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Box Sign

Box Sign is a secure, seamless way to get your documents signed electronically.

Box uses an e-signature provider called “SignRequest”

How to use Box Sign

Once Logged into Box Sign, here is what you can do:

- Sign and/or request signatures on 40+ file formats and anyone can sign a document, even if they don't have a Box account
- Identify who needs to sign the documents and choose the order in which people need to sign
- Include customized instructions or other important information in your request
- Add checkboxes in your request to confirm information
- Include additional security options such as password-protection for documents sent, and SMS-based signer verification
- Add text boxes in your request to gather additional information
- Track the status of each signature request you've sent
- Send automated and manual reminders to people who haven't yet signed the document

References:

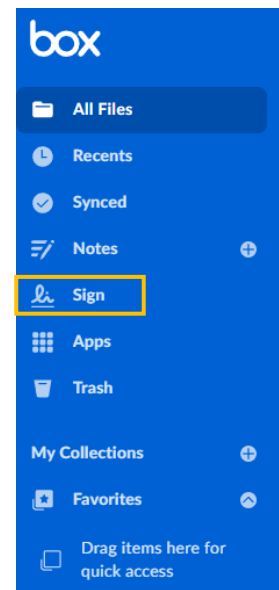
<https://box.csod.com/client/box/default.aspx?ReturnUrl=https%3a%2f%2fbox.csod.com%2fui%2flms-learning-details%2fapp%2fcourse%2f7f17b459-e7f7-4e62-bb18-0f6fde246fb2>

<https://blog.box.com/BoxSign>

Logging into Box Sign

1. Go to **rpi.box.com**
2. Click **continue** and then type your **RCS username/password** and choose **Login**
3. While at the Box “All Files” View, click **Sign** from the left navigation pane.

The Box Sign homepage appears.



Navigating the homepage

The screenshot displays the Box Sign interface. On the left is a navigation pane with 'Sign' highlighted (1). The main area shows a 'Sign' header with 'Sent Requests' (2) and 'My Requests' (3) tabs. A 'Templates' button (4) and 'New Request' button (5) are in the top right. A search bar (6) and a filter icon (7) are below. A table lists requests with columns for Title, Sent, Last Updated, and Status (8). A 'View Details' button (9) is next to one request.

Title	Sent	Last Updated	Status
Non-Disclosure Agreement-1626844451146.pdf Recipients: vlicata+rockuser1@boxdemo.com, vlicata+rock...	Jul 20, 2021, 10:14 PM	Jul 20, 2021	Signed
Non-Disclosure Agreement.pdf Recipients: vlicata+rock@boxdemo.com, vlicata+rockuser1...	Jul 20, 2021, 9:44 PM	Jul 20, 2021	Signed
Vendor Invoice Approval-1626836933980.pdf Recipients: snaegele+demo5@boxdemo.com	Jul 20, 2021, 8:08 PM	Jul 20, 2021	Signed
Vendor Invoice Approval-1626835529900.pdf Recipients: alan.cummings.boxsign@gmail.com, vlicata+roc...	Jul 20, 2021, 7:45 PM	Jul 20, 2021	In Progress
Vendor Invoice Approval-1626834728392.pdf Recipients: alan.cummings.boxsign@gmail.com, vlicata+roc...	Jul 20, 2021, 7:32 PM	Jul 20, 2021	In Progress
Non-Compete-Contract.pdf Recipients: dev.patel.boxsign+dara@gmail.com, vlicata+roc...	Jul 20, 2021, 10:53 AM	Jul 20, 2021	Signed
Business-Purchase-Contract-1626802895957.pdf Recipients: vlicata+rock@boxdemo.com, eogburn+demo1@...	Jul 20, 2021, 10:41 AM	Jul 22, 2021	In Progress

1 Box Sign – Click sign from the navigation pane to launch Box Sign

2 Sent Requests – See all your requests you sent to be signed

3 My Requests – See all of the requests that need your signature – the number to the right indicates how many requests need to be reviewed.

4 Templates – Click to create a new request template or to access an existing template

5 New Request – A new windows launches to choose a file stored in Box or upload a new one to begin the e-signature process

6 Search Requests – Use to Search for a specific request

7 Filters – Select from 12 different request categories to filter on

8 Status – Shows the status of each request

9 View Details – Hover over any request and then click **View Details** to see more information about the request.

The Requester

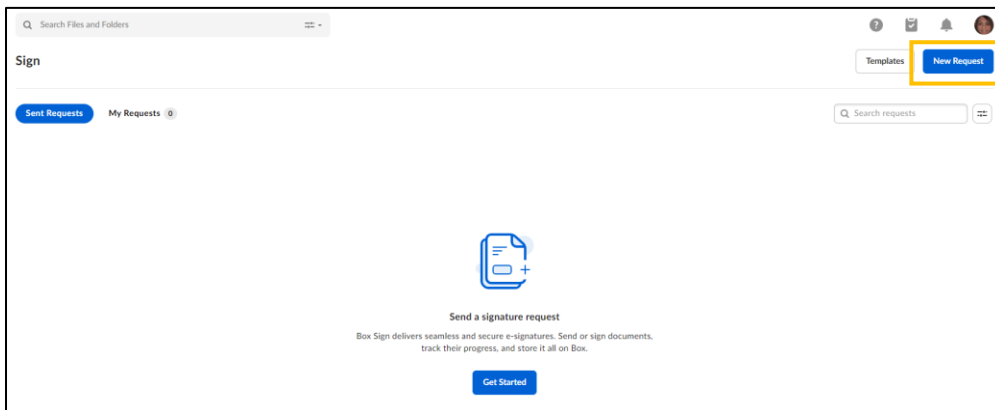
Sending a document for e-signature

To organize requests that need a signature, it would be best to **create a folder in your Documents folder** in Box. For example, you can name it **“My Sign Requests”**

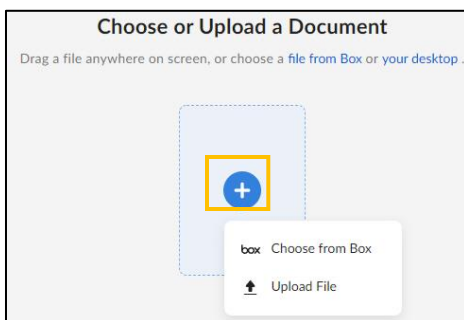
Steps 1-4 below shows the basics on how to setup an e-signature for signing along with how to use other *“optional”* features, like adding a password, sending reminders and adding an email notification.

STEP 1: Upload or select a document to be signed

1. From the Sign homepage, click **New Request**.

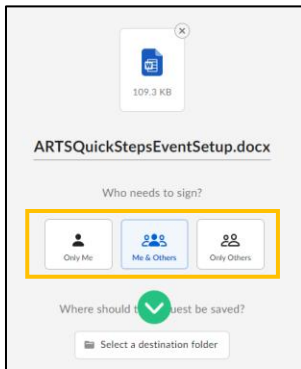


2. Click the **+** located in the middle of the screen to choose a file from Box, or to upload a document from file explorer.

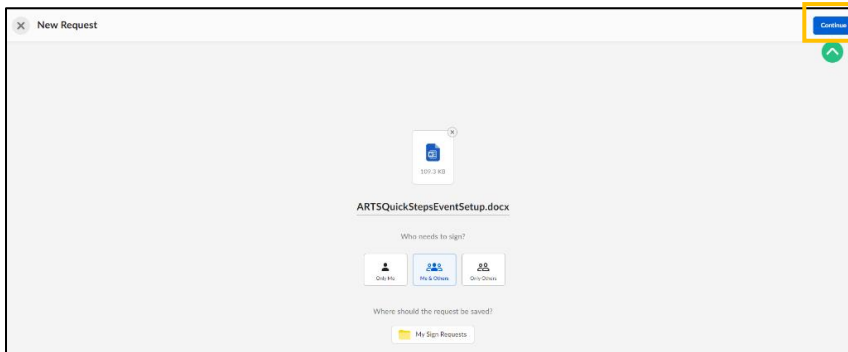


A new screen appears showing the title of your document.

- Determine who needs to sign this document by selecting: **Me**, **Me & Others**, or **Others**.



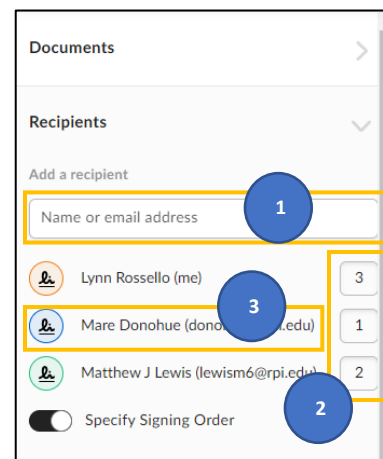
- Click **Select a destination folder** under “Where should the request be saved?” to select the “My Sign Requests” folder or another folder where you want to save the requests.
- Click **Save** to go back to the **New Sign Request** screen, then click **Continue**.



Your document appears and you can now add recipients.

STEP 2: Adding or modifying recipients

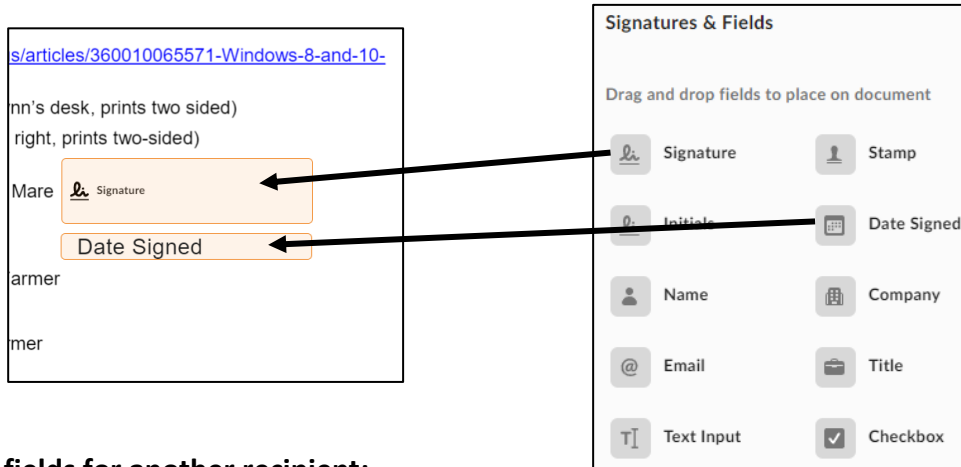
- Under the **Add a recipient** start typing the name or email address of the recipient(s) that need to sign the document.
- Select a **Signing Order (optional)** if this is needed.
- Click once on a recipient’s name to modify their email address, role, require a password or to remove them altogether.



STEP 3: Prepare the Request

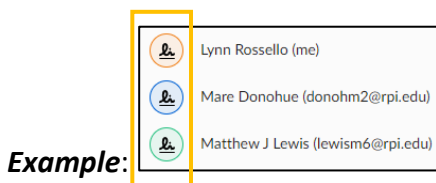
Signatures and Fields

1. Drag and drop the fields listed and place them on the document.



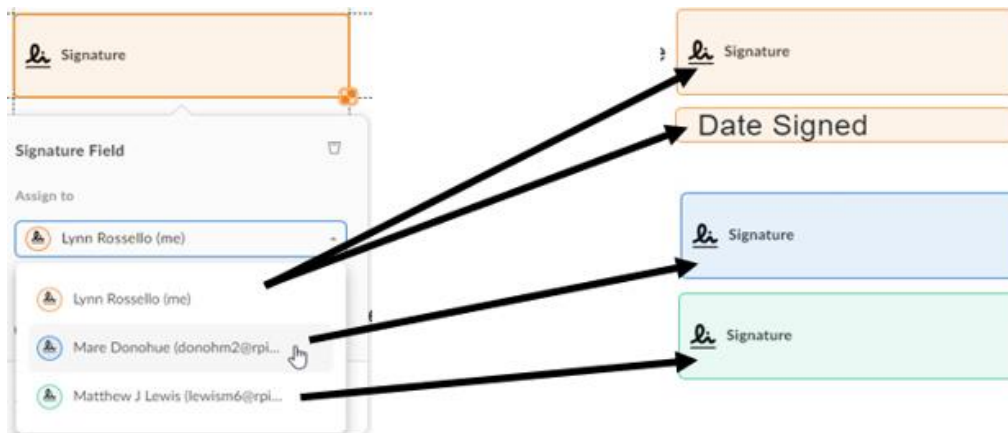
To add fields for another recipient:

NOTE: Each recipient has a designated color



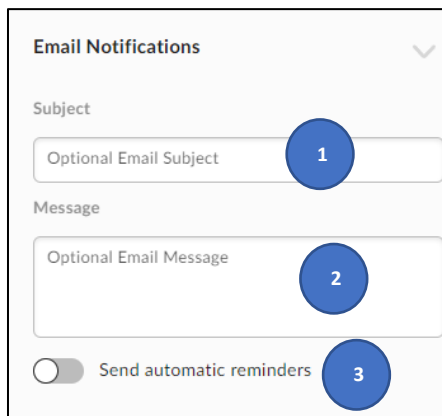
2. Repeat step 1 and then click once in the Signature box and choose the next recipient from the list.
3. Keep dragging and dropping each field and choose the appropriate recipient according to their name until all the fields for each corresponding recipient have been added to the document.

Example: All three recipients below have their own Signature box and one has a date box.



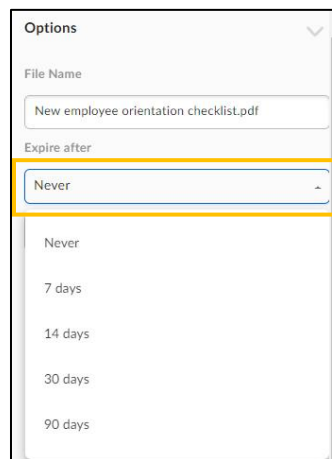
Adding an Email notification (optional)

1. Add a **Subject**.
2. Type a **Message**.
3. Move the slider to the right to select **“Send automatic reminders”** (Optional) If the recipient doesn’t sign the document on the day it was sent, Box will send the person a reminder after 7, 14, 30 and 90 days until the person signs the document.



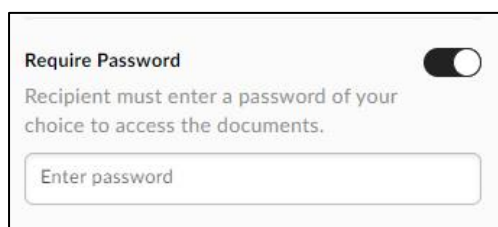
Options

- Set an expiration date (optional)
 - Click once under **“Expire after”** and choose, **7, 14, 30 or 90 days**.



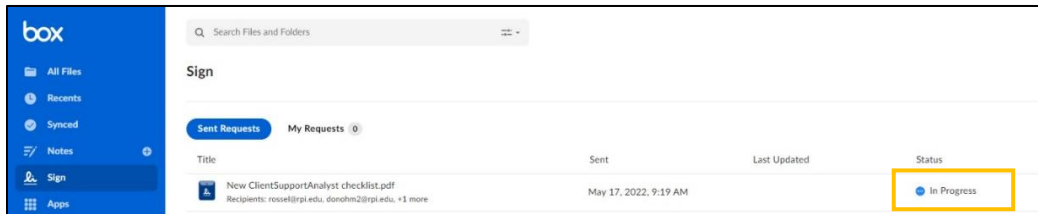
STEP 4: Send the Request

- Add a Password (optional)



1. Click **Send Request**.

The new request was added to the **Sent Requests** with the status “In Progress”



The Signer

Now that the document is out for signature, what steps does the signer take to review the document and sign.

NOTE: A **signer** does **not** need a Box account to sign a document.

A document can be signed:

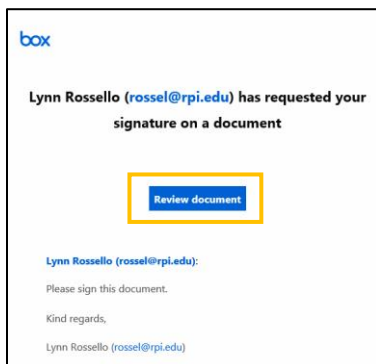
- Any time, from any device – desktop or mobile
- By drawing with a mouse, finger, or stylus
- By typing your name and choosing one of the fonts shown
- By choosing a signature previously saved in your profile

Signer process

Once the request is sent, the signer will receive an email that includes a “**Review document**” button.

Sign the Document

Example: Email signer receives



NOTE: Currently, **documents sent for signature cannot be changed during the signing process**. Senders will need to cancel and reissue the signature request.

1. Click **Review document**.

- Follow the green arrows at the top and check the **agreement box** and then click **Accept & Continue**.

By checking this box you:

Agree to use electronic records and signatures and confirm you have read the [Electronic Record and Signature Disclosure](#)

• Agree to Box's [Terms of Service](#) and confirm you have read Box's [Privacy Policy](#)

Accept & Continue

- Scroll through the document until the green arrow appears. This arrow appears anywhere the signer needs to sign.
 - Signature** – **Type your name** in the “Your Full Name” line or if your name appears below you can click on the font style and choose **Adopt**.

Draw **Type** Upload Saved

Your Full Name

Type your name

Type your name Type your name Type your name

Type your name Type your name Type your name

Type your name Type your name Type your name

Cancel Adopt

- Once the document is signed, the arrow moves to the “**Sign**” button.

NOTE: During the signing process, the sender can see the progress by logging into Box and then go to **Sign** → **Sent Requests** → **View Details** for that request.

New_ClientSupportAnalyst_checklist.pdf

In Progress

DOCUMENTS

New_ClientSupportAnalyst_checklist.pdf

RECIPIENTS

Lynn Rossello Needs to sign Third

Mare Donohue Needs to sign First

lewism6@rpi.edu Needs to sign Second

Pending Request Waiting on another recipient Sent May 17, 2022, 4:13 PM

Pending Request Waiting on another recipient

DOCUMENTS

New_ClientSupportAnalyst_checklist.pdf

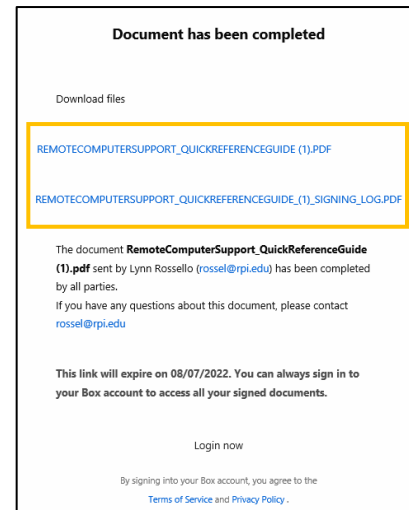
RECIPIENTS

Lynn Rossello Needs to sign Third Request viewed May 18, 2022, 8:27 AM

Mare Donohue Signed First Completed May 17, 2022, 4:21 PM

lewism6@rpi.edu Signed Second Completed May 18, 2022, 8:27 AM

5. When all recipients have signed the document – the sender receives an email that states “**Document has been completed**” and has a *link to the signed copy* as well as a *signing log link* with additional information like IP address, email address, time stamp, hash code, signature and more.



Signing the document with a password

1. Click "**Review Document**"
2. **Enter the password** that was provided to you, and accept the electronic record and signature disclosure to continue.
3. **Scroll down the document until a green arrow appears** - this will guide you through signing the document.
4. Once signing is complete, the arrow guides them to the "**Sign**" button.
5. Once your document has been signed by all signers, **everyone receives an email** that states, "**Document signed.**"
 - a. This email includes a *link to the signed copy* and the *signing log*. The signing log has additional information regarding the signing process.

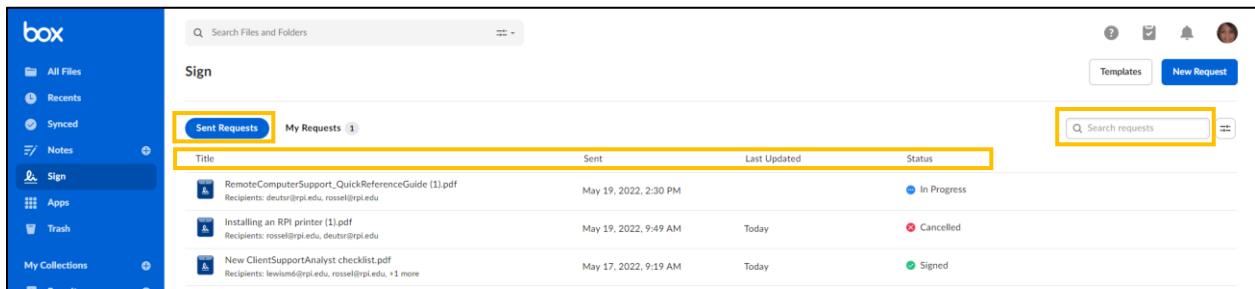
Box Sign – Views (Sent/Search/Filter requests/Details)

Sent Requests

When you open Box sign, the sent requests view appears with request information in real-time, such as: Title/Sent/Last Updated and Status.

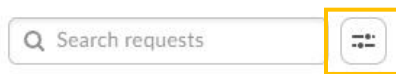
Searching

Use the search bar located in the upper right part of the interface to quickly locate a specific request.



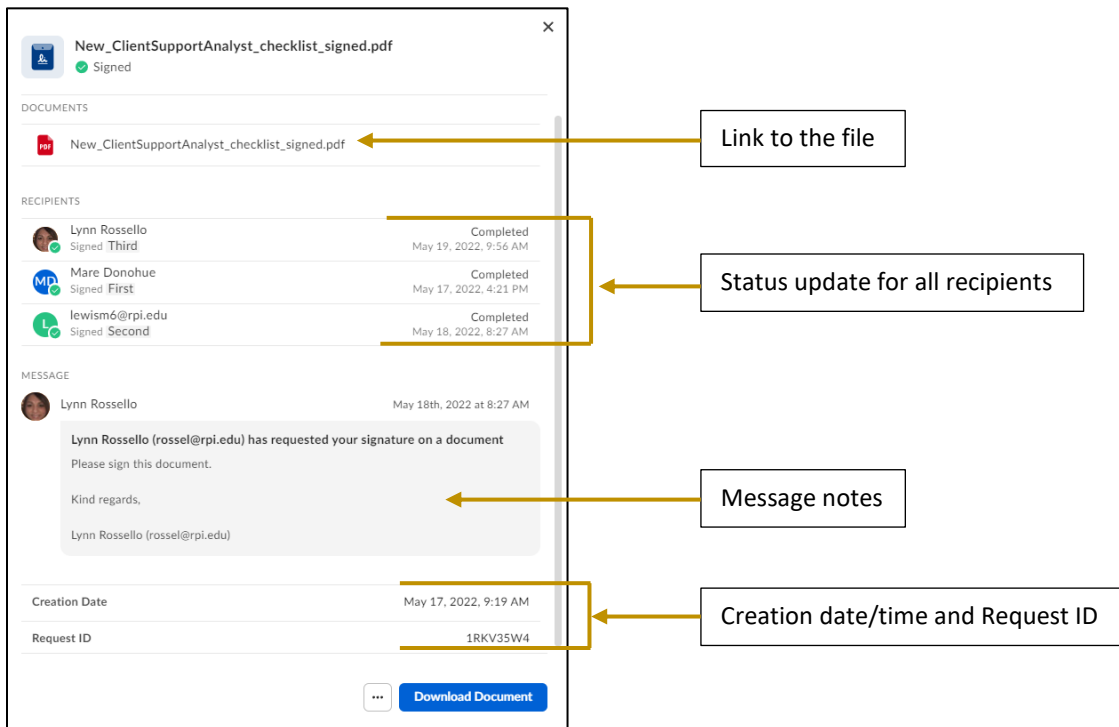
Filter requests

The filter icon allows you to choose 6 different categories to filter your requests.



Details

The details view provides a summary of the document sent for e-signature.



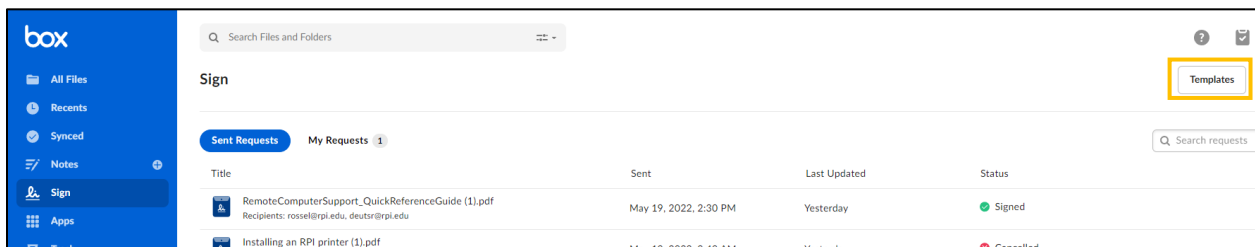
Box Sign template

A **template** is a great way to save time if you consistently send the same document for signature. You can customize the fields like specifying recipients' roles to modifying the email message.

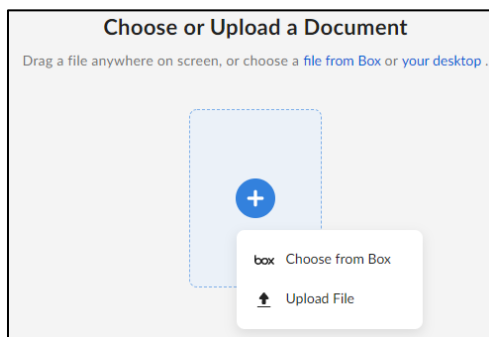
Templates can be created by **selecting “Templates”** on the “Sign” home page or **when saving a prepared document**.

Creating a template from the “Sign” homepage

1. Click the **Templates** button.



2. Click the **New Templates** button in the upper right corner.
3. Click the “+” under Choose or Upload a Document and then select choose a document from Box or upload a document.



4. Locate the file and then click **Select**.
5. Click the **Continue** button in the upper right corner.

Customizing the template

When adding recipients, think about the titles of placeholders for the types of signers you will be sending this template to. **Example:** if you need a Vendor or Sales Rep to always sign the document and you do not know their name, you can use a generic place holder like, *Vendor* or *Sales Rep* for this specific document.

Placeholders can be modified by clicking once on the recipient, which opens the “Modify Recipient” page.

Adding a placeholder and setting up the document

1. Type the placeholder title in the “Add a recipient” line and press **Enter**.

The screenshot shows the 'Recipients' panel in the Box Sign interface. At the top, there is a lock icon and a dropdown arrow. Below that is the text 'Add a recipient'. A text input field contains the text 'Vendor Sales Rep' and is highlighted with a yellow border. Below the input field is a button labeled 'Add Vendor Sales Rep'.

The new placeholder is added.

2. **Repeat step 1** until all placeholders are added.
3. **Add settings** such as: signatures & fields, signing order and email notifications and reminder (optional), which will carry over in future templates.

The screenshot shows the 'Recipients' panel with a list of recipients. The list includes: 'Sender - Automatically Set' (4), 'Vendor Rep - Placeholder' (1), 'Customer - Placeholder' (3), and 'Sales Rep - Placeholder' (2). The 'Vendor Rep - Placeholder' and 'Sales Rep - Placeholder' items are highlighted with a yellow box. At the bottom, there is a toggle switch for 'Specify Signing Order' which is currently turned off.

The screenshot shows a 'Box Sign Template Document for Training'. It features four rows of signature fields: 'Vendor Contract', 'Vendor Representative', 'Customer', and 'Sales Rep'. Each row includes a signature box (with a stylized 'li' logo), a 'Date Signed' field, and an 'Initial' field (with a stylized 'li' logo). The entire document area is highlighted with a yellow border.

The screenshot shows the 'Email Notifications' panel. It has a 'Subject' field containing the text 'Lynn Rossello (rossel@rpi.edu) has requested your :'. Below it is a 'Message' field containing the text 'Please sign this document. Please make a copy for your records.' and 'Kind regards'. At the bottom, there is a toggle switch for 'Send automatic reminders' which is currently turned off.

4. Click the **Save Template** button located in the upper right of the screen and the template has been added to the Templates view on the Box Sign homepage.

Using the Template

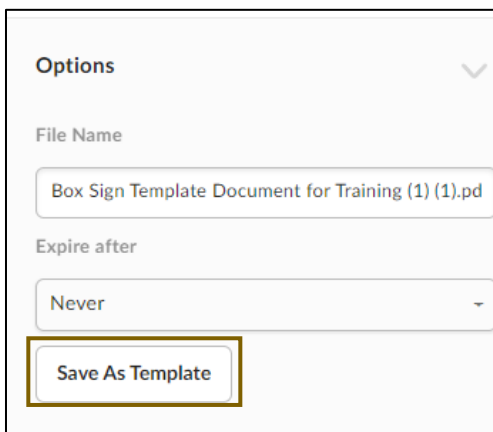
1. Move your mouse over the template and choose the **Use Template** button located to the right of the template.



2. Click the **Continue** button located in the upper right of the screen.
3. Click on each Recipient and **add their email address**.
4. **Edit** or make any other adjustments, like adding more fields and email notifications.
5. Click the **Send Request** button.

Creating a template from a prepared document

1. **Organize your document** with the necessary signers, fields, etc.
2. Click **Options** → **Save as Template** located at the bottom of the right navigation bar.

A screenshot of the 'Options' dialog box in the Box Sign interface. It contains a 'File Name' field with the text 'Box Sign Template Document for Training (1) (1).pd', an 'Expire after' dropdown menu set to 'Never', and a 'Save As Template' button at the bottom, which is highlighted with a yellow box.

This template has been added to the template page ready for you to use.

References

<https://box.csod.com/client/box/default.aspx?ReturnUrl=https%3a%2f%2fbox.csod.com%2fui%2flms-learning-details%2fapp%2fcourse%2f7f17b459-e7f7-4e62-bb18-0f6fde246fb2>

<https://blog.box.com/BoxSign>

Please review - **Information Classification Policy**

https://policy.rpi.edu/policy/Information_Classification_Policy