

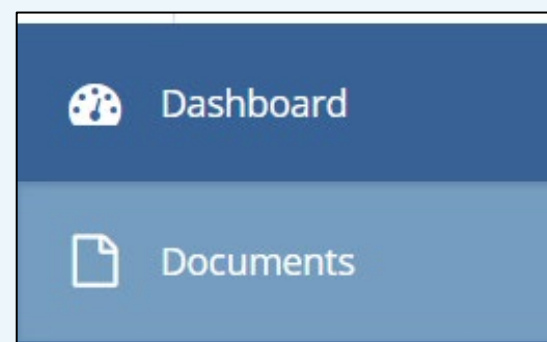
APPLICABLE TO:

- Admin
- Manager
- Editor
- Reader
- Collaborate
- eTMF

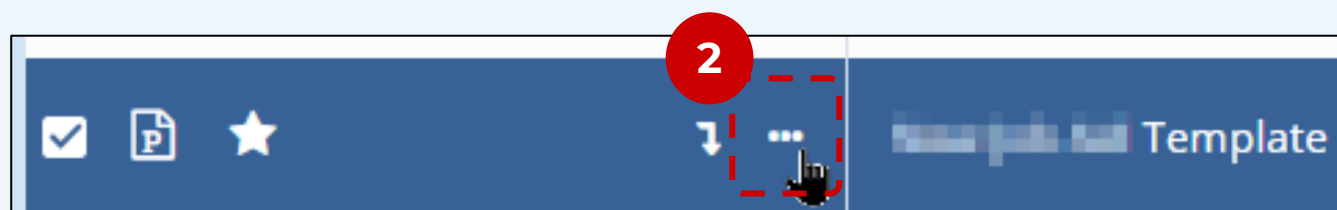
Part 1: Setup

[Only Editor and above users with eSignature action and Admins.]


1 **Navigate** to the document to be signed.

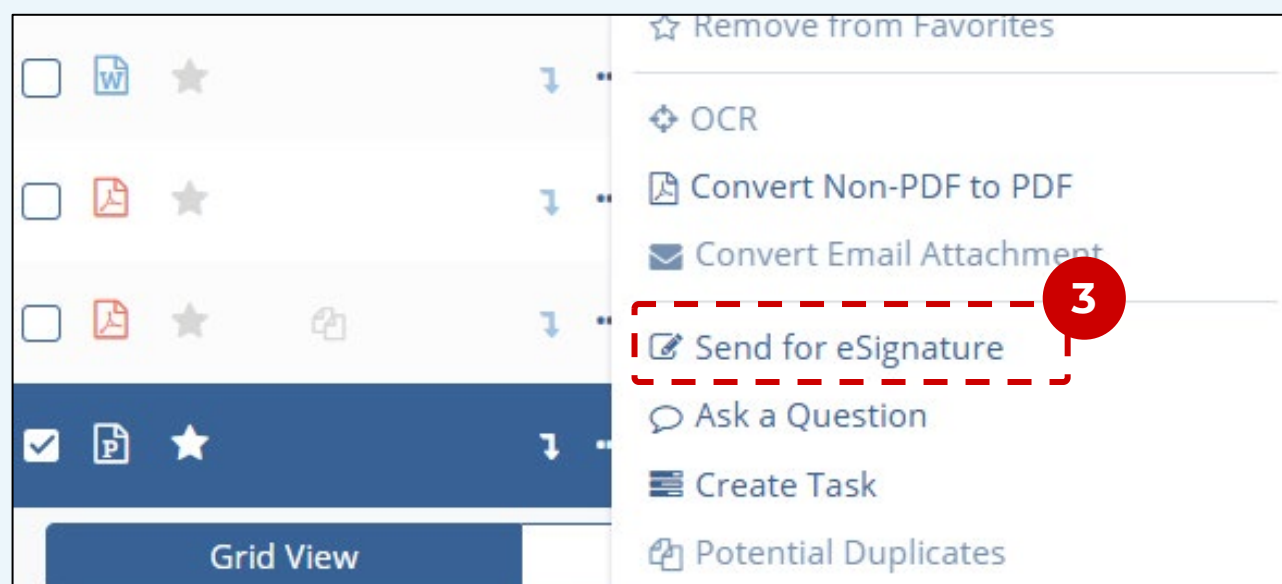


2 **Right-click** on the document line, or click on the **ellipsis**, to open the Document Actions menu.



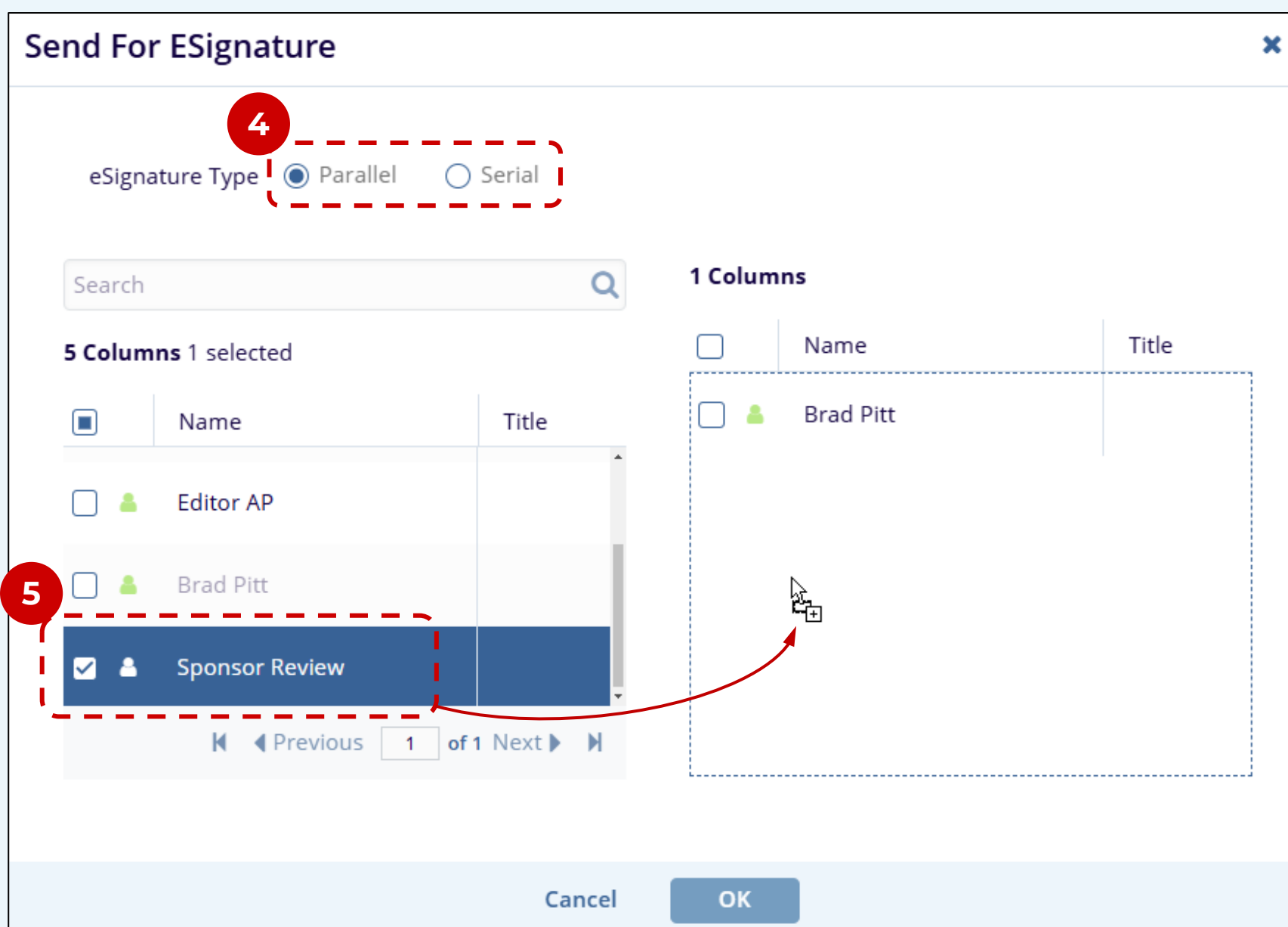
3 Select **Send for eSignature**.

 Documents in intermediate processing stages may not be eligible for eSign.

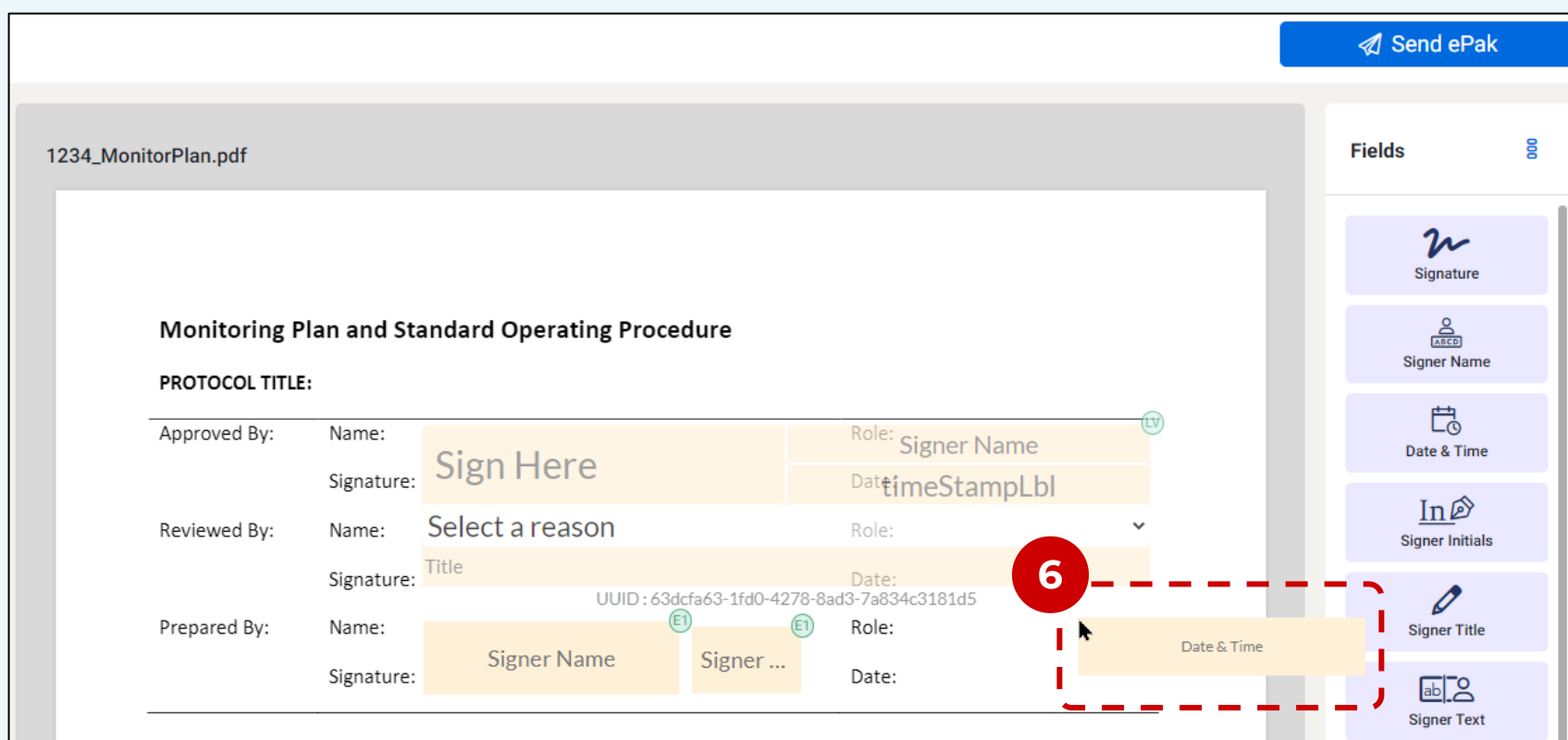


4 Set the eSignature Type to either concurrent signatures (“Parallel”) or specific order (“Serial”).

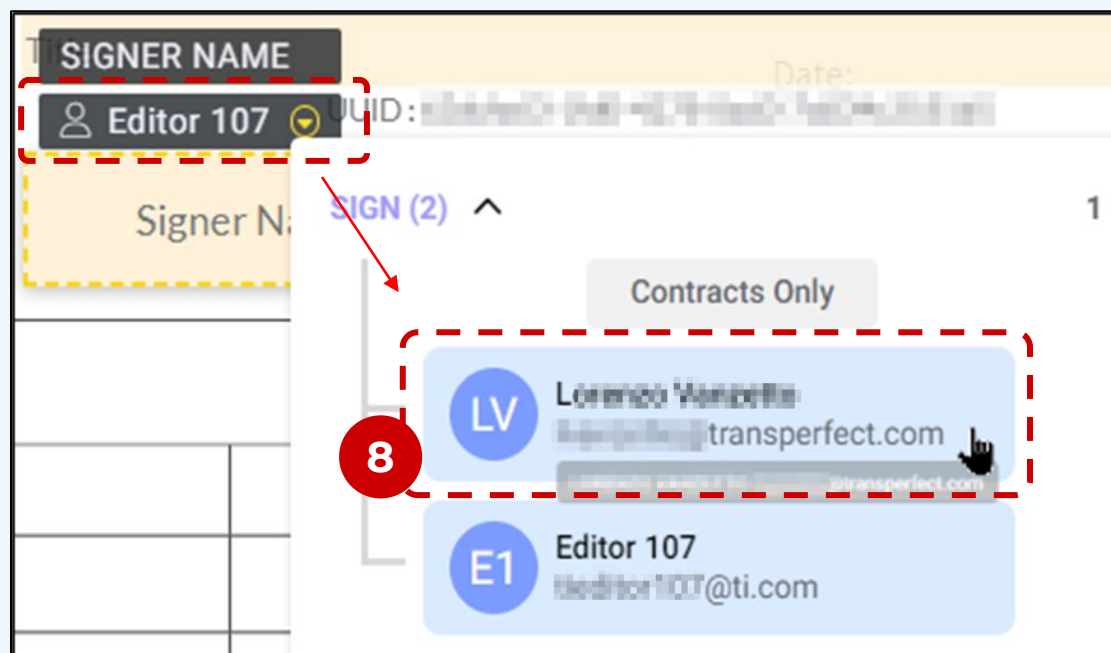
5 Add **signatories** by drag-and-drop from the left to the right column.



6 The signature preview will appear as a new window. Set up the document by including signature blocks (drag-and drop from right).



8 If multiple signers are involved, individual fields can be assigned to a specific user. Select the chosen field and **expand** the name selector, then **choose** an assignee. That field will not be presented to other signers for filling.

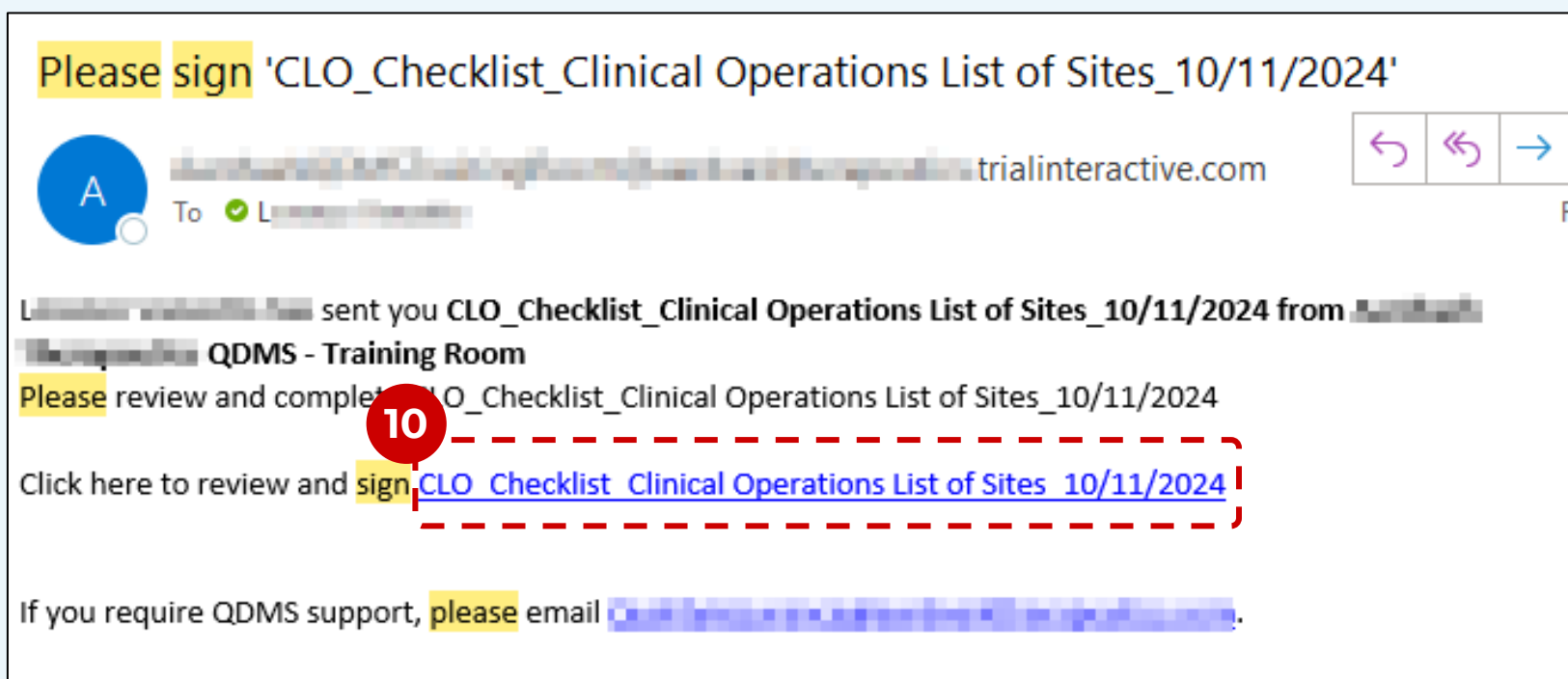


9 Click on **Send ePak** (top-right corner) to conclude the preparation phase.



Part 2: Signing

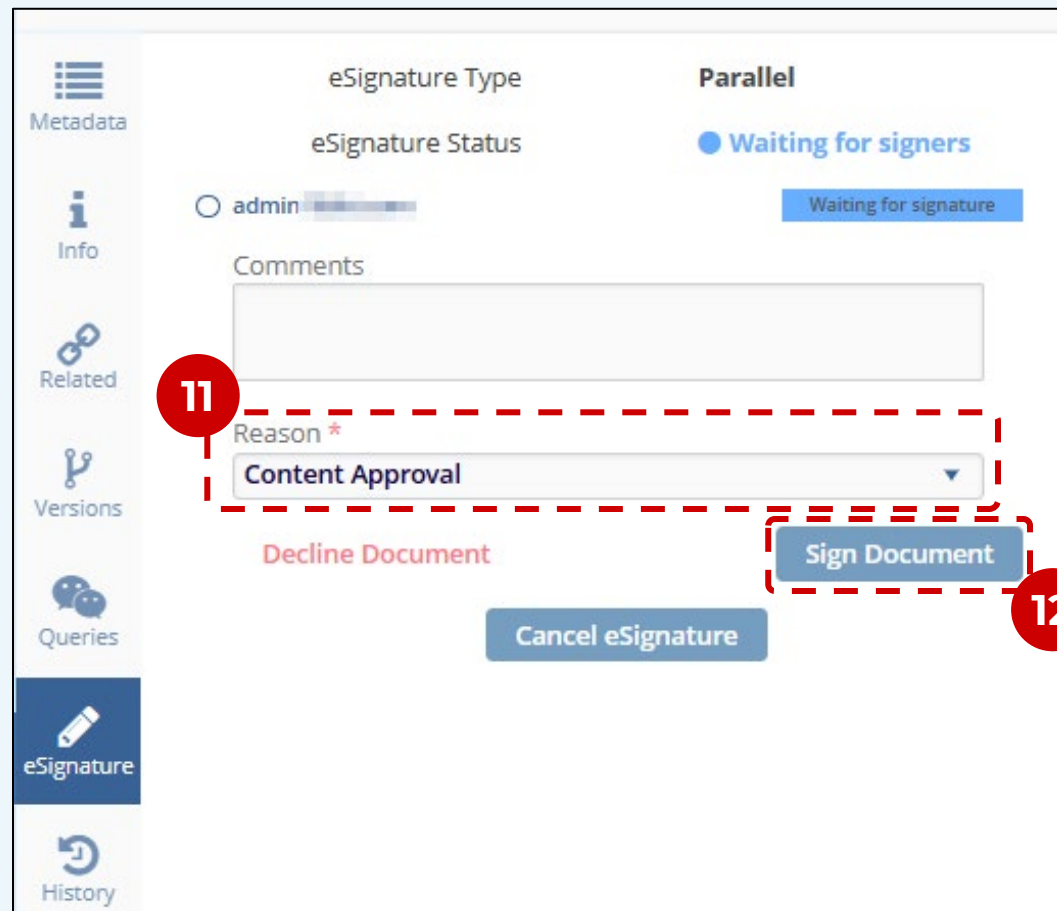
10 Each signatory will receive an email inviting them to sign the document, including a **quick access link**.



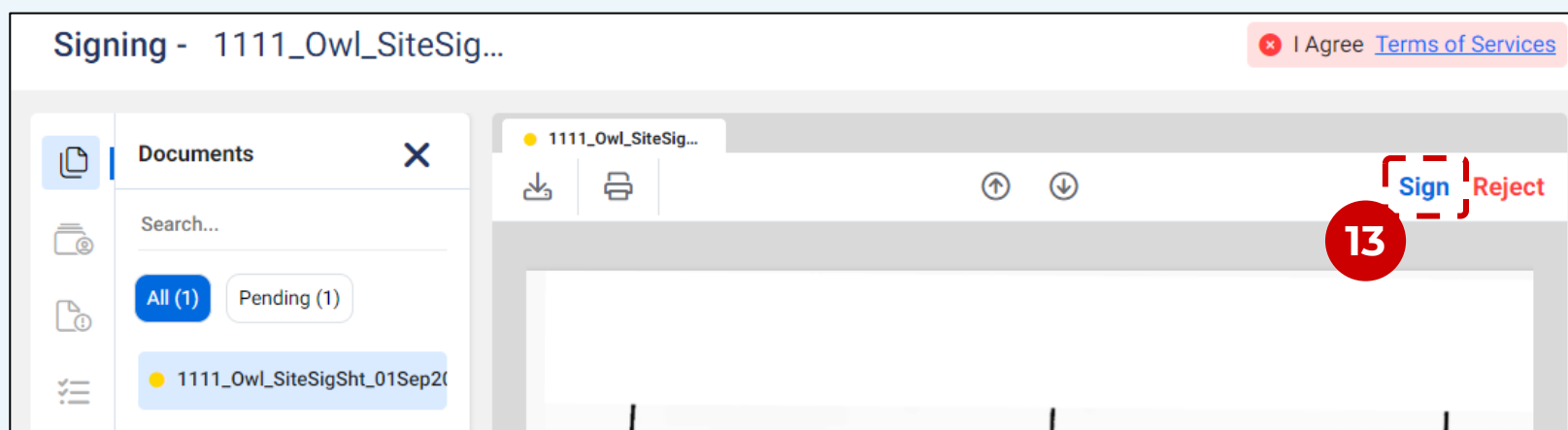
11 Users will find a Signature section in the metadata panel. Selecting a **Reason** is required.

12 Clicking **Sign Document** will open the MSB window with the document.

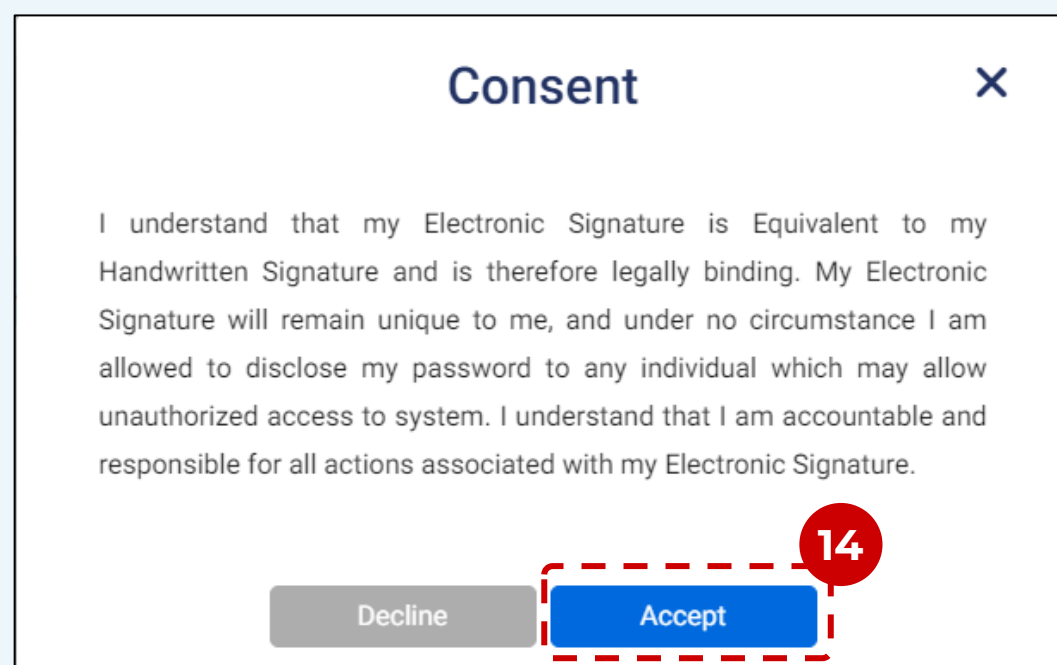
 **Note:** Users must allow popups in their browser for this function to work correctly.



13 Click **Sign** to start reviewing you assigned document fields.



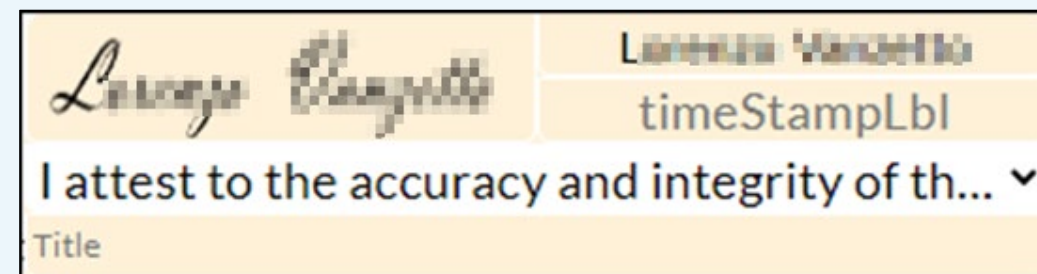
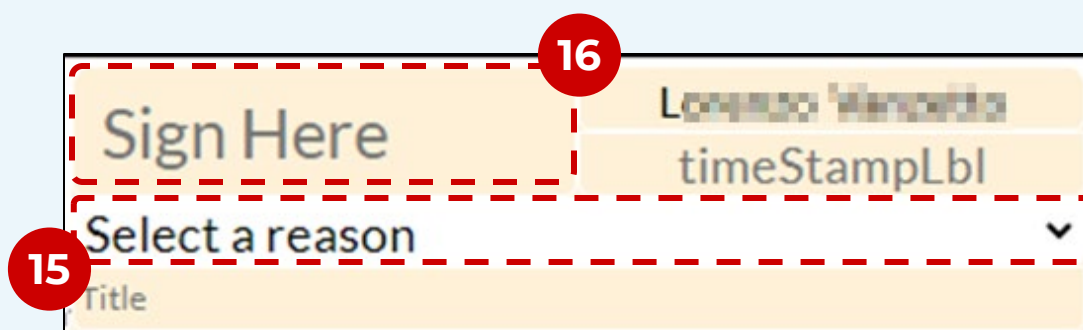
14 You may be asked to review and **Accept** a legal consent disclaimer.



15 Click on an active field, **select a reason** for your signature.

16 Click on **Sign Here**.

 Some fields will fill automatically after this step.



17 Click on the **Finish** button.



18 Signature progress is shown in the document's metadata panel.

