

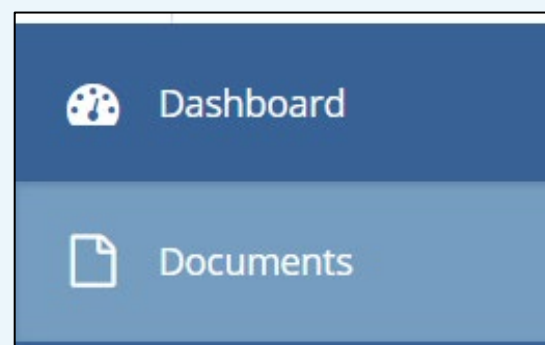
APPLICABLE TO:

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

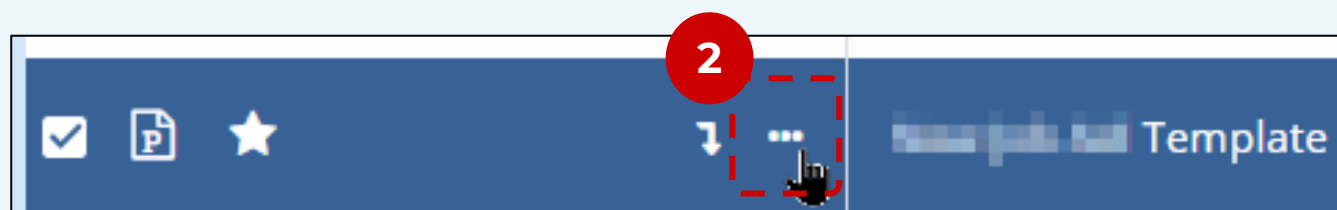
Part 1: Setup

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


1 **Navigate** to the document to be signed in Documents or Documents Library.

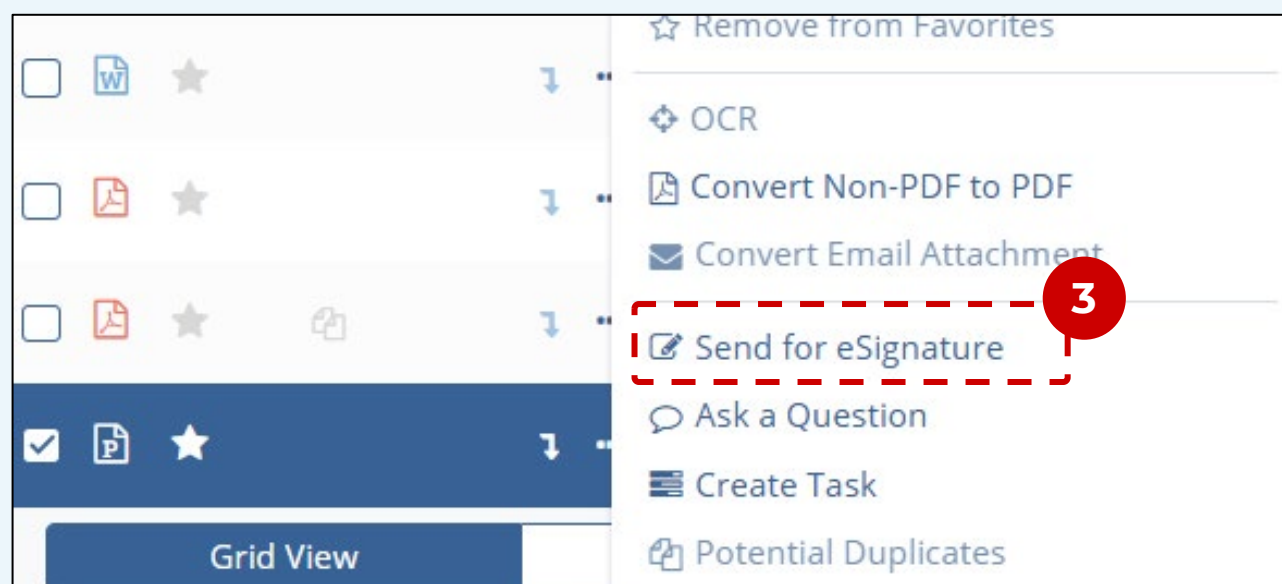


2 **Right-click** on the document line, or click on the **ellipsis**, to open the Document Actions menu.



3 Select **Send for eSignature**.

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



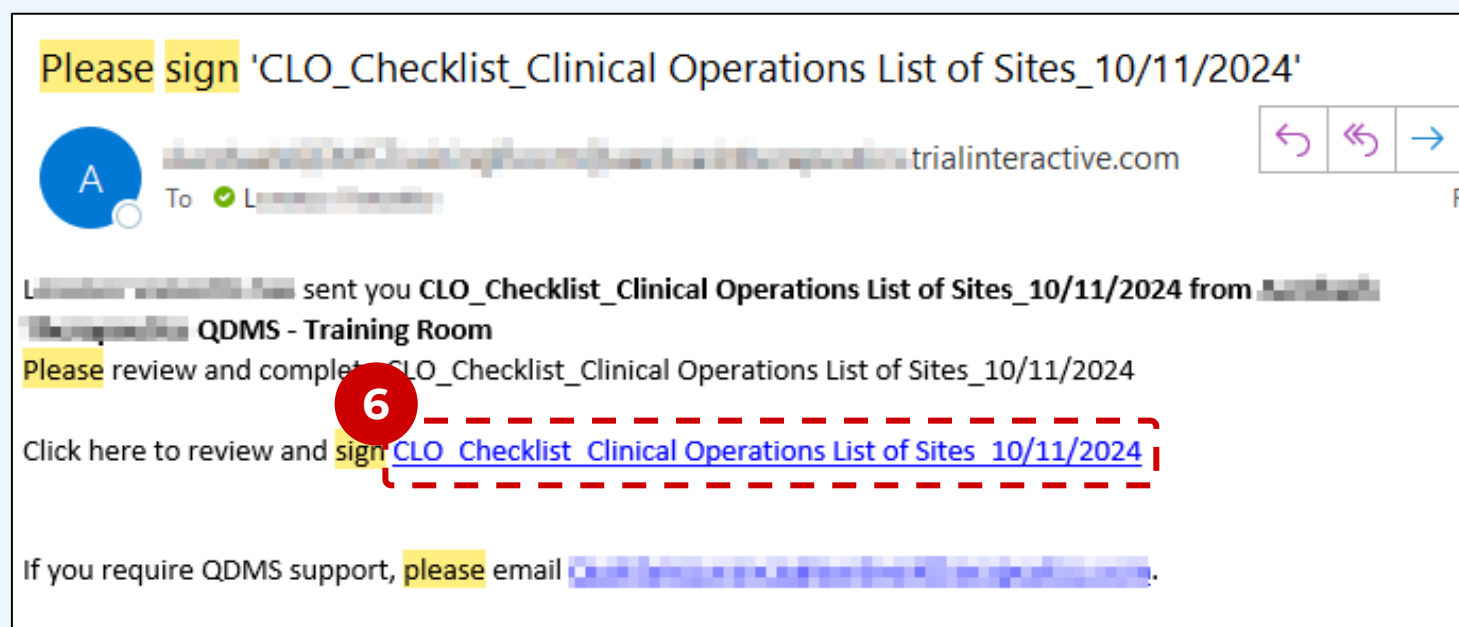
4 Set the eSignature Type to either concurrent signatures (“Parallel”) or specific order (“Serial”).

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



Part 2: Signing

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



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

8 Clicking **Sign Document** will open an authentication window.

9 Insert your username and password and click **OK**. This will sign the document.

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

