FP Sign –
User manual

Content

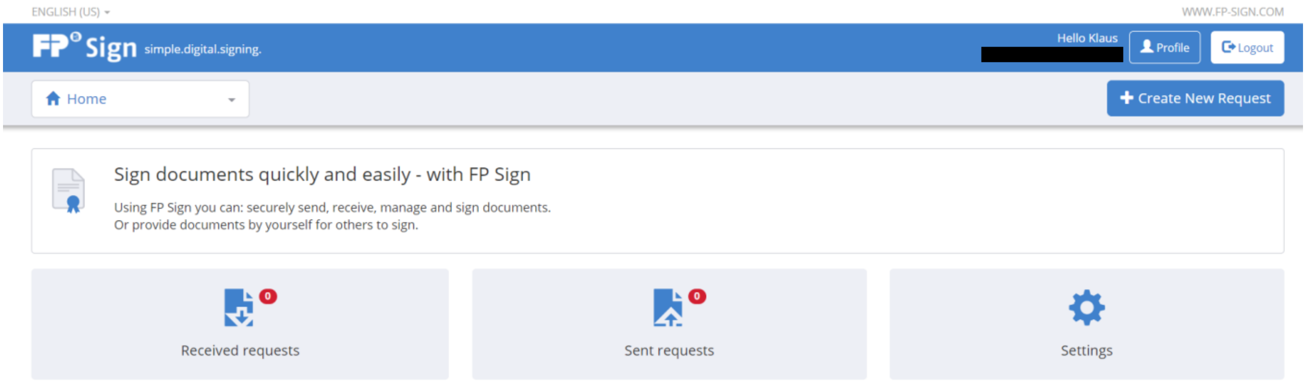
Welcome to FP Sign

Whether contracts, NDAs, or holiday or purchasing requests: With the FP Sign signature solution, documents requiring the written form can be digitally signed in a legally valid manner. Two different signature levels – the advanced electronic signature (AES) and the qualified electronic signature (QES) – allow you to apply signatures that precisely match the respective legal and regulatory requirements. Documents can be processed in PDF, Word or Excel format, for example.

Secure, digital, made in Germany
FP Sign was developed in Germany by FP Digital Business Solutions GmbH. FP Sign software is eIDAS-compliant and uses data centres in Germany**,** certified by the Federal Office for Information Security (BSI). FP Sign cooperates with Bundesdruckerei and Swisscom as a trust service provider for qualified signatures.

Let’s get started: First steps in the system

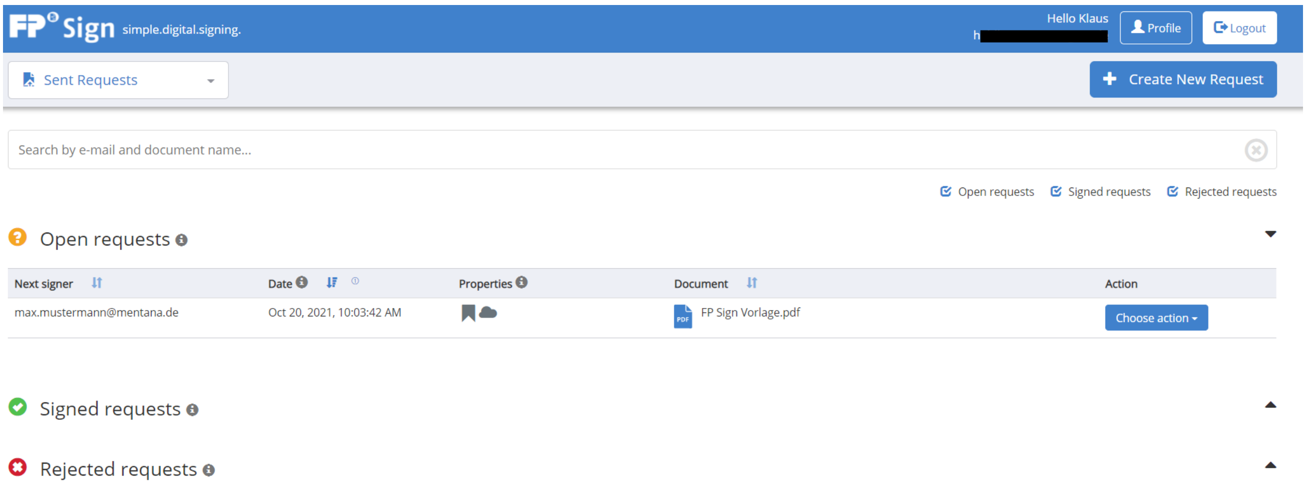
Homepage



On the homepage you will find buttons that allow you to create a new call, countersign received calls, check sent calls and change your settings. You can access the language settings via the menu at the top left, while you can access your profile via the button in the top right-hand corner.

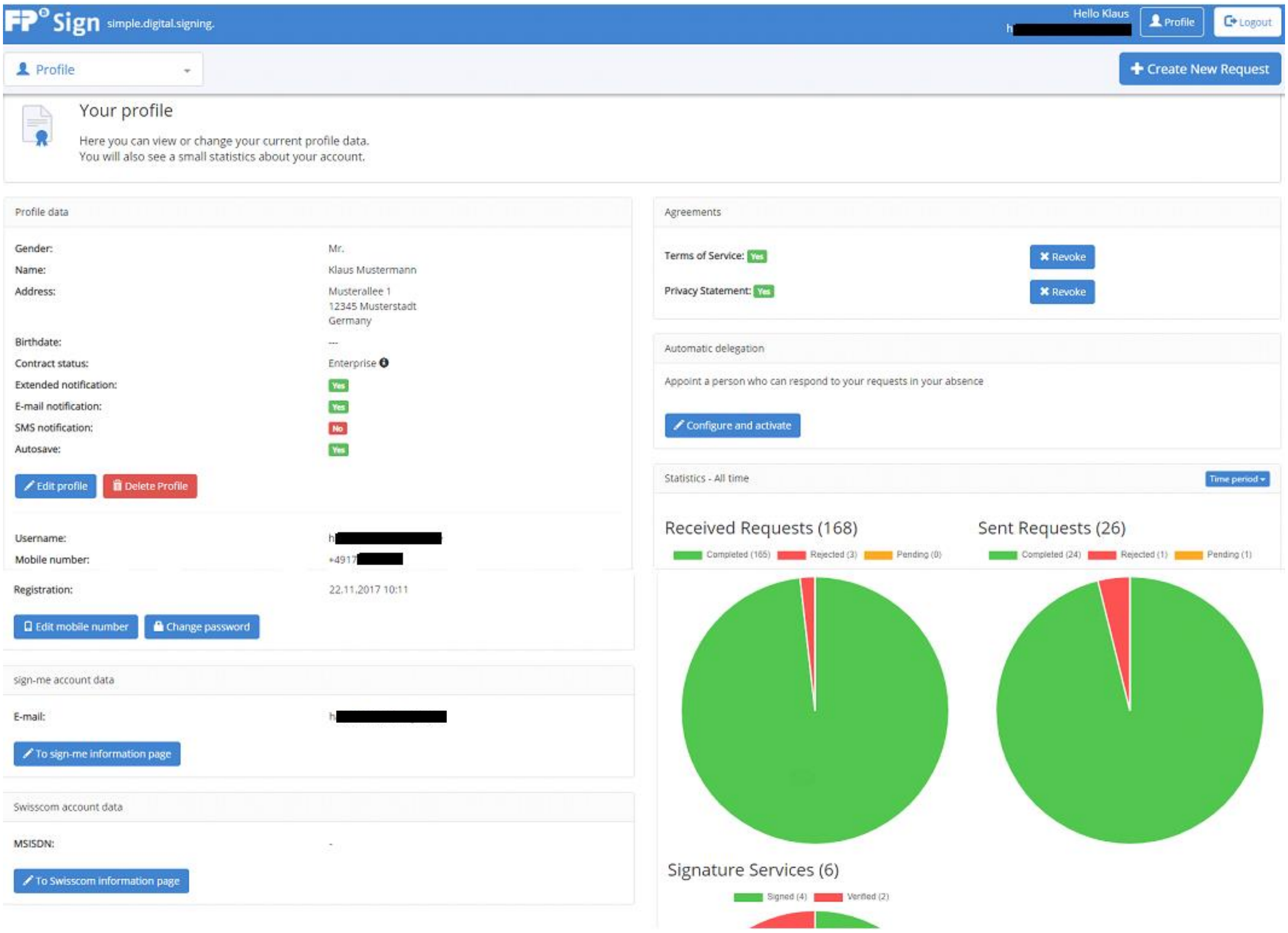
Requests received and sent

You can access the overview of received enquiries or sent enquiries via the homepage or the menu at the top on the left. This overview is divided into open, signed and rejected requests. Search functions and filters help you to keep track of your data. If you want to edit requests, click the buttons in the Action column in the overview.



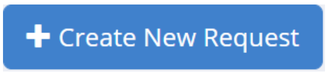
Settings / Profile

In the settings you will find your profile, where you can set personal data such as address, password and mobile phone number. You can also enter whether you want to receive notifications by e-mail or SMS. On the right-hand side, you have the option of reading your activities separately according to sent and received requests by means of a simple statistics overview. You will find details here.

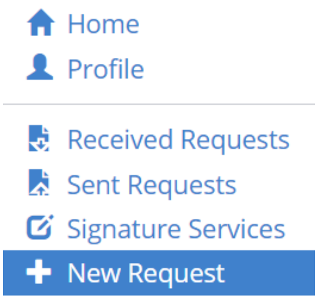


Create new request: Send documents for signing

Would you like to receive a signature from other people? Start by creating a New Request using one of the following methods.



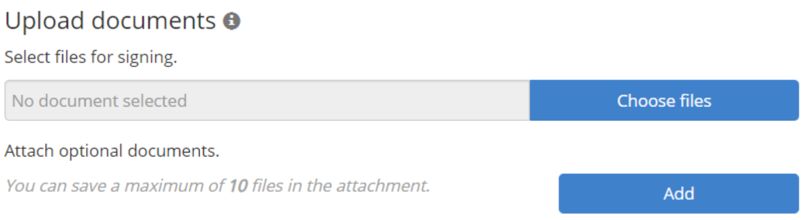
on the homepage at the top right



on the homepage at the top left via the drop-down menu

Step 1: Add a document

Once you have started a request, add the document that you want your recipients to countersign or approve . FP Sign allows you to select from a range of different file formats popular text, presentation, graphics or spreadsheet applications.



Select your files via the Select file button. Once the files have been added, FP Sign converts them into a PDF formatfor sending and saving. The name of the document to be signed is derived from the file name and cannot be changed.

TIP How to prepare a fillable PDF document for a request is explained in the chapter Editable PDF for countersigning

Optional: Start with a template

If you have already created a template, you can access it by going to New Request and selecting it from the Select Template drop-down menu at the top of the page. If you want to know more about templates, go to the chapter Working with Templates.

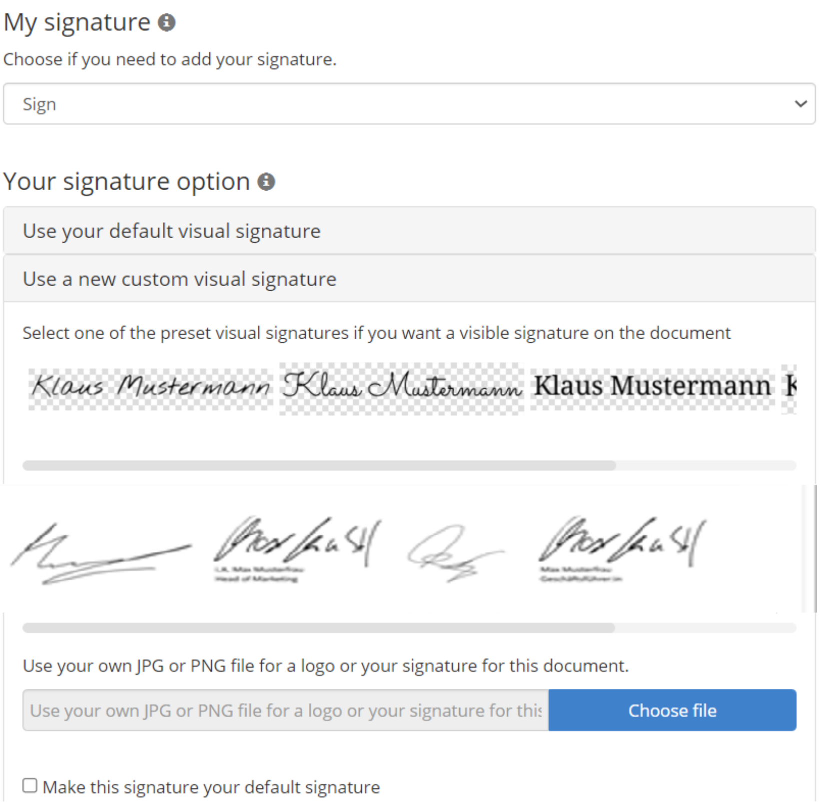
Add attachments

You can add supplementary documents as attachments. These documents do not receive a visible signature, but are merely sent additionally with the signed document.

TIP The file size of the signature request (document to be signed including all attachments) is limited to 50 MB. The number of installations may not exceed 10. When converting documents created in Word to PDF in FP Sign, fonts may not be transferred correctly.

Step 2: Add your own signature

You decide which signature setting – read confirmation (without signature) or signing (corresponds to the advanced signature) – you want to use to sign. If your FP Sign account is connected to Bundesdruckerei or Swisscom, you can also sign with QES. If you decide to sign, FP Sign offers you two options for pictorial signatures.



- Option A: You can select a suggestion displayed by the system.
- Option B: You upload your own signature or logo as a JPG file. In Select file you can select and upload up to five different signature images.

Confirm the image of your choice with a click.

You can set this signature as your default signature by clicking in the box at the bottom left.

The pictorial signature then appears in the upper left corner of the document preview.

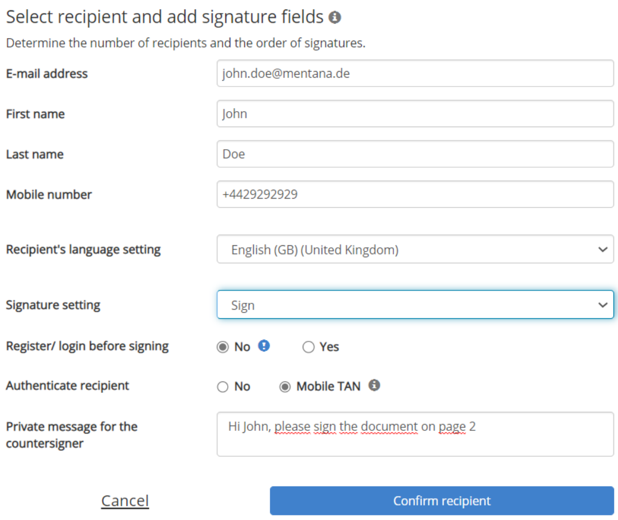
Now move your signature with the mouse to the place in the document where you want it to appear. Click on the blue tick to pin the pictorial signature in place.

To move the image to a specific page, use the arrow keys in the top edge of the document preview.

TIP You can find out more about setting up qualified remote signatures or qualified seals by clicking here.

Step 3: Add recipient

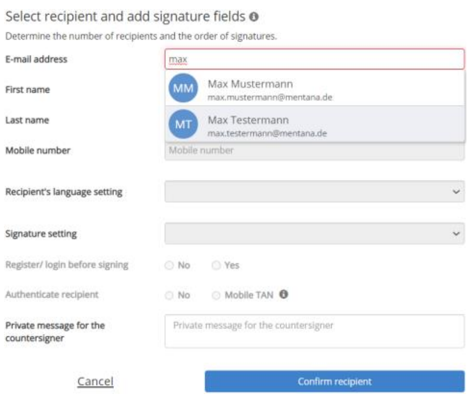
Specify here which persons will receive your request and which actions (sign, acknowledge, for information only) these recipients should take.



Enter the e-mail address of the recipient. If the recipient is not known, complete the remaining fields.

- Mandatory information: E-mail address, first name, last name
- Optional: Mobile number, country and language ("Germany – German" is the default setting)

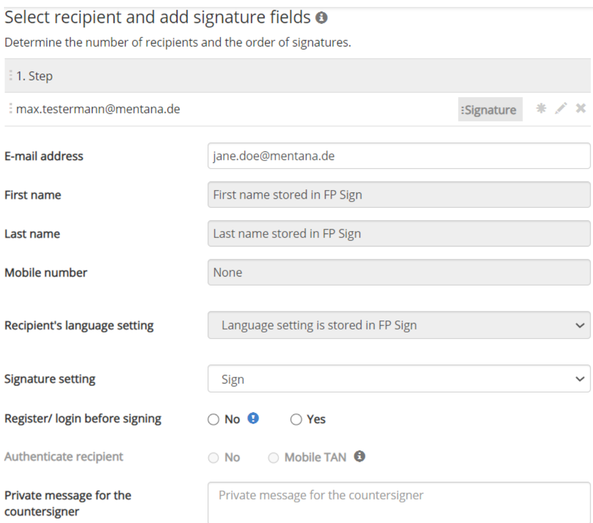
The mobile number is a prerequisite for using two-factor authentication, which is mandatory for the qualified electronic signature and optional for the advanced electronic signature.



If, on the other hand, the recipient is known, FP Sign's Magic Address Book suggests the appropriate contact after entering the first few letters, which you can confirm simply by clicking.

The suggestions result from your received and sent workflows. Addresses of your own company are also visible.

If there is an incorrect address among the suggestions, you can delete it from the address book by clicking the red X.

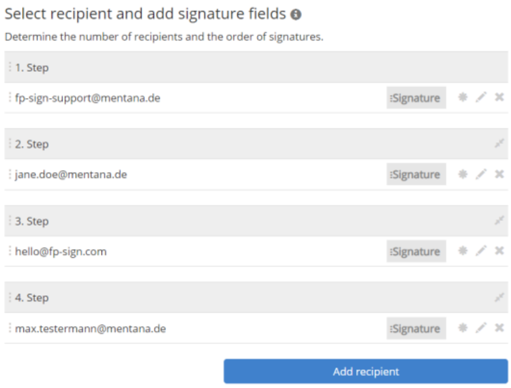


In addition to the recipient data, you set the signature level with which the recipient is to countersign or how he/she is to react under Signature setting. Learn more about the different variants of a signature here.

You can send a private message (max. 1,024 characters) to individual recipients. Recipients will see this in the email sent to them as well as in the request received under Private Message for Countersigner.

Add recipients and set order

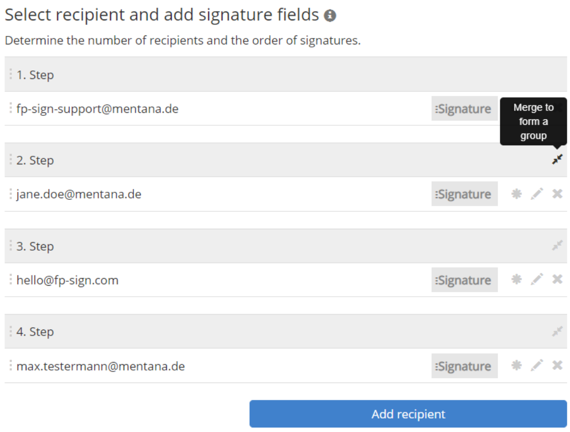
You can send a request to one or more recipients.



If you add several recipients, you must set an order. The recipients receive your request one after the other in this order.

You can change the order by dragging and dropping with the mouse as long as you have not yet sent the request.

Define recipient groups



If you want all recipients to receive your request at the same time, you can merge them into one group.

To do this, click on the arrow symbol within the grey area above the last recipient.

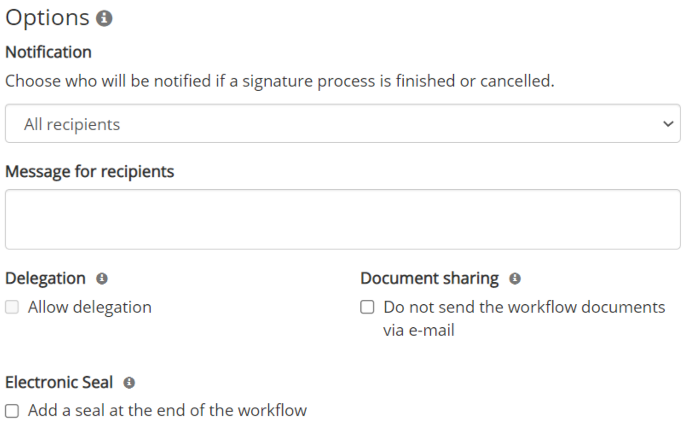
In the example on the left, three countersigners are grouped together. You can now select how many of the countersigners actually need to sign in the drop-down menu at the top right.

This is followed by step two: Here you can, if desired, specify an additional recipient or group who must also sign.

If you want to remove a countersigner from the group, click Remove from group.

Step 4: Set delivery options

Set Options that have to do with the communication of the request.



- Define who receives a notification by e-mail after the process is completed – all recipients or only the sender?
- Enter a message to all recipients of the operation.
- Allow delegation of the request made (default). Another person can then be invited by the countersigner to sign the request as well.
- Set a check mark in the document transmission if the signed document is not to be sent in the final message (other than what is predefined in the basic settings) .
- Tick Electronic seal if you want to apply one (an Electronic seal is a company-level QES: it will only appear if you have one).

Step 5: Send signature request

Send your request by clicking on Submit Request. You will be directed to the page of sent requests and will find the new (now sent) request in this overview.

You can save the current state of your request as a template at any time. This is recommended if you often send requests of similar patterns. Here you can find out more about working with templates.

Optional: Set editable PDF for countersigning

As a workflow creator, you can upload an editable PDF (in AcroForms format) and fill it out in FP Sign. Start as described in the previous chapters with Create new request. Edit your fillable document by clicking on the pen icon in the upper left corner of the document view.

Sometimes you need to edit or adapt your form before signing it – for example, if you need to enter account information for a SEPA process or other required data.

Select Fill in this form. Now all editable fields will turn blue.

At this point values can be entered. When the input is finished, press the green check mark. You can now sign the document and send it out or send it without a signature if the countersigner is still to fill in fields.

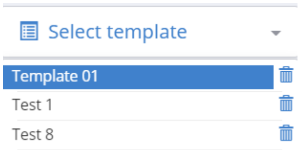
TIP

- Save your changes by clicking on the green tick in the bottom right corner of the document view.

- Add your signature: If one of the recipients is to edit the form, select Without signature for your own signature setting. This is because once a form has been signed, you can no longer edit it. For example, you can apply your own signature as the last workflow step at a later time.
- If you Select receiver(s) who are to edit the document, send the document to them first without a signature. Then the recipients can make changes in it.

Optional: Working with templates

In consistent signature processes with several people, you do not have to enter the recipients each time, but can work with templates instead.

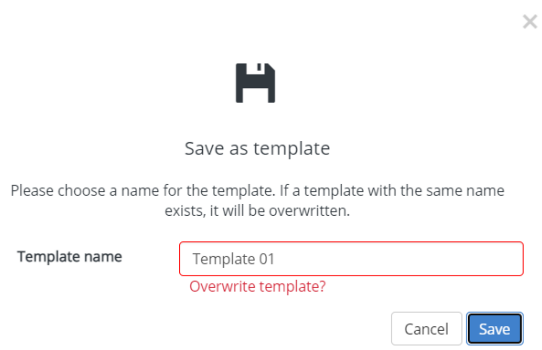


If you have created templates, an additional menu appears on the page for new requests (see above). This is where you select your variant and can now process your requests.

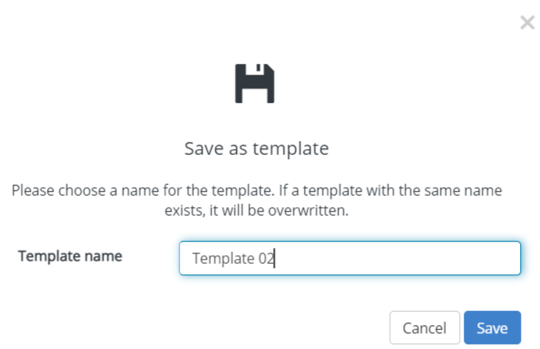
To save a template

You can save requests as a template. It does not matter whether you save them with or without a document.

To do this, define the recipient and signature setting and give the template a name. You can change the template at any time if you want to add recipients, change their order or adjust the options.



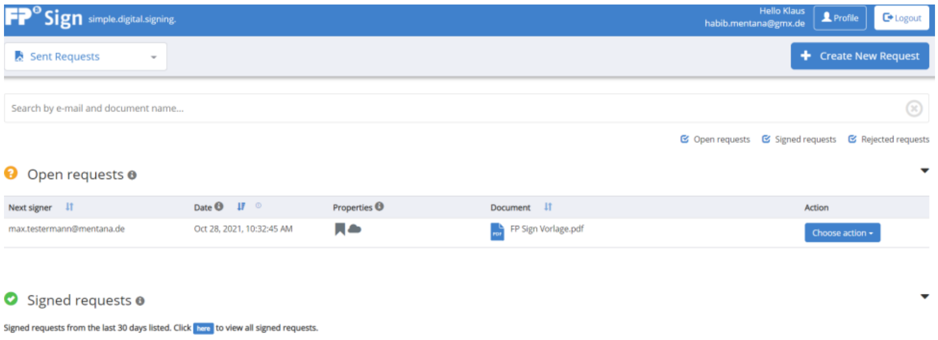
If you save a used template again, you will be informed that the name, and thus also the template, will be overwritten.



If you give it a new name, the original template is retained. The new template appears in the drop-down menu.

New request received: Sign documents

Overview of signature requests



At Requests received you will find a table that gives you an overview of signature requests. The requests are displayed row by row; in the five columns you can see different information about each request.

- Sender: Shows you the e-mail address of the sender of the request
- Date: Date and time (CET) of the request
- Features: Information on the signing types of the request
- Document: Document name
- Action: Various options for action (signing, history)

Filter requests
Under Filter you can select the options "open", "signed" and "rejected". Click on one or more of the options – your requests will be displayed accordingly.

Search requests
The search function helps you to find a specific request even faster. For example, enter the e-mail address or a document name in the search field placed centrally above the table view and all matching results will be displayed clearly and immediately.

Sort requests
Within the tabular view, you can sort your requests by clicking on the blue arrows in the table button. You can sort by sender, date and document and use the arrow view to specify whether the search should be in descending or ascending order. The blue circles with numbers indicate the order of sorting.

The following example sorts by sender (increasing), date (decreasing) and document (decreasing):

Next signer	Date	Properties	Document	Action

Sign documents

If you are required to sign a document – for example, with Advanced Digital Signature (AES) you have four options:

You choose countersigning:

- Proceed in the same way as described under Add your own signature
- The space provided will be occupied by your signature
- Optionally, write a comment / add attachments
- Confirm the procedure

You choose countersigning & delegating:

- Proceed in the same way as described under counter-signing
- Add another person to the request as described under Add a recipientAdd recipi-ent described
- Confirm the procedure

You choose delegate:

- Optionally, write a comment / add attachments
- Add another person to the request as described under Add a recipientAdd recipient described
- Confirm the procedure

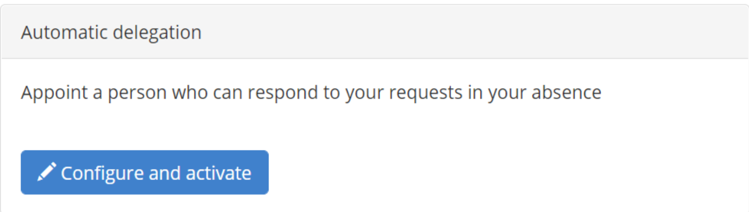
You select Reject:

- Optionally, write a comment
- Confirm the procedure

If, on the other hand, you are asked to review the document but not to add your signature, you can do so under Do not sign. Now carry out the following steps:

- You confirm or reject the request
- Optionally, write a comment
- You end with Cancel or Confirm

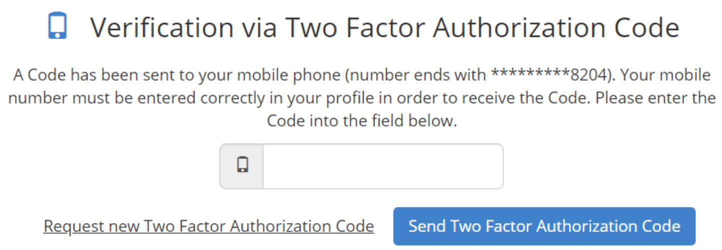
Automatic delegation



In your absence, you can have another person you trust sign in your place. If a request is made to you during this time, a mail is automatically sent to the representative.

Sign with two-way authentication (SMS TAN)

The prerequisite for this signature setting is that you have stored a mobile or landline number in the profile as the recipient of the signature request. As soon as you go to Sign you will be asked to enter a TAN which will be sent to your mobile phone. Confirm this by clicking on the Send TAN button. If you have not received a TAN after a few minutes, request a new TAN.



Confirm the TAN by entering it in the field provided. The TAN will now be verified and you will be taken to the signing page. Continue the signing process as described under [Sign documents](#).

Sign an editable document

Signing a fillable PDF differs only slightly from the other types of signing.

All changes in the document must be completed by confirming the green tick.

Close request

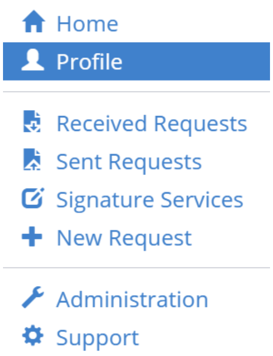
A request is completed when all tasks of the workflow have been completed. You will then receive a confirmation e-mail,

- if you are the sender.
- if the sender has allowed messages to all recipients (he/she can also set whether documents should go to all participants).
- if you have set Advanced Notification to "Yes" in your profile.

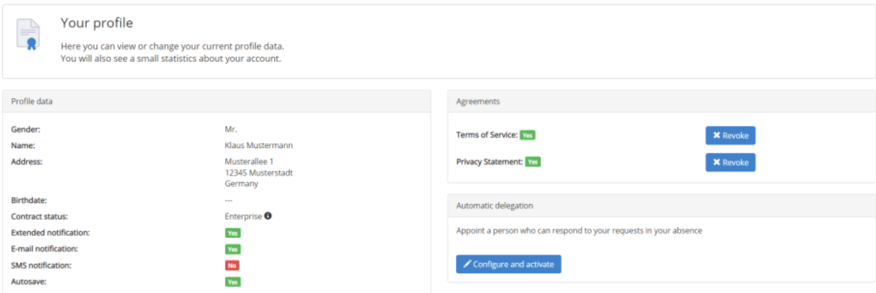
A workflow report is attached to the message. This gives you an overview of the fact that signing has taken place, as well as the method used.

You will now find the processed request in the section Signed requests. You can scroll through the document as usual and see the images of the signatures. You can also call up the verification log. The signature verification report tells you whether the integrity of the document has been maintained, i.e. whether the document has (not) been altered in transit.

Settings – Your profile

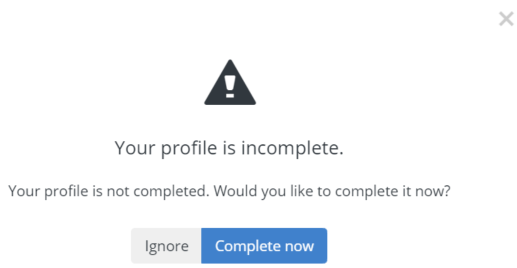


You can access your profile via the main menu (top left), via the Profile button (top right) or from the Settings button on the homepage in the main panel.



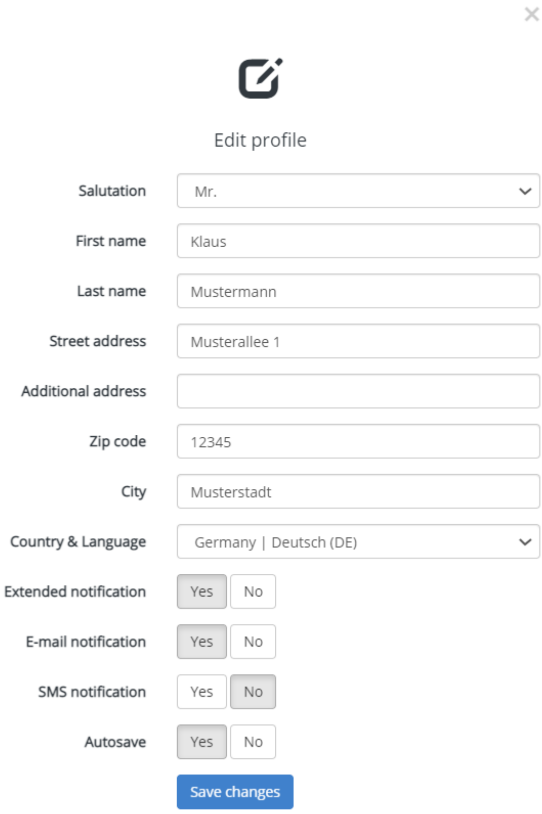
On your profile page you will find profile data and communication settings, including personal data. An overview of all consents is also available there.

You will also find simple statistics on the enquiries assigned to you in your profile.



If your profile does not yet contain all personal data, a message will appear reminding you to complete your profile.

Profile data



You can make changes in the profile at any time. To do this, go to Edit Profile on the left-hand side.

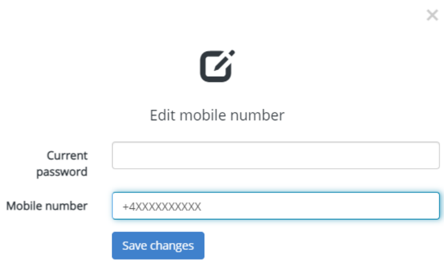
In addition to the personal data, you specify the country & language. This setting has an influence on the language of e-mail communication and which signature types are offered, but not on the language of the web interface. You can define the latter in the language menu.

If you set Advanced Notification to Yes, you will receive a final report and the signed document at the end of the request process.

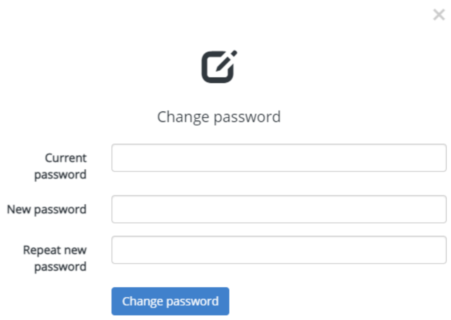
If you set email or SMS notification to Yes, you will be informed of any progress of your application in this way.

If you set Cache to Yes, the current progress of your work on an enquiry will be saved.

You can also manage entries of your mobile phone number and password.

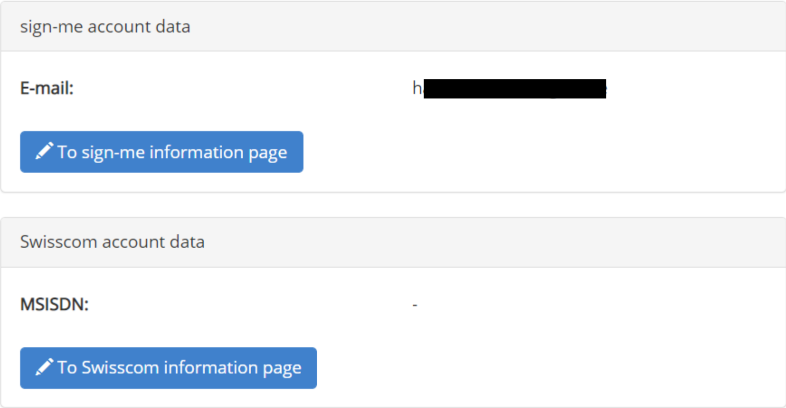


Edit mobile phone number
This supports two-factor authentication during the signing process.



Change password
You can change your password and thus manage it yourself.

Setting up qualified remote signatures or qualified seals



The button To the sign-me information page will take you to Bundesdruckerei's website, where you can register for a qualified remote signature from Bundesdruckerei. A qualified certificate will be deposited with Bundesdruckerei for you, which you can obtain via the Internet.

The same applies to the button To the Swisscom information page to use Swisscom's qualified remote signature.

TIP For sign-me from Bundesdruckerei and the qualified remote signature from Swisscom, it is necessary to enter a mobile number, as the release of the certificate must be confirmed by TAN.

Consents

Please be sure to note that the two consents to data protection and terms of service on the right-hand side must be marked green in order to be able to use FP Sign without restriction. You can revoke these settings at any time, but in doing so you accept possible restrictions in the use of FP Sign.

Statistics

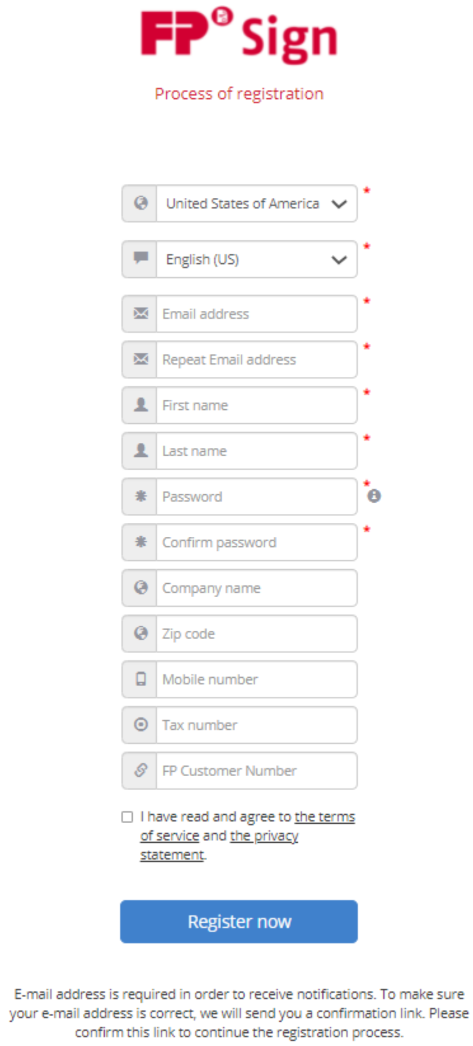
Within your profile you will find an overview of how many enquiries you have started or received. You choose the period from today, 7 days, 30 days, one year or all periods. The number of requests is displayed categorised by completed, rejected and pending.

TIP To set up the qualified remote signatures and seals, here are some helpful instructions and videos

- Videos on the use of QES via Swisscom (video 8) and Bundesdruckerei (video 9) with video identification procedure
- FP-Sign manual for video identification with Bundesdruckerei (PDF)
- FP-Sign manual for video identification with Swisscom (PDF)

Appendix

Registration



Register FP Sign at https://app.fp-sign.com/registration.

Fill out the registration form. All fields here are mandatory.

You must also confirm the fields for the GTC, the privacy policy and the intermediary power of attorney.

The last option, “We hereby grant the specified Intermediary Power of Attorney to the Provider FP Sign”, means that you grant FP Sign permission to issue signatures and verification on your behalf. You will find more information in the FAQs.

The registration process is complete when you confirm the link in the email sent to you.
You will then be taken to the homepage of your personal FP Sign account.

Signature types offered in FP Sign

Signing (advanced electronic signature, AES)

When you select Sign, you are selecting Advanced Electronic Signature (AES). It assures the sender and recipient of the same integrity (immutability) as with the qualified electronic signature (QES) – but at a lower security level, for example through simple password verification. For a large number of documents, the advanced signature is legally effective in Germany.

Qualified remote signature from Bundesdruckerei or Swisscom (qualified electronic signature, QES)

Some company-relevant documents require the written form in order to obtain legal validity or the greatest possible security through encryption. The qualified electronic signature (QES) is the highest and most secure signature level.

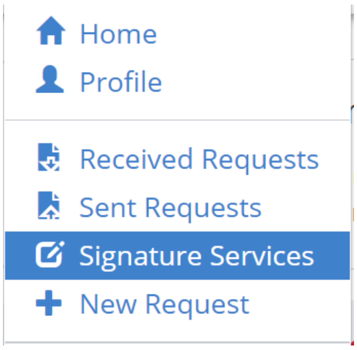
In FP Sign, you can use the qualified remote signature from Bundesdruckerei or Swisscom. It meets the strict requirements of the eIDAS Regulation for remote signatures. This has been confirmed by TÜV Informationstechnik GmbH in a detailed testing procedure and by the Federal Network Agency through inclusion in the national eIDAS trust list.

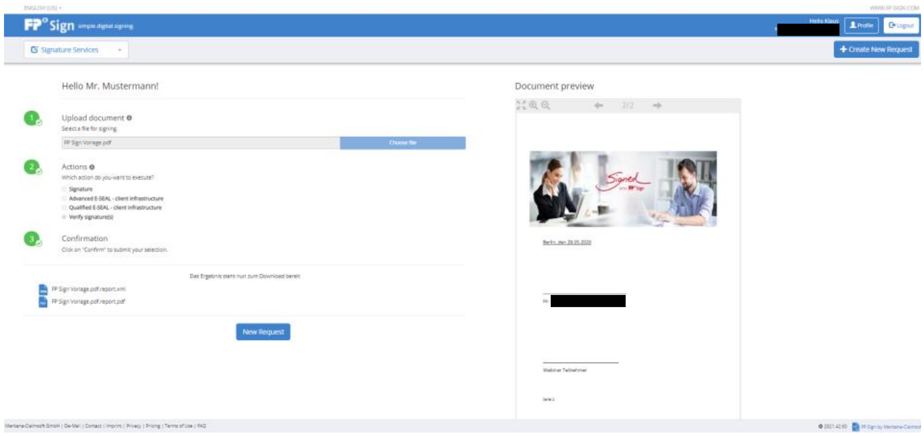
Company seal
With the company seal, FP Sign also gives you the option of applying a company signature to an electronic document. For further details please contact vertrieb@mentana.de

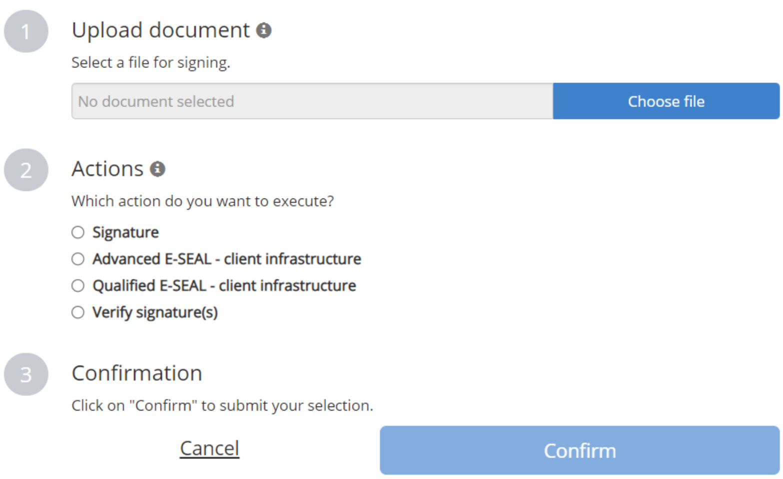
Read receipt (without signature)
Although read confirmation is not a signature type, it is available to you as a selection option in this context. This informs you as the workflow creator when the recipient of the document has seen it.

Signature services

As part of this additional service, you can sign and verify documents in FP Sign without having to open a workflow yourself. The main menu takes you to the Signature Services page.







The first step is to upload the document you want to sign or verify. Now you can select Advanced signature or – if you want to verify an already signed document – verify the signature(s). Select and go to confirmation.

Confirm and the signing or checking of the document begins. After the process is finished, you will be offered the option to download the document or the test report.

System requirements

Supported browsers

Chrome, Firefox, Windows Edge, Microsoft Internet Explorer (limited recommended)

Resolution

1074x768 minimum (desktop computers, laptops, tablets, smartphones)

Security

Session cookies, JavaScript

Supported file formats

Text formats

- PDF 1.4, 1.5, 1.6
- Microsoft Word (6.0/95/97/2000/XP/2003) (.doc and .dot)
- Microsoft Word 2003 XML (.xml)
- Microsoft Word 2007/2010 XML (.docx, .docm, .dotx, .dotm)
- Microsoft WinWord 5 (.doc)
- WordPerfect Document (.wpd)
- Microsoft Works (.wps)
- Lotus WordPro (.lwp)
- Abiword Document (.abw, .zabw)
- ClarisWorks/Appleworks Document (.cwk)
- MacWrite Document (.mw, .mcw)
- Rich Text Format (.rtf)
- Text CSV (.csv and .txt)
- StarWriter formats (.sdw, .sgl, .vor)
- DocBook (.xml)
- Unified Office Format Text (.uot, .uof)
- Ichitaro 8/9/10/11 (.jtd and .jtt)
- Hangul WP 97 (.hwp)
- T602 Document (.602, .txt)
- eBook (.pdb)
- AportisDoc (Palm) (.pdb)
- Microsoft Pocket Word (.psw)
- Apple Pages 4 (.pages)
- HTML Document (.htm and .html)

Table formats

- Microsoft Excel 4.x-5.0/95/97/2000/XP/2003 (.xls, .xlw and .xlt)
- Microsoft Excel 2003 XML (.xml)
- Microsoft Excel 2007/2010 XML (.xlsx, .xlsm, .xlts, .xltm)
- Microsoft Excel 2007/2010 binary (.xlsb)
- Lotus 1-2-3 (.wk1, .wks and .123)
- Data Interchange Format (.dif)
- Rich Text Format (.rtf)

- Text CSV (.csv and .txt)
- StarCalc formats (.sdc and .vor)
- dBASE (.dbf)
- SYLK (.slk)
- Unified Office Format Spreadsheet (.uos, .uof)
- HTML Document (.htm and .html files – including web page queries)
- Microsoft Pocket Excel (.pxl)
- Quattro Pro 6.0 (.wb2)
- Apple Numbers 2 (.numbers)

Presentation formats

- Microsoft PowerPoint 97/2000/XP/2003 (.ppt and .pot)
- Microsoft PowerPoint 2007/2010 (.pptx, .pptm, .potx, .potm)
- StarDraw and StarImpress (.sda, .sdd, .sdp and .vor)
- Unified Office Format Presentation (.uop and .uof)
- CGM – Computer Graphics Metafile (.cgm)
- Portable Document Format (.pdf)
- Apple Keynote 5 (.key)

Graphic formats

- Adobe Photoshop (*.psd)
- AutoCAD Interchange Format (*.dxf)
- Corel Draw (*.cdr)
- Corel Presentation Exchange (*.cmx)
- Microsoft Publisher 98-2010 (*.pub)
- Microsoft Visio 2000-2013 (*.vdx; *.vsd; *.vsdm; *.vsdx)
- WordPerfect Graphics (*.wpg)
- and all files with the extensions: BMP, JPEG, JPG, PCX, PSD, SGV, WMF, DXF, MET, PGM, RAS, SVM, XBM, EMF, PBM, PLT, SDA, TGA, XPM, EPS, PCD, PNG, SDD, TIF, TIFF, GIF, PCT, PPM, SGF, VOR,

Supported languages

Language for the FP Sign web interface:

In the language menu you can select the language in which you would like to use the web interface.

- German
- English (UK, US, CA)
- Swedish
- French (FR, BE, CA)
- Dutch
- Italian
- Spanish

Culture (country and language)) for your notifications:

In addition, FP Sign offers twelve language settings that allow global users to receive all notifications in their native language. You can change these language settings in the settings in your profile under Language and Country .

- Germany – German
- Austria – German
- Switzerland – German
- United Kingdom – English
- United States of America – English
- Canada – English
- Spain – Spanish
- France – French
- Belgium – French
- Canada – French
- Switzerland – French
- Italy – Italian
- Switzerland – Italian
- Netherlands – Dutch
- Belgium – Dutch
- Sweden – Swedish

FAQ

I have forgotten my password. What can I do?
You can request a password on the login page. All you have to do is enter your e-mail account. The new password will be sent to this address.

Where did my New Workflow button go?
Every new FP Sign account receives a free trial period of 30 days. If this period expires without a contract being concluded, the user loses the right to make signing requests. Thus, this menu item disappears. However, you can still receive signature requests and also answer them.

Where can I find my older requests in the overview?
Requests older than 30 days are not displayed in the standard view. Click on List all requests (blue), then you will find all requests.

How do I know that the verification protocol clearly belongs to my signed document?
The connection between the signed document and the verification protocol is given both by the name identity and by the same hash value as a unique link.

How do I know that my document is correctly signed and unaltered?
This information can be found in the verification protocol. This is available in your overview next to each signature step; you can download it if you wish. You can also find them in Acrobat Reader.

Can you see which bank ID was used to sign the document?
For data protection reasons, the authentication information from the bank ID is not included in the PDF. You can only see in the workflow report that the signature type Bank ID was used.

Can I delete a template?
Yes, via the recycle bin icon.

Can I sign a document without having to register?
Yes, you can do that. The request must then be made to you with the signature type Advanced Signature, without registration. If a qualified electronic signature is required, you must have an account as a countersigner.

Why does the message "Please finish editing the PDF form first" remain?
There are several reasons for this message. One potential cause is when you have placed the recipient's signature but not confirmed it with the blue tick. If you tick the blue box, the message disappears. Another cause could be that the completion of a fillable PDF was not yet finished. If you close it, the message also disappears.

Who can send renewed invitations or reminders?
Only the sender can perform these functions.

What can I do if my PDF file cannot be signed?
There can be various reasons why a file is not signable:

- It may be read-only or signature-protected. Make sure that this is not the case.
- The PDFfile is corrupted. In many cases, printing via a PDF print driver will help.
- A fillable PDFfile can be edited in the preview with the editing pen. Just click in an edit box or fill in these fields and the signing will successfully be carried out.

What is the third option in registration – the intermediary power of attorney – all about?
As a user, you authorise the FP Digital Business Solutions GmbH service provider as an intermediary.

- **Signature Power of Attorney:** The intermediary is authorised to affix a qualified signature to documents (files) issued by the principal on your behalf in accordance with Regulation (EU) No 910/2014 of the European Parliament and of the Council of 23 July 2014 (eIDAS Regulation). The power of attorney is limited to the signature of electronic documents. The purpose restrictions from the certificate extensions apply.
- **Verification Power of Attorney:** The intermediary is authorised to examine your submitted electronic documents to determine whether they contain qualified signatures, whether the document has not been changed since the signature was applied, whether the signature applied is valid, whether the signatory's certificate is not revoked and whether the certificate chain to the issuing organisation is complete. German law shall apply to the power of attorney.

Contact

Do you have any questions? We will be happy to help you!

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