

PEPPERDINE UNIVERSITY
Information Technology

Pepperdine eSign

User Guide

Last Updated: September 5, 2014

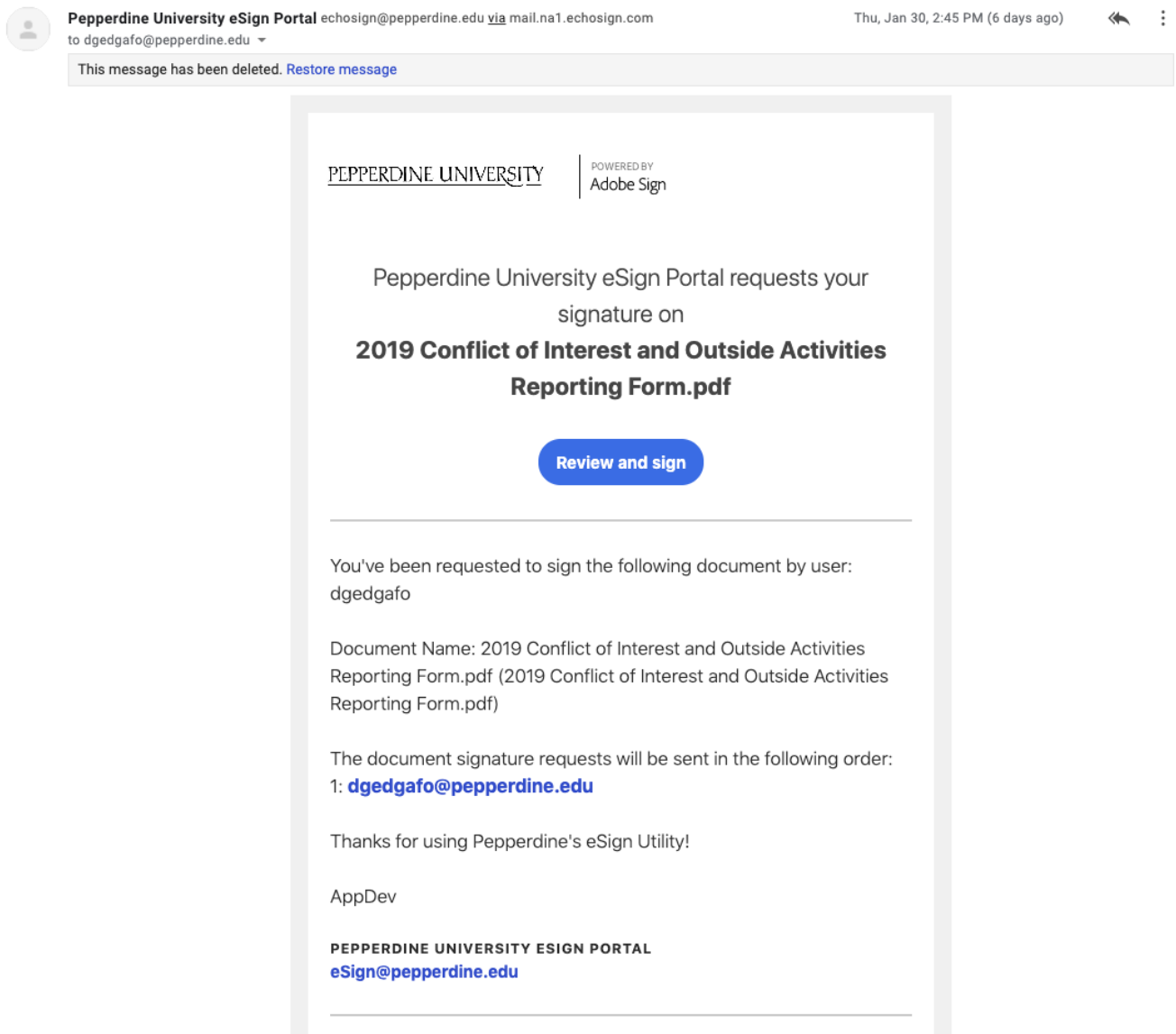
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1 How to Sign a Document with eSign

1.1 Initial Email

The signer will receive an email from Pepperdine University eSign Portal echosign@pepperdine.edu. If the signer is supposed to receive an email and he or she doesn't, check the SPAM filter. The email received will look like this:



1. Note the name of the document, along with the list of recipients
2. Click the blue Review and Sign button. This will open the form for you to sign

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1.2 Signing a Document

After clicking the link to review and e-sign the document, the following webpage will pop up...

The left screenshot shows the 'eSign Document' interface for Pepperdine University. It includes a header with the university logo and a 'Powered by Adobe eSign' note. The main content area has a list of instructions: 1. Review the document. 2. Fill out any required fields. 3. Click the button at the bottom to e-sign. Below this is a section titled 'PEPPERDINE UNIVERSITY ADDITIONAL EMPLOYEE PAYMENTS' with 'Notes' and 'Employee Information' fields. A green 'Start' button is visible. The right screenshot shows the same interface but with the 'Click to Sign' button highlighted. It also includes a 'Reason for Additional Payment(s)' section and signature fields for 'Requestor (Signature)', 'Major Area Budget Manager (Signature)', and 'Vice President (Signature)'. Both screenshots have red boxes and numbers 1 through 4 indicating key elements.

1. Verify that the email is yours.
2. Notifies you the number of **MANDATORY** fields needed to be filled out.
3. The green arrow button will scroll you through every field you can fill in.
4. Click to sign the document.

1.3 Signatures

There are two ways to sign a document electronically.

- Type your name and have eSign automatically generate a signature.

This screenshot shows the 'Enter your name here' step of the eSign process. The user has entered 'Information Technology' as their name. A signature is generated and displayed below the name. The date 'Aug 29, 2014' is also visible. The interface includes an 'Apply' button and a 'Cancel' button.

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2 Using the eSign portal

The portal allows users to check on the status of the documents that are currently in progress, as well as send new ones.

2.1 Landing Page

Going to esign.pepperdine.edu will take you to the landing page pictured below.

Click the blue Log In button on the right.

NOTE: You have to be on the Pepperdine network or Pepperdine VPN to access esign.pepperdine.edu.

The screenshot shows the Pepperdine eSign Portal landing page. At the top is a dark blue header with the Pepperdine logo and 'eSign Portal'. Below this, the page is divided into two main sections. The left section, titled 'Information Technology', features the heading 'eSign - Securely Send, Sign, and Save' in orange. It includes a paragraph about automating the document signing process and a list of three benefits: legally secure online signing, convenience across devices, and secure storage within NoliJ. Below this are sections for 'Best Practice' (notifying recipients and using digital signatures), 'User Guide' (with a download link), 'Frequently Asked Questions' (with a link to the FAQ), 'Bulk Send' (with a BUC file download link), and 'Questions?' (with an email address for help). The right section features the 'eSign' logo and a blue button that says 'Click to log in to eSign'.

PEPPERDINE | eSign Portal

Information Technology

eSign - Securely Send, Sign, and Save

Pepperdine's eSign will automate and streamline the document signing process for contracts and internal forms for all Pepperdine faculty and staff. What has traditionally taken days and sometimes weeks to get a document signed has now been reduced to minutes. *Simply Send, Sign, and Save!*

Benefits

- Legally and securely send documents for signatures online as easy as sending an email.
- Conveniently sign documents using any web browser or device, anywhere and anytime.
- Automatically store your documents securely within NoliJ.

Best Practice

- Always notify your recipients prior to sending a document to be e-signed.
- Documents must be signed entirely with digital signatures or wet signatures. Not both.

User Guide

[Download Here](#)

Frequently Asked Questions

[Click here](#) to find the FAQ.

Bulk Send

Need to send the same form to multiple people? Use the following BUC file to do a bulk send:

[Download](#)

Questions?

Need help? Please email appdev@pepperdine.edu to get help.

eSign

Click to log in to eSign

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2.2 Manage Documents Page

After logging into eSign, the Manage Documents page appears. To go back to this page, simply click the *Manage Documents* button.

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eSign Portal Manage Documents Send FAQ User

Send Document Send Template

Search Documents... Search Type Search

Sort Documents By: ID Ascending Descending Export to Excel

Display Name	Created Date	Document Status	Recipients:
Example 2	9/2/2014 1:15:24 PM	Waiting for signatures	informationtechnology@pep...
Example	9/2/2014 1:14:29 PM	Rejected by owner	informationtechnology@pep...
Sample Again	8/28/2014 4:52:15 PM	Completed	paul.wong@pepperdine.edu
Sample	8/28/2014 4:37:00 PM	Completed	paul.wong@pepperdine.edu...

« 1 »

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1. Send Tab

Select *Send Document* for [Single Send/Bulk Send](#).

Select *Send Template* to use an existing [Internal Template](#).

2. See all documents initiated by your account.

3. FAQ Page

4. User Tab

Select *Create Template* to [create a template](#).

Select *Edit Template* to edit a template.

Select *Logout* to logout.

Select *Submit an Error Report* to submit an error report.

5. Exports the list of documents initiated by your account to an Excel spreadsheet.

NOTE: If a document is *Waiting for signatures* for 30 days, it will automatically be cancelled. This is to make sure eSign's performance is not encumbered by forgotten documents.

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3 Single Send

Single Send is used when the user wants to send a single document out for signatures. From the home screen, click the *Send Document* button and...

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eSign Portal Manage Documents Send ▾ FAQ User ▾

Send Mode: **1**

File Storage Method
 2 ▾

File Display Name

Upload File
 No file chosen **3**

Recipients (?)
 4

CC: *optional* (?)

5

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1. Select **Single**.
2. Select file delivery method from the drop down menu:
Accellion = Secure email
Etrieve = Etrieve Location.
3. Upload your configured PDF file.
4. List recipients' emails spearated with a comma in the order you wish them to sign.
5. Click **Send to EchoSign** to send.

NOTE: All documents must be converted to EchoSign forms before use!
See *Creating Forms Using Adobe Acrobat XI*.

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4 Bulk Send

Bulk Send is used when the user wants to send the same document out to a group of people to sign.

In order to use Bulk Send, you need to download the BUC file from the landing page. See below.

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WaveNet | Faculty/Staff Directory

Navigation
• Information Technology
A-Z Guide for IT

Information Technology
eSign - Securely Send, Sign, and Save

Pepperdine's eSign will automate and streamline the document signing process for contracts and internal forms for all Pepperdine faculty and staff. What has traditionally taken days and sometimes weeks to get a document signed has now been reduced to minutes. *Simply Send, Sign and Save!*

Click here to Login

Benefits

- Legally and securely send documents for signatures online as easy as sending an email.
- Conveniently sign documents using any web browser or device, anywhere and anytime.
- Automatically store your documents securely within Noli.

Frequently Asked Questions
[Click here](#) to find the FAQ.

Bulk Send
Need to send the same form to multiple people? Use the following BUC file to do a bulk send. [Download](#)

Questions?
Need help? Please email esign@pepperdine.edu to get help.

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4.1 Configure the BUC file

	A	B	C	D	E
1	DISPLAYNAME	PRESIGNERS	SIGNERS	POSTSIGNERS	APPROVER
2	Name of the file you are sending		student1@pepperdine.edu		administration@pepperdine.edu
3	Name of the file you are sending		student2@pepperdine.edu		administration@pepperdine.edu
4	Name of the file you are sending		student3@pepperdine.edu		administration@pepperdine.edu
5	Name of the file you are sending		student4@pepperdine.edu		administration@pepperdine.edu
6	Name of the file you are sending		student5@pepperdine.edu		administration@pepperdine.edu

The BUC file has five columns in it.

Display Name: This is a descriptive title for the document that is more reader-friendly than the actual file name. This is the title that will show up on the eSign homepage. ****REQUIRED****

Presigners: Presigners are individuals who will always need to sign the form, regardless of who is making the request. They will sign the form before the signers receive it, so this field is generally for individuals responsible for allowing a form to be submitted. If there are multiple presigners, they should be entered in the same cell, separated by commas. ****OPTIONAL****

Signers: Signers are the specific individuals who need to sign a particular instance of the document. This could include an individual filling out a request form and their supervisor, or an individual who must sign a waiver. If there are multiple signers, they should be entered in the same cell, separated by commas. ****REQUIRED****

Postsigners: Postsigners are individuals who will always need to sign a form, regardless of who is making the request. They are usually the individuals who must give the form final approval. This could include a department head who will always need to approve an equipment request, or an InfoSec administrator who always need to approve security access. If there are multiple postsigners, they should be entered in the same cell, separated by commas. ****OPTIONAL****

Approver: After the document has been signed by all of the presigners, signers, and postsigners, it will be sent to the approver, who will ensure that the information has been filled out correctly. There can be only one approver. ****REQUIRED****

4.2 Bulk Send

Once the BUC file has been filled out and formatted correctly, go back to eSign. From the home screen, click the *Send Document* button and...

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eSign Portal Manage Documents Send ▾ FAQ User ▾

Send Mode: Single Bulk **1**

File Storage Method
Accellion **2** ▾

Upload File
Choose File No file chosen **3**
Select a file to upload

Upload BUC File
Choose File No file chosen **4**
Select a BUC file to upload

CC: "optional" (?)

Send To EchoSign **5**

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1. Select **Bulk**.
2. Select file delivery method from the drop down menu:
Accellion = Secure email
Etrieve = Etrieve folder
3. Upload your configured PDF file.
4. Upload your BUC file.
5. Click **Send to EchoSign** to send.

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5 eSign Templates

eSign Templates are used when you have a form that is regularly signed by the same signers. Templates allow for different signature roles to be predefined, eliminating the need to type the predefined signers email addresses.

There are two types of templates, [Internal Templates](#) and [Shared Templates](#).

5.1 Gaining Access to Templates

There is no prerequisite to using Templates that are already created. To gain access to Template creation tools, you will need Etrieve Content access and then be granted Template access.

To get access to Etrieve Content, fill out the following form: <https://etcentral.pepperdine.edu/#/form/74>

To get Template access, please email appMgmt@pepperdine.edu. The team will look over the requests and grant or deny access within 2-3 business days.

5.2 Internal Templates

Internal Templates are used for documents whose work process is internal. From the home screen, click the *Send Template* button and...

The screenshot displays the Pepperdine University eSign Portal interface. The top navigation bar includes 'eSign Portal', 'Manage Documents', 'Send', 'FAQ', and 'User'. The main form on the left is titled 'Template' and contains several fields: 'Template' (dropdown menu), 'Send Mode' (Single), 'File Storage Method' (Accellion), 'Attachments' (Choose File), 'File Display Name', 'Requestor' (requestor@pepperdine.edu), 'MABM' (MABM@pepperdine.edu), 'VP' (VP@pepperdine.edu), 'Final EchoSign Approver' (requestor@pepperdine.edu), 'CC: *optional* (?)', and a 'Send To EchoSign' button. A preview of the document is shown on the right, titled 'PEPPERDINE UNIVERSITY ADDITIONAL EMPLOYER PAYMENTS'. The document contains a table with columns for 'Requestor', 'MABM', 'VP', and 'Final EchoSign Approver'. The document is marked with a 'Sign' button and a 'Please fill out the following form.' message. Red boxes with numbers 1 through 6 highlight specific elements: 1. Template dropdown, 2. File Storage Method dropdown, 3. Attachments button, 4. MABM field, 5. Document preview, and 6. Send To EchoSign button.

1. Select which template you want to use.
2. Select file delivery method from the drop down menu:
Accellion = Secure email
Nolij = Nolij folder
3. Add supporting/additional documentation if necessary.
4. Named Fields are created to allow for emails to be prepopulated.
5. Displays the preview of the document being signed.
6. Click **Send to EchoSign** to send.

5.3 Shared Templates

Shared Templates are used for documents that need to be accessed by other people in the University. These templates are given a customized URL, so any individual that can access eSign can initiate the form. Embedding the URL into a website will allow people easy access to the Shared Template. Clicking the URL will direct the user to the following page and...

The screenshot displays the Pepperdine University eSign Portal interface. The header features the university's logo and navigation links. The main form area is titled 'Template' and contains several sections: 'Send Mode' (set to 'Single'), 'File Storage Method' (set to 'Accellion'), 'Attachments' (with a 'Choose File' button), 'File Display Name', and various roles with associated text fields or email addresses. A 'Send To EchoSign' button is at the bottom. On the right, a document preview is shown with a purple banner that reads 'Please fill out the following form.' Red boxes with numbers 1 through 7 are overlaid on the form to indicate key elements.

1. Selected shared template.
2. Select file delivery method from the drop down menu:
Accellion = Secure email
Etrieve = Etrieve folder
3. Add supporting/additional documentation if necessary.
4. Named Fields that vary by person/area, filled in by the user.
5. Named Fields that are constant in all processes involving this form, prepopulated.
6. Displays the preview of the document being signed.
7. Click **Send to EchoSign** to send.

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5.4 Creating Templates

The Creating Templates page is used when the user wants to create a new template. From the home screen, click the *User tab*, select *Create Template* and...

1. Select the Eteive document type that the finished form will be associated with
2. Input the name of the template.
3. Upload the file of the form that is becoming a template.
4. List Presigners' emails and Field Names seperated by commas.
NOTE: These fields are only used when there is a set signer at the beginning of the process.
Example: *requestor@pepperdine.edu*
List Presigners' Field Names - Requestor
5. List Signers' Field Names seperated by commas.
NOTE: These fields are the fields that depend on the user.
Example: *signer1@pepperdine.edu, signer2@pepperdine.edu*
List Signers' Field Names - Approver, MABM
6. List Postsigners' emails and Field Names seperated by commas.
NOTE: These fields are only used when there is a set signer at the end of the process. Example:
controller@pepperdine.edu
List Postsigners' Field Names - University Controller
7. Click **Create Template!** to create the template.

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6 Forms Using Adobe Acrobat XI

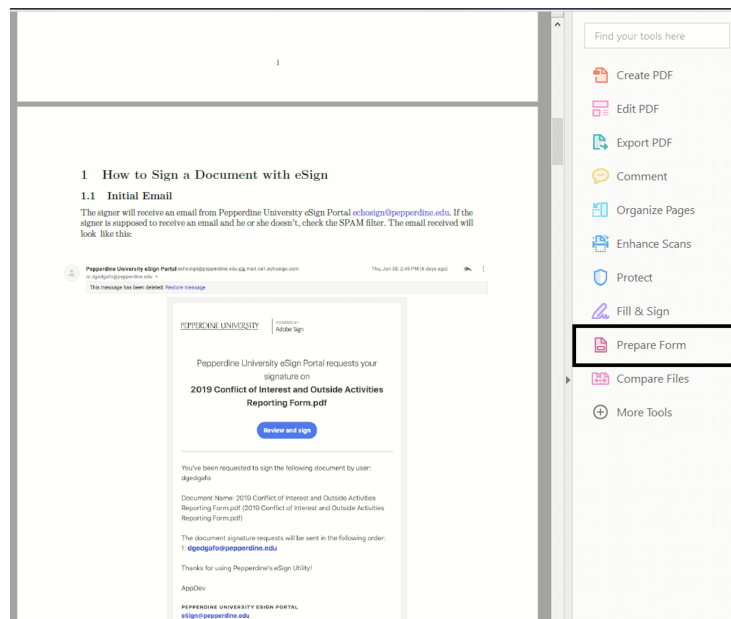
6.1 Creating Forms Using Adobe Acrobat XI

Forms have to be properly configured before being uploaded into eSign. It is **highly** recommended that documents be in PDF form before uploading them into eSign.

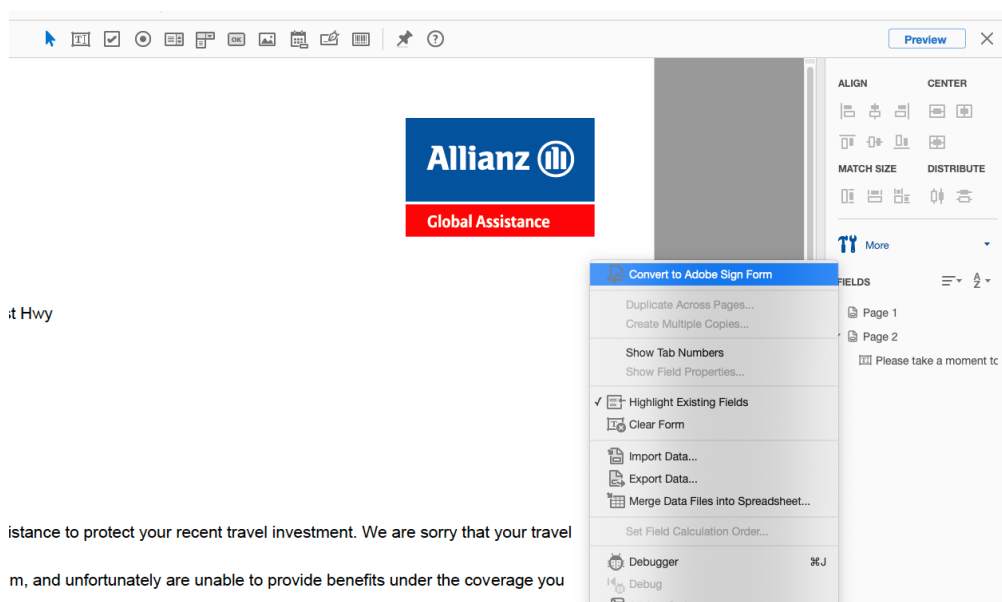
Converting the form into an EchoSign form allows you to customize your form to be compatible with eSign.

For detailed Adobe instructions, please click [here](#).

1. Click Prepare Form on the right hand side



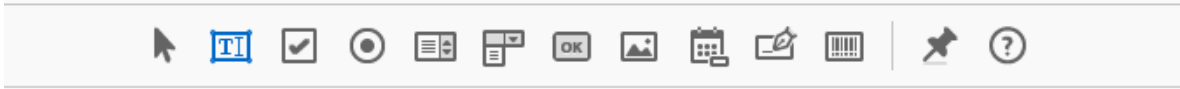
2. Click More... on the right hand side and click "Convert to Adobe Sign form".



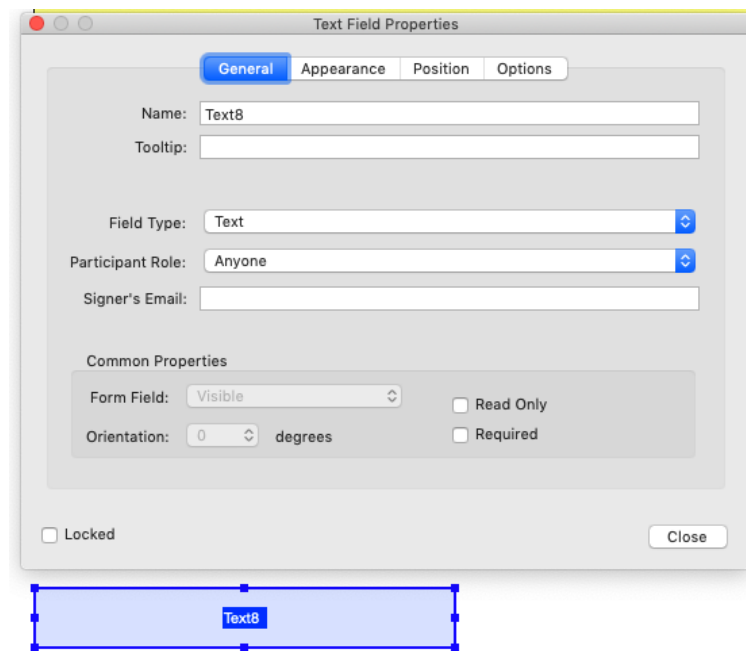
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6.2 Editing Form Fields Using Adobe Acrobat

Click the type of the field that you would like to add from the top bar.



To set the properties of the new field, right click the field and select Properties. A menu should appear and you can assign the name, field type, and role of the field.



There are four important parts to the properties of a Form Field.

1. Each field should have a **unique** name.
 2. What field type is it? *ex. Text, Signature, Date, etc.*
 3. Who is filling out this field? *ex. Signer1, Signer2, ...*
 4. Is this field required or read only?
1. Always notify your recipients prior to sending a document to be e-signed. This includes any assistants for employees in the work process.
 2. Documents must be signed **entirely** with digital signatures or wet signatures. **Not Both.**
 3. A person not in the work flow may **NOT** sign on behalf of a signer. There is a feature for a signer to delegate another person to sign on their behalf.
 4. A person is **NOT** allowed to delegate themselves on the signer's behalf without written consent.

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