oodrive sign

Administrator Guide

Oodrive Sign

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Distribution list

Company	Role
Oodrive Group	Oodrive Group colleagues and customers

Contents

1. Getting started with Oodrive Sign

1.1. Compatibility

Please visit the following web page on software compatibility:

https://support.oodrive-sign.com/portal/fr/kb/articles/quels-sont-les-pr%C3%A9requis-techniques-pour-utiliser-sell-sign

1.2. Log in to your workspace

There are three ways to log in to your workspace:

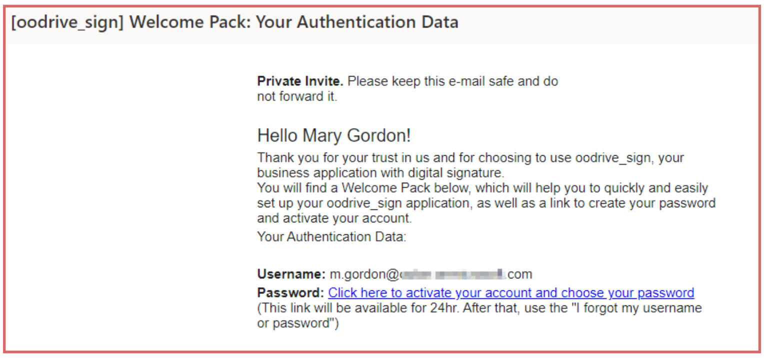
- with your Sign login credentials
- with your Oodrive login credentials
- with your company login credentials (if your company has signed up to this service)

Log in with your Sign login credentials.

Logging in for the first time

1. Retrieve the credentials emailed to you when your account was created.

2. Click the link **Click here to activate your account and choose your password**.



[oodrive_sign] Welcome Pack: Your Authentication Data

Private Invite. Please keep this e-mail safe and do not forward it.

Hello Mary Gordon!

Thank you for your trust in us and for choosing to use oodrive_sign, your business application with digital signature.
You will find a Welcome Pack below, which will help you to quickly and easily set up your oodrive_sign application, as well as a link to create your password and activate your account.
Your Authentication Data:

Username: m.gordon@[redacted].com
Password: Click here to activate your account and choose your password
(This link will be available for 24hr. After that, use the "I forgot my username or password")

3. You will be redirected to a browser page asking you to set a password and confirm before clicking **Validate**.

4. Once on the login page, enter your username and password, then click **Connection**.

   Tip: We recommend that you add the Oodrive Sign login page to your browser bookmarks to make it easier to find next time you log in.

Log out at any time by clicking on your name in the upper-right corner of the page, then **Logout**.

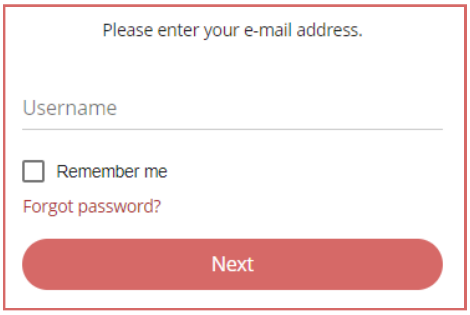
<u>**Subsequent logins**</u>

1. Retrieve the credentials emailed to you when your account was created.

2. In your web browser, go to the login page for your signature platform:

   https://sign.oodrive.com/

3. Enter your username, then your password.

   If you want the browser to remember your login credentials, tick the **Remember me** box.

   If you have forgotten your password, click **Forgot password?**

4. Click **Connection**.

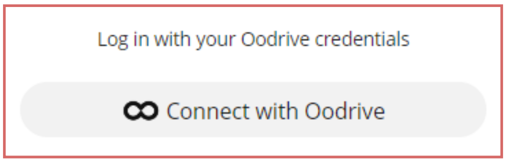
Log out at any time by clicking on your name in the upper-right corner of the page, then click **Logout**.

Log in with your Oodrive login credentials

1. In your web browser, go to the login page for your signature platform:

   https://sign.oodrive.com/

2. Click **Connect with Oodrive**.

   If you have already logged in to the Oodrive platform, connection to Oodrive Sign will be automatic. If not, you will need to enter your login credentials.

3. Enter the name of your workspace, then click **Ok**.

4. Enter the username and password you use to log in to your Oodrive applications, then click **Log in**.

Log out at any time by clicking on your name in the upper-right corner of the page, then click **Logout**.

Log in with your company login credentials

If your company has signed up to this service, you can log in to your Oodrive Sign license using your company login credentials.

1. Use the personalized link you have received to access the dedicated login page for your company.

   Tip: We recommend that you add this personalized login page to your browser bookmarks to make it easier to find next time you log in.

2. Log in using your company login credentials.

   If you have already logged in to other solutions using your company login credentials, connection to Oodrive Sign will be automatic.

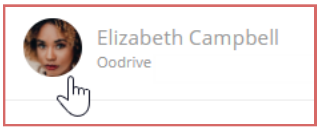
Log out at any time by clicking on your name in the upper-right corner of the page, then **Logout**.

1.3. Overview of your license

Your Oodrive Sign license is the independent environment assigned to your company on the signature platform.

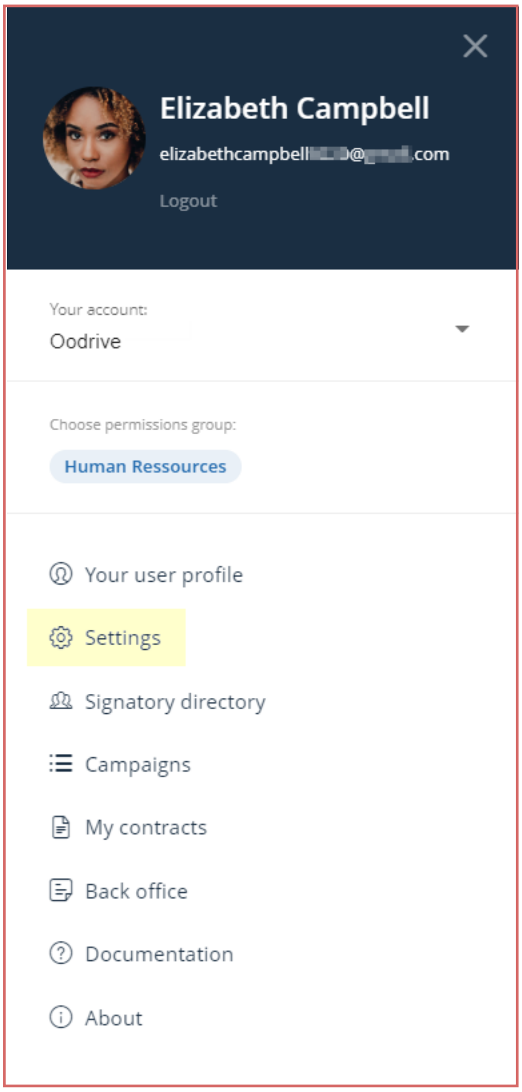
Every company using the Oodrive Sign solution is assigned one or more licenses, each of which covers the contractual activity for one legal entity.

You can quickly access all sections of your license in the navigation panel that appears when you click your profile:



You can perform administration activities from the **Settings** section of your license. From this section, you can manage the following items:

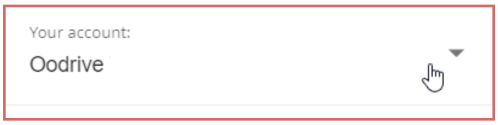
- your user base,
- your license theme,
- the dashboard showing contractual activity for your license,
- the partitioning of your license activities into several independent permission groups (if you have the Enterprise version).



1.4. Navigate between several licenses

If you are affiliated to several legal entities, you can navigate between them by switching from one license to another.

1. Click your profile in the upper-right corner of the screen.
2. In the navigation panel, click the **Your account** drop-down list and select the license you want to go to.



This redirects you to the dashboard for the selected license.

2. Customizing your license

As a holder of an Oodrive Sign account with administrative rights, you can customize your license to suit the requirements of your company.

This lets you:

- Customize the appearance of your signature platform,
- Customize your users' dashboards,
- Manage advanced settings for your license.

2.1. Set the license theme

From your license settings, you have full control over the customization of your signature platform using your company's corporate branding colors, and you can make changes to these custom graphics as required.

A preview of your changes will be visible in real time so that you can improve the display throughout the customization process.

1. Click your profile in the upper-right corner of the screen.
2. In the side menu, click **Settings**.
3. Customize the theme as desired in the **Your theme** tab:

   To modify the logo for your license:

   - Click the current logo in the **Your logo** section.
   - Select the new logo in your file explorer.

     Note: For the best final rendering, we recommend the use of a 140 x 45px image.

   To modify the colors for your license:

   - Click the colored square to the left of **Main color** or **Secondary color**.
   - Select the color of your choice using the color selector or by entering a hexadecimal code in the field provided for this purpose.
   - If you have chosen light colors, you can adjust text color by enabling the **Shade for related text: Dark** setting.

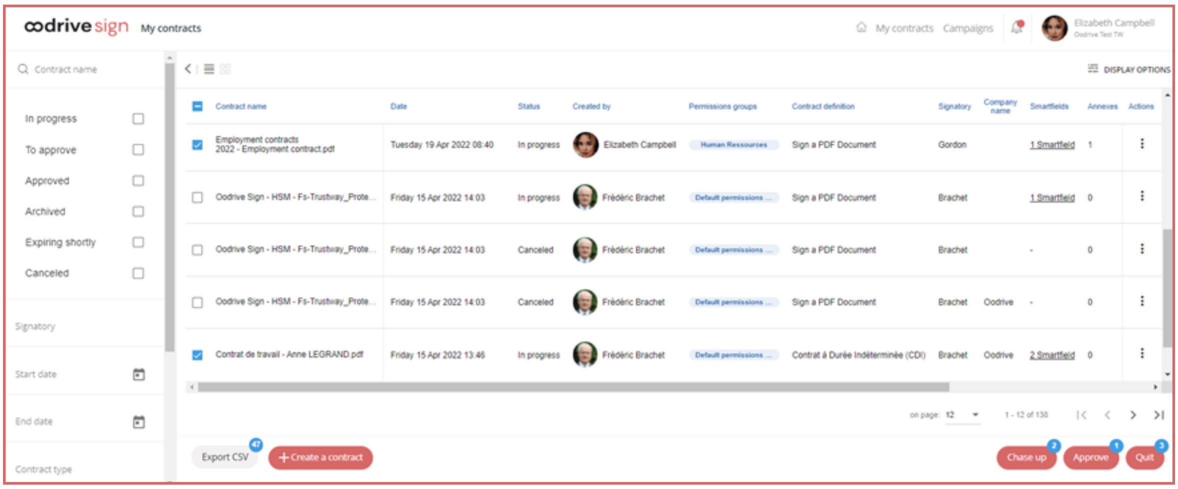
4. View your changes in real time in the rendering sample to the right of the screen.
5. Once you have finished, click **Ok**.

The new graphic theme will be immediately available for users of your license.

If you wish to cancel your changes and return to the default theme, click **Reset**.

2.2. Customize the dashboard

The **My contracts** menu is the dashboard where users can track transactions started within their permissions group:



From your license settings, you can customize how the dashboard columns are displayed, in order to show the information that is most relevant to your activity.

These customized settings will be the default for all users of the license, but users will be able to change the display options to suit their own personal requirements.

Create columns

Default columns are preconfigured for your license (Date, status, permissions groups, annexes, etc.), but you can also add customized columns to your dashboard.

1. Click your profile in the upper-right corner of the screen.

2. In the side menu, click **Settings** and select the **Dashboard** tab.

3. Click **Create column**.

4. Enter the name of the column, then select the type of content it will display from the available options:
   - **Text**
   - **Flag** (colored dot)
   - **Date**

5. If you want to use the contract data to fill in the column, enable the **Dynamic content** setting.

   Whether you activate this option or not, users can manually enter information in each customized column from their dashboard.

6. If you want to allow sorting of the column by ascending or descending order, enable the **Custom sorting** setting.

7. Once you have finished, click **Approve**.

Once the column has been created, it appears in the list of available columns. You can create as many columns as you wish

Modify or delete columns

You can modify or delete the custom columns you have created for the dashboard at any time.

Please note: You cannot edit or delete the preconfigured columns. However, you can choose to hide them.

1. From the **Settings** menu, go to the **Dashboard** tab.

2. Identify the column you wish to edit or delete, and click the three dots to the right of the column to display the available actions.

   - **To modify a column**, click **Edit** and make your desired changes. Once you have finished, click **Approve**.
   - **To delete a column**, click **Delete**, then confirm your choice.

3. If you wish to change whether a column is displayed or not, select or deselect the **Displayed** setting.

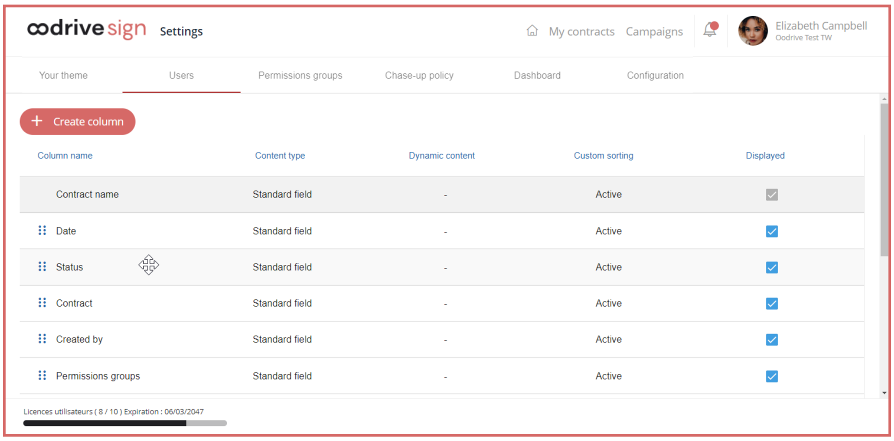
Organize columns

You can organize the dashboard columns to highlight the most relevant information for your activity.

1. Click your profile in the upper-right corner of the screen.

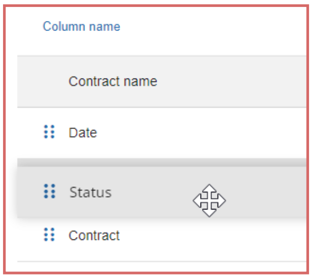
2. In the side menu, click **Settings** and select the **Dashboard** tab.

   You can see the list of available columns for the dashboard display:



3. Show or hide the columns of your choice by ticking/unticking the box in the **Displayed** column.

4. Drag and drop the table lines to arrange the columns in the order of appearance of your choice.



   Your changes are auto-saved as you make them, and will be available immediately in the users dashboard for your license.

2.3. Manage advanced settings

As a user with administrative rights, the **Configuration** menu allows you to manage advanced settings for your license to suit the requirement of your company. You will also be able to enable or disable certain features.

1. Click your profile in the upper-right corner of the screen.
2. In the side menu, click **Settings**, then go to the **Configuration** tab.
3. Go to the section of your choice to manage the corresponding settings:
   - **Company information**

     Your company's address, town/city, country and ZIP code.
   - **Create new contracts page**

     Show or hide the bundles section on your home page and define the display order of the bundle and campaign creation sections.
   - **Sending e-mails**
     - Define name of sender
     - Define sender format in email notifications
     - Define when to send an email to people in carbon copy
   - **Signatories directory**
     - Open signatory directory if no signatory is already present on the document
     - Limit directories to user perimeters
     - Limit directories to user roles
   - **Contract creation**
     - Make transaction autovalidation availble to non-managers
     - Enable sequential signature
     - Enable the function "Insert Smartfields" (experimental)
     - Enable the function "Detect/add Smartfields" (experimental)
     - Select the welcome screen after sending for signature
   - **"My contracts" list**
     - Display the "My Contracts" in condensed view
     - Add filter for contracts to sign (experimental)

- **Signature page**
    - Automatically send the OTP via email if the phone number is incorrect
    - Allow signatories to download annexes
    - Display draft before collection
    - Display the list of signers at the time of signing
- **More**

  Manage links and redirection (to documentation, the "about" page, brochures...).

4. Once you have finished, click **OK** to save your changes.

3. Define auto chase up policies

The auto chase up feature allows users to schedule the sending of reminder notifications to signers and pre-validators to ensure that they sign contracts on time.

To do this, users can select an auto chase up policy from those available on your license when creating a transaction.

Three chase up policies are available by default on your license: **After a week**, **Every week** and **Every day**.

As a holder of an Oodrive Sign account with administrative rights, you can:

- Create new auto chase up policies (single or multi-rule), available for all contracts or for one or more specific contract templates,
- Modify existing auto chase up policies,
- Delete obsolete auto chase up policies.

3.1. Create a chase up policy

1. Click your profile in the upper-right corner of the screen.
2. In the side menu, click **Settings**, then go to the **Chase-up policy** tab.
3. Click **Add a chase up policy**.
4. In the new window, enter the name of your auto chase up policy.
5. Select the type of policy you want to create:
   - **Multi-rules**: a policy combining several different rules
   - **Unique**: a policy made up of a single rule that repeats itself at the frequency of your choice
6. Click **Next**.
7. In the **Contract templates** tab, select the contract template(s) for which this policy should be available.

   If you do not select any contract template, the auto chase up policy will be available for all contracts created on your license.
8. When you have finished, click **Add a policy**.

Your chase up policy is created with default parameters and now appears in the list of chase up policies available on your license.

You will now be able to configure and customize the settings of your auto chase up policy.

3.2. Configure a chase up policy

Single-rule policy

1. Click your profile in the upper-right corner of the screen.
2. In the side menu, click **Settings**, then go to the **Chase-up policy** tab.
3. In the chase up policy list, select the single-rule policy you want to configure.
4. In the **Details** tab of the side panel, expand the rule associated to the policy, then click **Edit**.
5. Make the configuration of your choice by defining:
    - The number of repetitions
    - The time period after which the reminder is sent
    - The event triggering the sending of reminder notifications (either the first notification or the sending of the document for signature)
    - The approximate time of the reminder
    - The notification mode (SMS, email, or both)
    - The title of the reminder message
    - The content of the reminder message
6. When you have finished, click **Approve**.

Multi-rule policy

1. Click your profile in the upper-right corner of the screen.
2. In the side menu, click **Settings**, then go to the **Chase-up policy** tab.
3. In the chase up policy list, select the multi-rule policy you want to configure.
4. Go to the **Details** tab of the side panel.
5. Do either of the following:
    - **To make changes to an existing rule:** expand the rule to configure, then click **Edit**.
    - **To add a new rule:** click **Add rule** in the **Details** tab.

6. Make the configuration of your choice by defining:

    - The time period after which the reminder is sent
    - The event triggering the sending of reminder notifications (either the first notification or the sending of the document for signature)
    - The approximate time of the reminder
    - The notification mode (SMS, email, or both)
    - The title of the reminder message
    - The content of the reminder message

7. When you have finished, click **Approve**.

8. Repeat the previous steps as many times as needed to add more rules to your chase up policy.

3.3. Modify an auto chase up policy

1. Click your profile in the upper-right corner of the screen.

2. In the side menu, click **Settings**, then go to the **Chase-up policy** tab.

3. Select the policy you want to configure from the list of chase up policies.

4. Go to the **Details** tab of the side panel to make changes to the policy name and rules.

    To modify the name of the policy:

    - Click **Edit**.
    - Modify the name of the policy, then click **Approve**.

    To make changes to an existing rule: expand the rule you want to configure, then click **Edit**.

    To add a new rule to a multi-rule policy: click **Add rule**, then configure your rule settings. When you have finished, click **Add rule** again.

    To delete a rule from a multi-rule policy:

    - Expand the rule you want to delete, then click **Edit**.
    - Click **Delete**.
    - Click **Yes** to confirm.

5. Go to the **Contract templates** tab of the side panel to modify the contract templates for which the policy is available:

   - Scroll down the templates list if needed, then click **Edit** along the bottom of the **Contract templates** tab.
   - Select the templates for which the policy must be available. To make the policy available to all contracts created on your license, de-select any previously selected templates.
   - Click **Approve**.

3.4. Delete an auto chase up policy

1. Click your profile in the upper-right corner of the screen.
2. In the side menu, click **Settings**, then go to the **Chase-up policy** tab.
3. Select the policy you want to delete from the list of chase up policies.
4. In the **Details** tab of the side panel, click **Delete**.
5. Click **Yes** to confirm.

4. Managing permissions groups for your license

If you have chosen the Enterprise version of Oodrive Sign, you can create an unlimited number of permissions groups in your license.

A permissions group is a space in your license that lets you divide your contractual activity into partitioned units that each match criteria of your choice. For example, you can separate your contractual activity by:

- Sales representative or reseller
- Document templates
- Business sectors
- Geographical areas

You can then freely associate users with each permissions group. Users will only have access to the clients, contracts and document templates associated with the permissions groups to which they belong.

This system lets you partition your activity to offer greater privacy.

4.1. Create new permissions groups

1. Click your profile in the upper-right corner of the screen.
2. In the side menu, click **Settings**, then go to the **Permissions groups** tab.
3. Click **Create a permissions group**.
4. Enter the **Name** and **Description** for your permissions group, then click **Next**.
5. Select the users you want to add to the permissions group.

   Note: You can use the search bar above the list of users to quickly find a user.
6. Click **Next**.
7. Select the public contract templates you wish to associate with the permissions group.

   These templates will be available to all users of the permissions group from their home page.
8. Click **Create a permissions group**.

Your new permissions group is added to the list of permissions groups available on your license.

Tip: You can also create a permissions group more quickly by duplicating an existing permissions group, then editing it. To do so, select the permissions group of your choice and click **Copy** in the **Details** tab of the side panel.

4.2. Modify existing permissions groups

You cannot delete an existing permissions group, but you can modify it or remove all of its users.

1. Click your profile in the upper-right corner of the screen.
2. In the side menu, click **Settings**, then go to the **Permissions groups** tab.
3. In the list of permissions groups, click the permissions group you wish to edit.
4. In the side panel, browse the **Details**, **Users** and **Contract templates** tabs to view the permissions group properties.
5. Select the tab for the item you wish to edit, then click **Edit**.
6. Make your changes, then click **Approve**.

4.3. Navigate between permissions groups

If several permissions groups are available for your license, users belonging to several permissions groups can navigate between them to access the related contract templates and contractual activities.

To change permissions group:

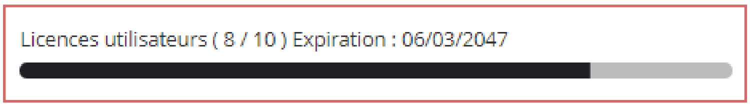
1. Click the icon to go to your license home page.
2. Click your profile in the upper-right corner of the screen.
3. In the side menu, click **Select permissions group**.
4. Use the drop-down list to select the permissions group you want to go to.
5. Click **Approve**.

oodrive sign

5. Managing users for your license

The user accounts associated with your license are employees at your company who are authorized to use Oodrive Sign. Each account created in your license uses up one user license.

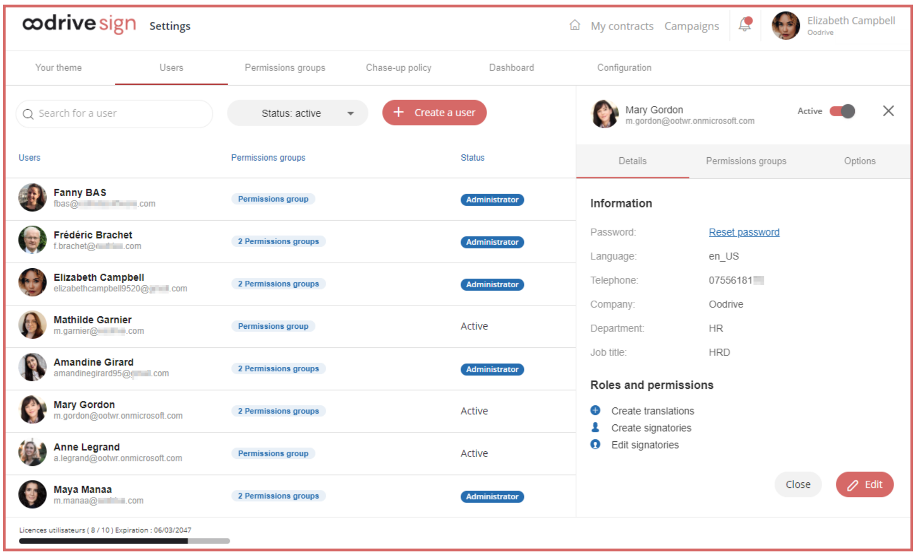
From the **settings** section, you can monitor the number of user licenses currently available using the gauge in the lower-right corner of the screen:



Please note: If you want to add additional user licenses to your Oodrive Sign license, you will need to contact oodrive technical support or your sales representative.

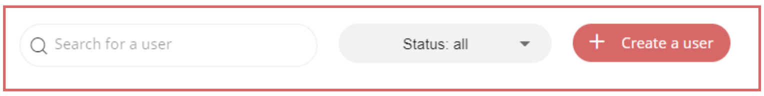
5.1. Search for users

The **Users** tab in the **Settings** section lets you view all users for your Oodrive Sign license.



You can use filtering options to quickly locate a specific user:

- Use the search bar to find a user from their surname, first name, or email address.
- Select a status (**All** or **Active**) in the drop-down list to display only active users, or all users that have been created for your license.



5.2. Create a new user account

1. Click your profile in the upper-right corner of the screen.

2. In the side menu, click **Settings**, then go to the **Users** tab.

3. Click **Create a user**.

4. In the **Information** tab, you are required to fill in all mandatory fields for the person for whom you are creating the account:
   - **Last name and first name**
   - **Email address**
   - **Cellphone number**
   - **Preferred language for the account**

   You can also fill in optional fields as required.

   If you want to add a profile image, click the default profile image at the top of the user file, then select the image of your choice in your file explorer.

5. Click **Next**.

6. In the **Information** tab, enable the permissions you wish to assign to the user:

Permission	Associated effect
Create users and assign rights to them (administrator)	Elevates users to Administrator level and enables them to access the license Settings so that they can: • Modify the theme • Manage users • Manage permissions groups (Enterprise version) • Customize the dashboard By granting this permission, you will also enable the permissions for creating, viewing, and approving transactions.
Create transactions	Allows the user to initiate transactions (e.g. send PDFs, bundles, or signature campaigns from a template or an uploaded document)

Permission	Associated effect
Check other users' transactions	Allows the user to track and take action on transactions initiated by other users in the same permissions group or, in the case of Administrators, all users of the license. When creation of signatories is enabled, this permission also allows the user to create signatories who will be visible for all users in the permissions group who have permission to check transactions.
Approve transactions	**Requirements:** The ability to check other users' transactions. Allows the user to countersign a transaction on behalf of the legal entity that they represents. Users with this permission are commonly known as "Managers".
Create signatories	Allows the user to populate the signatories directory by creating new customer records.
Edit signatories	Allows the user to edit the customer files that are available in the signatories directory.

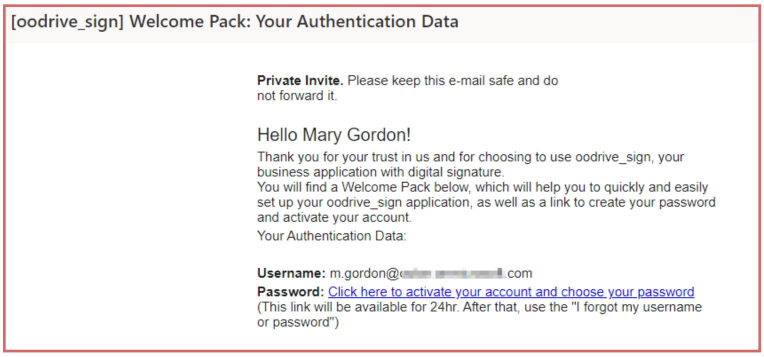
Important: If you create an Administrator-type user, that user will be able to edit the user files and permissions of other Administrators.

7. Click **Next**.

8. If you have the Enterprise version, select the permissions group(s) you want to assign to the user.

9. Once you have finished, click **Approve**.

An email will be automatically sent to each new colleague to notify them that the account has been created:



[oodrive_sign] Welcome Pack: Your Authentication Data

Private Invite. Please keep this e-mail safe and do not forward it.

Hello Mary Gordon!

Thank you for your trust in us and for choosing to use oodrive_sign, your business application with digital signature.
You will find a Welcome Pack below, which will help you to quickly and easily set up your oodrive_sign application, as well as a link to create your password and activate your account.
Your Authentication Data:

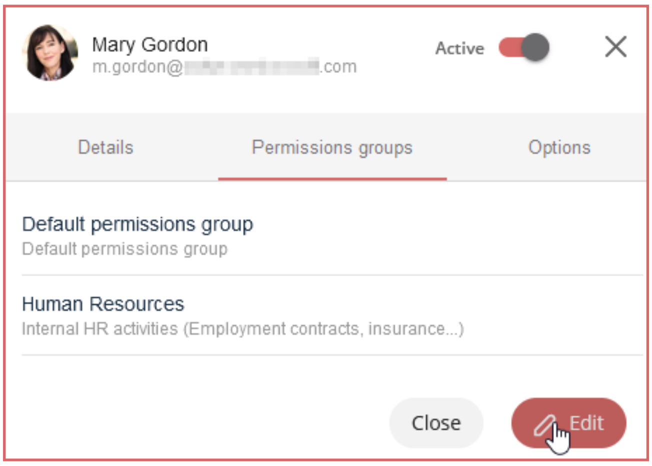
Username: m.gordon@[illegible].com
Password: Click here to activate your account and choose your password
(This link will be available for 24hr. After that, use the "I forgot my username or password")

5.3. Modify existing user accounts

Modify user accounts

You can modify the user file of a colleague at any time to make changes to their personal information and permissions.

1. Click your profile in the upper-right corner of the screen.
2. In the side menu, click **Settings**, then go to the **Users** tab.
3. In the list of users, click the user you want to edit.
4. In the side panel, browse the **Details** and **Permissions groups** tabs to view the properties of the user account.
5. Go to the tab for the item you want to modify, then click **Edit**.



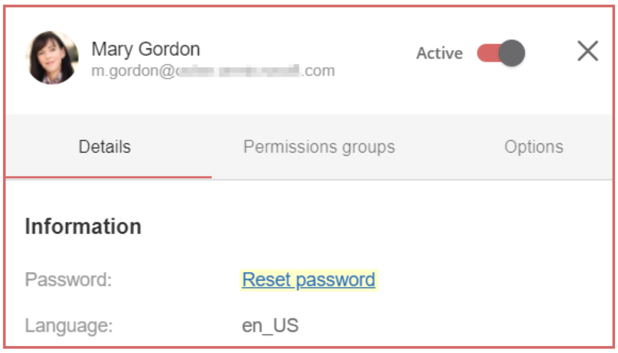
6. Make your changes, then save them.

Reset passwords

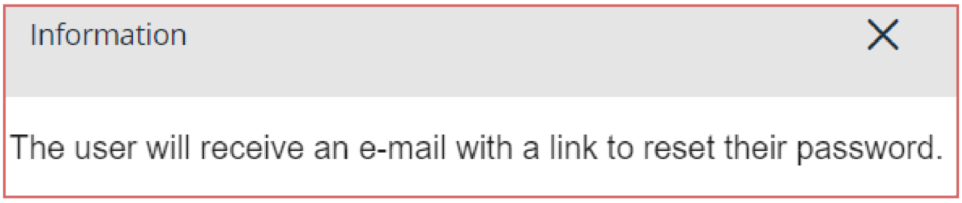
By default, colleagues can change their passwords from their profile menu.

However, you can intervene at any time to reset the password. This feature is particularly useful when editing the email address linked to the account.

1. Click your profile in the upper-right corner of the screen.
2. In the side menu, click **Settings**, then go to the **Users** tab.
3. In the list of users, click the user whose password you want to reset.
4. In the **Details** tab in the side panel, click **Reset password**.



5. You will receive the confirmation message shown below, confirming that a password reset email has been sent to the colleague.



When the colleague clicks on the reset link received in the email, they are redirected to a page in their browser asking them to set a new password.

Deactivate user accounts

You can deactivate a user account at any time to prevent them from accessing your Oodrive Sign license. A deactivated account may be reactivated at any time as required by your company.

This status preserves all of a user's data and history until their account is reopened at a later date.

Transactions initiated by the suspended user remain available to signatories. They can be continued by any user with permission to manage transactions.

1. Click your profile in the upper-right corner of the screen.

2. In the side menu, click **Settings**, then go to the **Users** tab.

3. In the list of users, click the user you want to deactivate.

4. In the side panel, turn off the **Active** setting at the top of the user record.

The account is immediately deactivated, and the user in question will no longer be able to log in to your Oodrive Sign license.

You can reactivate this account at a later date by clicking the **Active** setting again.

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