

# FAQs

## How do I access a Videosign meeting?

Once a meeting has been booked by the host, you will receive an email with a link which will take you directly to the meeting within the browser.

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## Do I need to download any software?

Videosign is completely browser based, as long as you have an internet connection, mic and camera, you are good to go.

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## What type of documents can I upload?

At the moment, only PDF documents can be uploaded to the "To Sign" folder, in addition PDF document images can be uploaded into the "Read only" folder.

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## Can multiple people sign the same document?

Yes. The host can simply pass control to the participant needing to sign the document then take control back by clicking "Take control" to be able to pass it again to another participant. Note each user must click on complete before control is taken back for the signature is to be recorded in the document.

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## Can my participant upload documents as well?

There are two ways a participant can upload documents into a virtual closing room

### 1. Host is present in the meeting:

1. As the host of the meeting, you first must pass the control of the room by clicking "Give control"
2. Once they have control, they just click the "Upload" button.
3. They have an option of uploading from their local storage by clicking "My Files".
4. Once the PDF has been selected click "upload"

### 2. Host is not present in the meeting

1. If a participant is present in an online virtual closing meeting without the host the participant has default rights to upload documents
2. Just click the "Upload" button.
3. They have an option of uploading from their local storage by clicking "My Files".

Once the PDF has been selected click "upload"

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## Does my client need a Videosign account to join a meeting?

Not at all. Once you schedule a meeting, Videosign will send the participant a meeting invite which contains the link to access your online meeting. They will also be provided with a meeting specific username and one time password they can use to log into Videosign to access your meeting.

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## Can I use Videosign on my mobile?

Any participant to a meeting will be able to join a Videosign meeting from their mobile device, the host of the Videosign meeting must work from a desktop.

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## How to schedule your Meeting □

1. On the [www.videosign.co](http://www.videosign.co) page, click **Login** in the top right corner, and log in.
2. On your Meeting Manager page click on the '**Add Meeting**' button. This will open the Add Meeting form.
3. Fill out the details including a meeting subject, date/time, and invitee details (other fields are optional). Click **Create**. This will take you to the upload screen.
4. If you wish to upload a pdf document or image, you can do it on this screen. Do not forget to select a folder (note: only pdfs can go into To Sign). Then click **Schedule**, and your meeting will be created.

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## How to update or reschedule a meeting □

1. After logging in to Videosign, **search** for your meeting within the Meeting Manager tab to edit using the Search panel
2. Once the meeting appears in the list, **click** the Edit icon on the right-hand side of the row for that meeting:
3. Change the meeting details or add/modify invitees as desired
4. Click **Update**

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## How to remove a participant from a meeting □

If you accidentally invite the wrong participant or misspell an email, you can uninvite that person and prevent them from entering the meeting.

### Instructions for non-integration (standard) meetings

1. Open the Meeting Manager page
2. Click the button for the desired meeting
3. Click the button for the participant you wish to remove
4. Click Update.

Note that if the user is already present, they will not be kicked out of the meeting, but if they refresh their browser page, they will not be able to return. Users present in the meeting will have to refresh the meeting to see the user disappear from the user panel.

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## How to upload a document to a Videosign meeting □

### As a Host via the Meeting List:

There are two ways to upload a document to a meeting:

The first option is within meeting manager, select the meeting you wish to upload a document to by simply clicking on the meeting. This will take you to a new page showing Participant, Documents and Recorded Videos. In the documents section, select the upload button (shown below)

This will open a small window where you can navigate to your document, select it then choose upload.

The second option is to upload the document while in your meeting, on the menu to your left of your meeting screen select Upload Document, choose to sign or read only, navigate to your document and select open. This will then show in your documents to sign/read.

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## As a Host via the Meeting List:

Once your meeting is scheduled

1. Log into Videosign if you are not already logged in
2. In the meetings list, browse through to find your meeting OR use the search feature in the top right.
3. Click the Enter Meeting button on the left side of your meeting in the list:

## As a Host via the Meeting Invitation:

Once your meeting is scheduled

1. Go to your inbox and open the meeting invitation
2. Click the large blue 'Click here to join meeting' button, this will take you to the login page
3. Log in using your host details

## As a Participant via the Meeting Invitation:

1. Go to your inbox and open the meeting invitation
2. Click the large blue 'Click here to join meeting' button

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## How to run the Meeting Health Check □

Before joining a meeting, it is recommended that you run the Meeting Health Check to ensure you will not face any issues in your meeting.

To get started:

1. Go to the [Meeting Health Check page](#).
2. Wait for the meeting health check to complete.

If the result shows 'You're good to go', you are good to enter your meeting without any issues.

If the result shows 'We have detected issues', you may not have given permission to a required device (e.g. microphone) or your device may be in use. Please visit this [troubleshooting page](#) to help resolve any potential problems.

On completion of the health check if everything has been successful you should see all boxes as Green. If you have some 'Amber' boxes then there may be some limitations but you should still be able to enter a meeting. If you have any boxes that are red then you are unlikely to be able to enter a Videosign meeting and may require some action. Please contact our [Service Desk](#) for further help.

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## How to add text to your document □

When working with a PDF document in Videosign, you can add text to your document without starting a signing process.

To Add Text:

1. With a PDF document open in your meeting, click Add Text on the document toolbar at the left of your screen
2. A popup will appear. Type your text into it
3. Click Continue.
4. Drag or resize the text as desired and click the **tick** to place it

Do not forget to click Complete afterwards to save any changes!

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## How to attach an artefact to your document □

When signing a document, you can attach image or pdf files as additional pages to the document.

Attaching files:

Before attaching, a signature must have been placed on the document before changes have been completed.

1. Click Add File on the document toolbar
2. Select the source of your file (Dropbox or your device)
3. Choose the file to attach from your selected source

After that, the Attachment button will show a new file has been attached. When you click Complete, the file will be added as a new page (or pages) to the bottom of your document.

Supported browsers include:

- Chrome
- Firefox
- Microsoft Edge
- Safari (Apple)

### Screen Sharing

When in a meeting, so long as you have Control and nobody is currently signing a document, you can share your screen.

1. All you need to do is click the **Screen Share button**, which looks like this:
2. Next, depending on your browser, you may see a window that lets you select what to screen share. Select your entire screen/application window/browser tab and click Share.

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## How to pass and take control

### What is Control?

Control is the ability to upload documents, sign documents, and share your screen.

Only one user is in control at a time, and this is governed by the Host (if they are present in the meeting).

### How do I change Control?

- As a Host, you can click Give Control at the bottom right of the screen to allow Participants to take it
- You can also click Take Control to retake it as the Host, this is also located at the bottom right of the screen
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### Adding Signatures to the document:

1. When the document to sign is open, select the name of the participant in the signees menu on the left
2. This creates a small popup signature box where this participant will need to sign or initial depending on what you select
3. Move the signature box to where is relevant within the doc and select the green tick to lock it in place (press red X to cancel)

If no Host is present, Participants can Take Control from one another

If someone is signing, control cannot be shifted. The user must finish signing and click Complete before control can be passed or taken again.

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### To Sign the document as a Host or Participant:

1. Firstly, the user signing the document must have **Control**
2. Once the user has Control, they must click the **Add Signature** button
3. They should **select** their preferred method for signing on the menu on screen
4. Once the signature has been created/uploaded, they must **tick** the "I consent" tick box below the signature panel, and then click the **Add Signature** button
5. The user can now drag their signature around and place it on the document by clicking the **tick** button
6. Once the user is finished signing, they must click **Complete**. This will save the signatures to the document

If the document has all the signatures/changes required, then it is ready to be Finalized.

### To Finalize the document:

1. As the Host, take **Control**, if you do not have it already
2. Click **Finalize** Document at the bottom of the menu on the left

After a moment, the document will reopen. It is now Finalized and can no longer be altered without invalidating the integrity of the document. You can verify this integrity by downloading the pdf document and viewing in [Adobe Acrobat Viewer](#). You will see a green tick in the reader confirming the documents integrity.

Additionally, new pages will be added to the bottom of the document, containing an audit trail of the usage of that document, and any associated recordings.