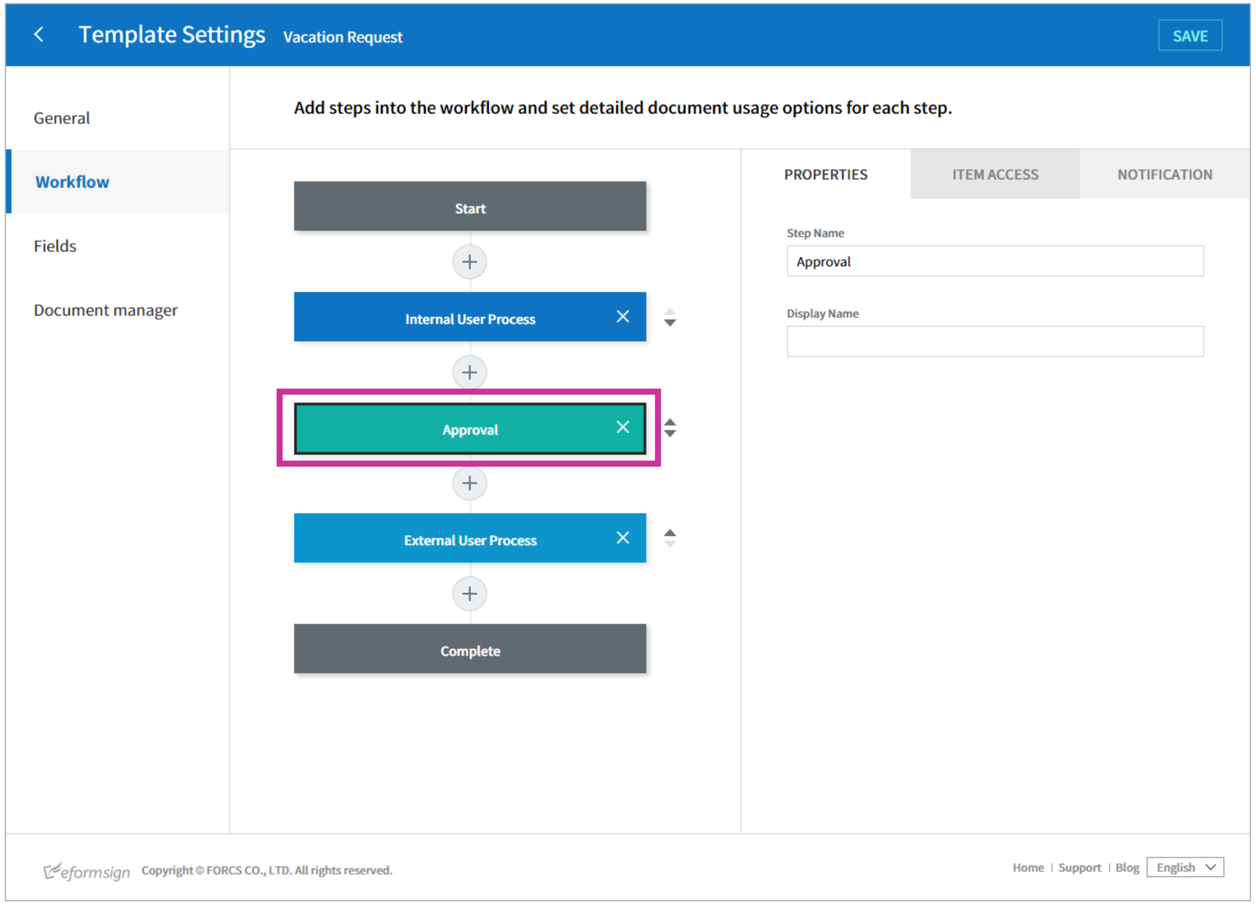
- Internal User Process steps are used when an e-document is created and the acceptance step is required.

- Set the name then select [Internal User Process] and press [SAVE].

- Add creator assigns members who can create the document.
  ① Creator of the first internal process step option assigns the initial writer of the document to be a person in charge for that specific internal process step.
  ② Creator of the previous internal process step option assigns the previous responder as a person in charge.
  ③ Add members or groups to create document option assigns a desired person in charge from the member list.

Modify > Workflow

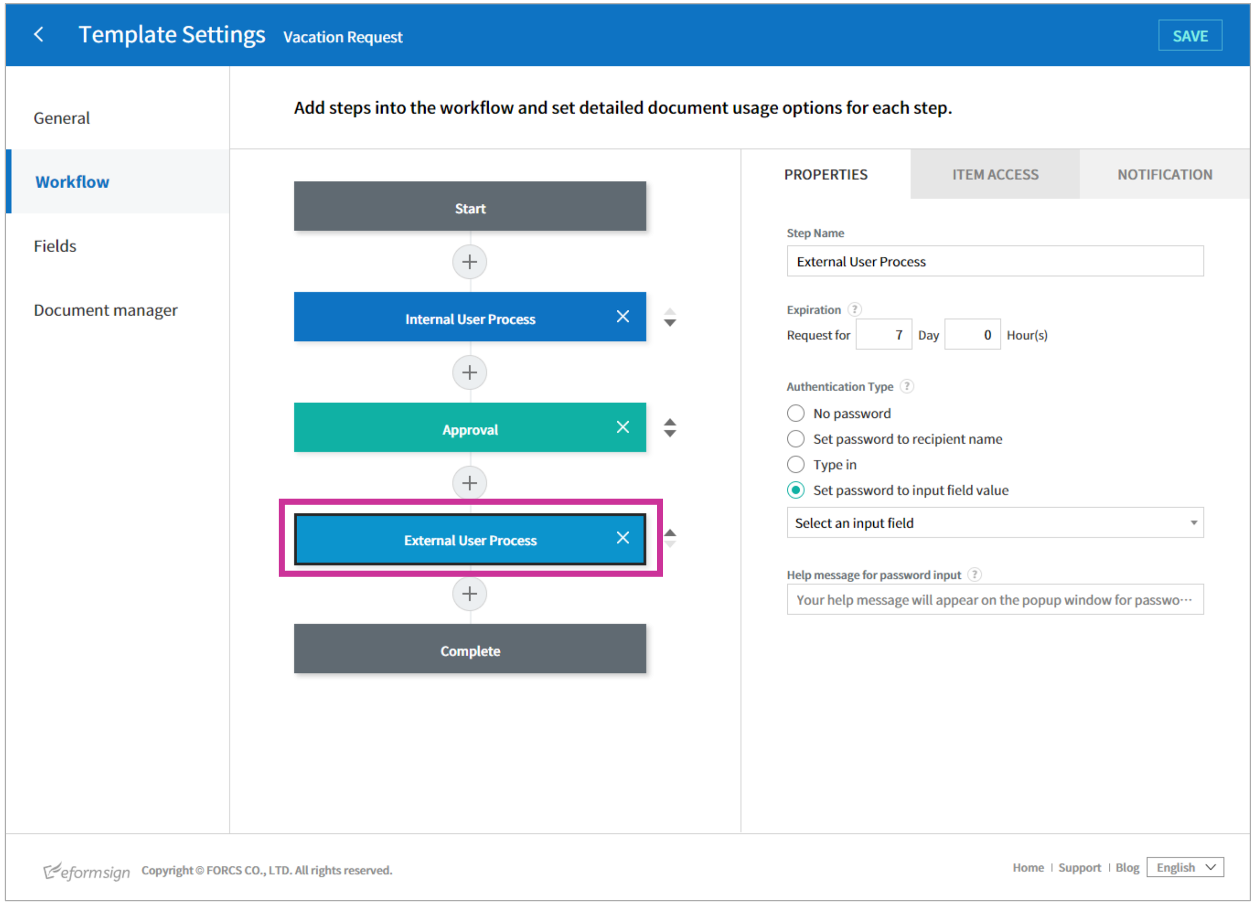
Administrator Template Manager



- Approval steps are used when authorization is required.
- Set the name then select [Approval] and press [SAVE].

Modify > Workflow

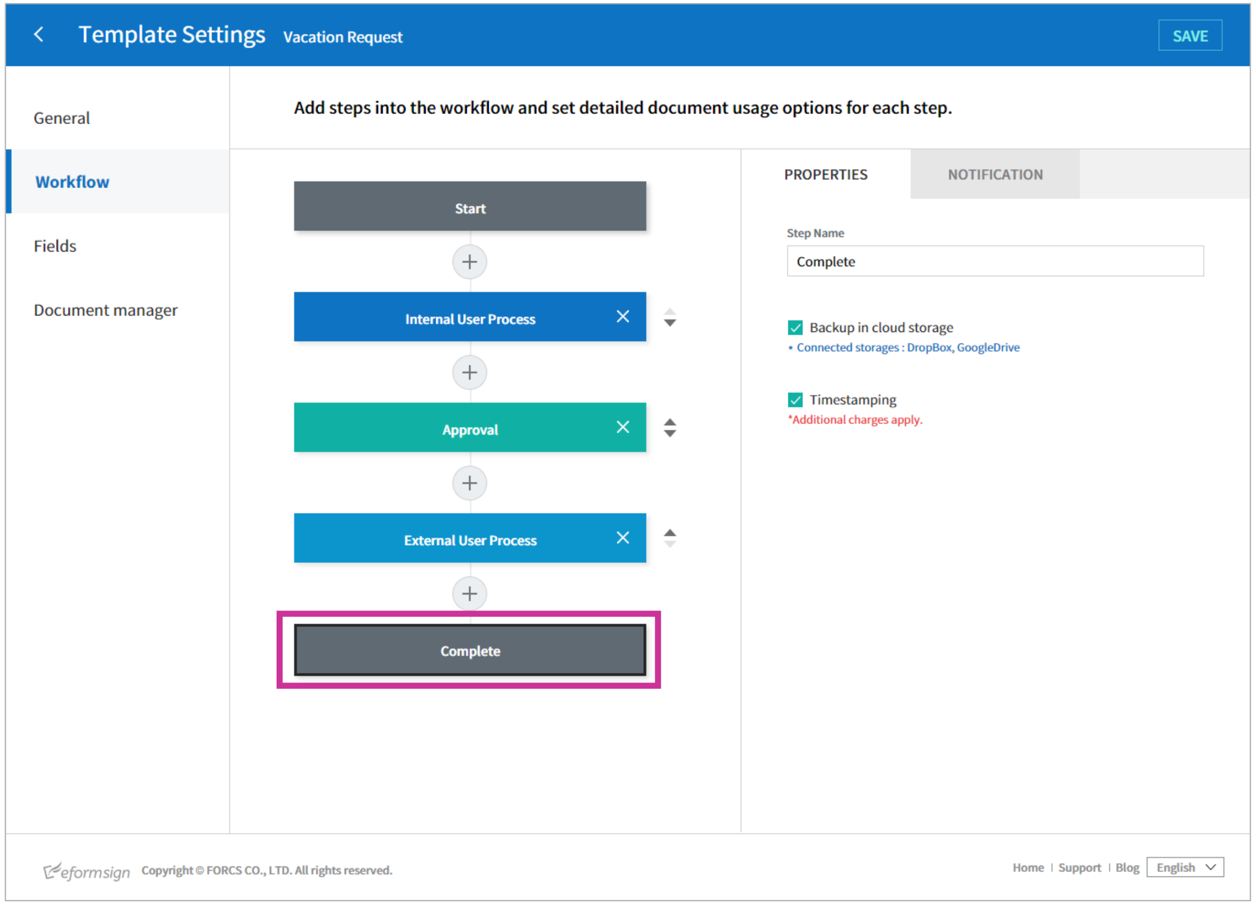
Administrator Template Manager



- External User Process steps are used when third parties need to check e-documents (open, sign, etc.).
- Set the name then select [External User Process] and press [Save].
- The user may set the document's verification method and an expiration time for external users.
- The user may set the passcode for the external user's access on Authentication Type option.
- The user may set the help messages on Help message for password input option.

Modify > Workflow

Administrator   Template Manager

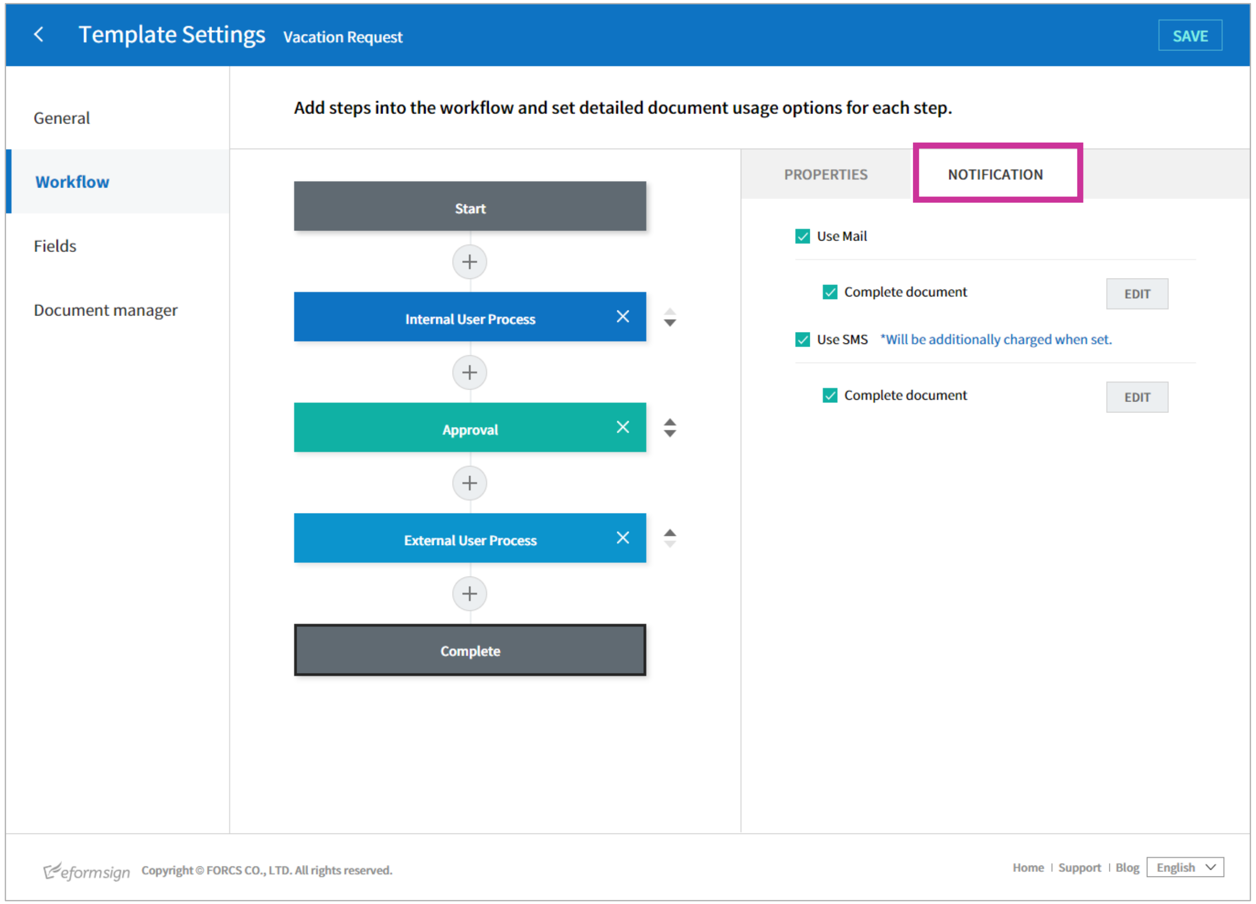


- The document completion notification can be set on the Complete step.
- Once the Backup in cloud storage option is enabled, all of the completed document will be saved to the cloud storage.
- The document will be timestamped if the Timestamping option is checked.

Modify > Workflow

Administrator

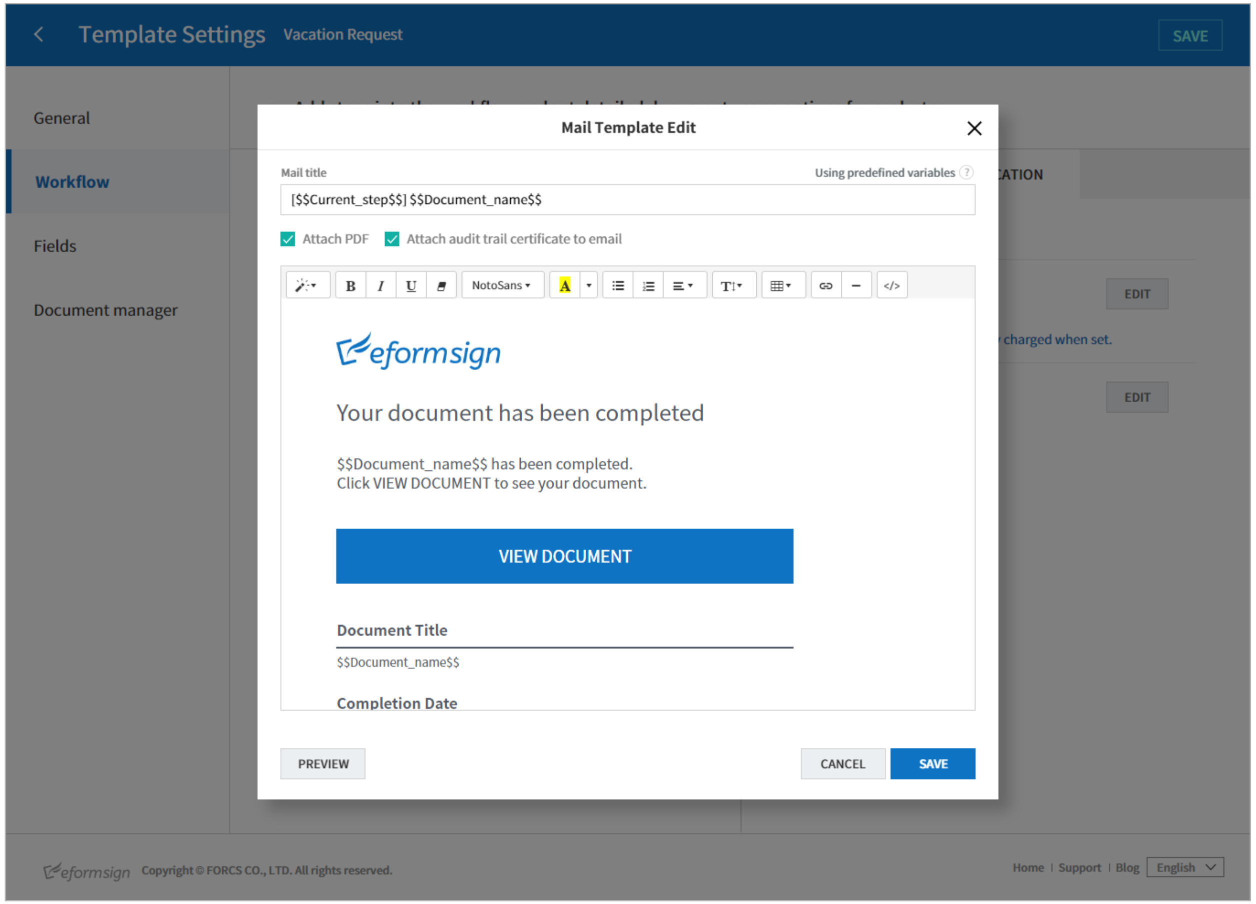
Template Manager



- The user may set mail or text message template via NOTIFICATION tab.

Modify > Workflow

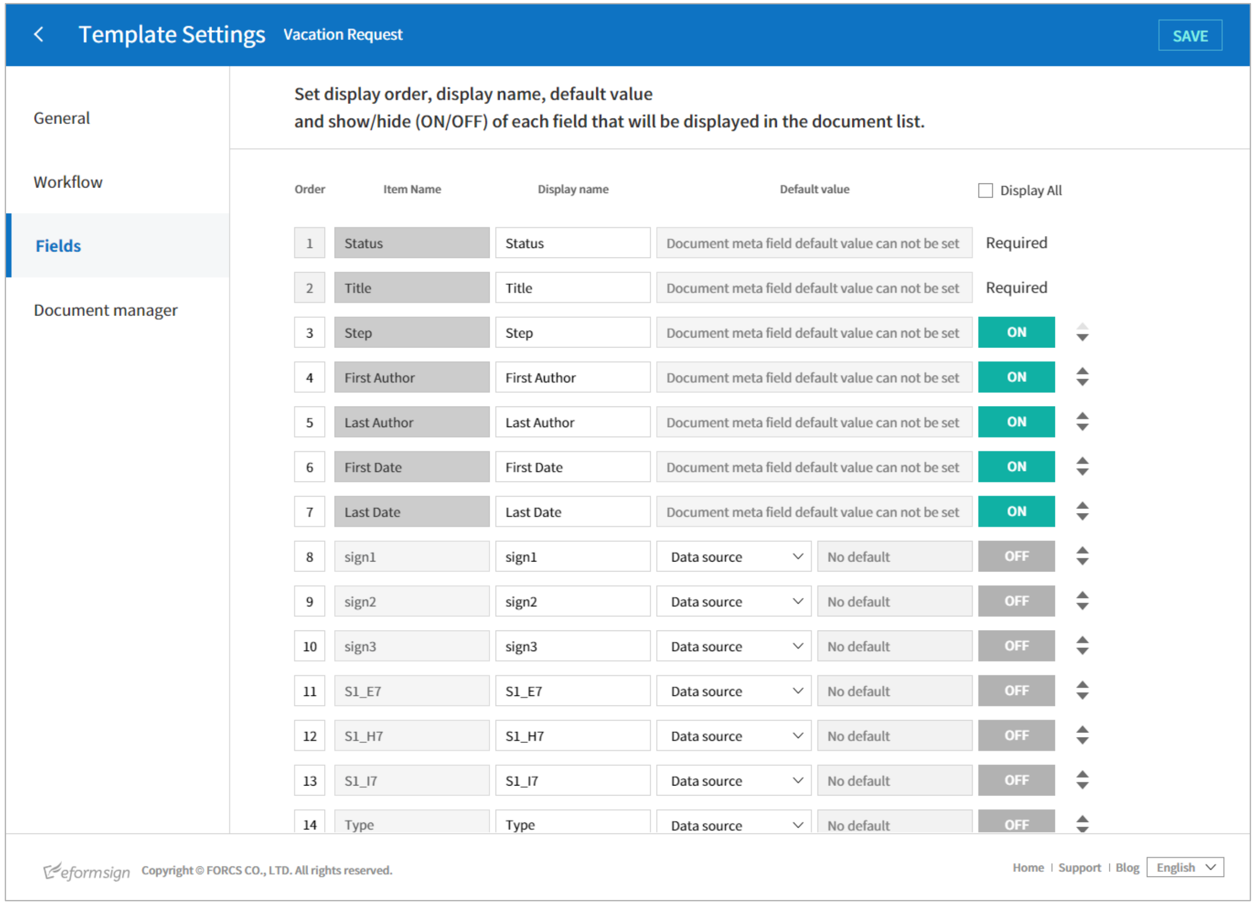
Administrator Template Manager



- The user may edit the mail or text message template by clicking [EDIT] button.
- The PDF version of the completed document gets attached to the notification mail if the Attach PDF option is enabled.
- The audit trail gets attached as a file if the Attach audit trail certificate to email option is checked.

Modify > Fields

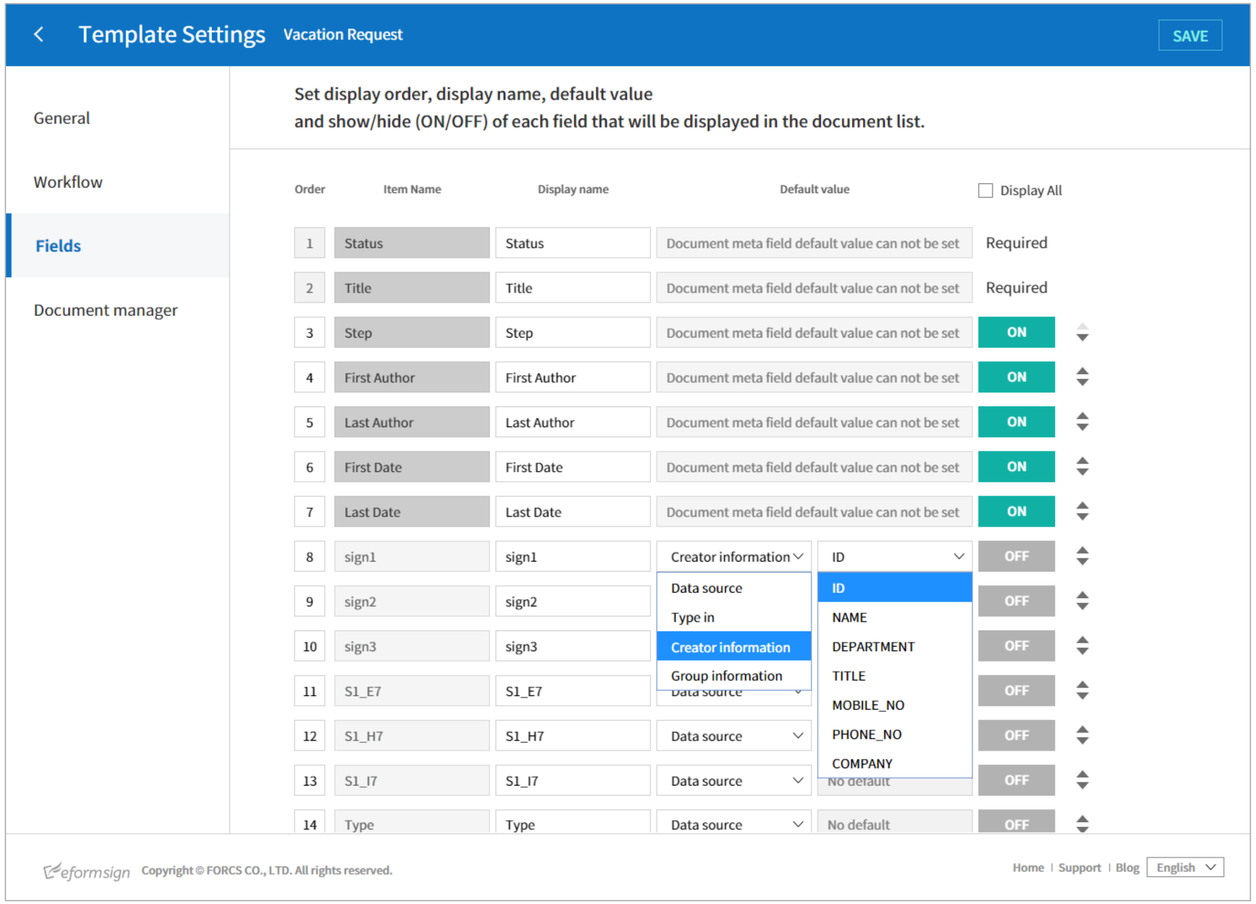
Administrator Template Manager



- Select [Fields] to display the screen where can set the order and name of the fields to display in the list of electronic documents.
- Item Name and Display Name columns are the field display name on the document list. The default value will be prescribed to the input components if filled into the Default Value column.
- Display item settings can be accessed via document management.

Modify > Fields

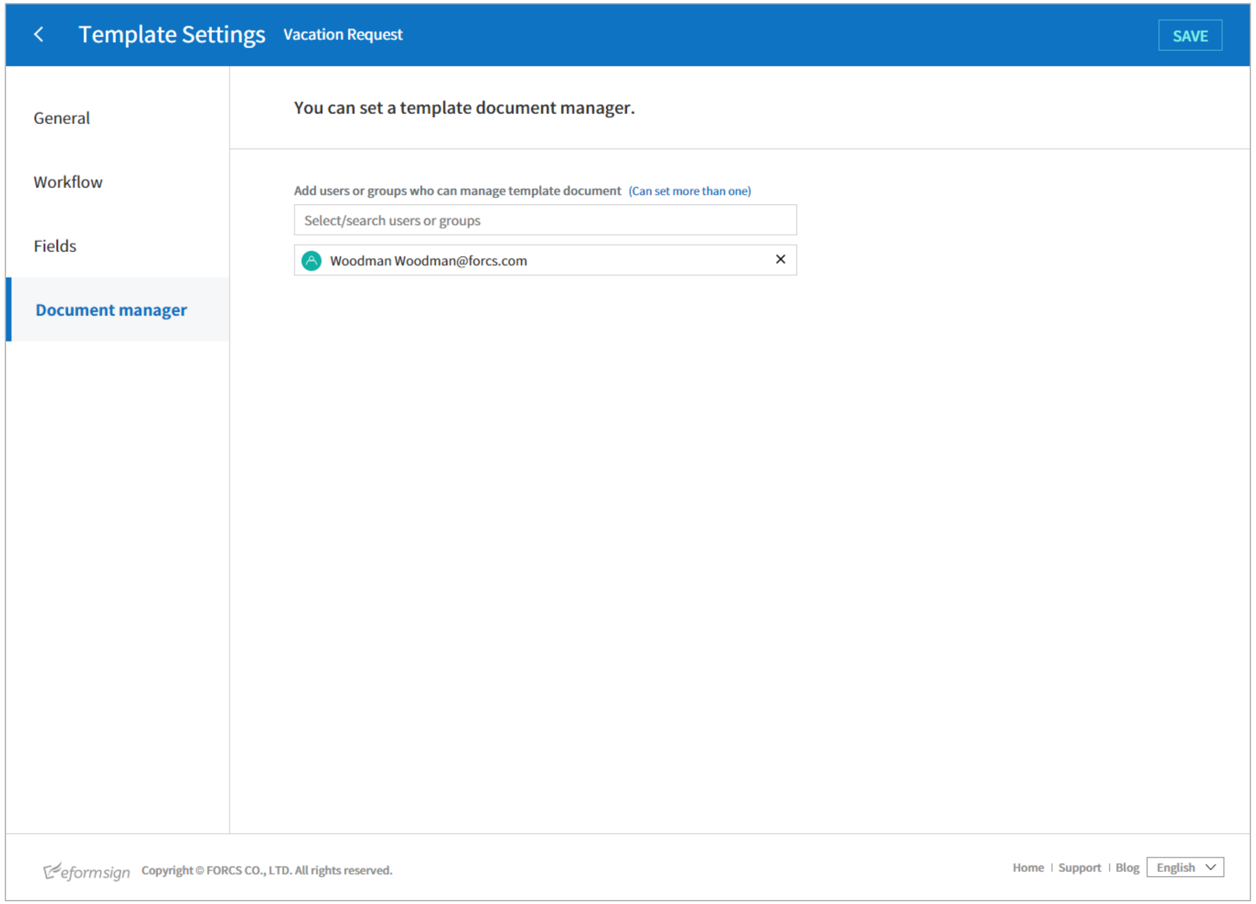
Administrator | Template Manager



- If the Type in option is set, the user may manually set the default value of the input field.
- The user may set the default value of the input fields as the information of the creator information with Creator information option.
- The user may set the default value of the input fields as the group's name and description and custom fields with Group information option.

Modify > Document manager

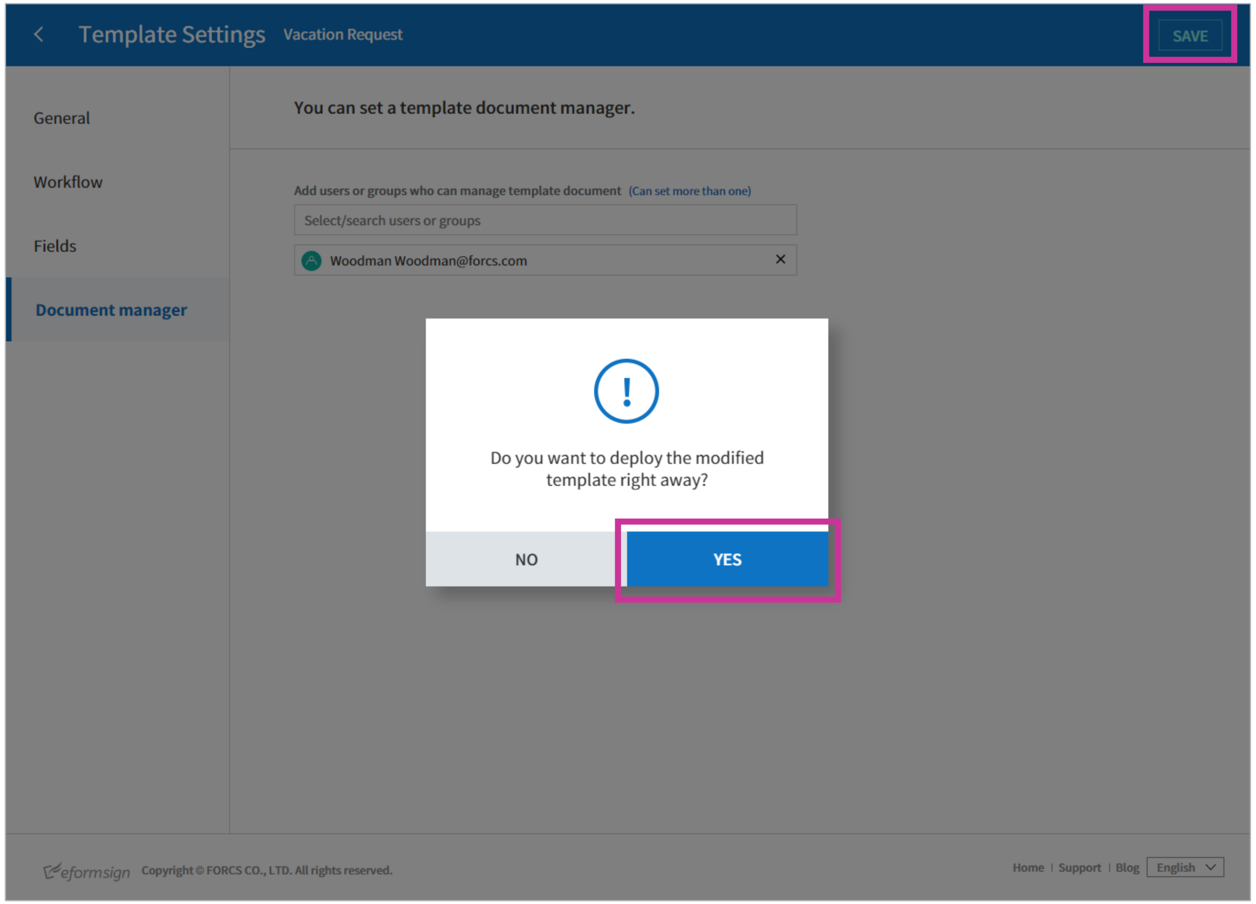
Administrator



- By clicking [Document manager] on the left side, the user may access the screen where one can assign the Document manager.

Modify

Administrator Template Manager

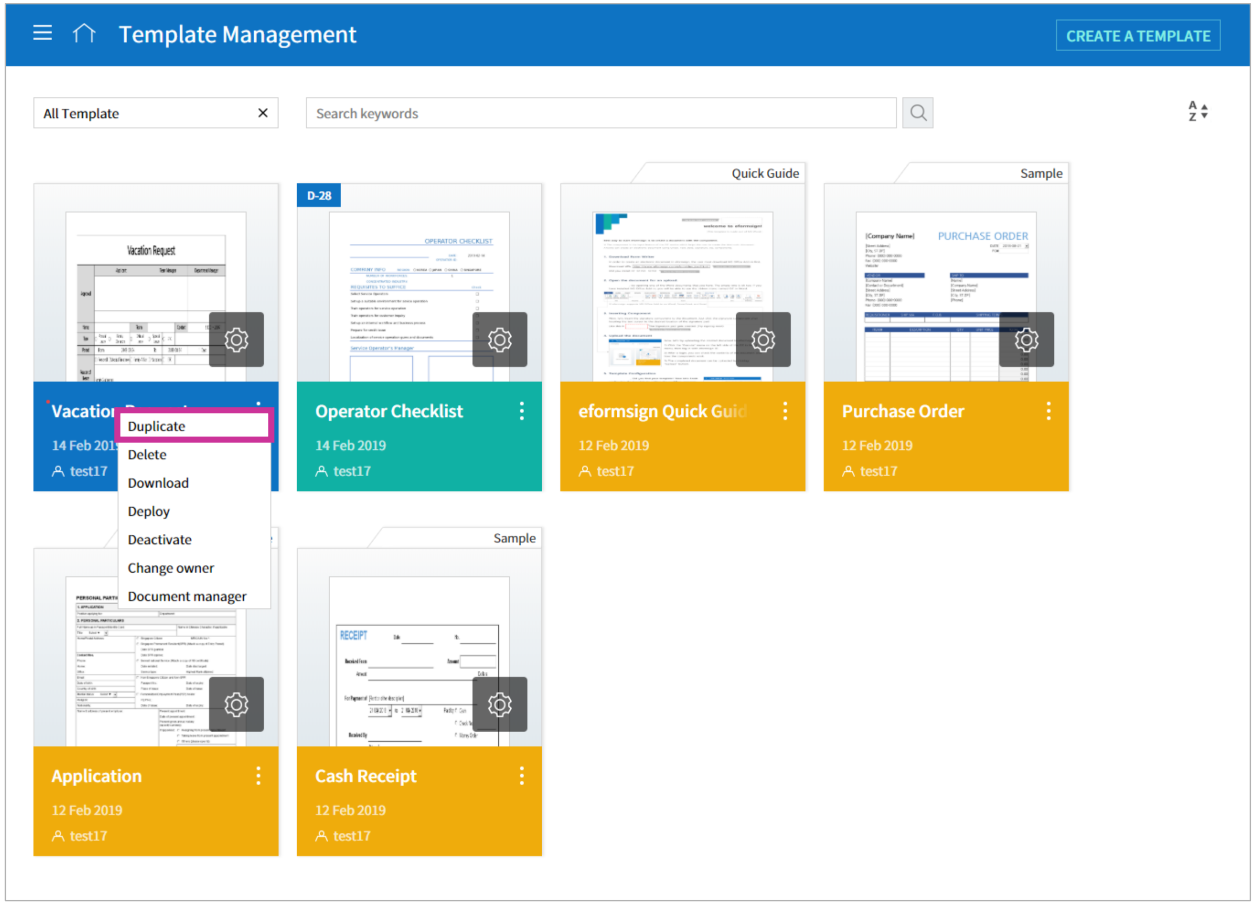


- Please press [SAVE].
- Click [YES] when the template deployment popup shows up. Once the template is deployed, the users with writable access can create the document using the template.

Duplicate

Administrator

Template Manager

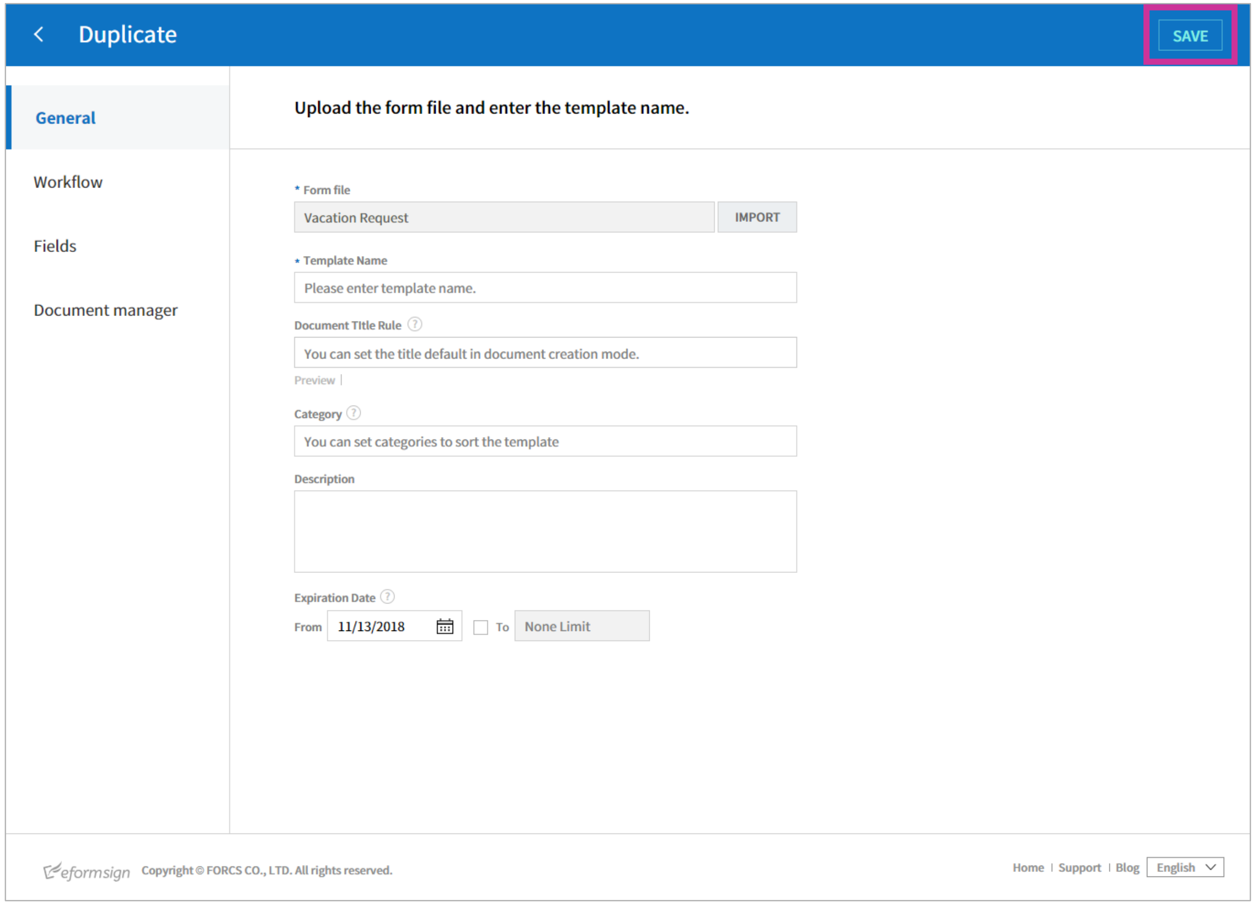


- In the template list, please select [⋮] to duplicate the template and select [Duplicate] in popup menu.
- This will redirect the user to the template duplicate screen.

Duplicate

Administrator

Template Manager

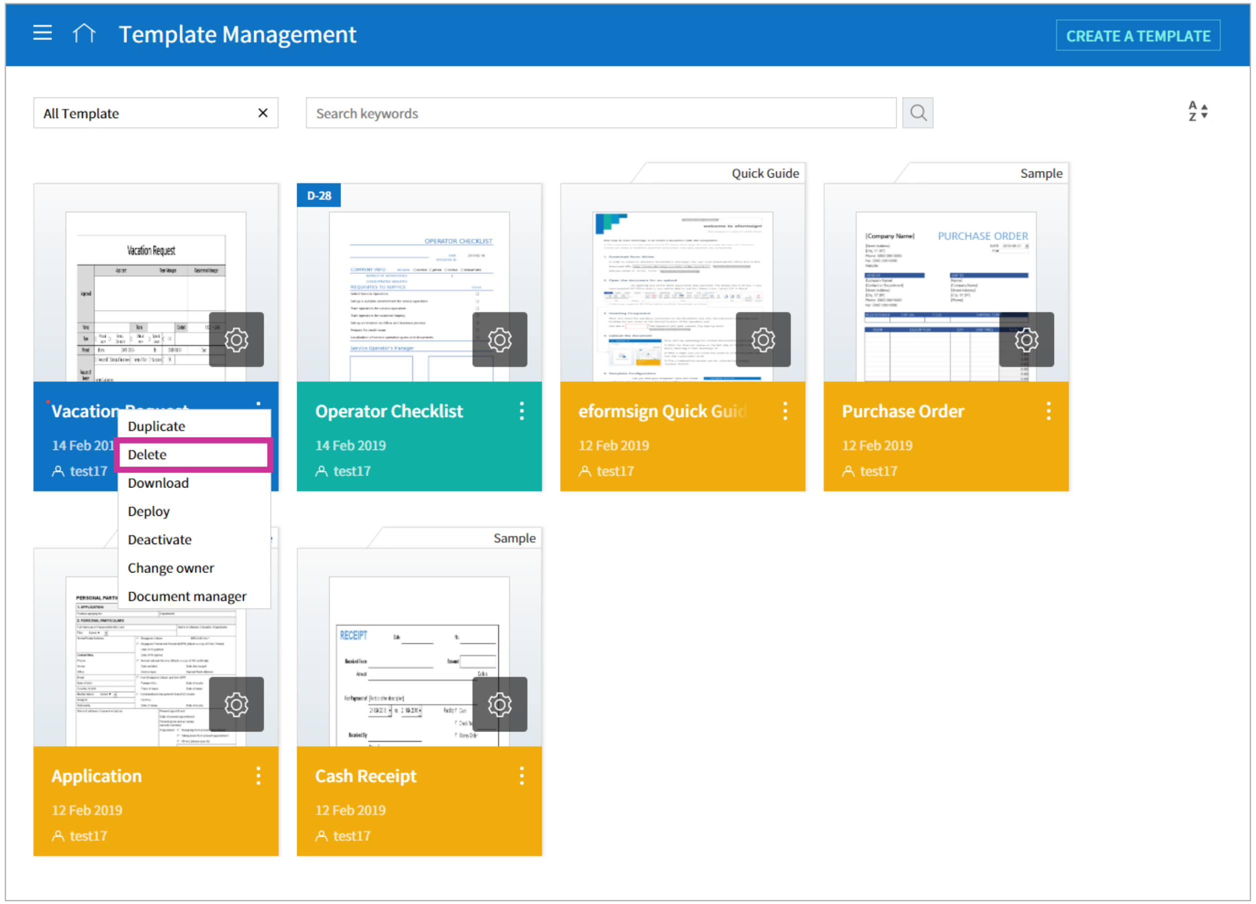


- Duplicated template brings the same template settings from the original template.
- After editing the template settings, press [SAVE].

Delete

Administrator

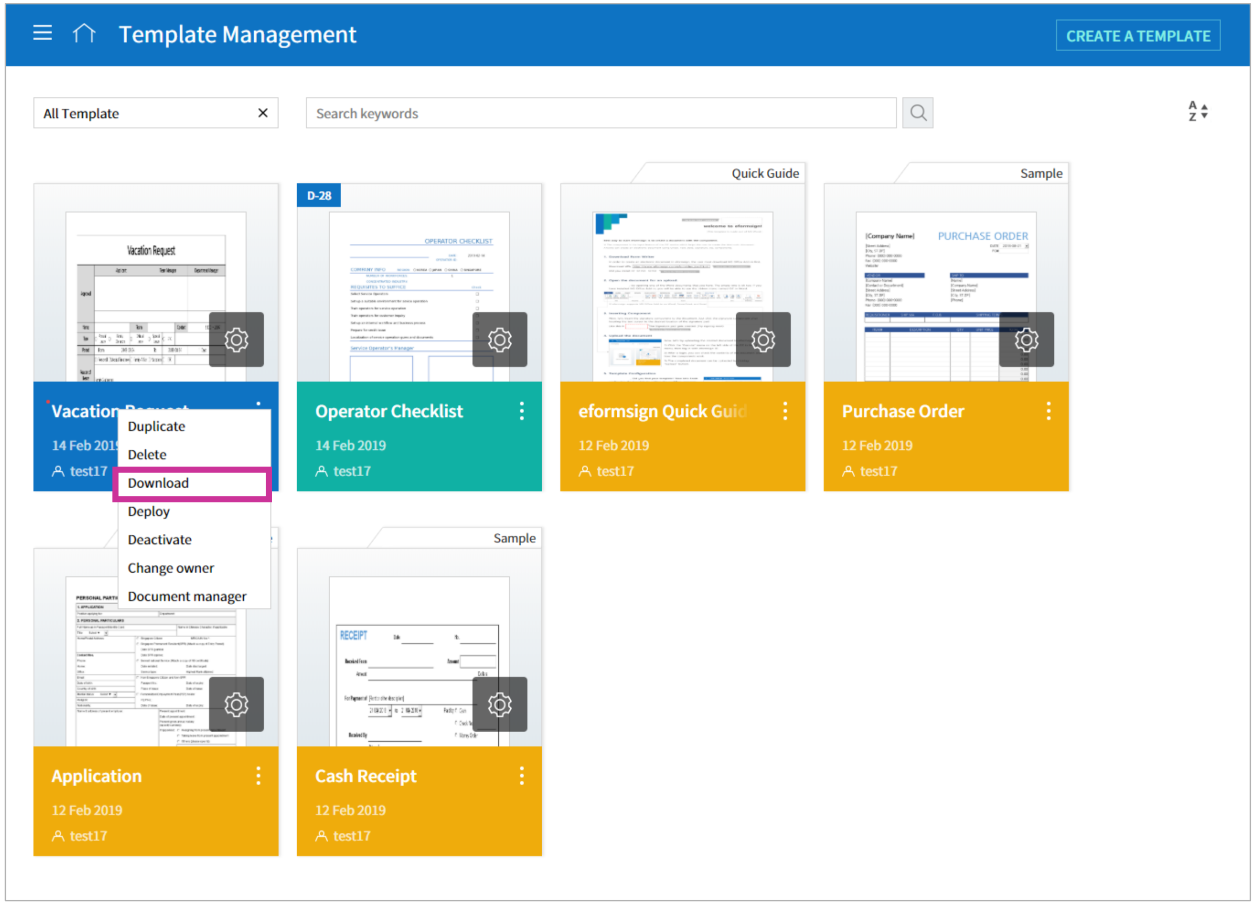
Template Manager



- In the template list, please select [⋮] to duplicate the template and select [Delete] in popup menu.
- The template gets deleted from the Template Management list.

Download

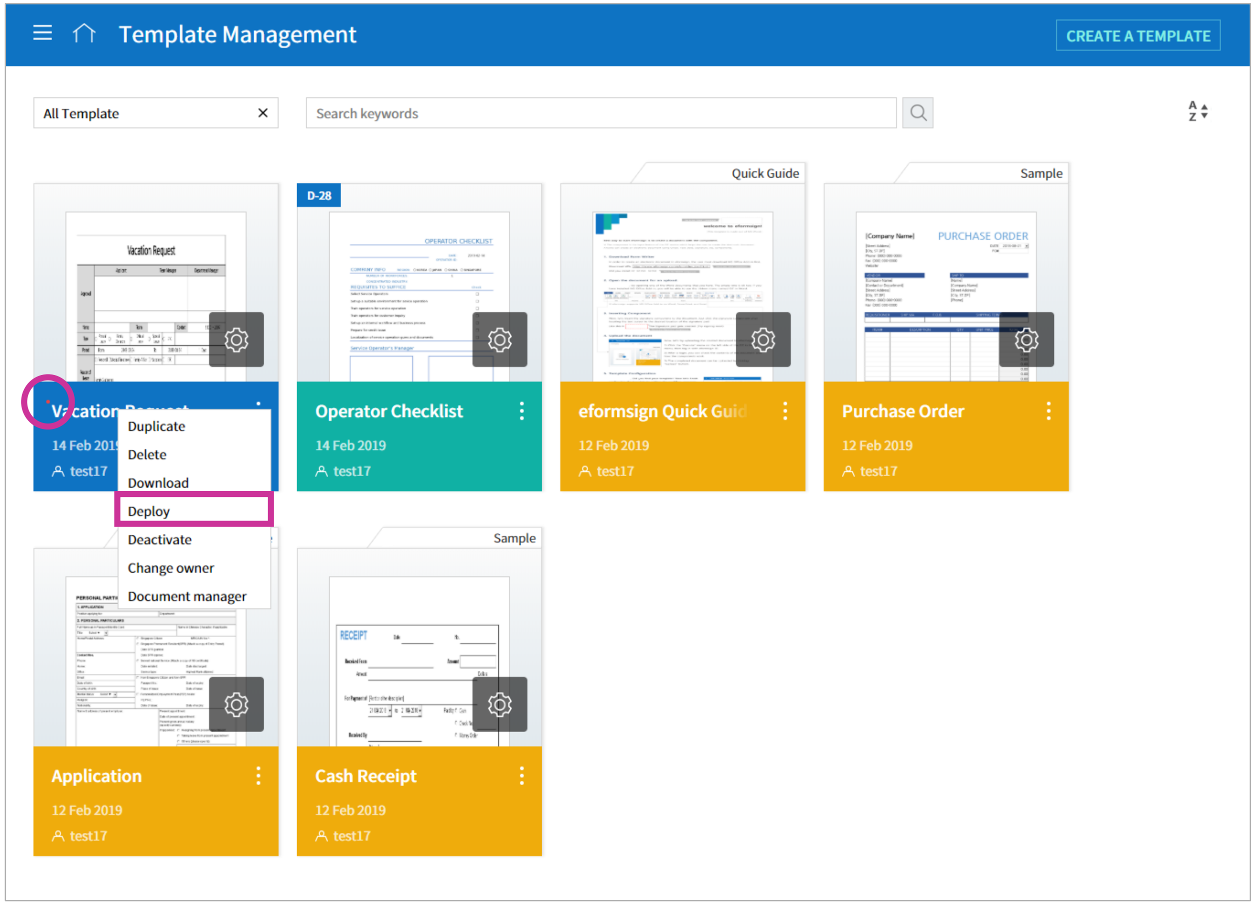
Administrator Template Manager



- In the template list, please select [⋮] to duplicate the template and select [Download] in popup menu.
- This is used when the user desires to download the form in Office or OZR file.

Deploy

Administrator Template Manager

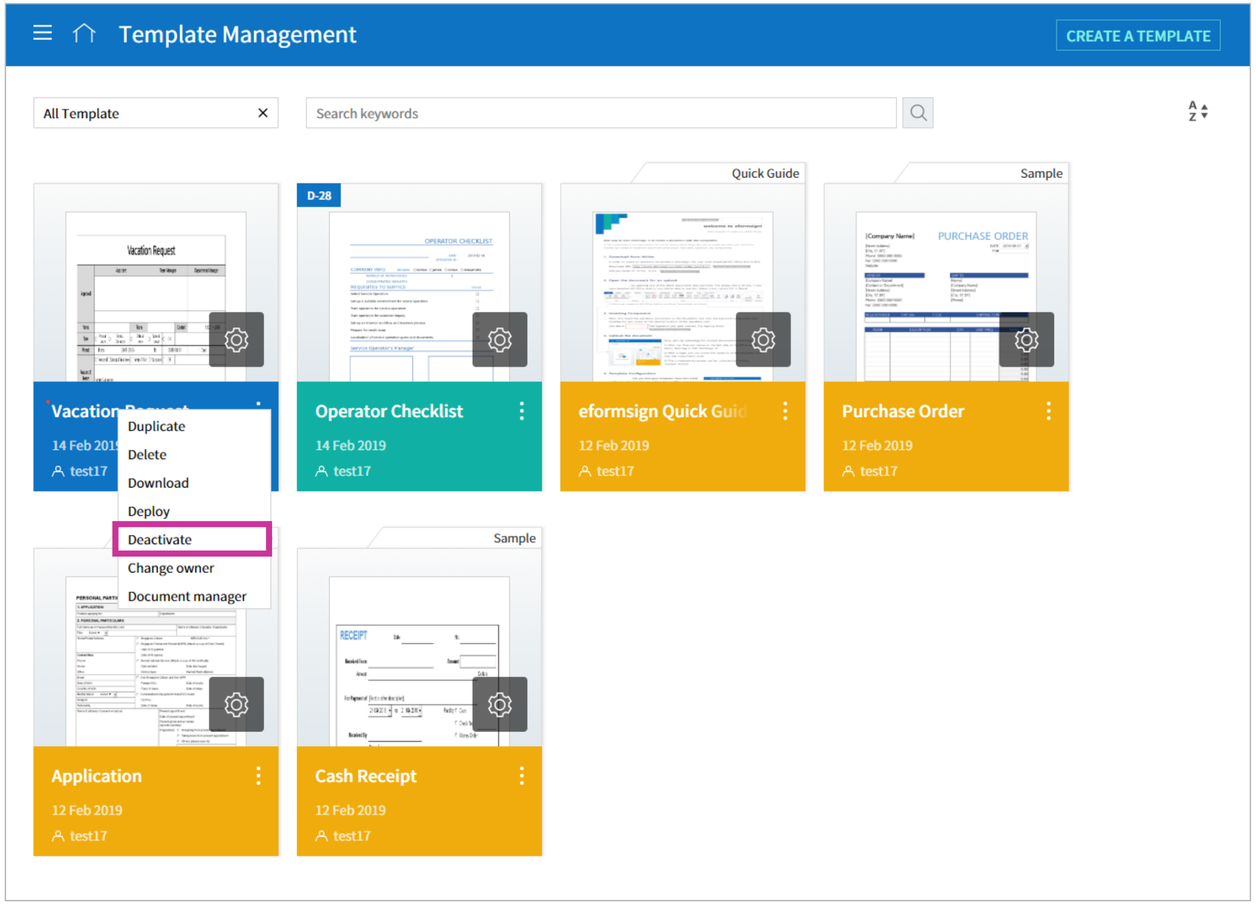


- Deploy the e-form in user write-able template. Please follow this instruction only if the template was not deployed right after finishing the management.

- In the template list, please select [⋮] to duplicate the template and select [Deploy] in popup menu.

Deactivate

Administrator Template Manager

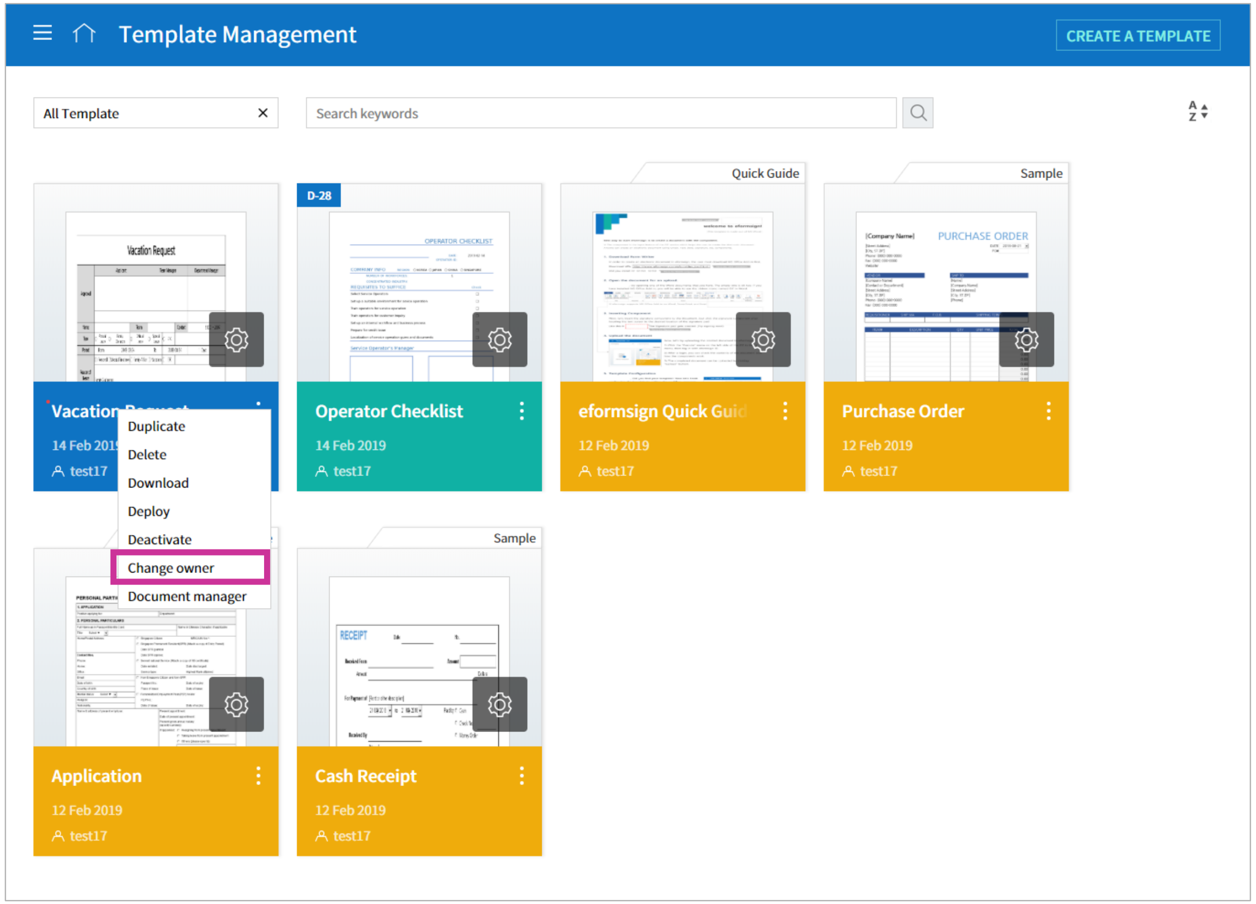


- In the template list, please select [⋮] to duplicate the template and select [Deactivate] in popup menu.

- When the template gets deactivated, that template does not appear on user's screen.

Change owner

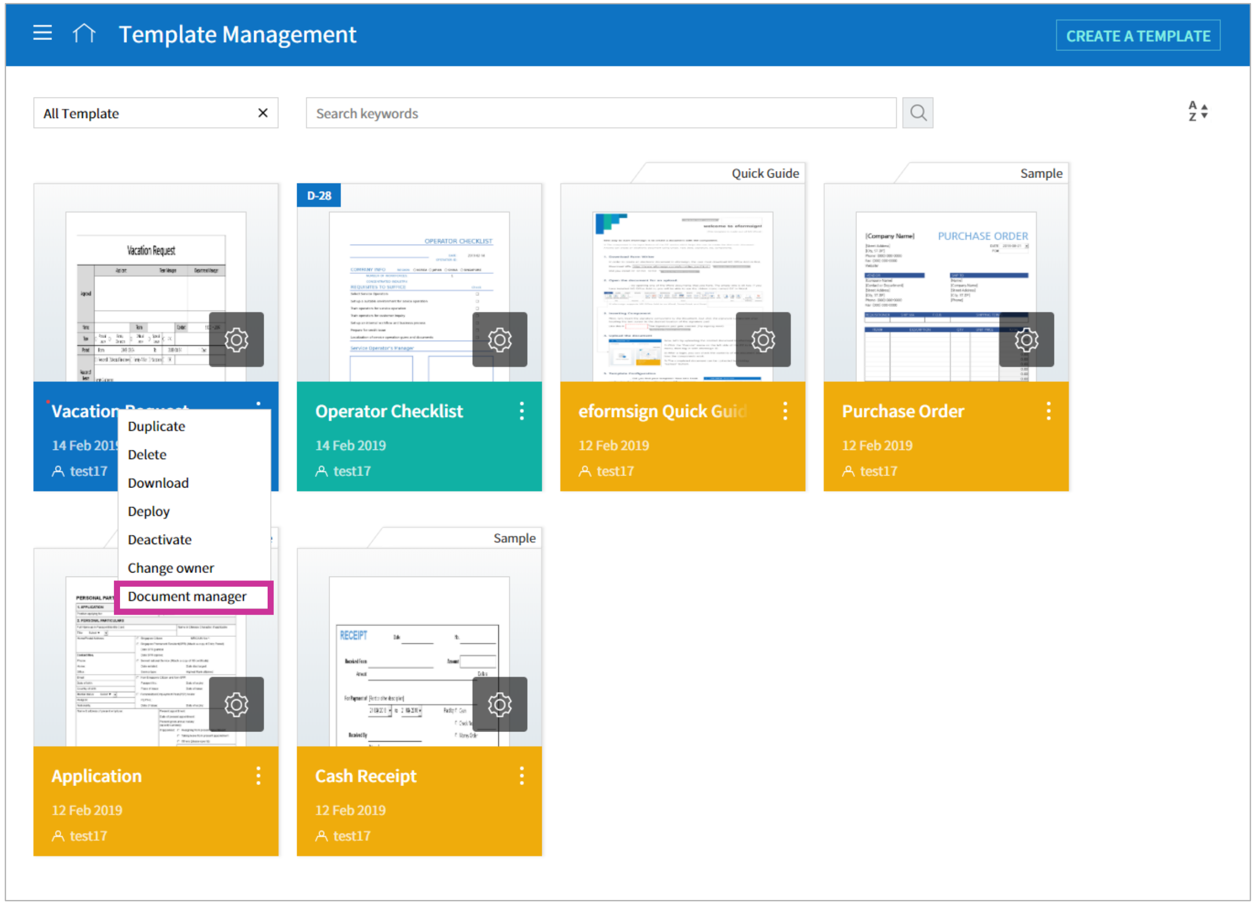
Administrator Template Manager



- On the template which the user desires to change the owner, select the [⋮] then [Change owner]on the popup menu.
- The Change owner popup will be displayed and the member with template management access will be displayed.
- After changing the template owner, the new owner would be able to manage the template from that point.

Document manager

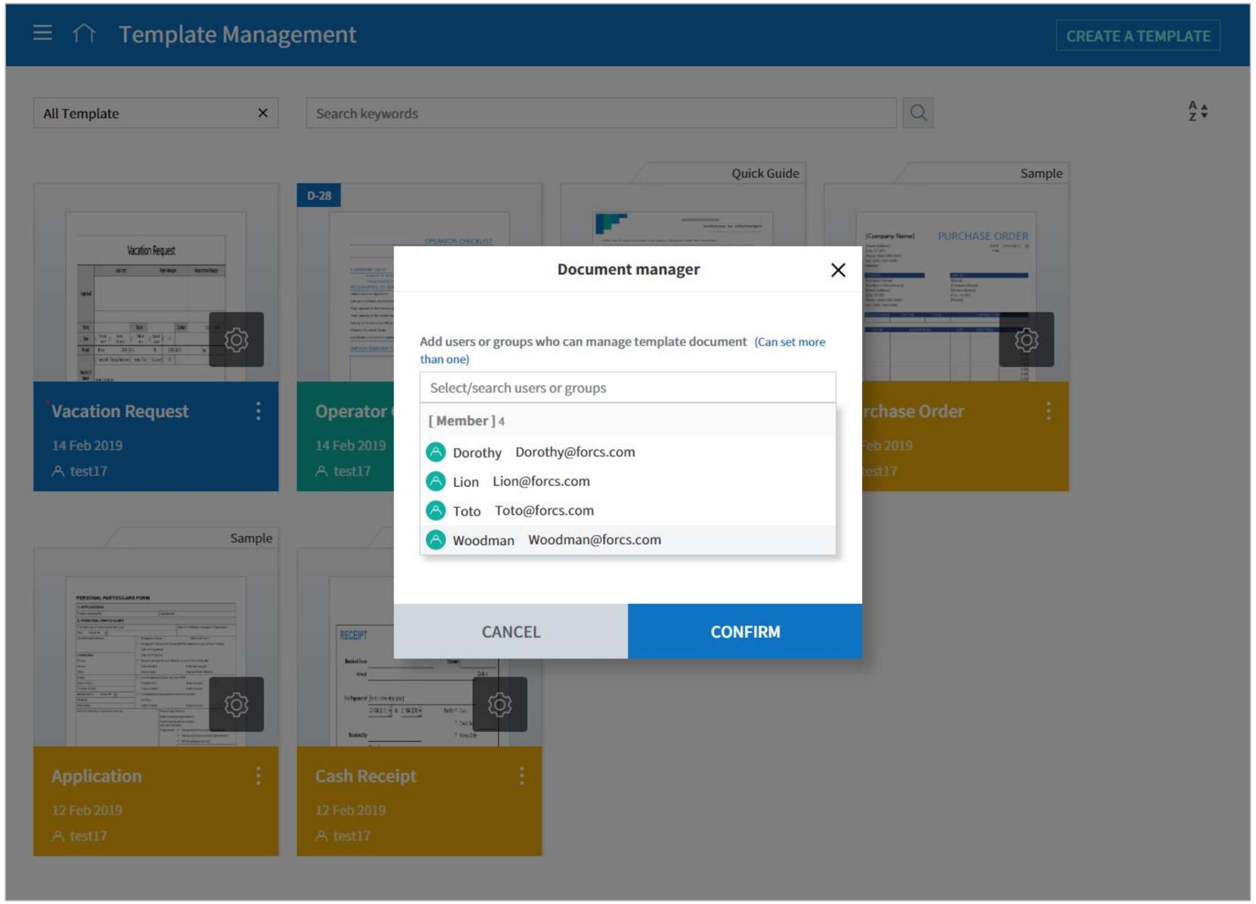
Administrator
Template Manager



- In order to assign the document manager, select [⋮] then [Document manager]on the popup on the desired template.

Document manager

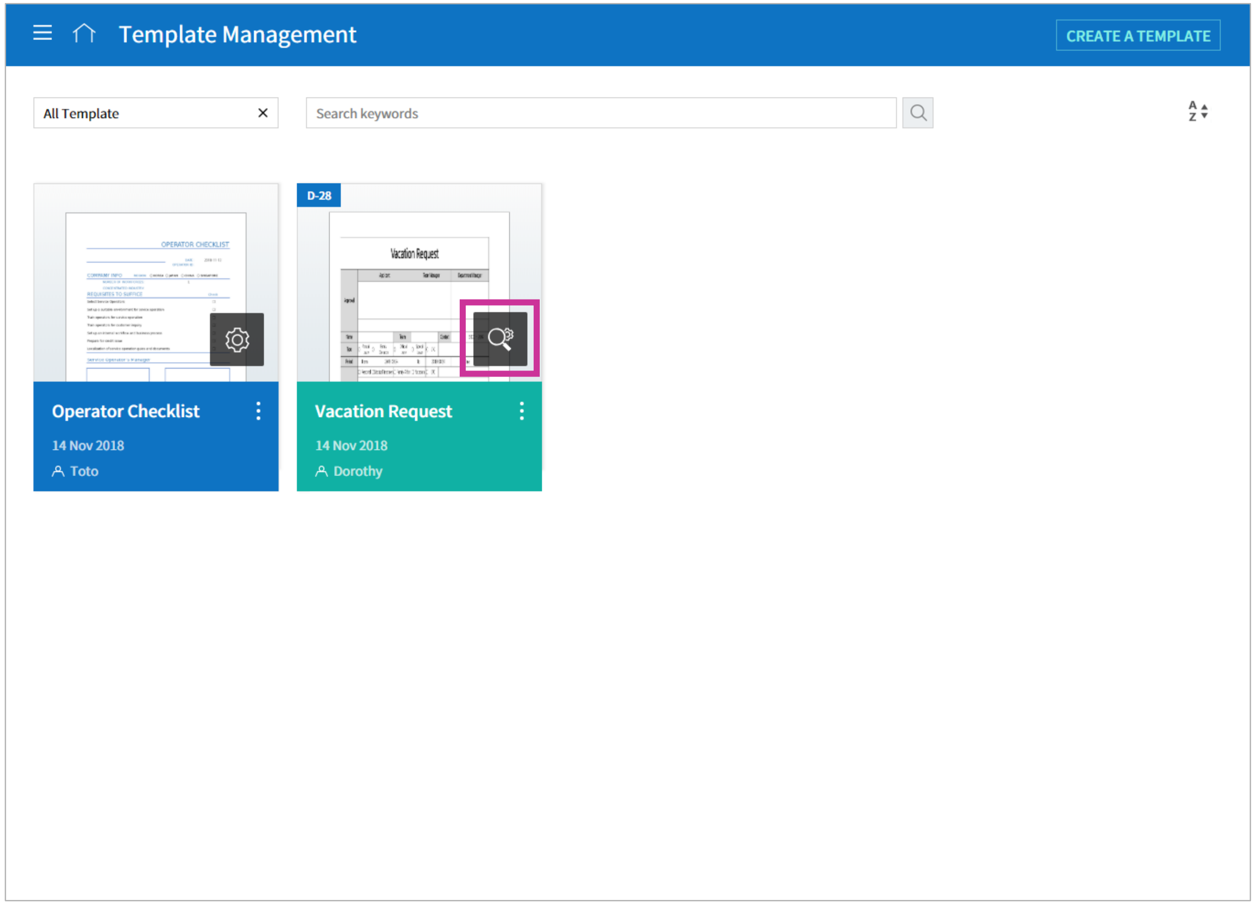
Administrator



- Template’s document manager settings will be displayed as a popup. The document manager would be able to check all the created document from this template.

Check settings

Administrator | Template Manager

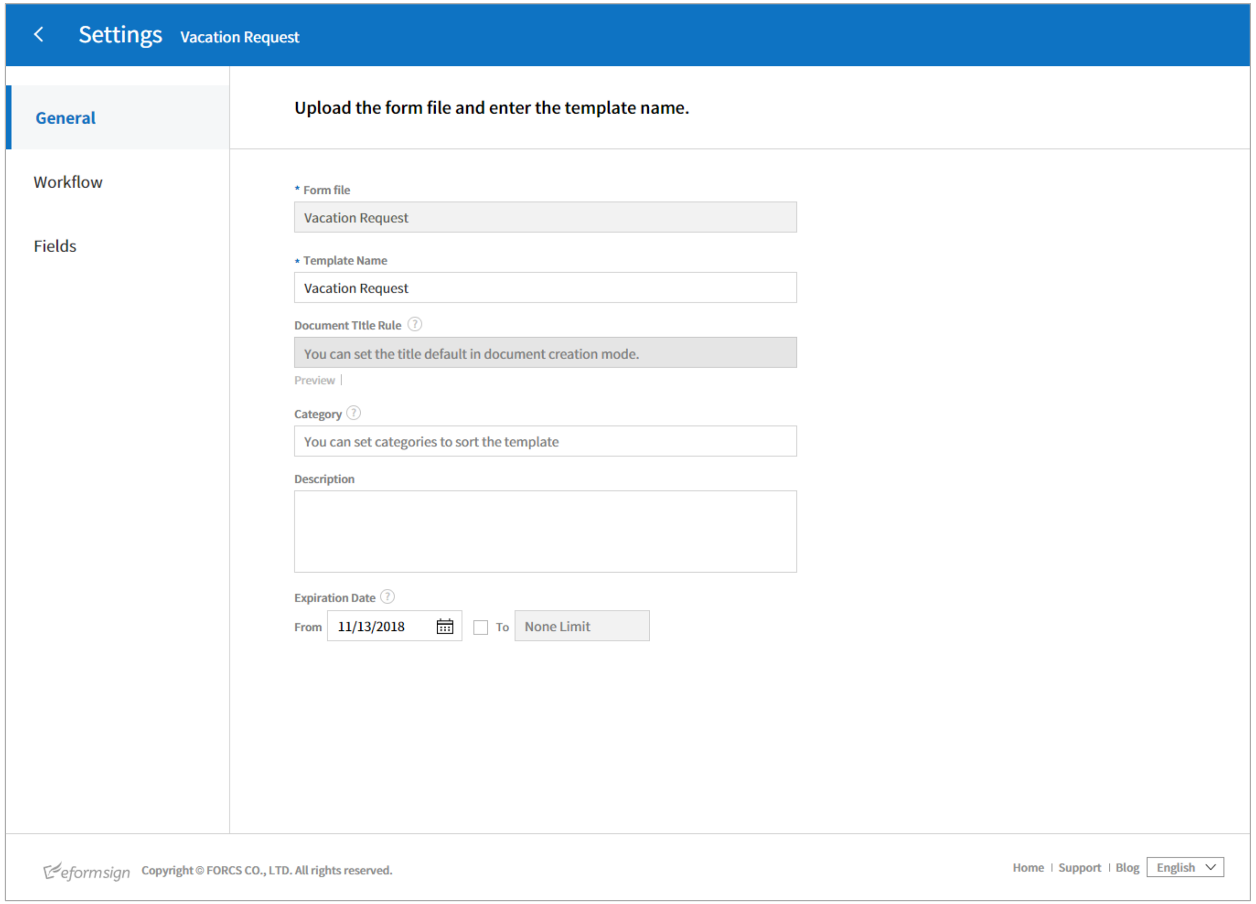


- In case the user does not own the document, the user may check the settings of the template by clicking [ ].

Check settings

Administrator

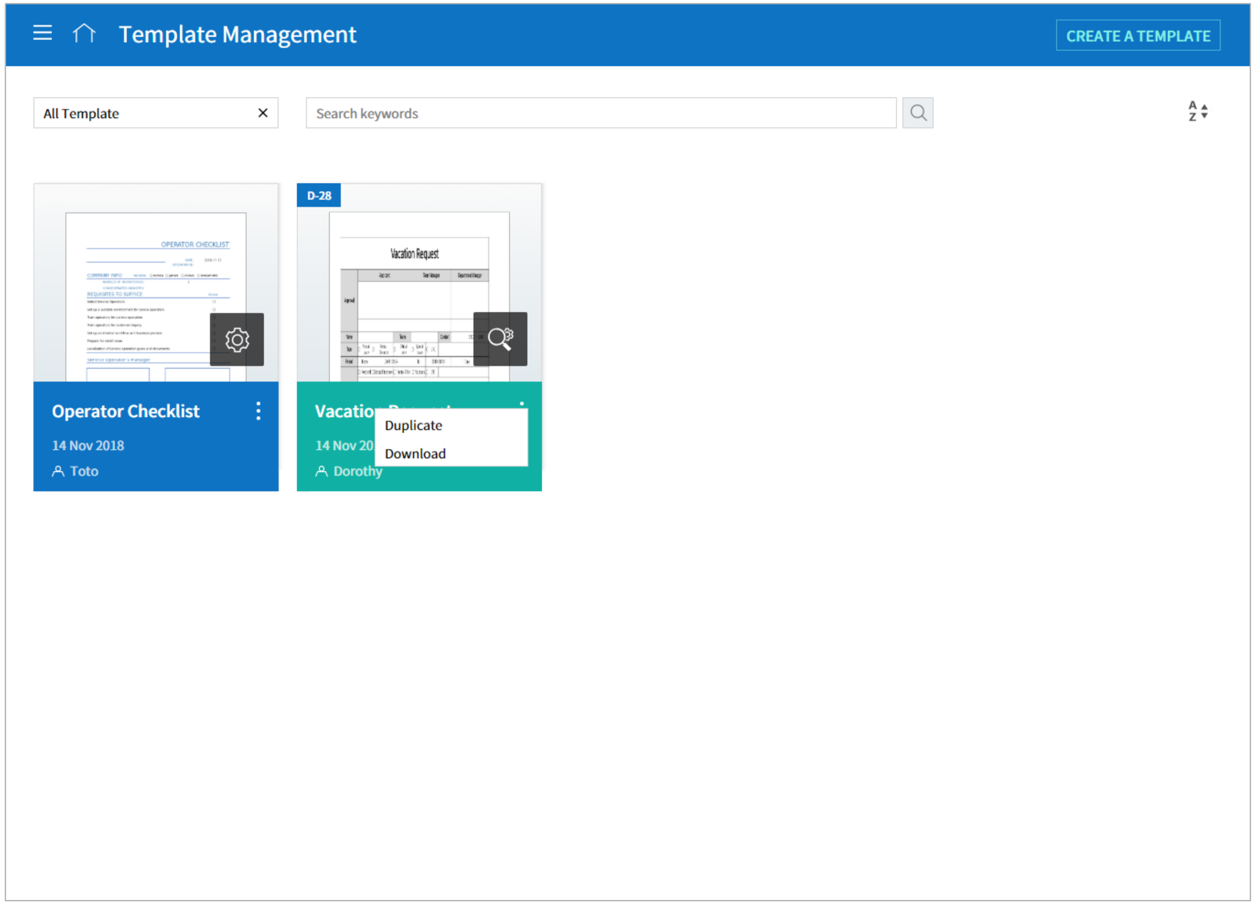
Template Manager



- General, workflow, and field configurations can be checked on the template settings.
- Even if the changes are made, those change will not be applied (in check settings).

Check settings

Administrator | Template Manager



- The template may be downloaded or duplicated by clicking [⋮] on the desired template.

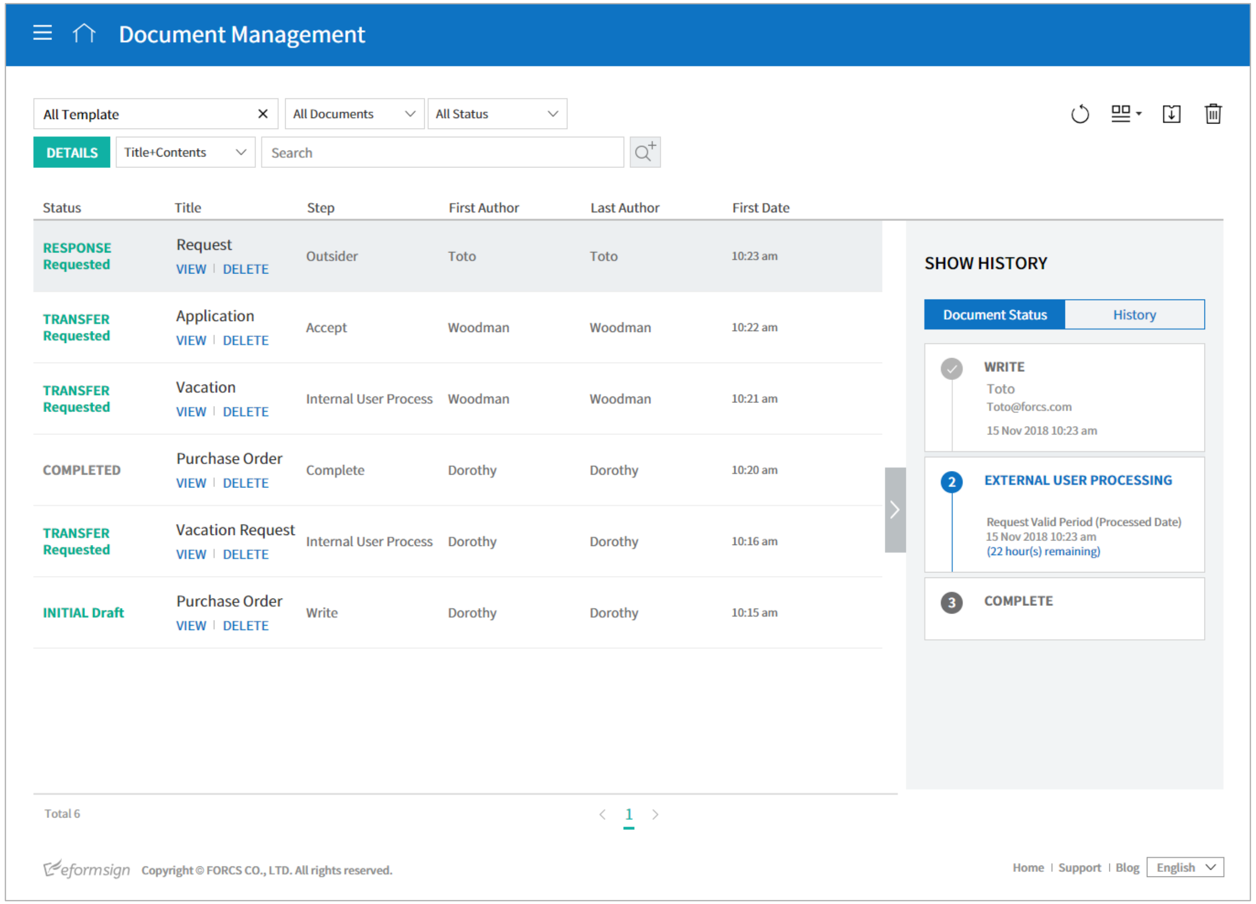
MANAGER

04. Document Management

Search All Documents

Search All Documents

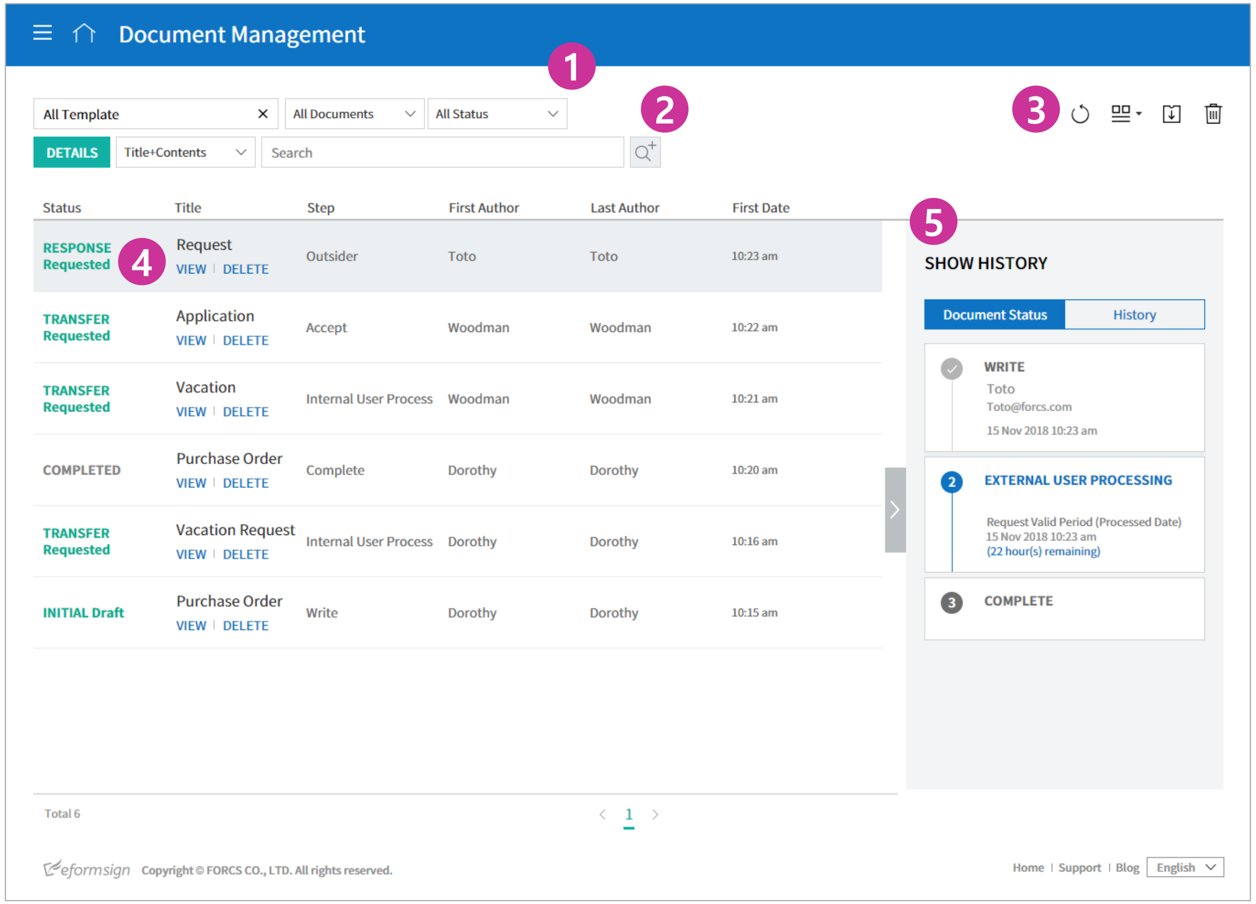
Administrator | Document Manager



- Clicking upper left corner [≡] > Document Management to view all documents.

Search All Documents

Administrator | Document Manager



- The document management toolbar consists of:
  ① Documents get sorted by template name, status, or by columns.
  ② The keywords or search conditions can be added by clicking [DETAILS] when searching documents.
  ③ The user may refresh the document list, select the columns for the display, or download or delete selected documents.
  ④ Completed documents can be viewed by clicking [VIEW] under the document's title.
  ⑤ By clicking the documents, the user can check the mail/text message/push notification and document history on the right side of the screen.

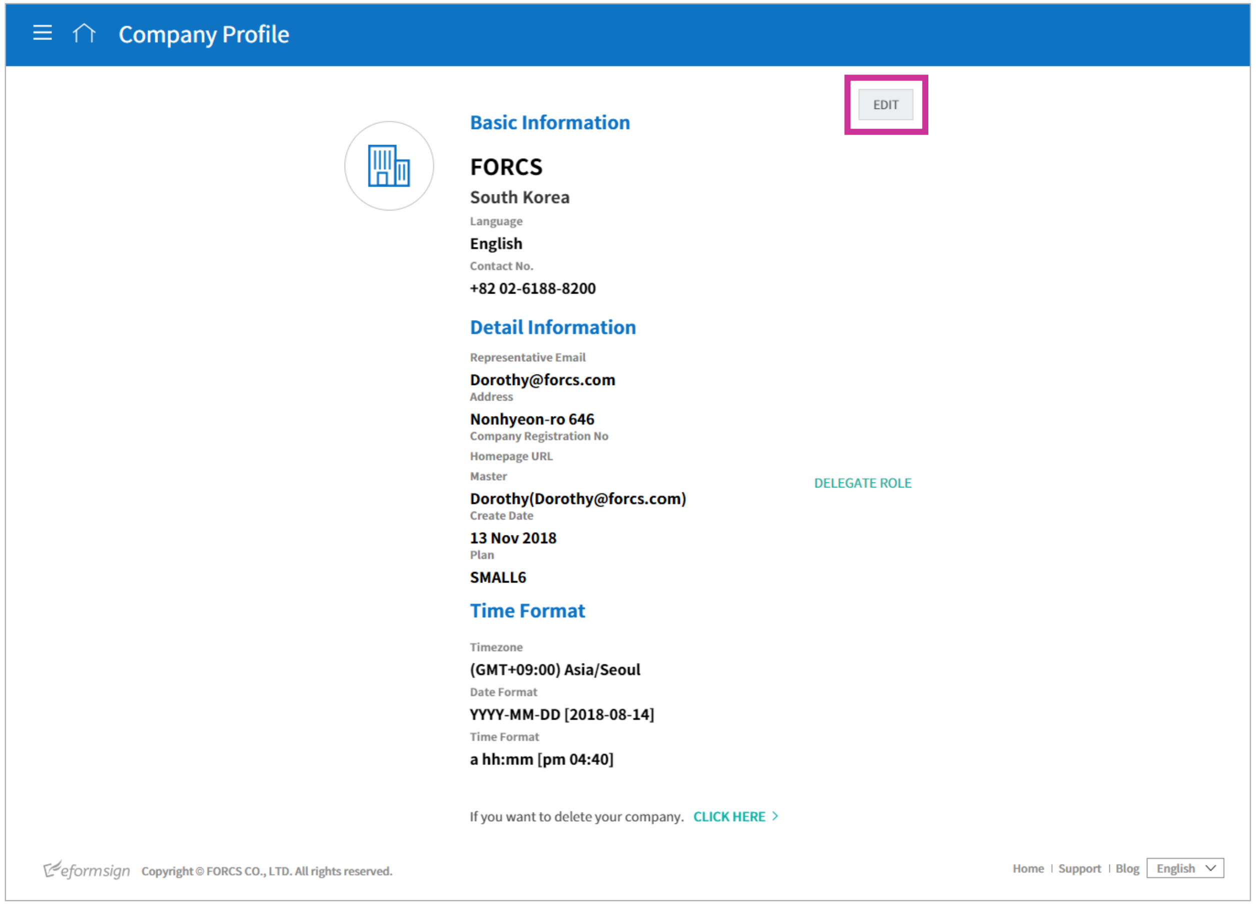
MANAGER

05. Company Manage

- Company profile
- Group management
- Member management

Company profile

Administrator Company Manager



- Clicking upper left corner [≡] > Company Management > Company Profile to browse and edit the company profile.
- In order to change Master, select [DELEGATE THE ROLE].
- In order to edit the company profile, select [EDIT].

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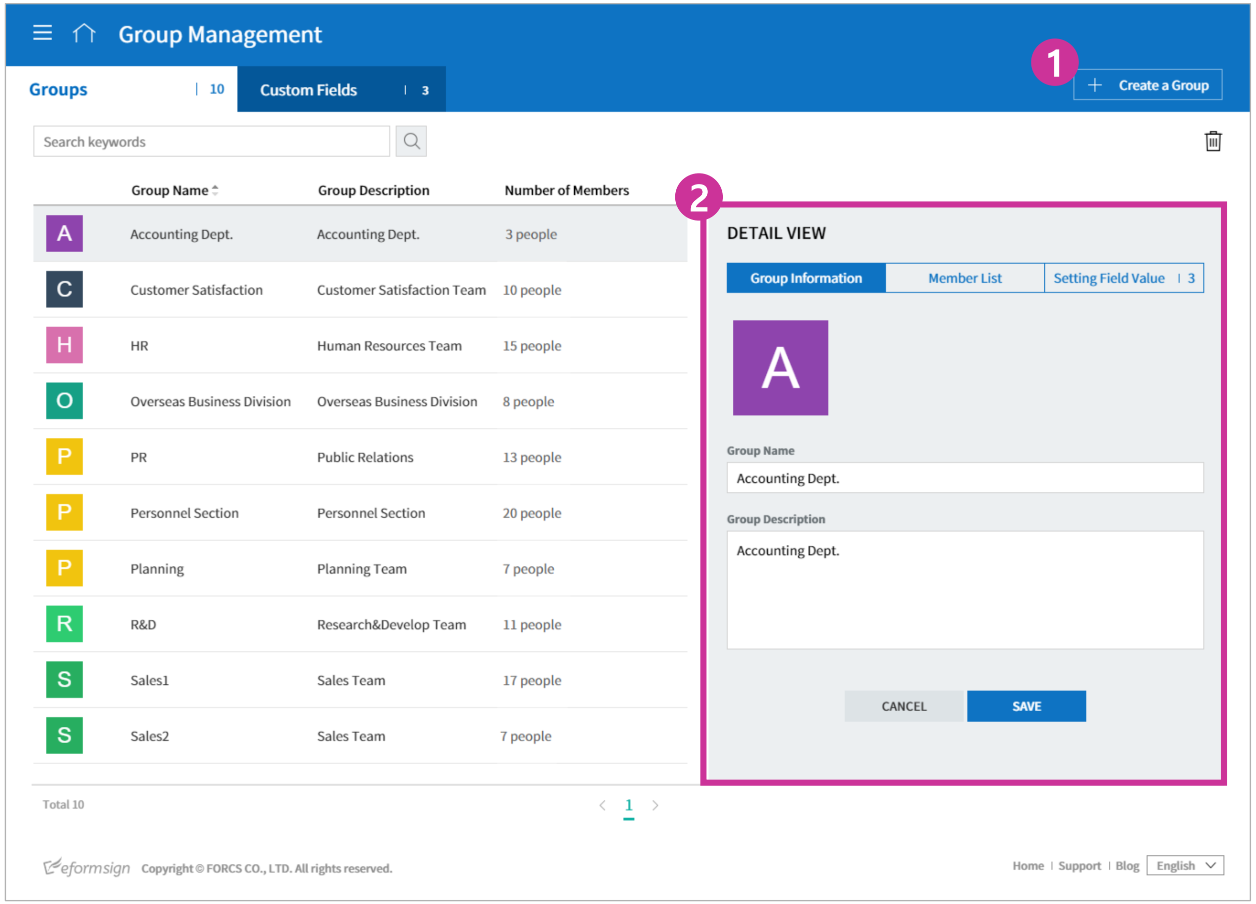
Group Management

Administrator Company Manager

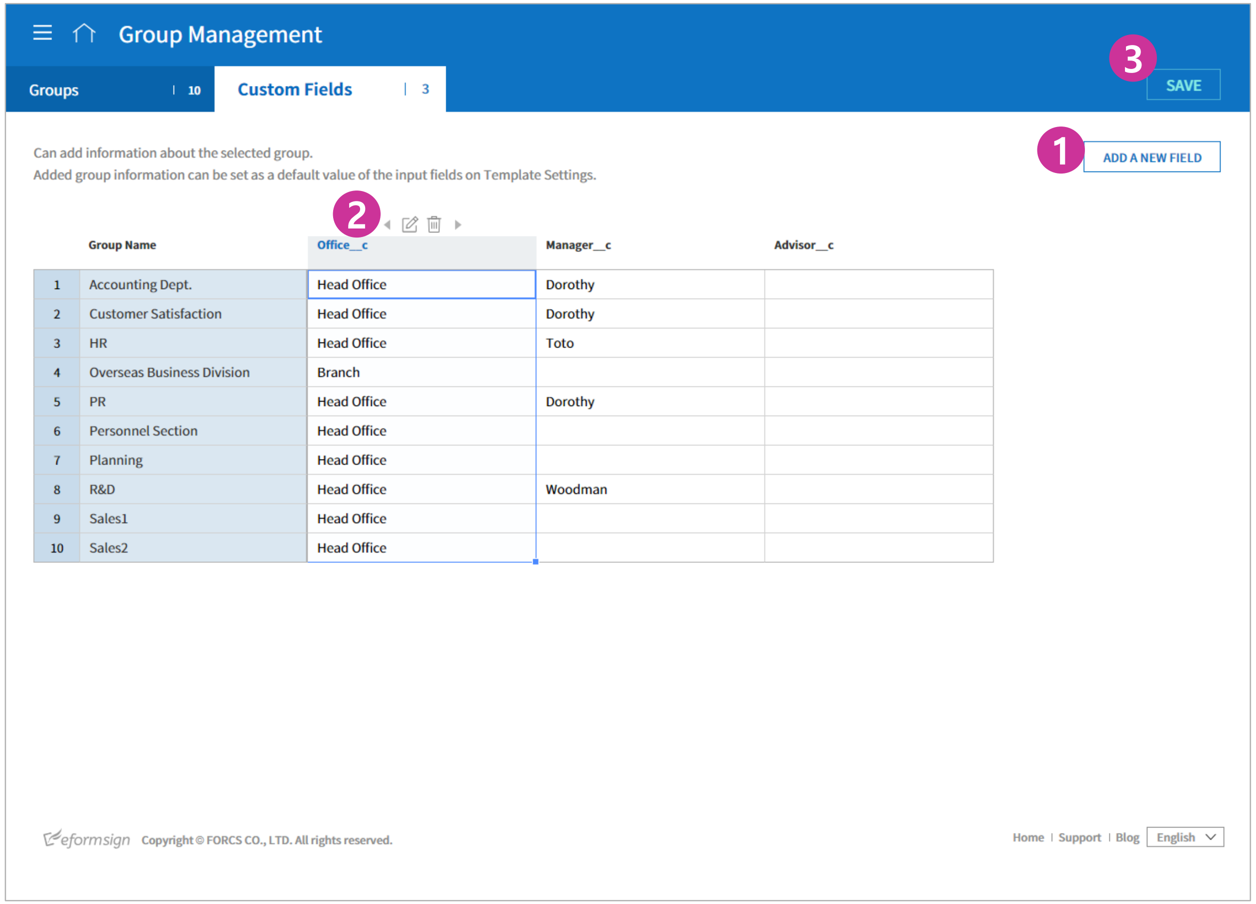


- Clicking upper left corner [≡] > Company Management > Group Management to create a group or manage group profile.

- The group management toolbar consists of:
  ① In order to add group, select [+ Create a Group].
  ② On group information tab among group details, group's profile, name, and description are displayed. Press [SAVE] in order to finish group management.

Group Management

Administrator | Company Manager

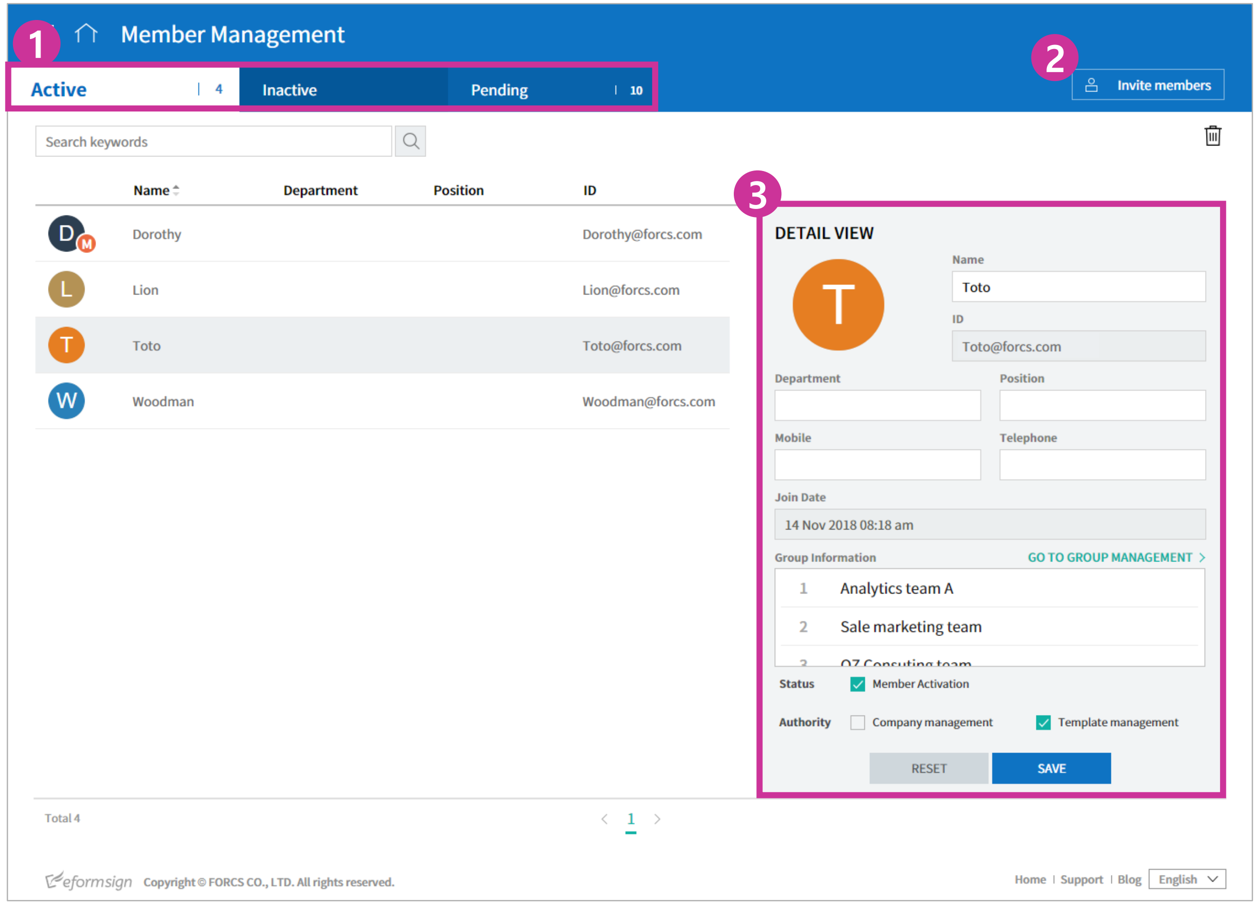


- On this tab, the user may add or edit custom fields.

- The custom fields tab and toolbar are composed as below.
  ① The user may add a new custom field by clicking [ADD A NEW FIELD].
  ② The icon shows up when the custom field is clicked so the field may be edited, moved, or deleted.
  ③ Click [SAVE] button to apply the changes on the custom field.

Member Management

Administrator Company Manager



- Clicking upper left corner [≡] > Company Management > Member Management to invite members or change members' profile.

- The member management toolbar consists of:
  ① Members are displayed separately depending on the member's active/inactive status or pending for an invitation.
  ② Select [Invite members] on the right upper corner to invite the new member.
  ③ Member's profile is shown when the member is clicked. Select [SAVE] to finish editing member's profile.

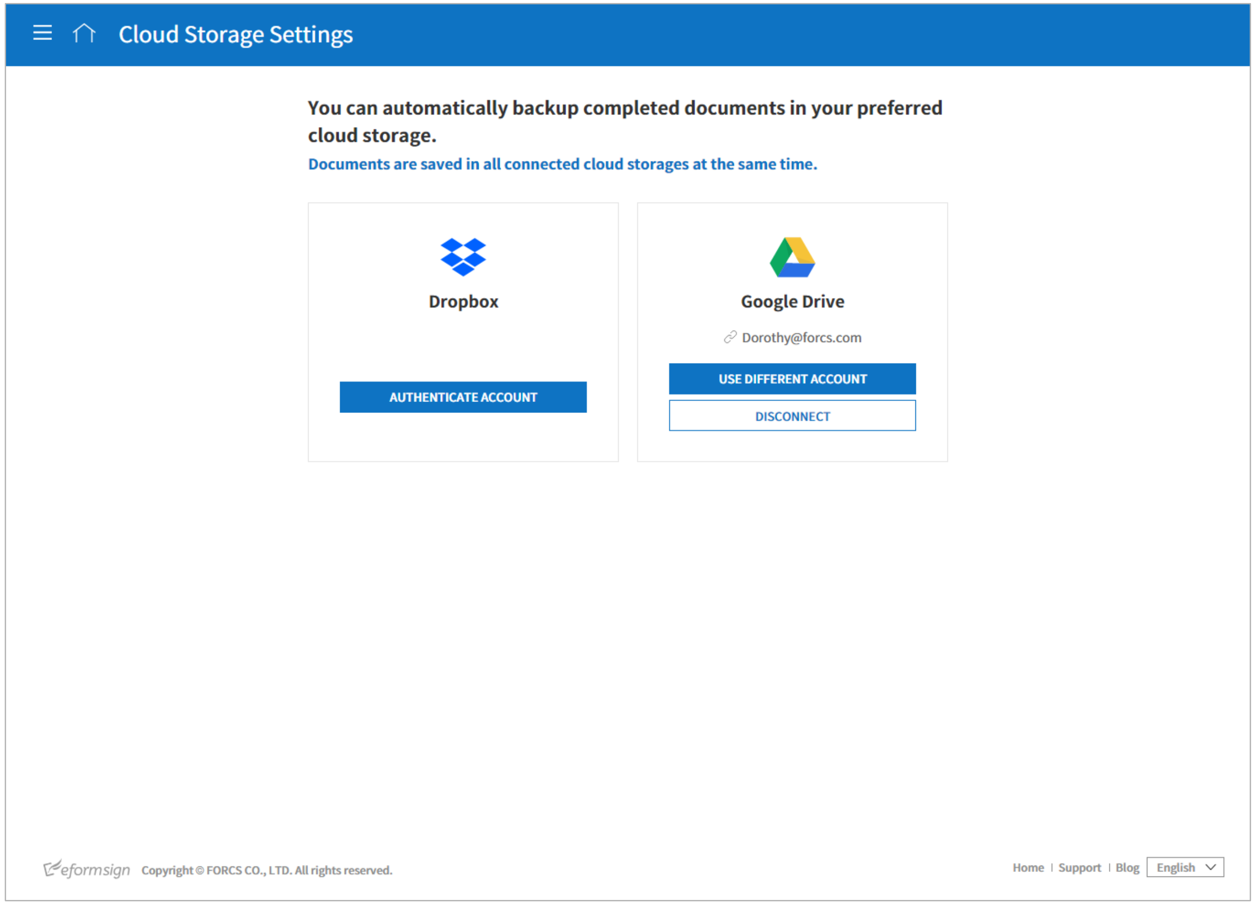
MANAGER

06. Integration

Cloud Storage Settings
Access Key Management

Cloud Storage Settings

Administrator



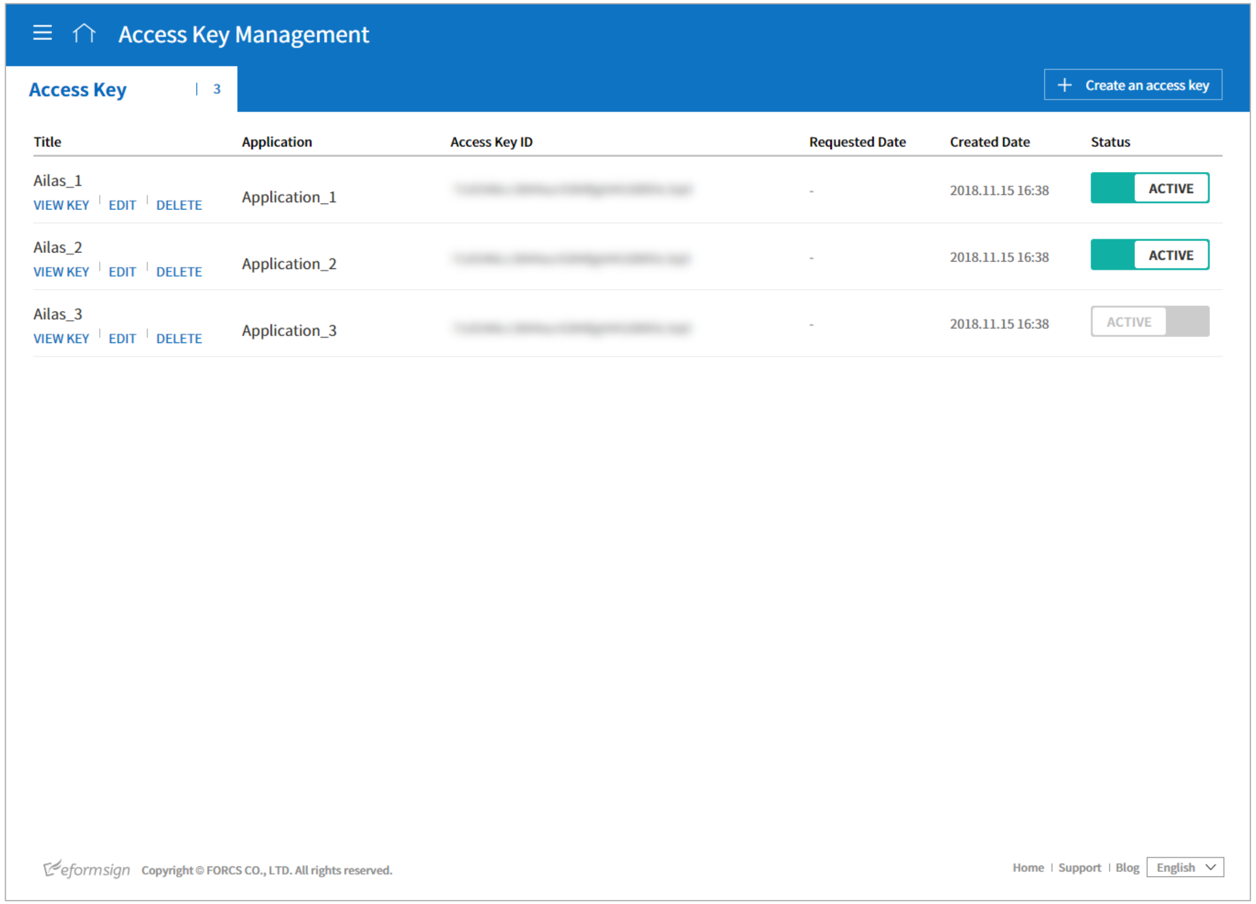
- The user may designate the file storage which to store the completed documents by clicking upper left corner [≡] > Integration > Cloud Storage Settings.

- The user may use Dropbox or Google Drive by clicking [AUTHENTICATE ACCOUNT].

- The user may change one's connected account by [USE DIFFERENT ACCOUNT] or disconnect by clicking [DISCONNECT].

Access Key Management

Administrator



- Clicking upper left corner [≡] > Company Management > Access Key Management to create an Access Key to extract data and use it.

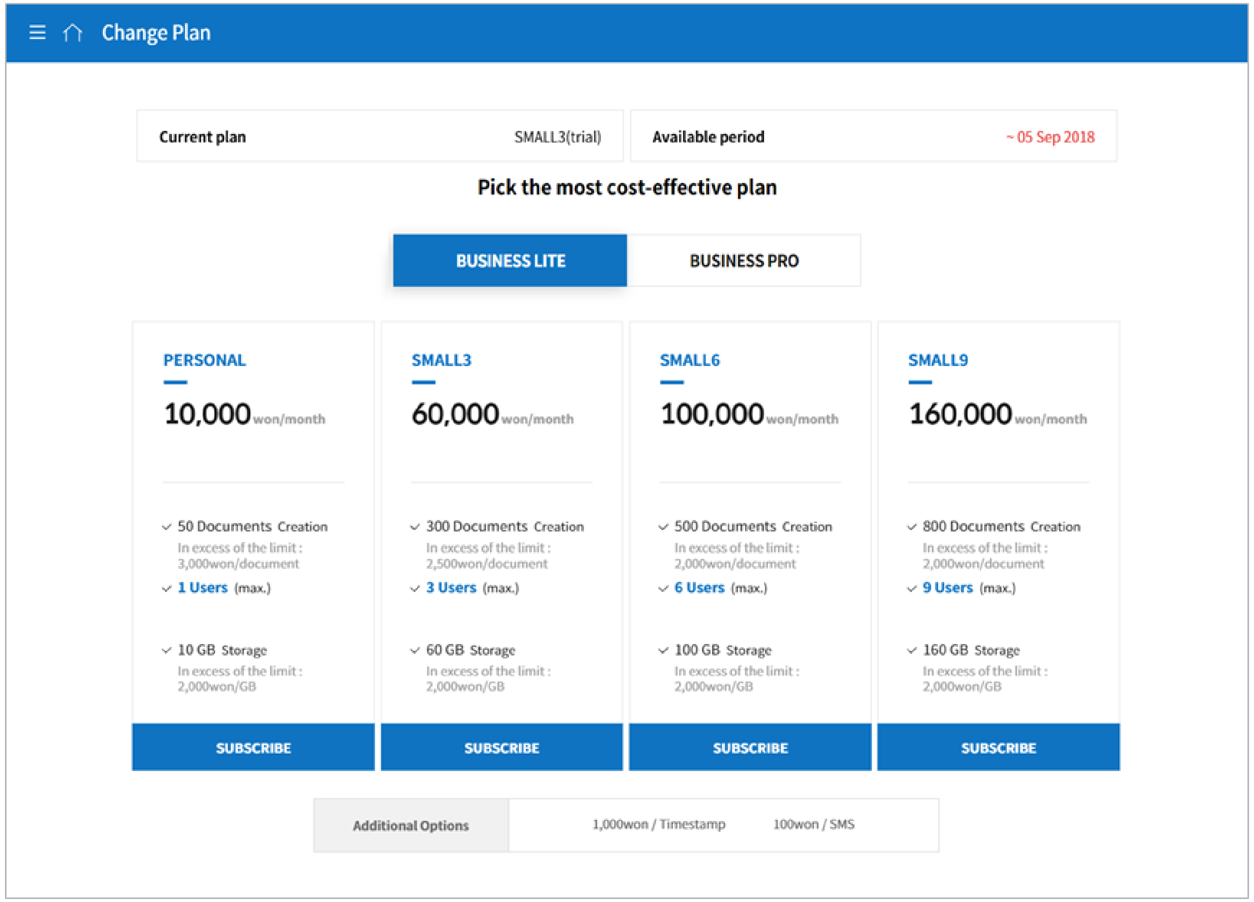
MANAGER

07. Billing

- Change Plan
- Real-Time Billing
- Monthly payment history
- Set Payment Method

Change Plan

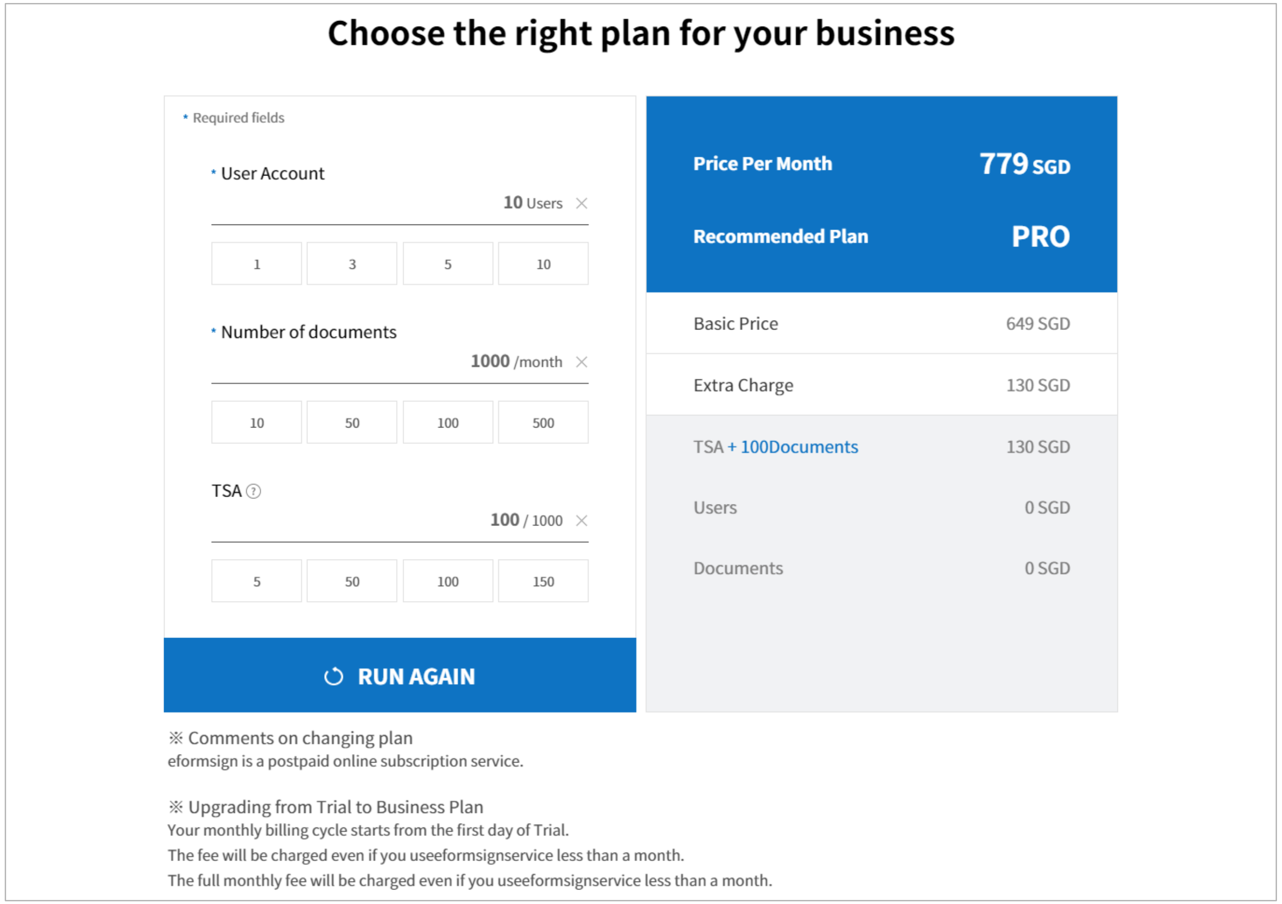
Administrator



- Clicking upper left corner [≡] > Billing > Change Plan to view price table.
- Please add a payment method in order to change the plan.
- BUSINESS LITE is suitable for low number of members and high number of documents. BUSINESS PRO is suitable for high number of members that want to add additional user accounts at a low price.
- Select [SUBSCRIBE] in order to change plan. For more information, please contact us by pressing [ASK QUESTION].

Change Plan

Administrator



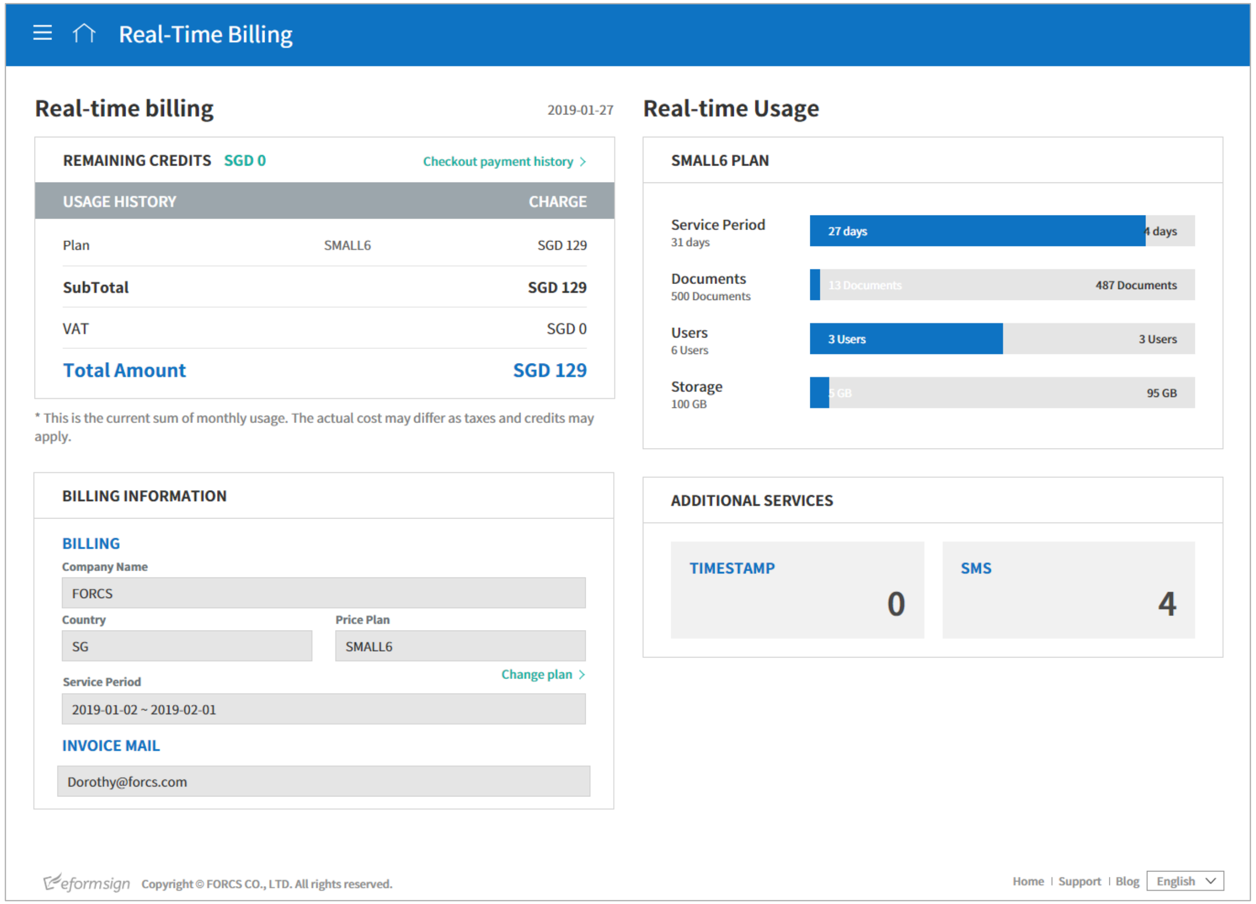
- The plan calculator can suggest you the suitable plan based on the needs.

- The amount and name of the recommended plan is shown when the user click [RUN AGAIN] the calculator after inserting required information such as User Account, Number of documents, TSA.

- For example, if the user has 10 people in one's company with 1000 documents and decides to use 100 TSA, the expected monthly price would be 799SGD and the recommended plan would be PRO.

Real-Time Billing

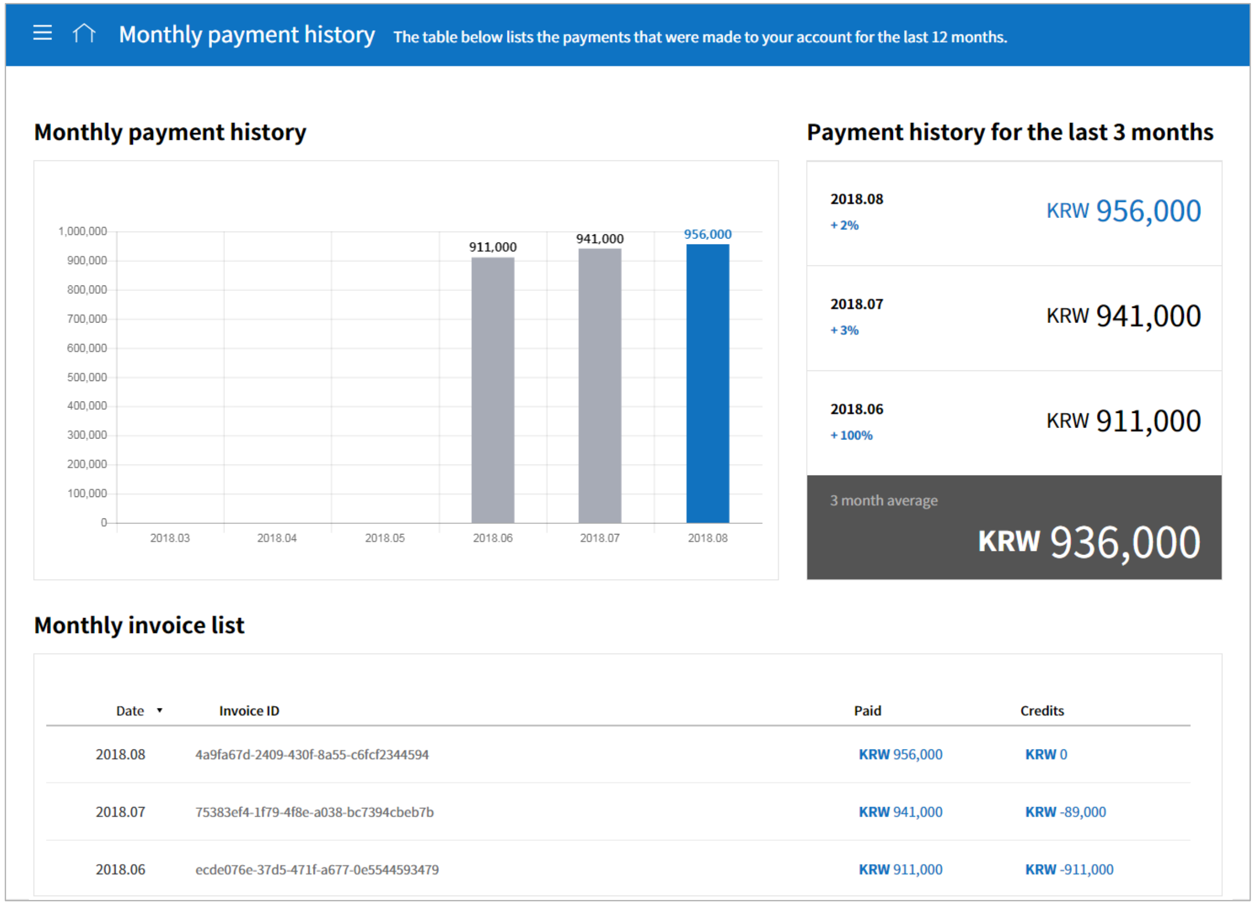
Administrator



- Clicking upper left corner [≡] > Billing > Real-Time Billing to view real-time billing.

Monthly payment history

Administrator



- Clicking upper left corner [≡] > Billing > Monthly payment history to view monthly payment history.

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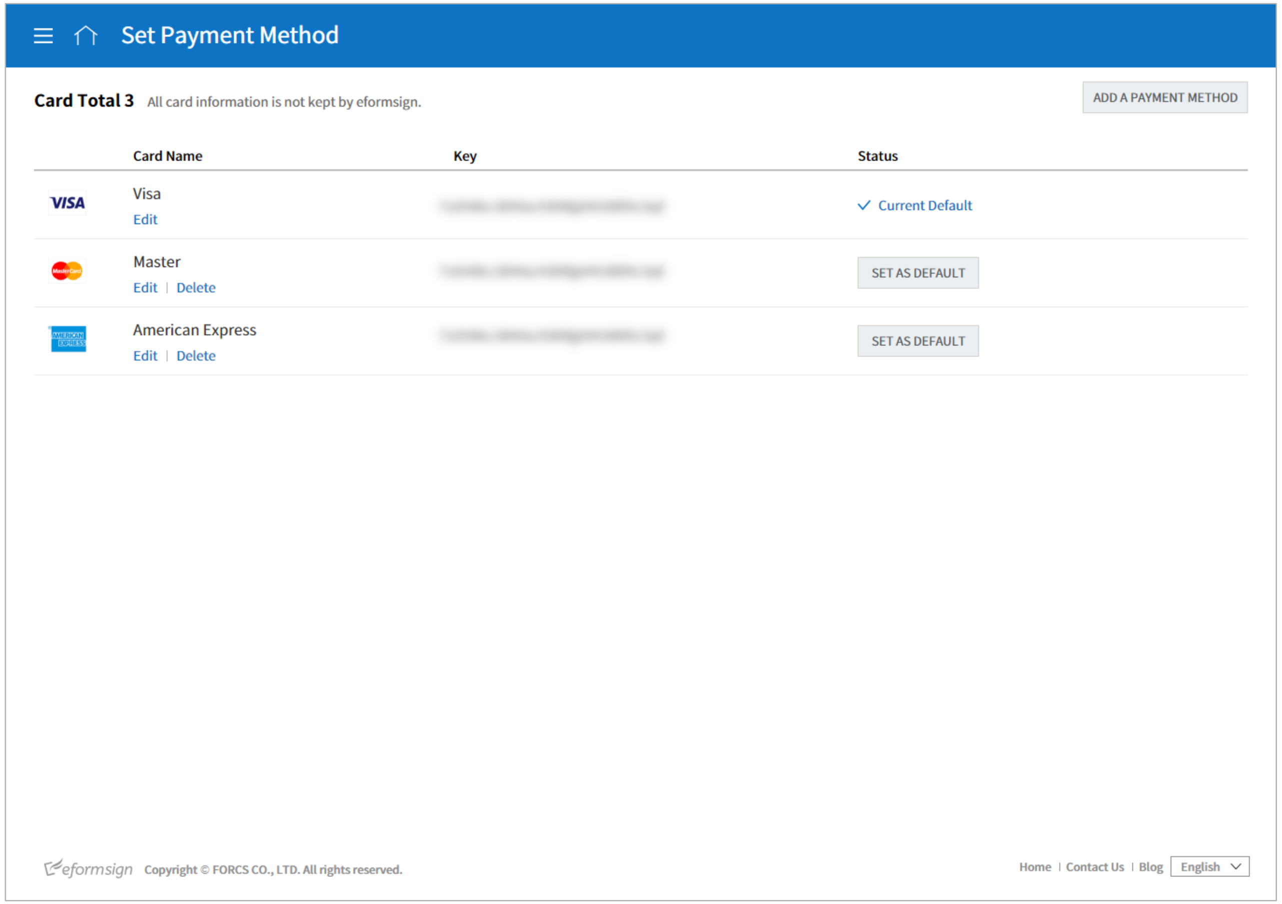
Set Payment Method

Administrator



- Clicking upper left corner [≡] > Billing > Set Payment Method to add a payment method.

MANAGER

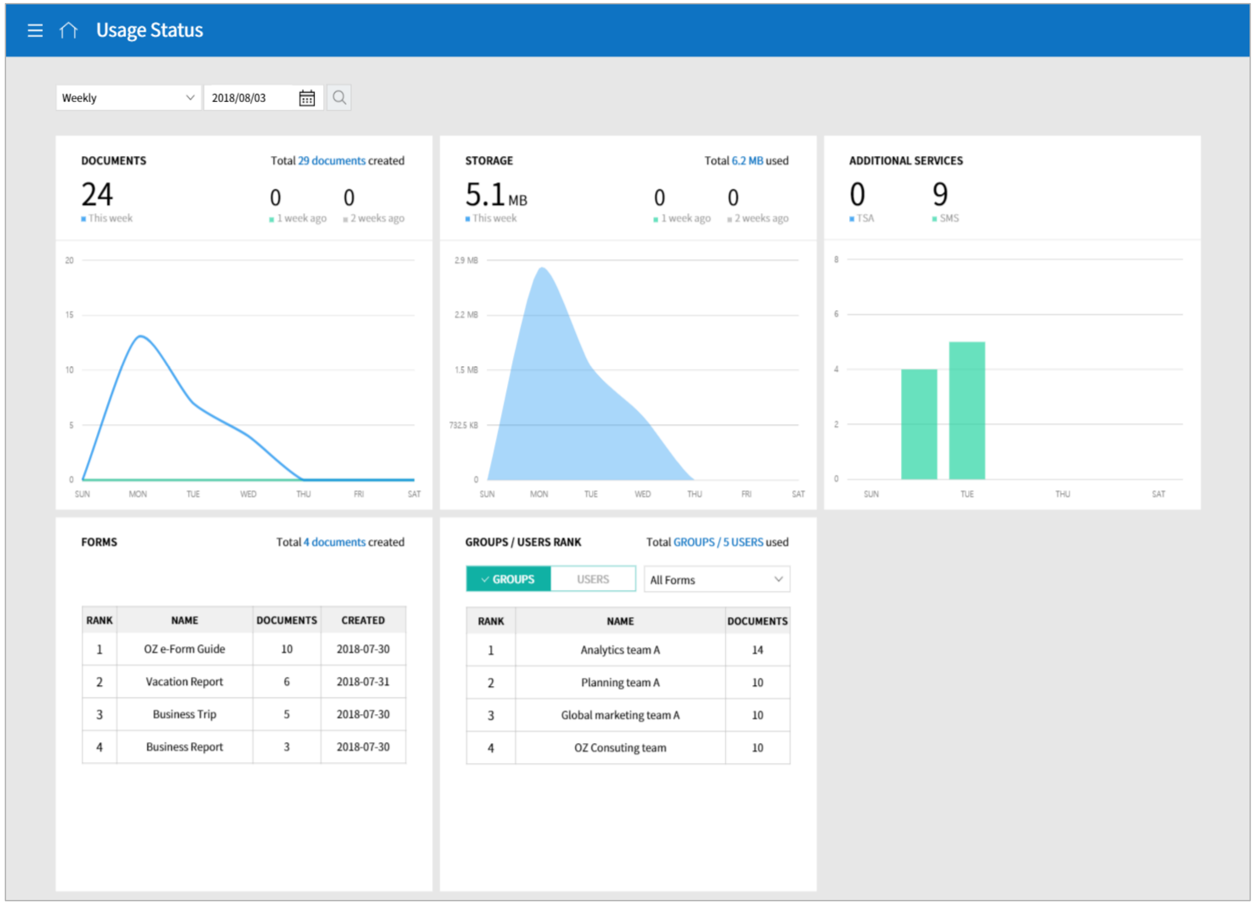
08. Usage Status & FAQ

Usage Status
FAQ

eformsign

Usage Status

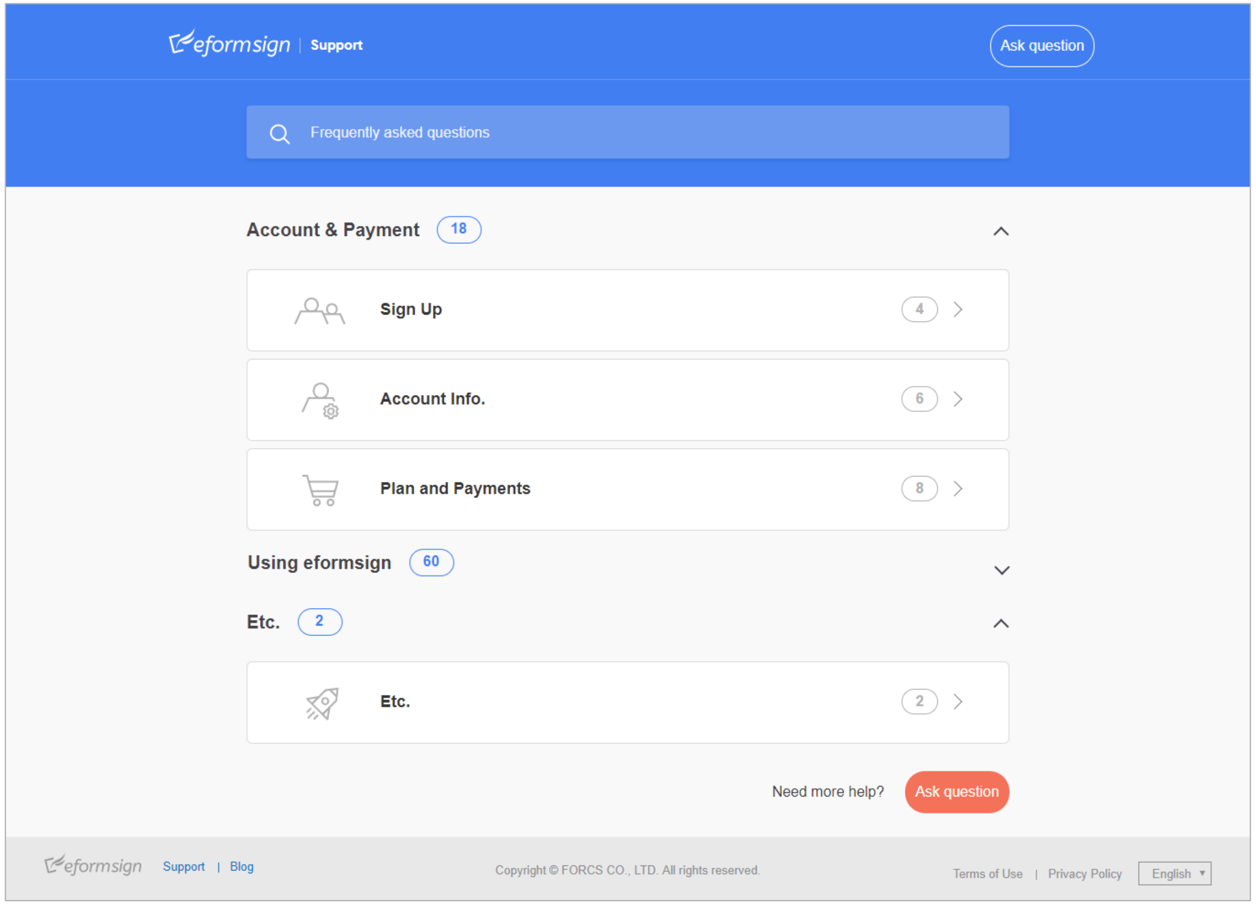
Administrator | Company Manager | Template Manager



- Clicking upper left corner [≡] > Usage Status to view weekly, monthly, and annual usage.

FAQ

ALL



- The user can access eformsign FAQ via [Support] on the bottom of the page.
- The user may look up frequently asked questions by inserting search keywords.
- The user also can ask a question by clicking [Ask question] if one could not find the desired questions.

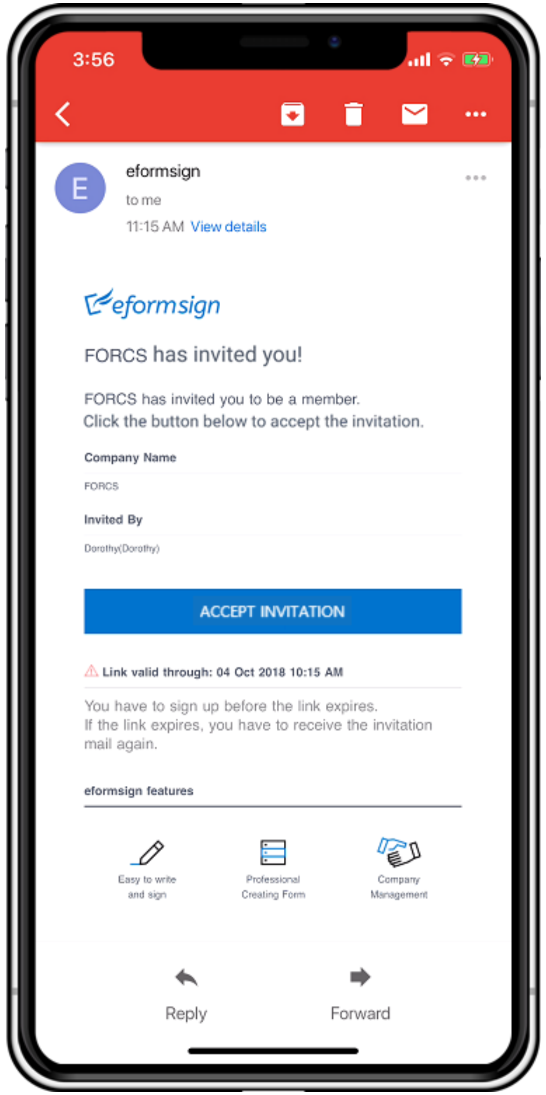
MEMBER

09. Use Service

- Accept Invitation
- About Menu
- Create a New Document

Accept Invitation

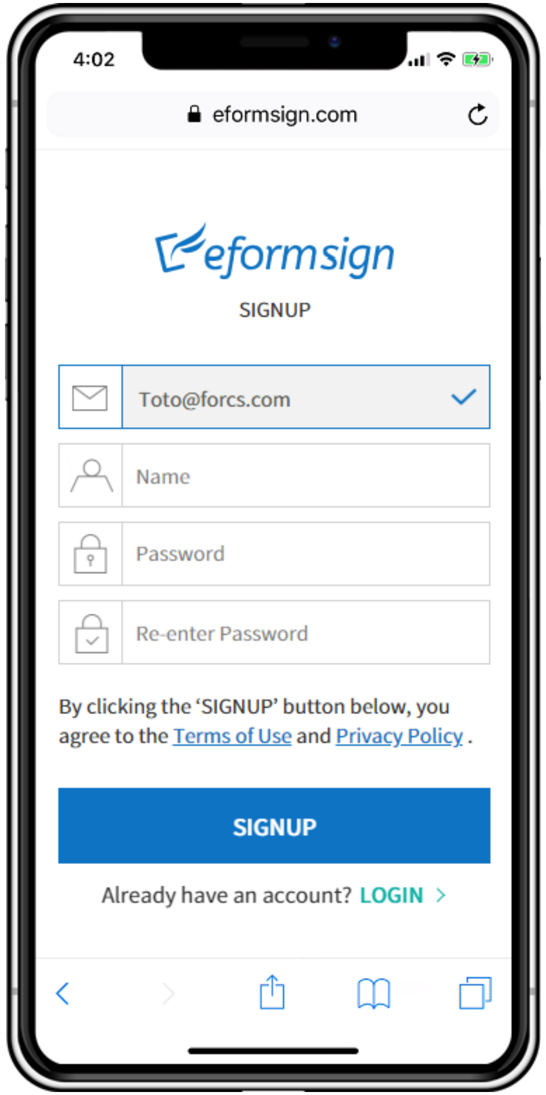
Member



- The users that have been invited via email will receive the invitation mail. Text message will be sent for users that have been invited with phone number.
- Select [ACCEPT INVITATION] to accept the invitation.
- Select the SMS [Link] if the user has been invited via text message.

Accept Invitation

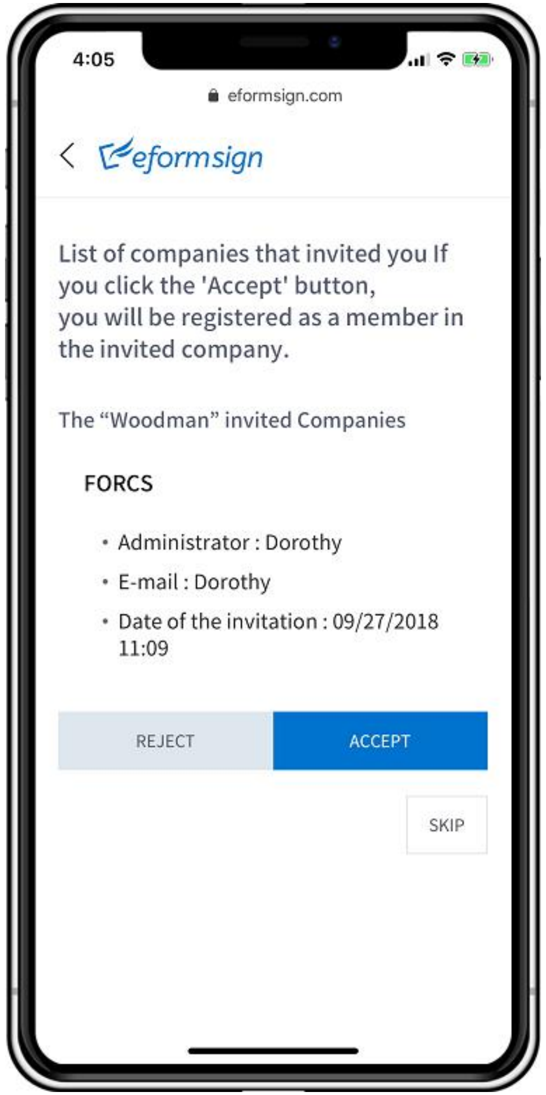
Member



- Invited user's email will be automatically filled out on the form.
- The phone number and name are automatically prescribed to the sign up form if the user is invited by Administrator or Master.
- By clicking [SIGNUP] button after filling out account information, the list of companies which invited the user will show up.

Accept Invitation

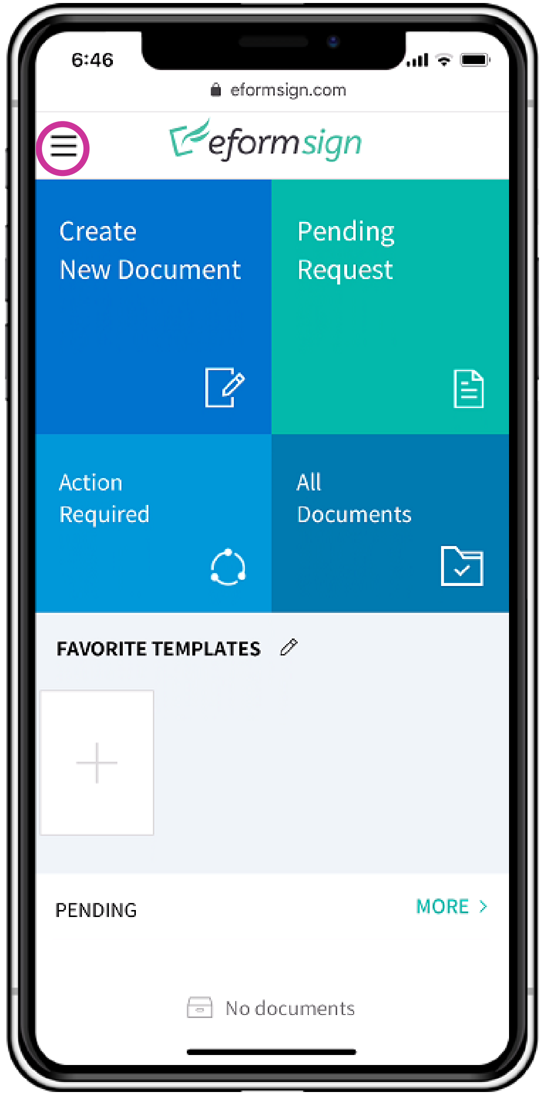
Member



- Invited companies are displayed.
- Press [ACCEPT] to join as a member of company.
- Press [GO TO CREATE DOCUMENTS] to go to the dashboard.

About Menu

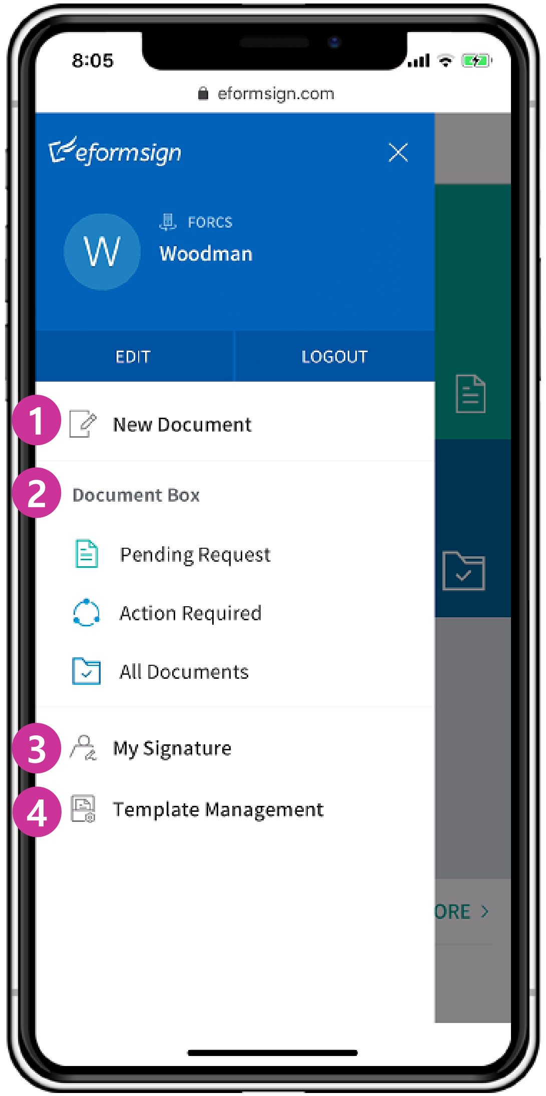
Member



- This is the first screen after the login.
- Please select [≡] on the upper left of the screen.

About Menu

Member



① New Document: Shows the template list where the user can click a template and start to create the e-form.

② Document Box: User can check your created e-forms.

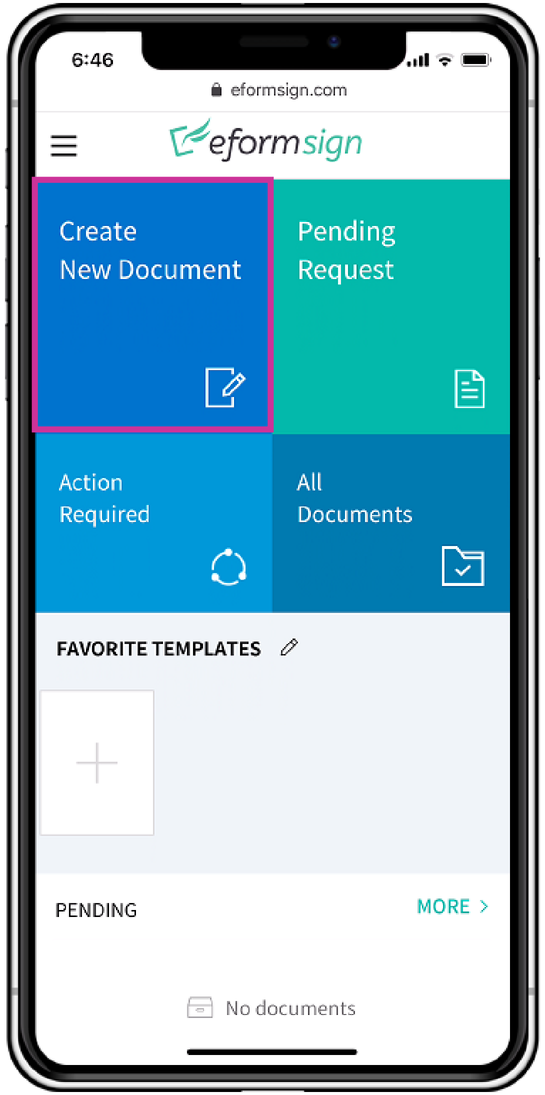
- ✓ Pending Request: User can check the documents that are in progress.
- ✓ Action Required: User can check the documents that have been requested for approval from other members.
- ✓ All Documents: User can check the all documents.

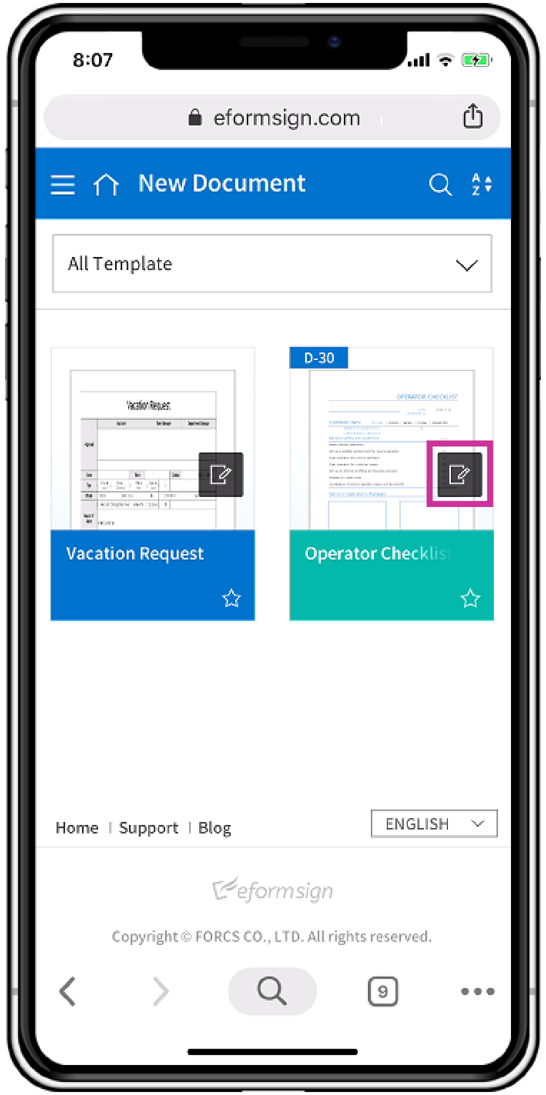
③ My Signature: Can create and save the signature which can be used when signing an e-Form. Also, work in the desktop environment where signing action is quite difficult.

④ Template Management: User can check the template list.

Create a New Document

Member





- Select My template from the dashboard to view the list of templates user can create.
- This can also be approachable by clicking upper left corner [≡] > New Document.
- Press [Write] on the desired template from the template list.

Create a New Document

Member

- The e-Form gets displayed.
- Insert the title of the e-form on the upper left corner.
- Click [SAVE AS DRAFT] on [⋮] menu on the right upper corner in order to save the document as the draft.
- Select [SUBMIT] or [COMPLETE] on the upper right corner after finishing writing e-form. [SUBMIT] shows up if the next step is Approval/External User Process. [Completion] shows up if the next step is the completion.
- When [SUBMIT] is clicked, request for approval popup shows up. After selecting the approver and writing the comments, the mail/text message/push notification gets sent to the approver based on preset configuration.

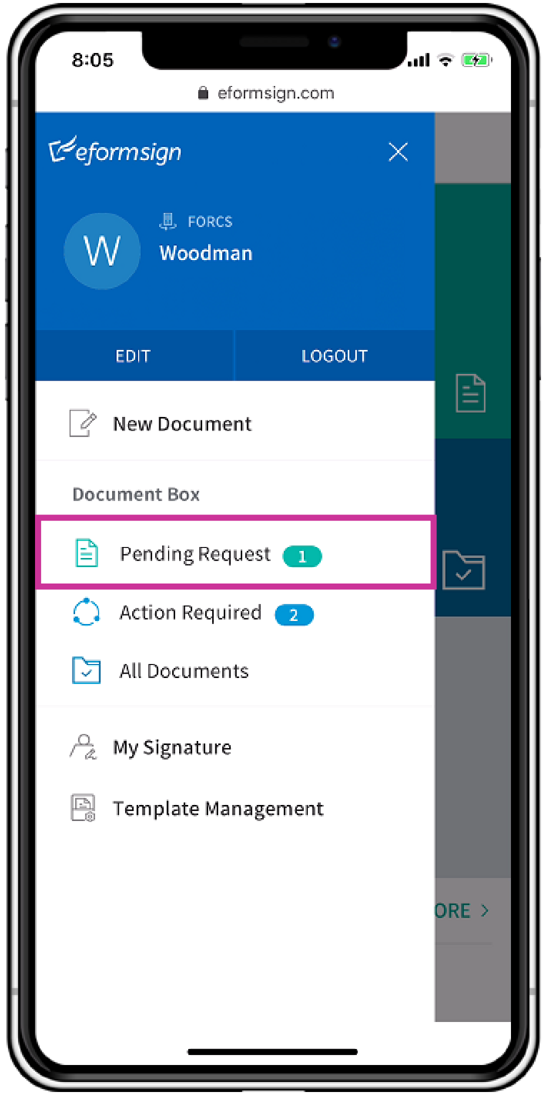
MEMBER

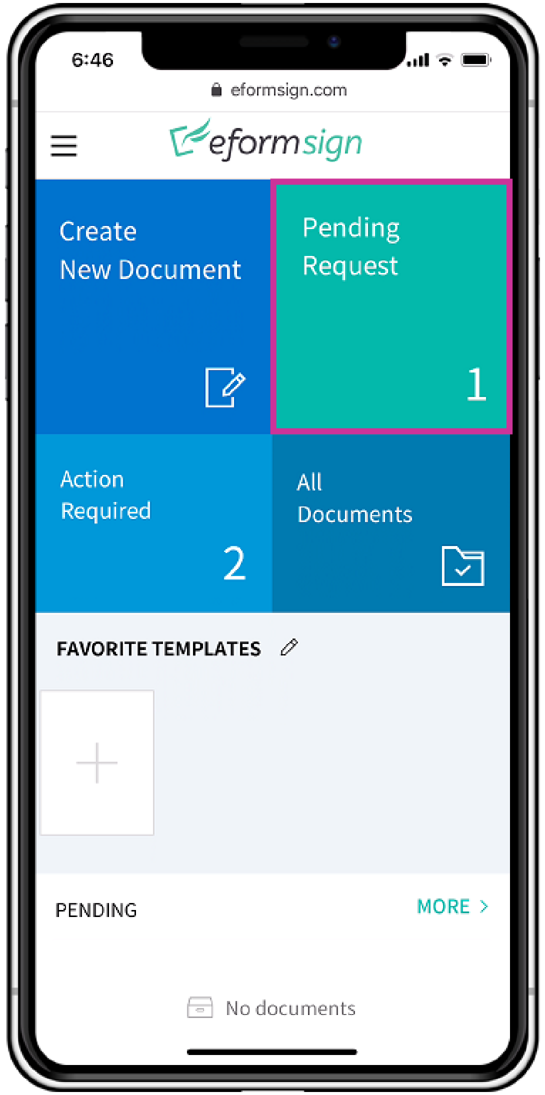
10. Document Box

Pending Request
Action Required
All Documents

Pending Request

Member

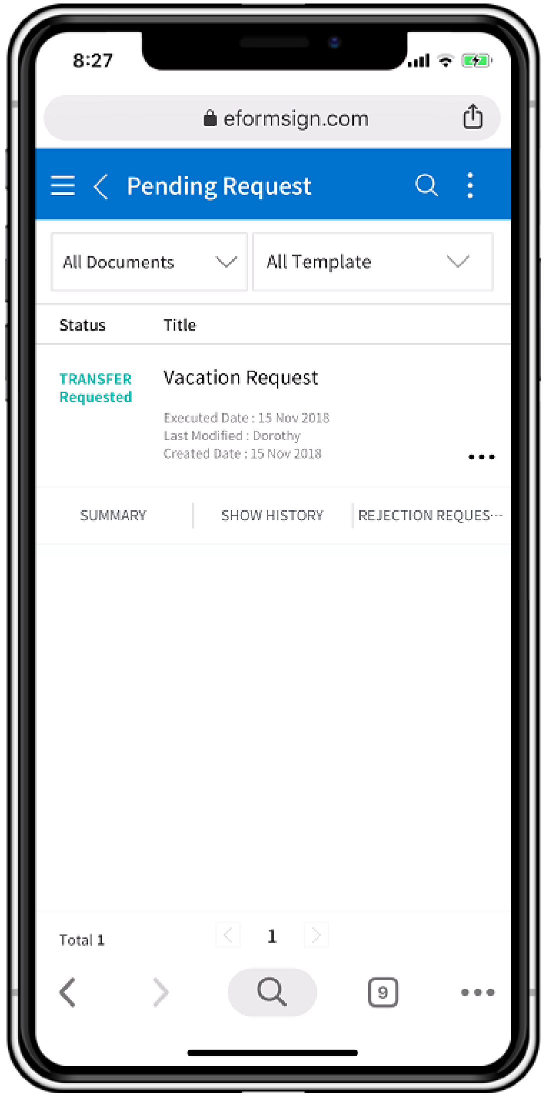




- Select Pending Request from the dashboard to view documents in progress.
- This can also be approachable by clicking upper left corner [≡] > Document Box > Pending Request.

Pending Request

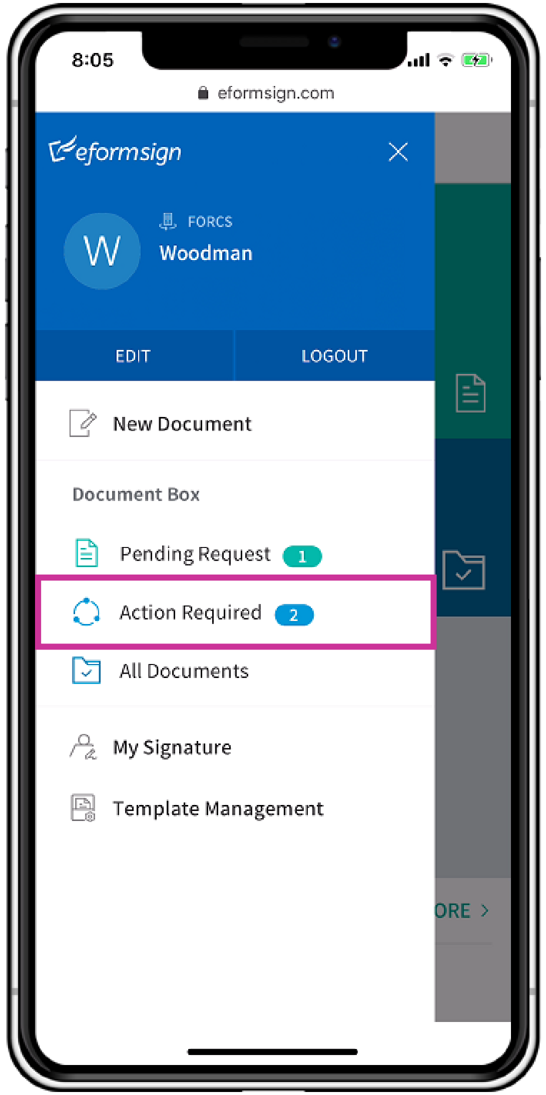
Member

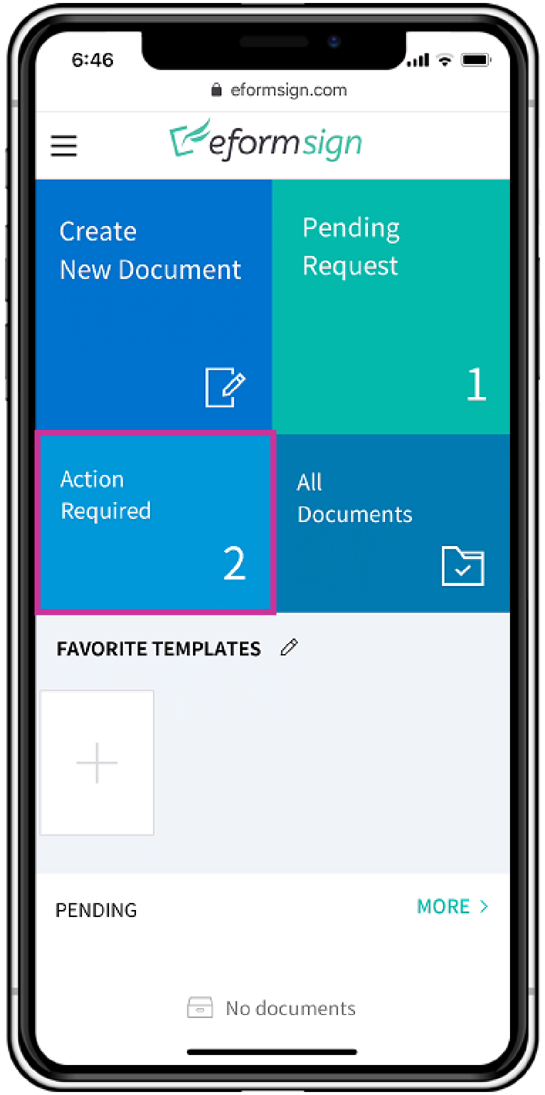


- Search e-forms by searching keywords. e-Forms can be downloaded and lists can be refreshed by using [⋮] on the upper right corner.
- e-Forms can be viewed in its status or column order.
- Written e-forms can be viewed after selecting the e-form.
- The deletion request button is hidden and unfolds when the user selects [⋯] button.
- Depending on the e-document status, different buttons are displayed.
  - ✓[SUMMARY] : the documents information is displayed.
  - ✓[SHOW HISTORY]: e-Form’s history and status get displayed.
  - ✓[REJECTION REQUEST]: the user can request the approver to reject the sent approval.

Action Required

Member

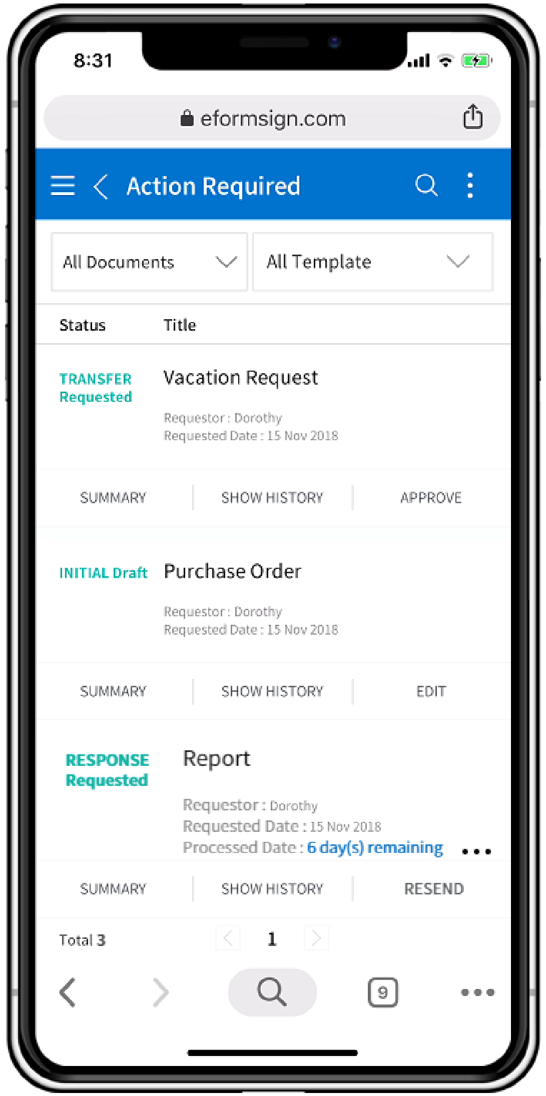




- Select Action Required from the dashboard to view documents in progress.
- This can also be approachable by clicking upper left corner [≡] > Document Box > Action Required.

Action Required

Member



- Search e-forms by searching keywords. e-Forms can be downloaded and lists can be refreshed by using [⋮] on the upper right corner.

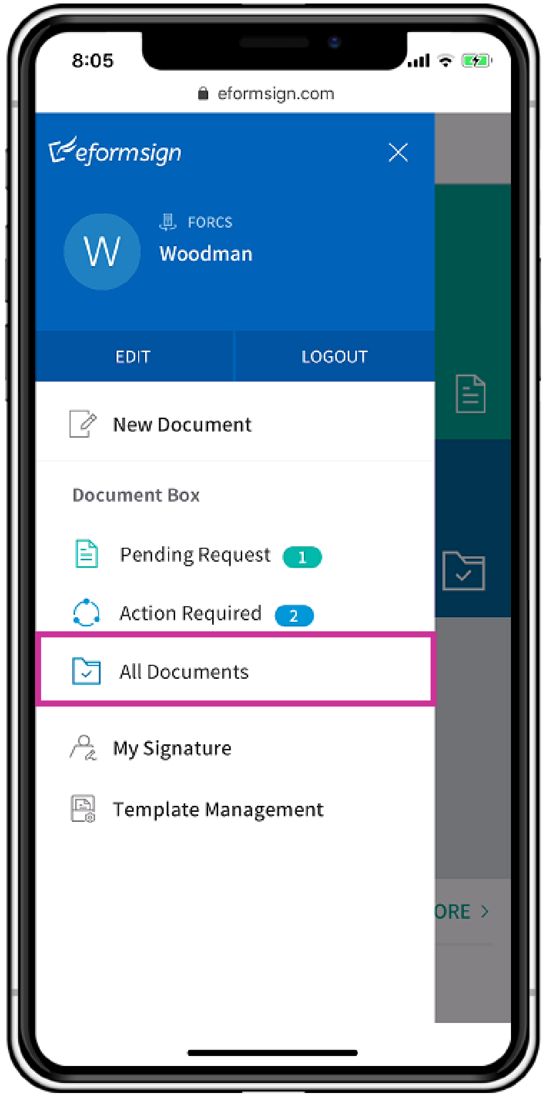
- Can view e-forms sorted by its status.

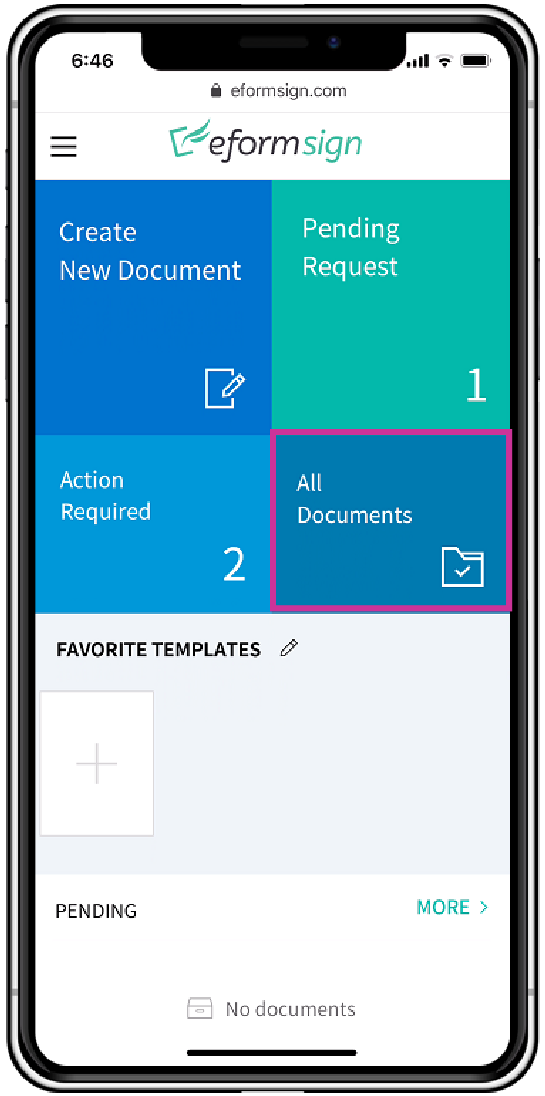
- Press [···] > Approval in order to take care of approval requests or steps.

- Depending on the e-document status, different buttons are displayed.
  - ✓[SUMMARY] : the documents information is displayed.
  - ✓[SHOW HISTORY]: e-Form's history and status get displayed.
  - ✓[RESEND]: the user may ask again for the external approval request.
  - ✓[APPROVE]: the user may approve the document.
  - ✓[EDIT]: the user can continue to create/write the document which was saved as a draft.

All Documents

Member

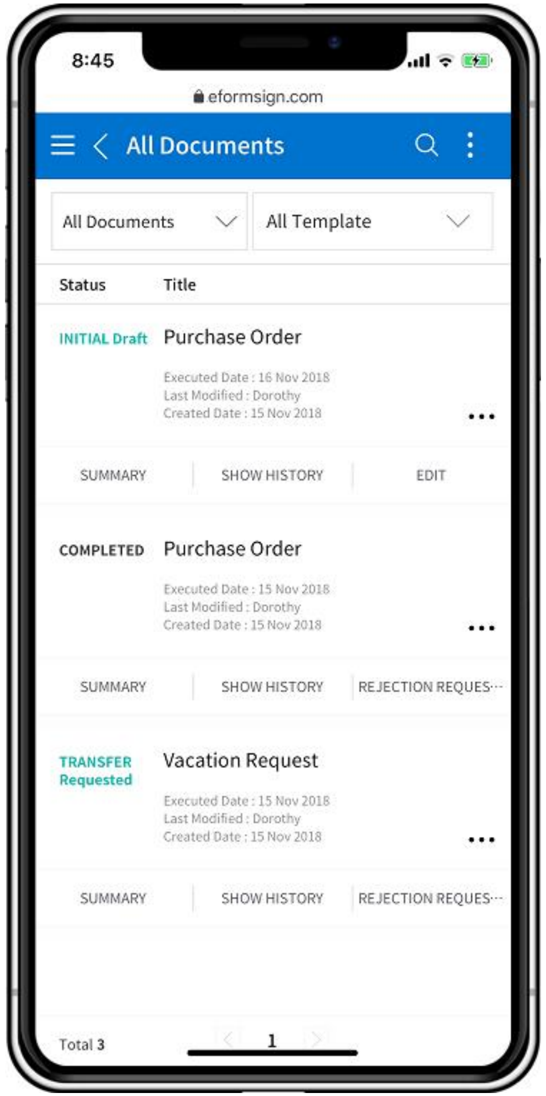




- Select Action Required from the dashboard to view the All Documents e-Forms by clicking All Documents.
- This can also be approachable by clicking upper left corner [≡] > Document Box > All Documents.

All Documents

Member



- Search e-forms by searching keywords. e-Forms can be downloaded and lists can be refreshed by using [⋮] on the upper right corner.
- Can view e-forms sorted by its status.
- Press [···] > Approval in order to take care of approval requests or steps.
- Depending on the e-document status, different buttons are displayed.
  ✓[SUMMARY] : the documents information is displayed.
  ✓[SHOW HISTORY]: e-Form's history and status get displayed.

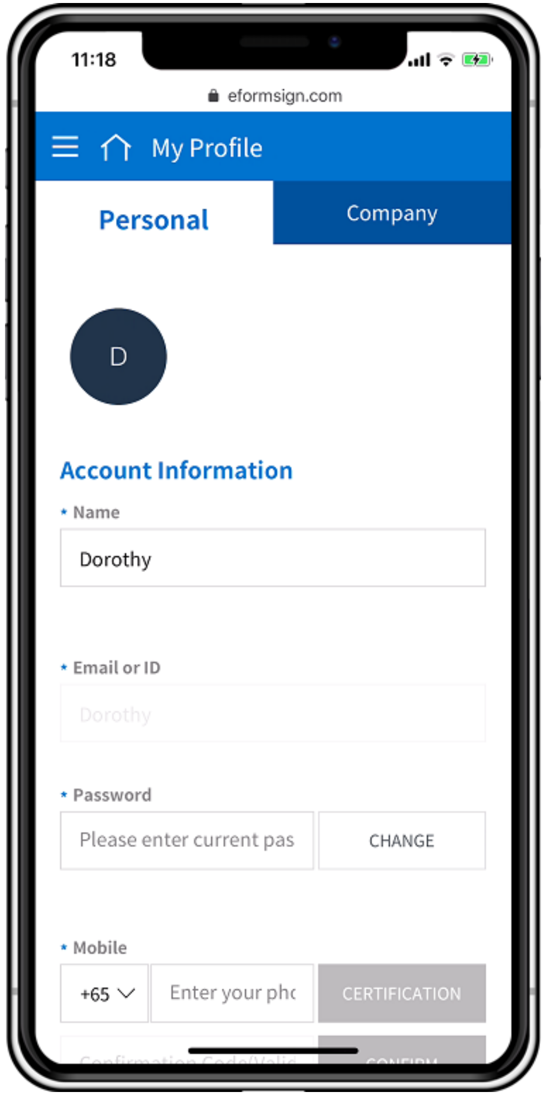
MEMBER

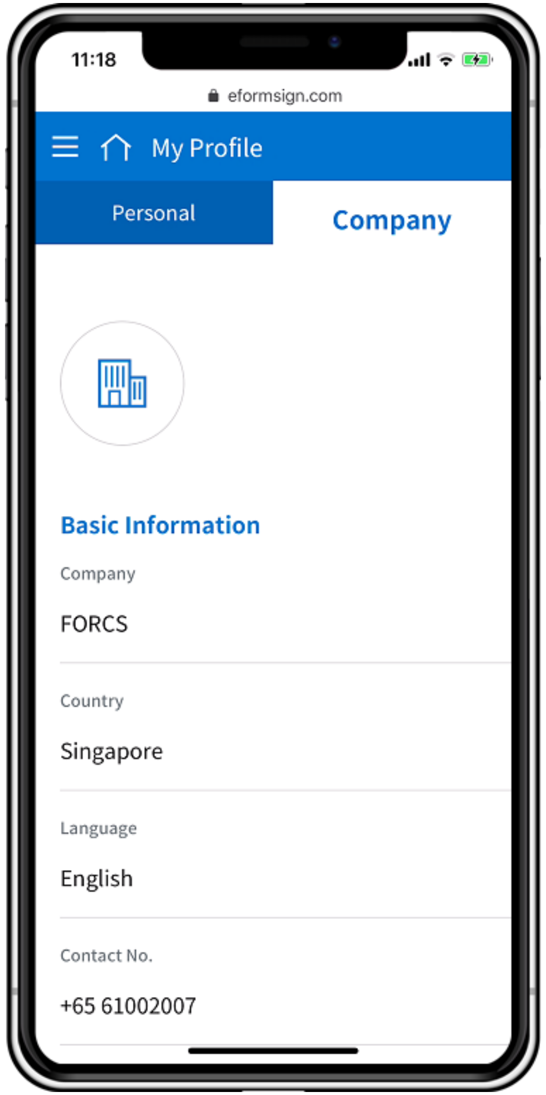
11. Profile

Personal & Company Information
My Signature

Personal & Company Information

Member

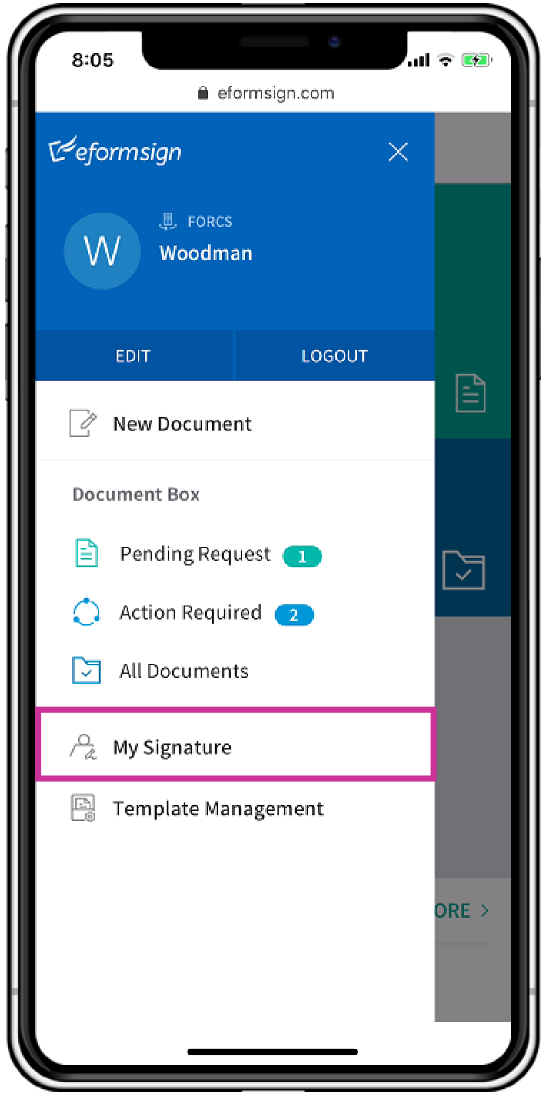


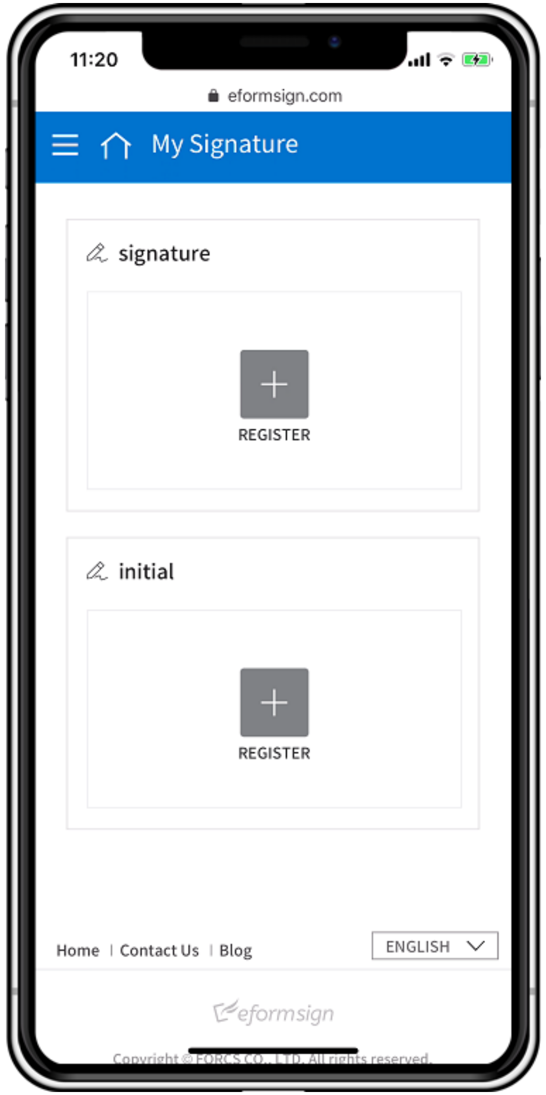


- Clicking upper left corner [≡] > EDIT to edit user profile or view company profile.
- Edit user profile or view company profile.
- The user can access and edit one's profile. After the edit, the user may re-enter the password then click [SAVE] to save the changes.
- The member can only look up the company profile but not edit.

My Signature

Member



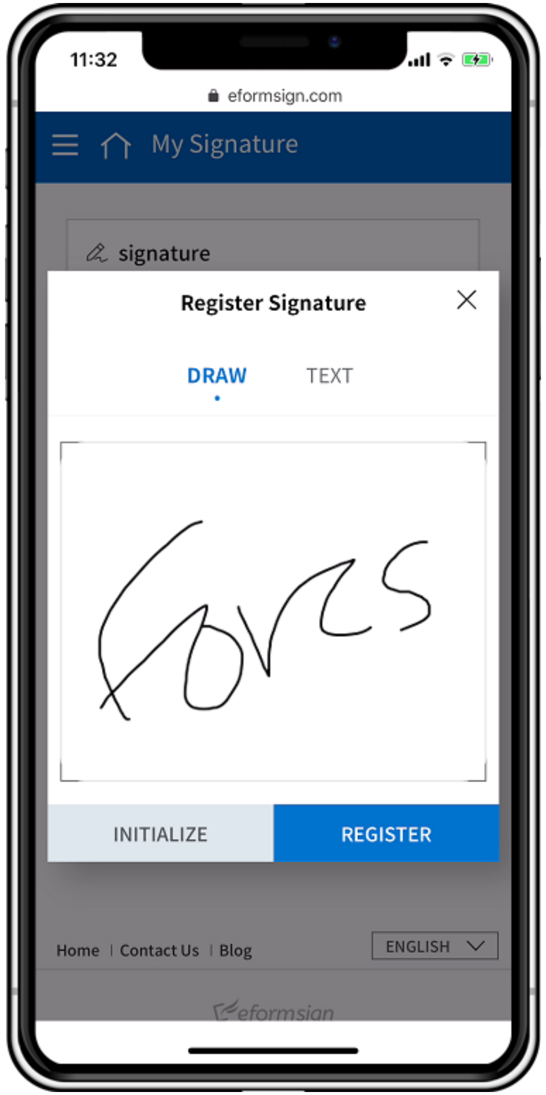


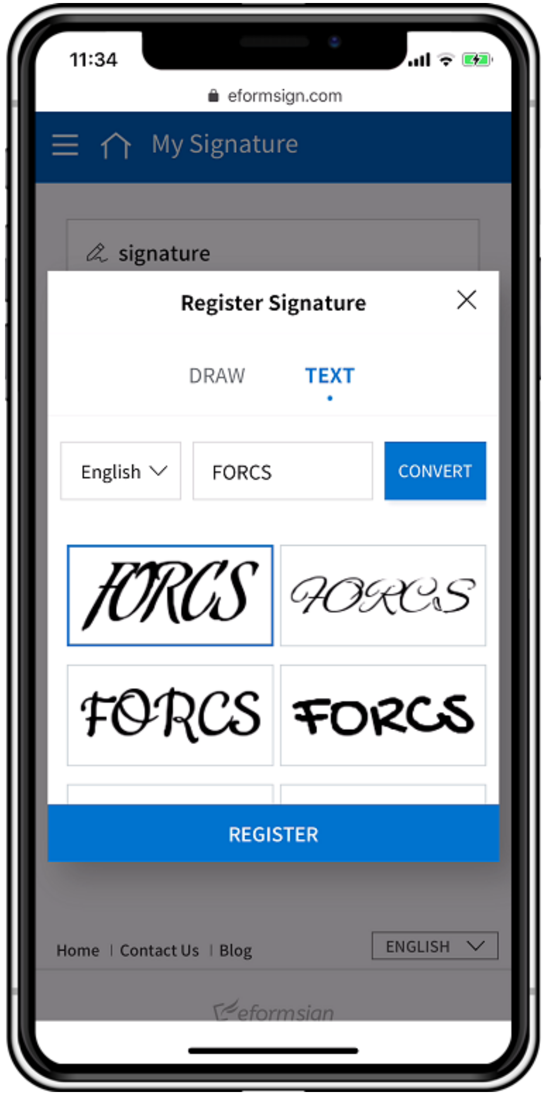
- Clicking upper left corner [≡] > My Signature to upload, Modify or delete the user's signature.
- Can create and save the signature which can be used when signing an e-Form. When writing the e-form or doing approvals if there is a place where the user has to sign the registered signature automatically gets inserted into that area.
- Signatures are displayed separately by Signature and Initial.
- Press [+ REGISTER].

eformsign

My Signature

Member





- The available signature registration options are DRAW and TEXT. If the user wants to register the signature on mobile while on the PC environment, the user may click ON MOBILE option to register signature via QR Code.

- For DRAW method, any signature drawn on the white area gets registered. For TEXT method, the user may enter the text then click [CONVERT] where various font candidates show up. The user can simply choose the desired one to use.

- If select [INITIALIZE], the entered signature is initialized. If select [REGISTER], the entered signature is registered.

If there is any question or comments about the eformsign service or the manual, please contact the service center of your region.

Contact us

FORCS Co., LTD

Thank You

www.eformsign.com