Quick Reference Guide – Box Sign

Rensselaer

Logging into Box Sign

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

STEP 1

The Requester – Send 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.

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.

3. Determine who needs to sign this document by selecting: **Me, Me & Others,** or **Others**.
4. 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.
5. 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

The Requester - Adding or modifying recipients

1. Under the **Add a recipient** 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

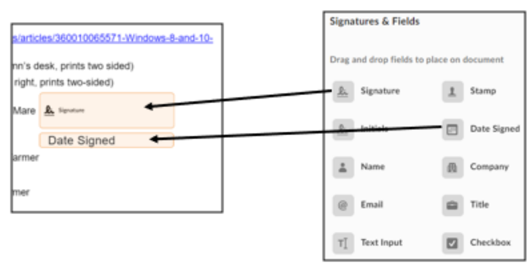
1. Move the **Specify Signing Order** slider to the right and then click in each numbered box to the right of the recipient to retype a different number to designate their signing order.

STEP 3

The Requester – Prepare the Request

Signatures and Fields

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



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

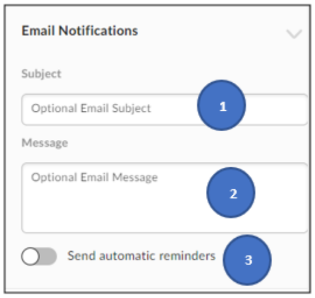
2. Click once inside a field and choose a Recipient (each recipient has a different color)

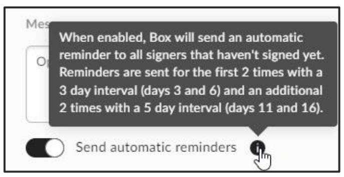
Once the recipient is selected the field box changes to the color designated for that recipient.

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

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

The Requester – Send the Request

1. Click the **Send Request** button located in the upper right corner of the document window.

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

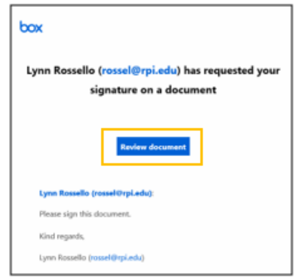
The Signer (continued)

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.

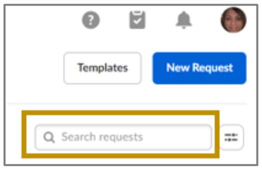
Signing the document with a password

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.

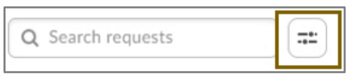
Views (Sent/Search/Filter requests/Details)

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.

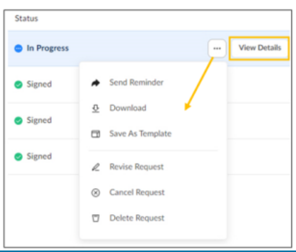


Filter requests – The filter icon allows you to choose six different categories to filter your requests.



Details – The **View Details** button provides a summary of the document sent for e-signature. Shows: **Status update for all recipients**, **message notes**, **creation date/time** and **Request ID** and any **file links**.

More Options – view features such as: manually **Send a Reminder**, **Revise**, **Cancel** or **Delete** a request.



Box Sign - Templates

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 located in the upper right corner of the Sign homepage.
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.

Box Sign – Templates (continued)

Customizing the Template

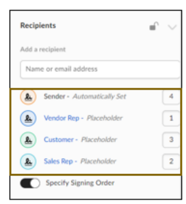
When adding recipients, think about the titles of placeholders for the types of signers you will be sending this template to. **Example**: if you need a Vendor or Sales Rep to always sign the document and you do not know their name, you can use a generic place holder like, *Vendor* or *Sales Rep* for this specific document. Placeholders can be modified by clicking once on the recipient, which opens the "Modify Recipient" page.

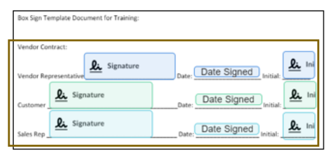
Adding a placeholder and setting up the document

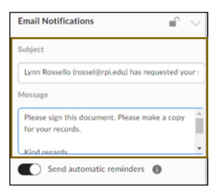
1. Type the placeholder title in the "**Add a recipient**" line and press **Enter**.

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.
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.

Box Sign – Templates (continued)

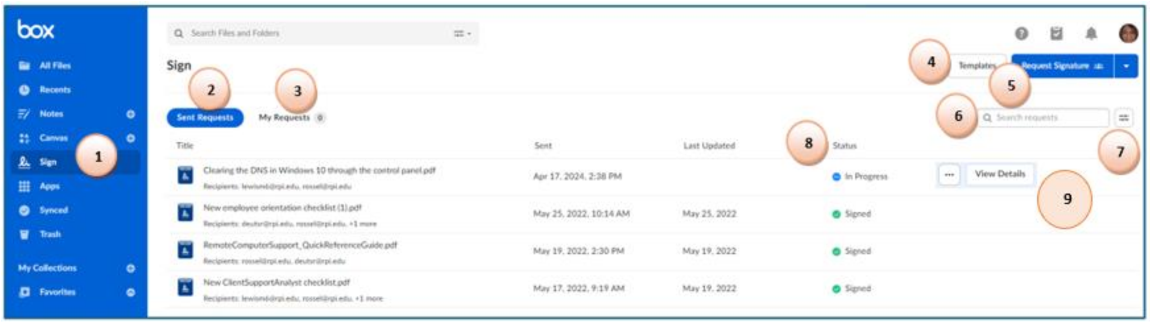
Creating a template from a prepared document

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.

Box Sign Homepage

Navigating the Sign 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 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.

References/Sign Article/RPI Policy

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

Box Sign Article in ITSSC
https://itssc.rpi.edu/hc/en-us/articles/6464941228173

Please review - **Information Classification Policy** https://policy.rpi.edu/policy/Information_Classification_Policy