

Signing

Advanced signing

SUMMARY:

We'll look at some of the options related to signing.

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Ubidogy A/S

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diogy Digital Signing made easy



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Conditions

To read this document, you must be able to sign. If you have not followed the process of this, then you can advantageously read the document "your first signing".

The goal of advanced signing is to give you more options for classifying and grouping your documents.

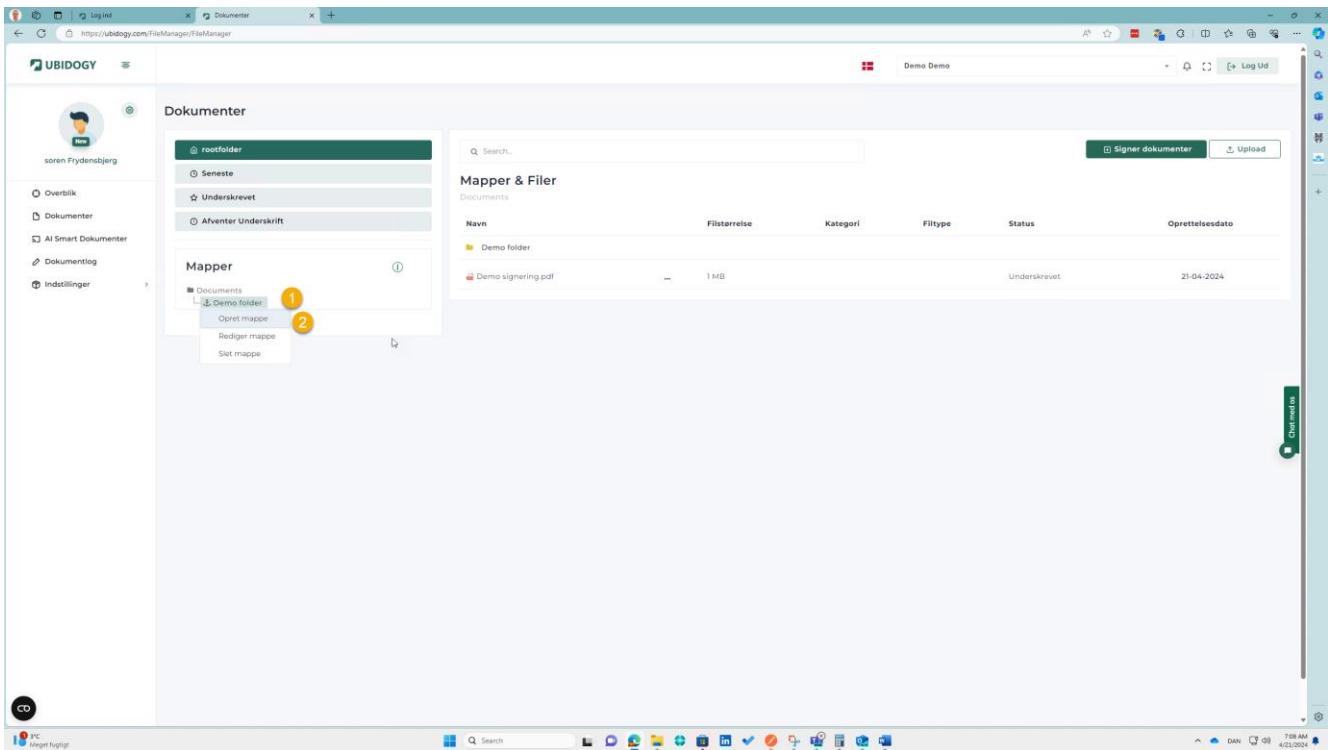
This document describes

- 1) Leaflets
- 2) Tags
- 3) Category and document type

Folders

Ubidogy has chosen to do this grouping via Folders, i.e. you can save your documents in Folders.

In **Documents** , you can right-click a folder, and then choose Create Folder. Then you make a subfolder:



You will see the following popup.

Opret mappe ×

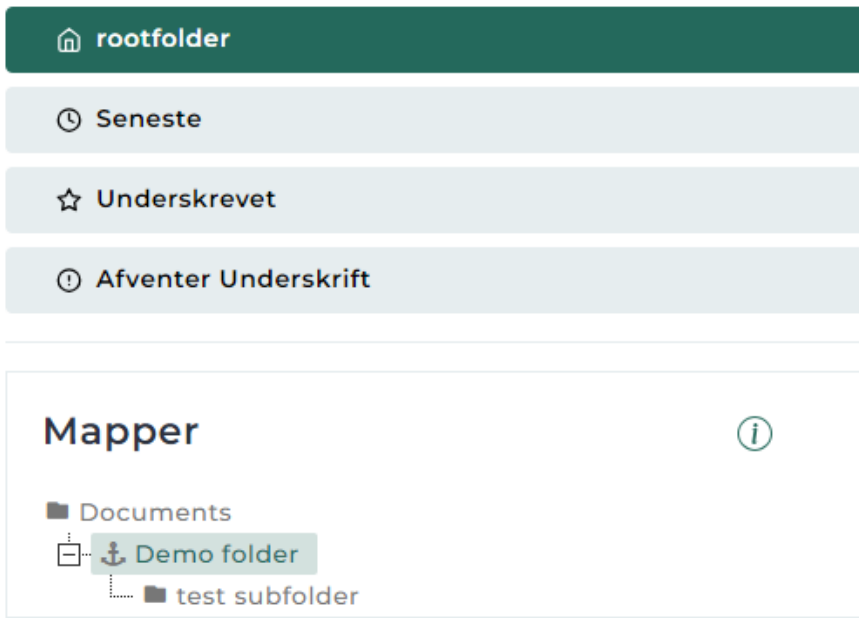
Mappe Navn

Mappeikon

Mappebeskrivelse

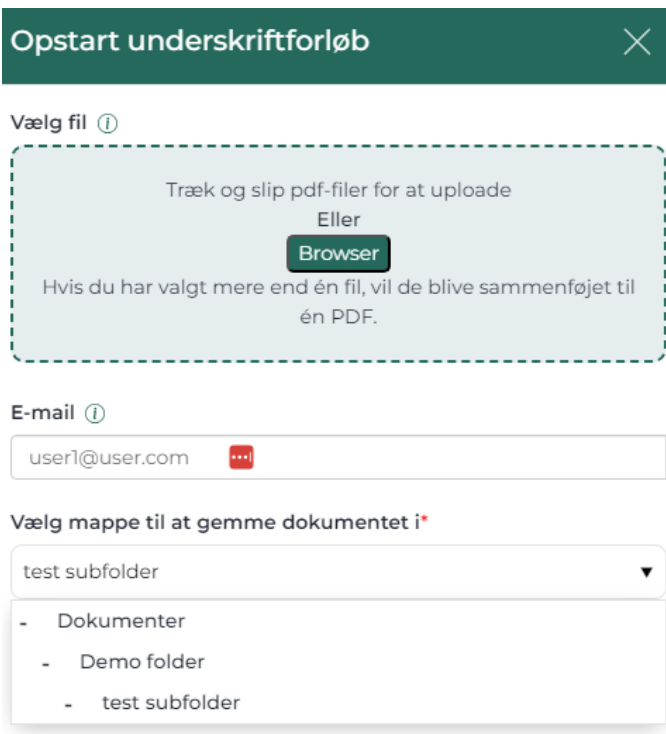
Enter required information and press save.

You now have a subfolder:



You are now ready to use this, so you can select **Sign documents**.

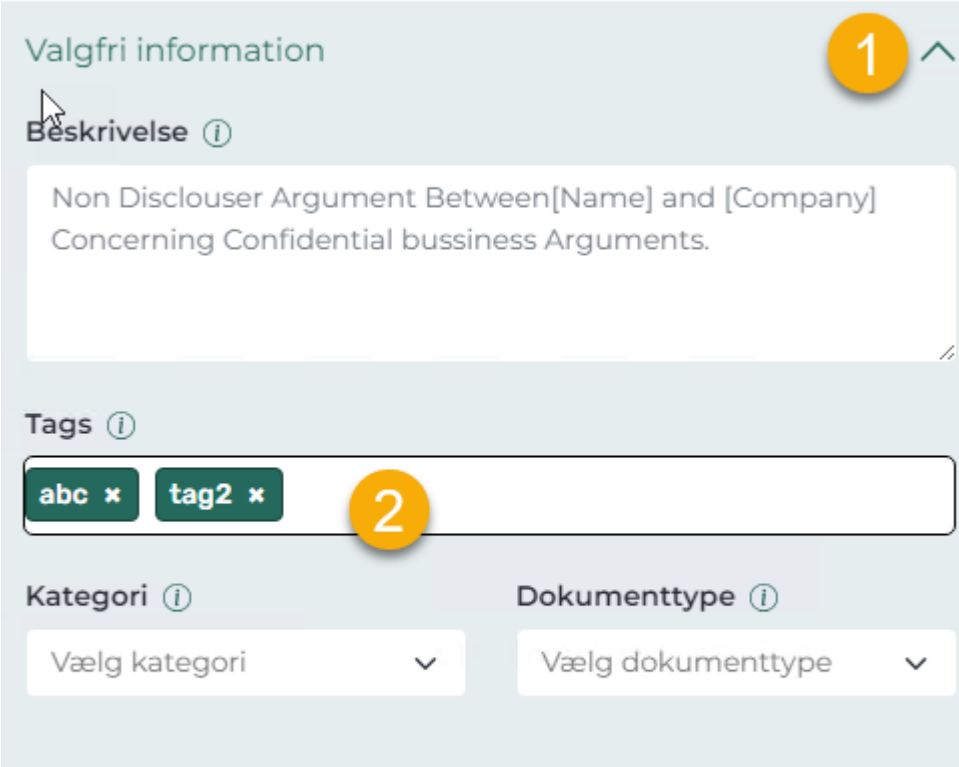
If you are in the folder when you select Sign Documents, signing will start in this file.



Otherwise, you can select the dropdown on the right side and select a new folder.

Tags

Tags are words you can use to classify your documents, and it's a bit more freestyle than document categories.



Valgfri information 1 ^

Beskrivelse ⓘ

Non Disclouser Argument Between[Name] and [Company]
Concerning Confidential bussiness Arguments.

Tags ⓘ

abc x tag2 x 2

Kategori ⓘ Dokumenttype ⓘ

Vælg kategori ▼ Vælg dokumenttype ▼

Forhåndsvisning Send

In signing, you can select Optional Information and then you can create Tags. If you have made tags before, they will come as suggestions, but otherwise you just type your tag and press enter.

You do this as many times as you want tags.

Category and document type

Valgfri information 1 ^

Beskrivelse ⓘ

Non Disclouser Argument Between[Name] and [Company]
Concerning Confidential bussiness Arguments.

Tags ⓘ

Kategori ⓘ

Temporary documents 2

Dokumenttype ⓘ

Employment Contract 3

Forhåndsvisning

Send

- 1) Select optional information
- 2) Select the category you want
- 3) Select document type

In the document manager, you can now see the categories.

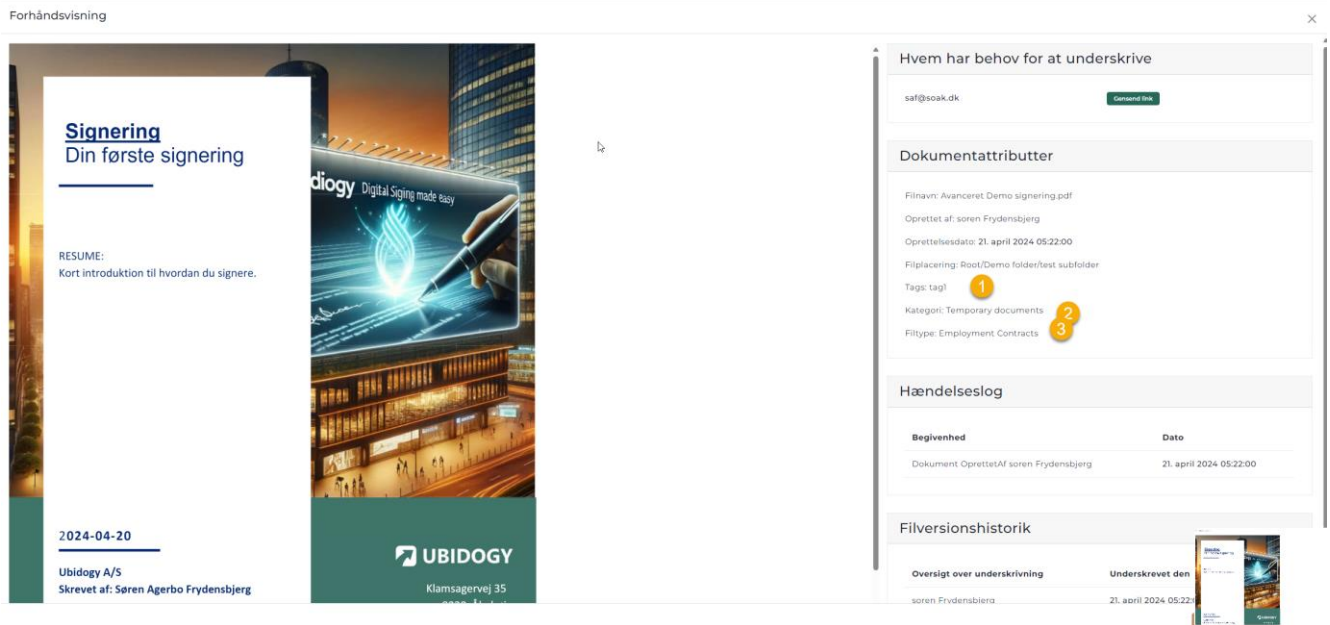
Signer dokumenter

Upload

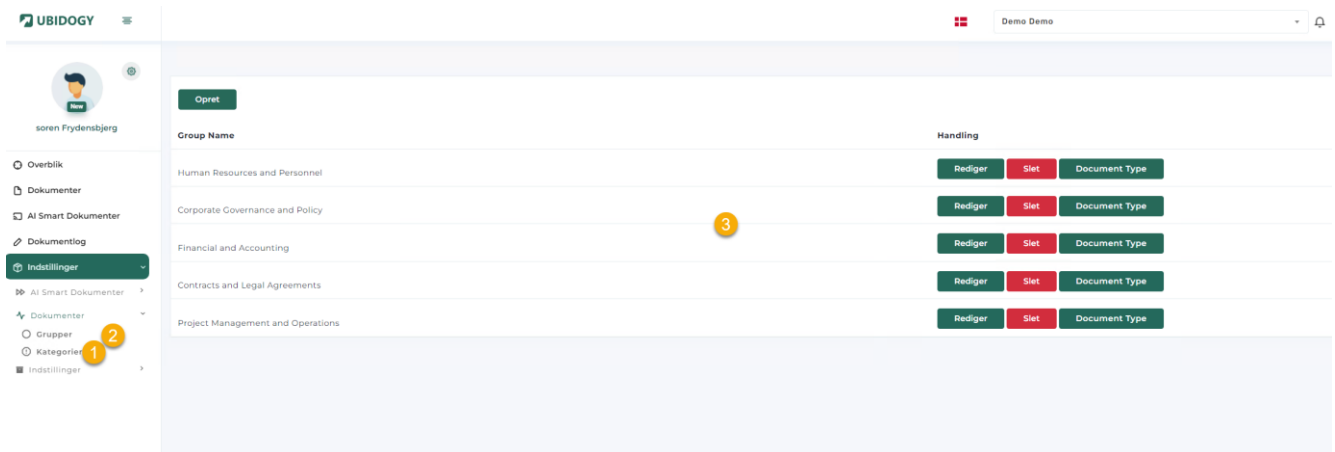
Mapper & Filer
Documents > Demo folder > test subfolder

Navn	Filstørrelse	Kategori	Filtype	Status	Oprettelsesdato
Avanceret Demo signering.pdf	... 1 MB	Temporary documents	Employment Contracts	0/1	21-04-2024

In preview, you can see tags and categories.

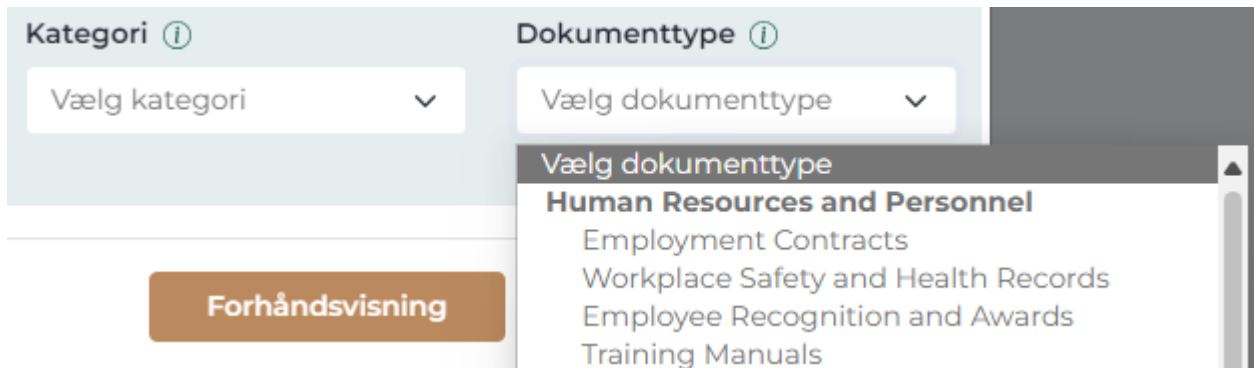


You maintain this in Documents settings → .



There are two menu items.

- 1) Categories maintains the Category dropdown in the signing.
- 2) Groups maintain Document Types in signing.



The reason it's called Groups even though it says Document Type in the user interface should be found in the dropdown list.

It appears that all Document types are grouped, heading "Human Resource and Personal". This is a Group, and below the group are the Document Types.

You can create your own document types, and the ones created when you log in are some Ubidogy has made for you to come back.

In later versions of the software it will be possible to translate.