Table of Contents

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

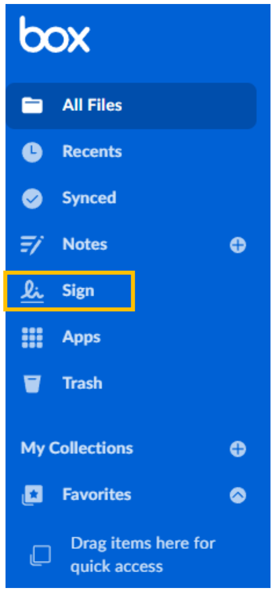
References:

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

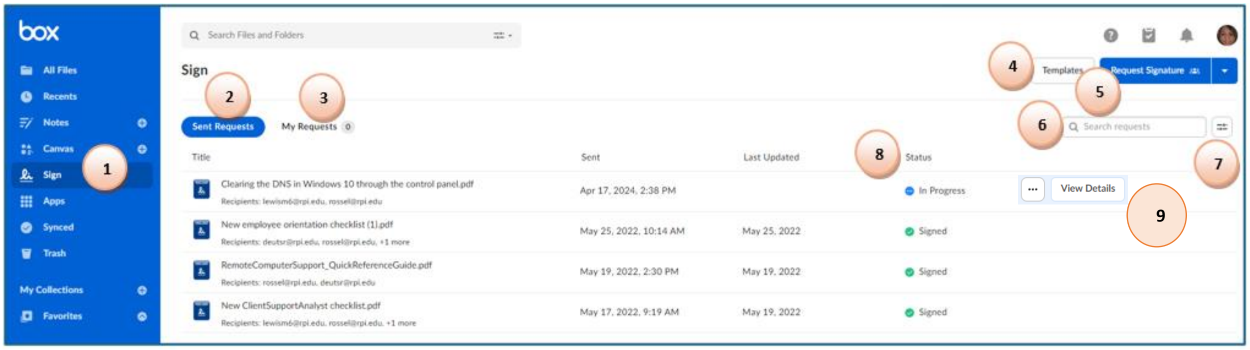
Logging into Box Sign

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



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 Request Signature – 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

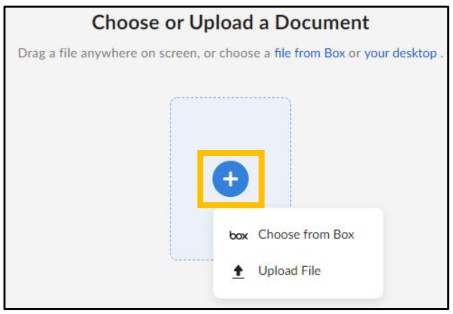
Sending a document for e-signature

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 set up 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 **Request Signature**.

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



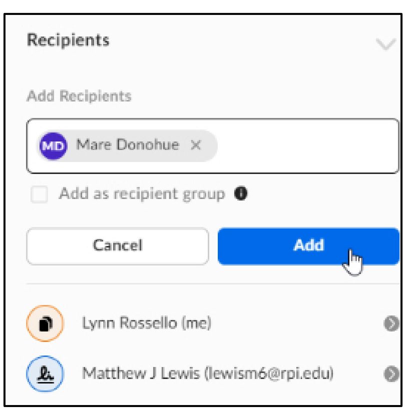
A new screen appears showing the title of your document.

3. Choose the document and then click **Open**.
4. Click the radio button to the right to choose a destination folder and then click **Save**. **NOTE**: you may want to create a folder called "My Sign Requests"

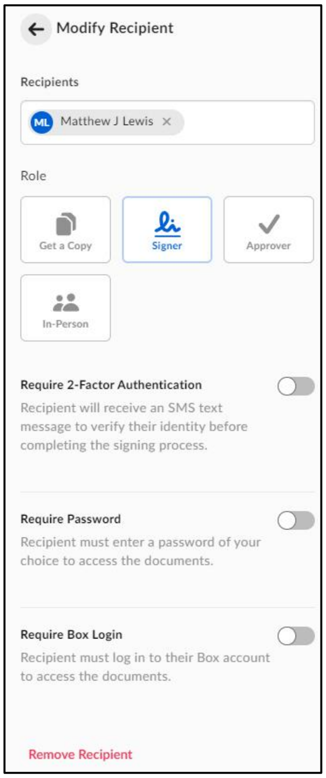
Your document appears and you can now add recipients.

STEP 2: Adding or modifying recipients

1. Under **Add Recipients** located on the right, start typing the name or email address of the recipient(s) that need to sign the document.
2. Click **Add**. (repeat steps 1 & 2 until all the recipients have been added)



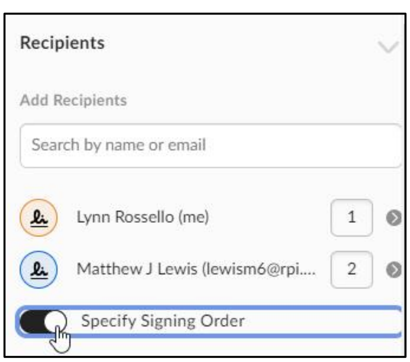
3. Click to the right of a recipient's name to **Modify Recipient**. There are many features you can change or turn on such as: changing the recipients **Role**, **Require password**, or **Removing Recipient**.



Specify the Signing Order

As you add recipients, they will automatically be in signing order, but you can change this order.

1. Move the **Specify Signing Order** slider to the right and then click in each numbered box to the right of the recipient to retype a different number to designate their signing order.



Adding a recipient group

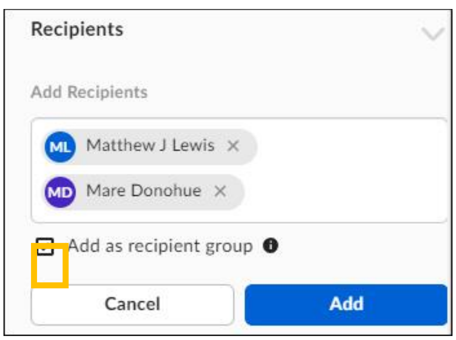
As a signature request sender, you can use the recipient group feature to add single recipients and create a group out of them. **NOTE**: Only the first person from the recipient group to take action will be able to sign or approve the document.

A Recipient group can be helpful if:

1. you know of multiple authorized signers within one organization,
2. some signers/approvers of the document are absent or unavailable.

The recipients can be in your enterprise or outside of it, and a recipient group can include both types of users at the same time.

1. Add your first two recipients in the **Add Recipients** field in order for the **Add as recipient group** box to appear.
2. Once the group of recipients are all added, select the checkbox **Add as a recipient group** and then **click Add**.



The group was created and shows to the right of the first recipient's name.

3. Click the right arrow to the right of the group and assign the correct role to the recipient group. Available options are **Signer**, **Get a Copy**, or **Approver**.

You can then:

- specify the signing order
- assign the recipient group to specific fields
- modify the recipient group before you send the signature request
- or remove the group, click the **Remove Recipient Group** button

NOTE: You can add recipient groups to Box Sign templates.

Restrictions to groups

Number of recipients in a group:

You can add a maximum of 35 unique email addresses to the signature request. Each individual in a recipient group counts towards this total. When you try to add more than 35 recipients to the group, the following error message appears: **Failed to add user because it exceeds the maximum 35 unique users per signature request.**

Adding the same recipient multiple times:

You can add the same recipient more than once (for example once in a recipient group and once as a required individual signer), but the signing order needs to be different. See the possible error message below:

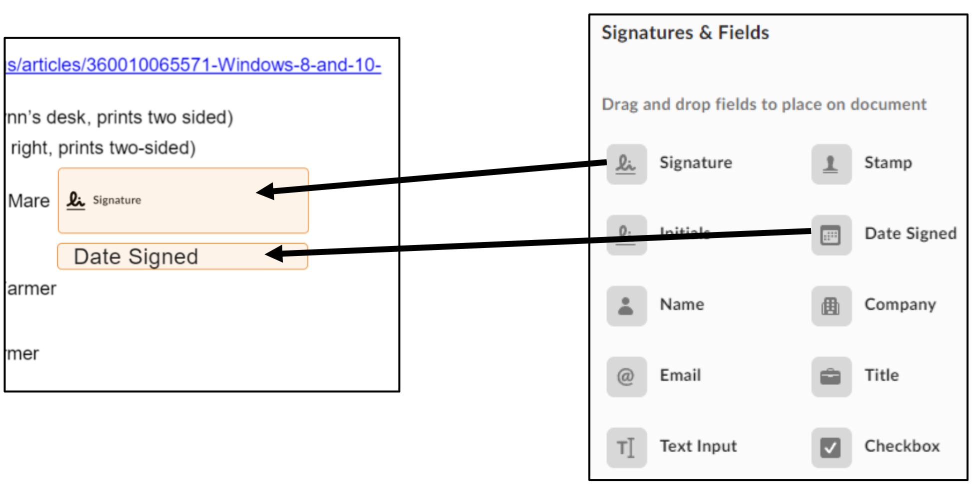
Sending the request: **Failed to send because user dog@box.com has been added multiple times with the same signing order. To proceed, recipients need to have a different signing order to be used multiple times in the same request.** https://support.box.com/hc/en-us/articles/4404105810195-Sending-a-document-for-signature?utm_source=Iterable&utm_medium=Email&utm_theme=CloudContentManagement&utm_content=FY25Q1-wave1-EU&utm_buid=2238568718

STEP 3: Prepare the Request

Signatures and Fields

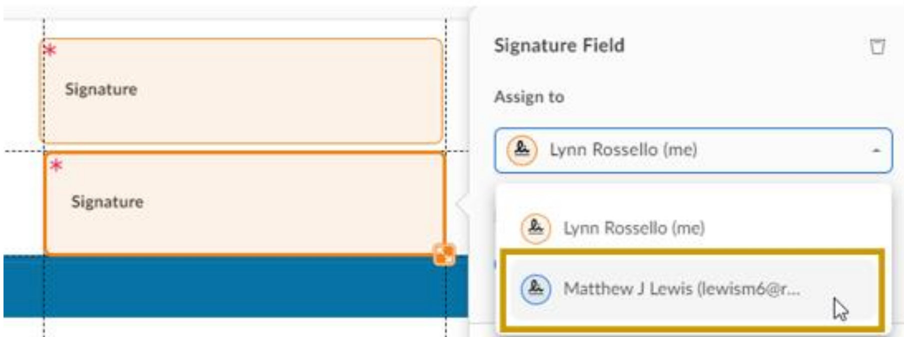
1. **Drag and drop the fields** listed on the right side recipients panel and place them on the document.

Fields include: *Signature*, *Initials*, *Name*, *Email*, *Text Input*, *Attachment*, *Dropdown*, *Stamp*, *Date Signed*, *Company*, *Title*, *Checkbox* and *Radio*. **NOTE**: The following **fields** support **Read-Only**: Name, Text Input, Company, Title, Checkbox, Radio Button and Drop-down.

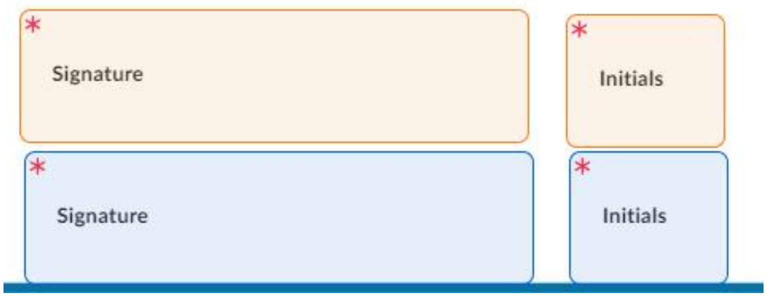


Once a field is added you can **right click and open a shortcut menu** to: Cut, Copy, Duplicate or Delete this field.

2. Click once inside a field and choose a Recipient (each recipient has a different color)

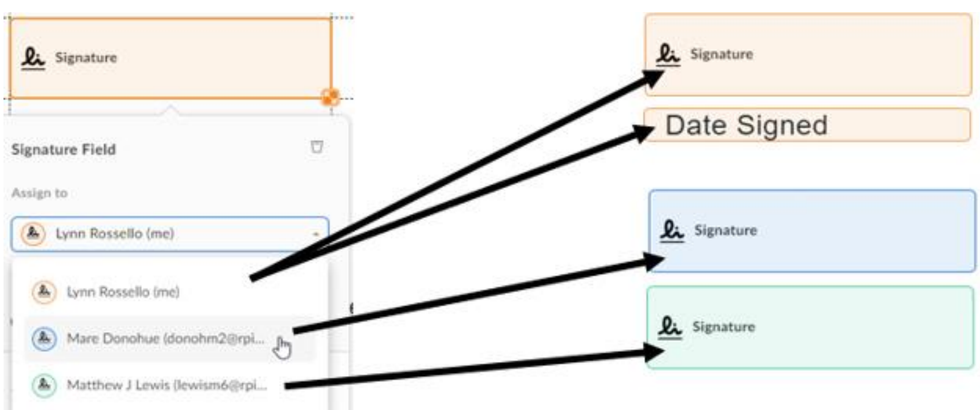


Once the recipient is selected the field box changes to the color designated for that recipient.



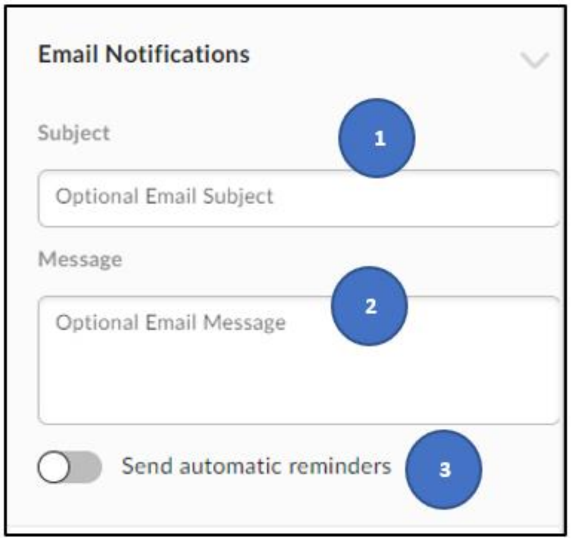
3. Keep dragging and dropping each field until all the fields for each corresponding recipient have been added to the document.

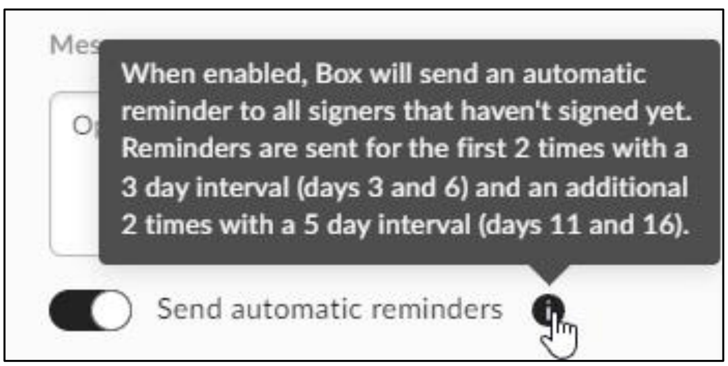
Example: All three recipients below have their own Signature box, and one has a date box.



Adding an Email notification (optional)

1. From the right side panel, scroll down until you see Email Notifications and then click the drop-down arrow to the right.
2. Add a **Subject**.
3. Type a **Message**.
4. Move the slider to the right to select "**Send automatic reminders**" (Optional)





To set an expiration date

1. From the right side panel slide down and click **Options**.
2. **Slide the Set Expiration button to the right** and then **type the number of days** the signature request expires.

   NOTE: You will need to contact the recipients to notify them of the expiration date.

STEP 4: Send the Request

1. Click the **Send Request** button located in the upper right corner of the document window and Box Sign immediately sends the document and signature request. All signers and sender receive an email notification when all signing is complete.

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 **<u>not</u>** need a Box account to sign a document.

A document can be signed:

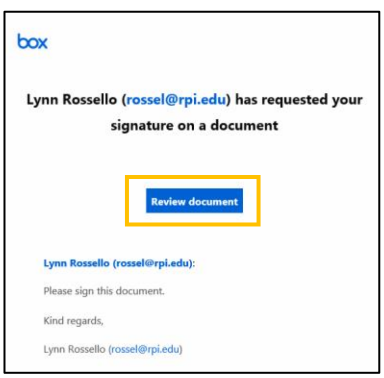
- Any time, from any device – desktop or mobile
- By drawing with a mouse, finger, or stylus
- By typing your name and choosing one of the fonts shown
- By choosing a signature previously saved in your profile

Signer process

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

Sign the Document

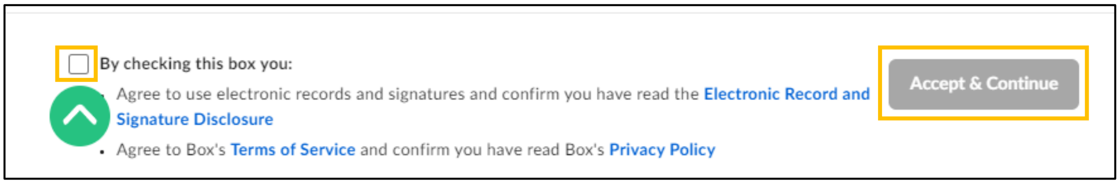
***Example**:* Email signer receives



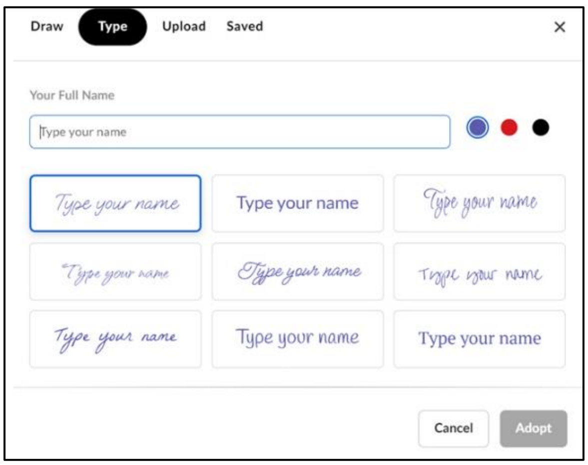
NOTE: Currently, **documents sent for signature cannot be changed during the signing process**. Senders will need to cancel and reissue the signature request.

1. Click **Review document**.

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

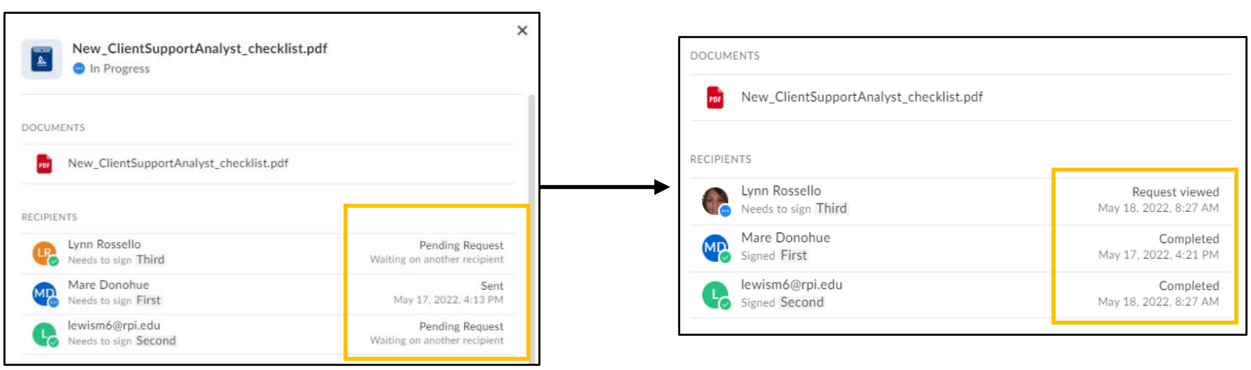


3. Scroll through the document until the green arrow appears. This arrow appears anywhere the signer needs to sign.
    a. **Signature** – **Type your name** in the “Your Full Name” line or if your name appears below you can click on the font style and choose **Adopt**.

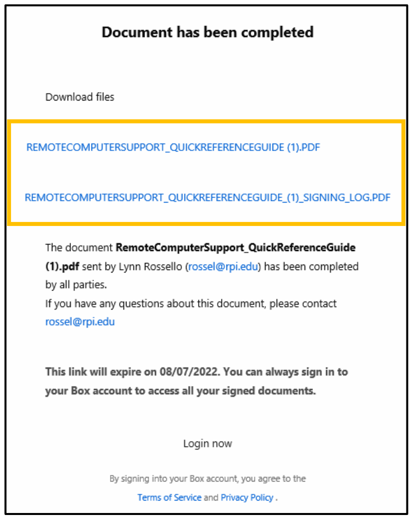


4. Once the document is signed, the arrow moves to the “**Sign**” button.

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.



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.

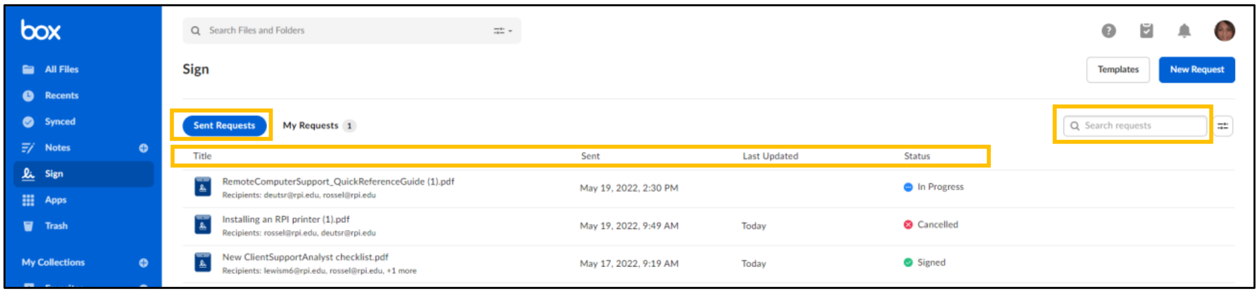
Box Sign – Views (Sent/Search/Filter requests/Details)

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.



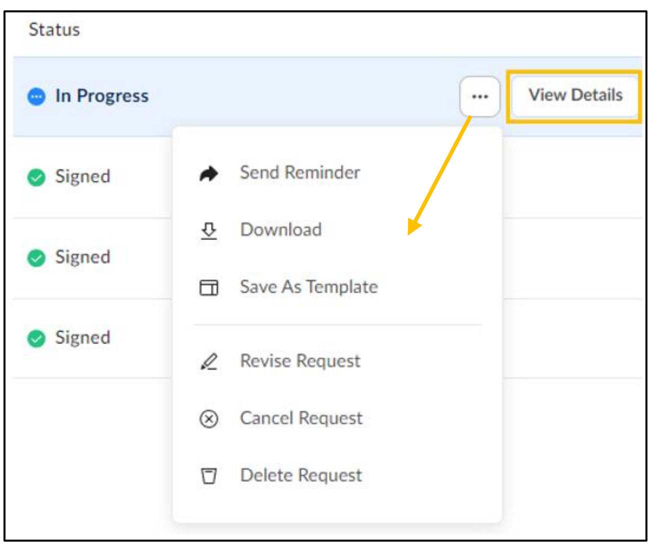
Filter requests

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

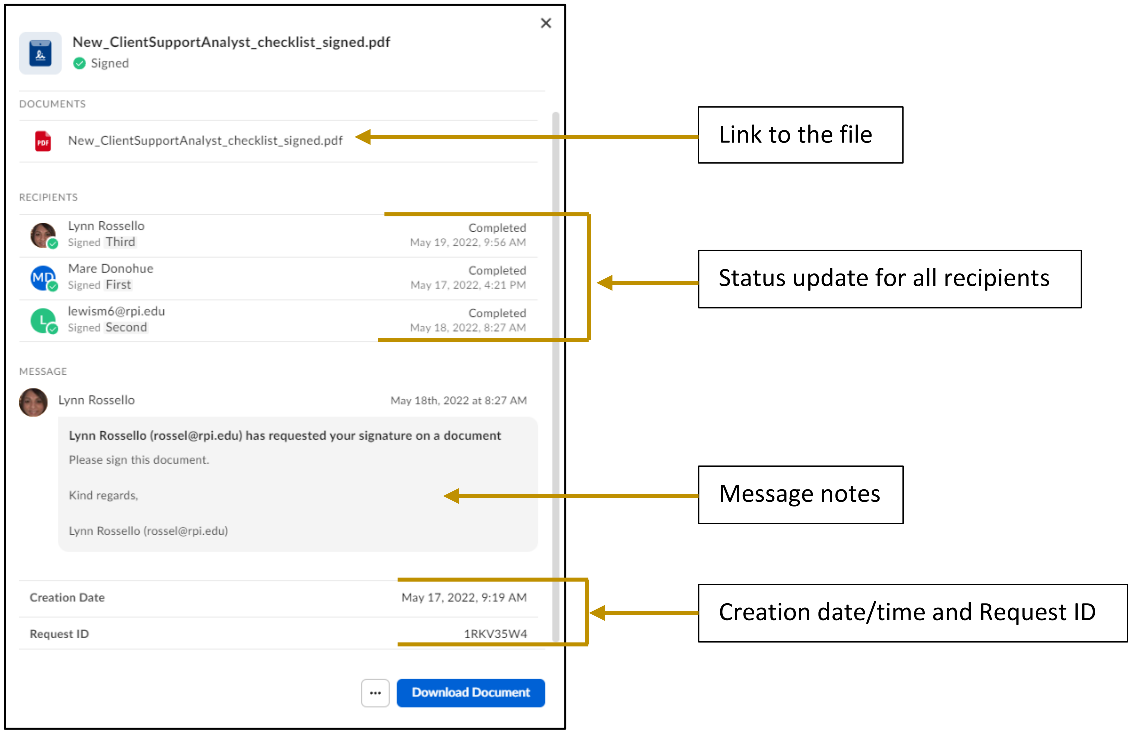
Details

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

1. While viewing Sent Requests, click the **View Details** button to the far right of any request.
2. Click **More Options** " **. . .** " to view features such as manually **Send a Reminder**, **Revise**, **Cancel** or **Delete** a request.



Details screen



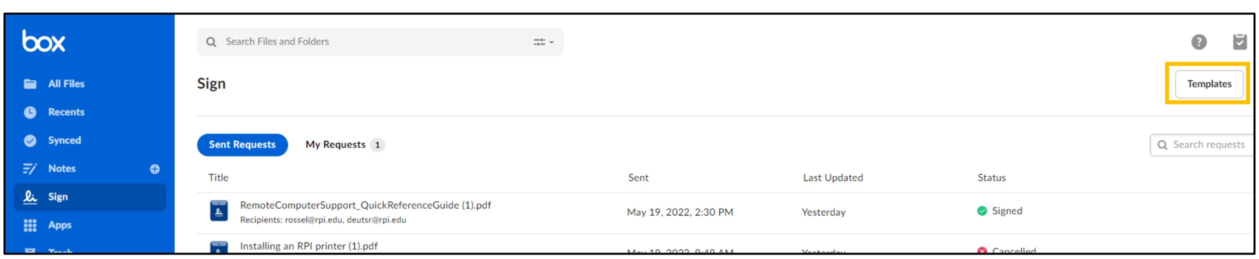
Box Sign template

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**.

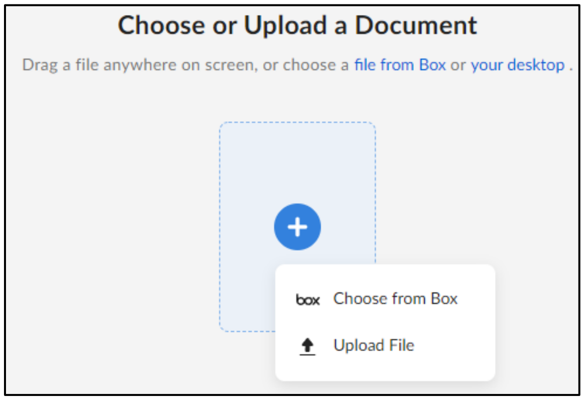
Creating a template from the "Sign" homepage

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.

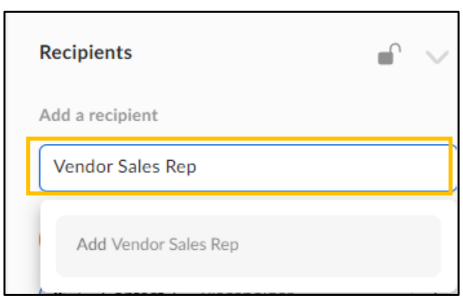
Customizing the template

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

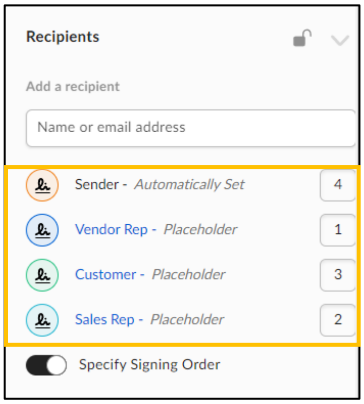
1. Type the placeholder title in the “**Add a recipient**” line and press **Enter**.

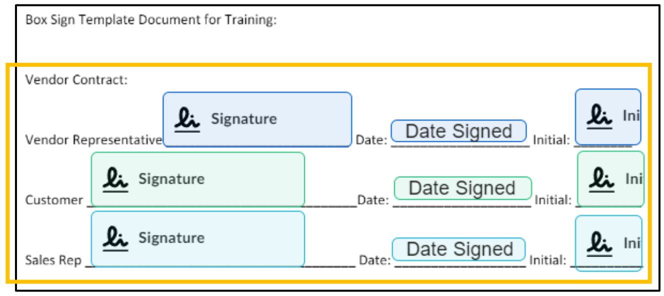


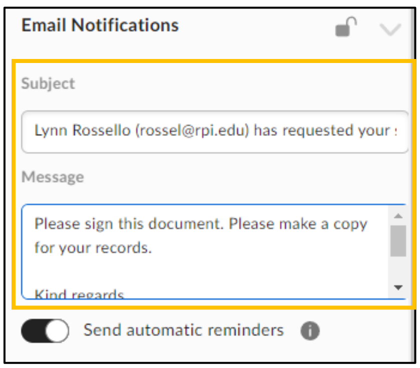
The new placeholder is added.

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.







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.

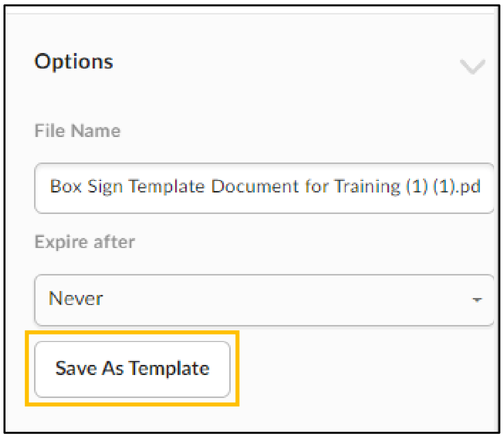
Using the Template

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.



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