

OneSpan Sign for Microsoft SharePoint 2013

User's Guide

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Introduction

This guide describes how to use *OneSpan Sign for Microsoft SharePoint 2013* to obtain secure electronic signatures.

The guide's main sections are:

- [Minimum System Requirements on page 3](#)
- [Creating & Sending a Package on page 5](#)
- [Navigation Menu on page 21](#)

1.1 Video Tutorial



[How to Use OneSpan Sign for Microsoft SharePoint](#)

Minimum System Requirements

2.1 Operating System

- Vista, Windows 7, Windows 8
- Mac OS X

2.2 Browsers

- Internet Explorer: 11
- Chrome: 34, 35, 36
- Firefox: 28, 29, 30

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Creating & Sending a Package

A *Package* is an e-signature process within OneSpan Sign. To create a package and then distribute its documents for signing, perform the following procedures:

- [Step 1. Creating a Package on page 6](#)
- [Step 2. Managing Signers on page 8](#)
- [Step 3. Adding Documents on page 13](#)
- [Step 4. Preparing Documents on page 17](#)
- [Step 5. Sending a Package on page 20](#)

3.1 Step 1. Creating a Package

To create a package:

1. On the top navigation menu, click **New Package**.

NOTE: Optionally, you can modify an existing package by clicking **Packages** from the navigation menu, and selecting the package you want to modify.

2. Give the package a **Name**. Ensure that the name meaningfully identifies the package's contents (e.g., *Mortgage Renewal Documents*).
 - Optional: Give the package a **Description** that explains its purpose.
 - Optional: Select a **Template** from the drop-down menu if you want to base your package's creation on an existing template.
 - Optional :Click **Advanced Options** to configure any of the following:
 - **Expiry Date** – Indicate to all signers that the documents must be signed by a specified date.
 - **Language** – Specify the package's language.
 - **Group** – Specify the group to which the package belongs. If no group is selected, only the package creator will be able to take actions on the package.
 - **Email Message** – Configure an optional email message to all signers.
 - **In Person Signing** – Check this option if you want to require signing-in-person.
 - **Review After Completion** – Check this option if you want to review the package and its documents before marking it as *Complete*.
3. Click **Create**.

Package



Details | **Advanced Options**

Name *

Description

Template

Package



Details | **Advanced Options**

Expiry Date

By choosing an expiry date, you indicate to all Signers that the Documents are to be signed by the specified date. The expiry date is used to assist you to managing your Packages. The Package will no longer be available for signing once it has expired.

Language

Group

Email Message

Optional email message to all Signers. This text will appear in the email message after the Web link for this Package.

In Person Enable in person signing.
If you want to sign in person, check this option.

Review After Completion Do not auto-complete the Package.
If you need to review the Package and its Documents before marking it complete, check this option.

3.2 Step 2. Managing Signers

You should add as "signers" everyone whom you want to sign one or more of a package's documents . Signers are added one at a time. By default, you are listed as a signer because you're the package owner. All signers for the current package are displayed in the *Signers* list.

The rest of this section describes:

- [Adding Signers on page 8](#)
- [Signer Authentication on page 10](#)
- [Changing the Signer Order on page 11](#)
- [Deleting Signers on page 12](#)

3.2.1 Adding Signers

To add a signer to a package:

1. From the package view, under *Signers* click **Add Signers**.

Package : Contract for Bob Smith Prepare to send

Details Advanced Options

Name *

Description

Update

Documents

There are no records to show in this view.

Upload Document Select Document(s) Change Order

Signers

First Name	Last Name	Email	Placeholder	Action
Alan	Johnson	ajohnson@gmail.com	..	

1 - 1

Add Signers Define a role workflow

2. Enter the signer's **Email, First Name, and Last Name.**

Signer □ ×

Signer Advanced

Signer Type This signer will be:
Someone I invite.

Signer Details
Invite someone to sign your documents.

Select user from:
 Active Directory New User Mapping List

User:

Email: *
bobsmith@gmail.com

First Name: *
Bob

Last Name: *
Smith

Title:

Company:
Company Inc.

Authentication Method Method:
 Email
 Q&A
 SMS

The identity of the Signer is verified using their secure name and password when logging into the above email account.

Save Cancel

TIP: Under *Signer Type*, you can choose a Signer Placeholder. This is useful if you are creating a template, and don't know the signer's identity.

- Optional: Add an existing SharePoint contact as a signer by choosing **Active Directory** or **Mapping List**.
 - Optional: Enter the signer's **Title** and **Company**.
3. Choose an [Authentication Method](#). The choice is between **Email** (default), **Q&A**, and **SMS**.
4. Click **Advanced** to configure any of following options:

- *Personal Email Message Option*
- *Document Delivery Option*
- *Change Signer Option*

Signer

Signer **Advanced**

Personal Email Message Option Message:

You can add a personal message as part of the invitation sent to this Signer or Reviewer by entering the desired text in the message box below.

Document Delivery Option Delivery:

Also deliver signed documents as an email attachment
Signers can securely download the signed documents from the completed e-SignPackage™. The completed e-SignPackage™ will remain accessible until archived or deleted.

Change Signer Option Allow to change Signer:

Allow to change Signer
You can allow a Signer to assign someone else to sign the e-SignPackage™ instead of the original Signer that is defined by you. The Signer will then be asked to enter the email address and full name of the person to sign along with an optional email message to send to the new Signer. You will be notified of this change of Signer and will also be CC'd on the email message (if used).

Save Cancel

5. Click **Save** .

3.2.2 Signer Authentication

A signer can be authenticated using any of the following three methods:

- **Email:** This is the default Authentication Method. The identity of a signer is verified by their ability to access the email sent by OneSpan Sign. Because this method depends on the security of the email system, it is less secure than the Q&A and SMS methods.

Authentication Method

Method:

- Email
- Q&A
- SMS

The identity of the Signer is verified using their secure name and password when logging into the above email account.

- **Q&A:** This method requires the package owner to define one or two questions (and answers) to which the signer must answer correctly. If the signer can do so, they are verified as the correct package recipient. If you choose to mask the answer provided by the signer, each character entered by them will appear on their screen as an asterisk (*).

Authentication Method

Method:

Email

Q&A

SMS

The identity of the Signer is verified using their secure name and password when logging into the above email account.

Question 1

What city do you live in?

Answer 1

Montreal

Mask the answer when entered by the Signer

Question 2

What colour is the sky?

Answer 2

Blue

Mask the answer when entered by the Signer

- **SMS:** When this method is selected, the package owner must provide the signer's mobile phone number. OneSpan Sign will send a code to this number once the package is sent. The signer's identity is verified by their ability to provide this code when they try to access the package.

Authentication Method

Method:

Email

Q&A

SMS

The identity of the Signer is verified using the secure SMS code that is sent to the Signer's cell phone number provided below. The Signer will have to enter this code to start signing.

Cell number: *

5141234567

Example : 5143342345

3.2.3 Changing the Signer Order

If a package has multiple documents, each signer must sign the documents in the order in which those documents appear in the *Documents* list.

However, multiple signers of a given package can by default sign in any order. If you want signers to sign in a specific order, configure a *Signer Workflow* by performing the following procedure.

To configure a Signer Workflow:

1. In the *Signers* section, select the checkbox called **Define a role workflow**. The box changes its name to *Change Order*.
2. Click **Change Order**. A new dialog box displays an ordered list of signers.
3. Drag the handlebar to the left of each signer's name to its desired position in the *Signers* list. The cursor will change to a crossbar.
4. When you've positioned all signers in the desired order, click **OK**.

3.2.4 Deleting Signers

To delete a signer from a package:

- Click **X** next to the signer's name.

3.3 Step 3. Adding Documents

This section describes:

- [Uploading Documents on page 14](#)
- [Adding Documents from SharePoint Libraries on page 15](#)
- [Changing the Document Order on page 16](#)
- [Deleting Documents on page 16](#)

OneSpan Sign supports three types of documents:

- Adobe *Portable Document Format* (*.pdf).
- Microsoft Word (*.doc or *.docx).
- Open Office (*.odt).

CAUTION: The system supports a maximum of 5 MB *per document* (smaller documents yield better performance – we recommend under 5 MB per document). However, there is no limit to: (1) the number of documents in a transaction; (2) the total collective size of documents in a transaction.

3.3.1 Uploading Documents

To upload a document to a package from a local repository:

1. From the *Package* page, click **Upload Document**.

Package : Contract for Bob Smith Prepare to send

Details | Advanced Options

Name *

Description

Update

Documents

There are no records to show in this view.

Upload Document Select Document(s) Change Order

First Name	Last Name	Email	Placeholder	Action
Alan	Johnson	ajohnson@gmail.com	..	

Add Signers Define a role workflow

2. On the dialog box that appears, click **Choose File**, browse to your document's location, and select it. Click **Open**.

Upload Documents Close X

Browse to the document you intend to upload.

Name: * Choose File

Overwrite existing files

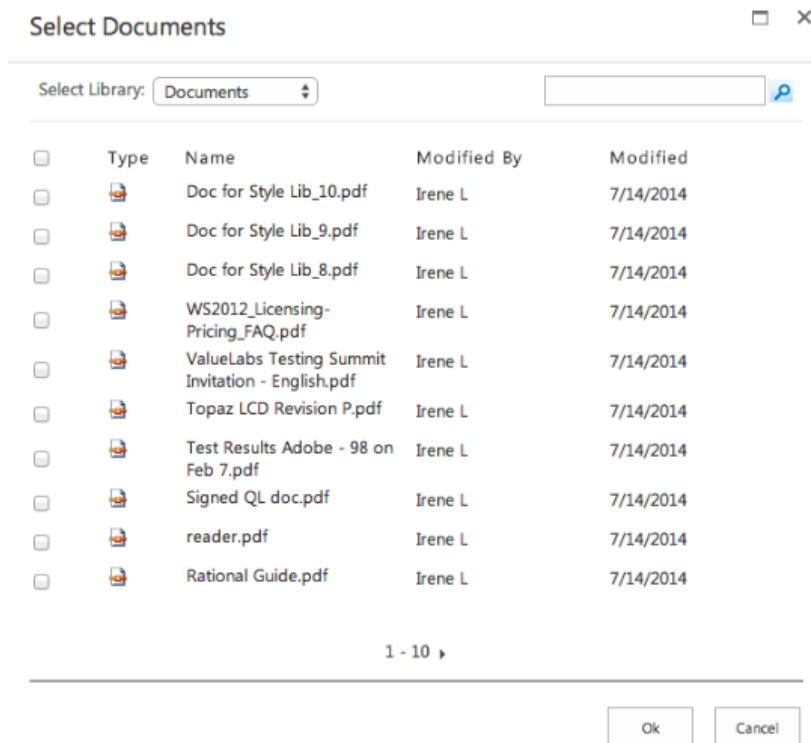
Ok Cancel

3. *Optional*: If you want to add another document, repeat Steps 1-2.
4. Click **OK**.

3.3.2 Adding Documents from SharePoint Libraries

To add documents to a package from a SharePoint Library:

1. From the *Package* page, click **Select Document(s)**.
2. Click the **Select Library** drop-down menu, and select the relevant library.
3. Choose each document you want to add by selecting the box next to its name. You can select multiple files.



4. Click **OK**.

3.3.3 Changing the Document Order

To change the order in which documents will be presented to signers:

1. Click **Change Order**.
2. Drag the handlebar left of each document's name to its desired location in the *Documents* list.
3. When all documents are in the desired order, click **OK**.

3.3.4 Deleting Documents

To delete a document from a package:

- Next to the document name, under *Action*, click **X**.

3.4 Step 4. Preparing Documents

Once you have added the documents and signers to the package, you are ready to start adding Signature Boxes and fields to each document. Signature Boxes define where each signer must sign a document, and fields contain associated information about the signer. On a given document, you can include more than one Signature Box for the same signer.

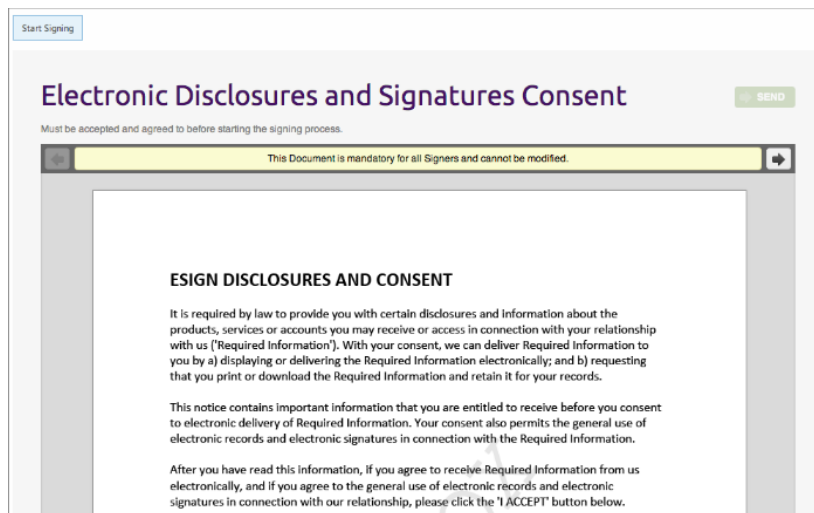
The rest of this section describes:

- [Adding Signature Boxes and Fields on page 17](#)
- [Field Types on page 18](#)
- [Electronic Disclosure & Signature Consent on page 19](#)

3.4.1 Adding Signature Boxes and Fields

To add Signature Boxes and fields to a document:

1. Click **Prepare to Send** to open the *Designer* view.
2. On the [Electronic Disclosure & Signature Consent on page 19](#), click the right arrow to take you to your first document.



3. Using the drop-down arrow in the *Signers* list, select the signer whose signature you want to add.
4. Click **Add Signature**.
5. Drag the Signature Box to where you want it to appear in the document.
6. To change the Signature Box type, or to add a field, click the gear icon. This will open the Signature Box menu.

TIP: The next section describes the types of fields that can be added.

7. Repeat Steps 3 to 6 for each Signature Box you want to add.
8. If the package includes multiple documents, click the **right arrow** to proceed to the next document. Then repeat Steps 3 to 7.

3.4.2 Field Types

You can add any of the following types of fields:

- **Signing Date:** This field is automatically filled with the date when the document is signed.
- **Signer Name:** This field is automatically filled with the signer's first and last names, which are provided when the signer is added to the transaction.
- **Signer Title:** This field displays the signer's title, which is provided when the signer is added to the transaction. If the signer's title is not provided, this field remains blank, and is not visible on the document.
- **Signer Company:** This field displays the signer's company, which is provided when the signer is added to the transaction. If the signer's company is not provided, this field remains blank, and is not visible on the document.
- **Text Field:** This field provides a box in which the signer can enter additional information at the time of signing.
- **Checkbox:** A checkbox is an option that the signer can click to display a check mark (clicking again removes the mark). A checkbox is useful to indicate that

the signer has completed an action. For example, a document may include the question *Have you applied for a mortgage with another financial institution?*, with accompanying answers *Yes* or *No*. You can place one checkbox beside *Yes*, and another beside *No*.

3.4.3 Electronic Disclosure & Signature Consent

OneSpan Sign automatically includes the *Electronic Disclosures and Signatures Consent* agreement in all its packages. All signers must accept the terms of this agreement before they can access package documents.

If you do not want this agreement in your packages, please contact Technical Support (sign.support@onespan.com; 1-855-MYESIGN).

3.5 Step 5. Sending a Package

After you have prepared a package's documents, you are ready to distribute the package to its recipients.

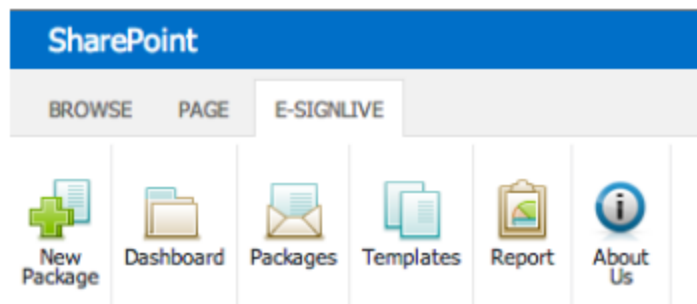
To send a package to its recipients:

1. In the *Designer*, click **Send**.
2. Click **OK** to confirm that you want to send the package.

Navigation Menu

The top Navigation Menu connects to the following topics:

- [New Package on page 22](#)
- [Dashboard on page 23](#)
- [Packages on page 24](#)
- [Templates on page 25](#)
- [Report on page 27](#)
- [About Us on page 28](#)



4.1 New Package

To learn how to create a package, see [Creating & Sending a Package](#) on page 5.

4.2 Dashboard

From the *Dashboard*, you can view:

- A list of unsigned packages
- Recent Sent, Completed, or Archived Packages
- Usage Statistics including:
 - Percentage of Completed over Sent Packages
 - Average time for a package to go from Sent to Completed
 - Number of Package Events

Dashboard

<p>Oldest Unsigned packages</p> <p>There are no records to show in this view.</p>	<p>Statistics</p> <p>From: <input type="text" value="6/24/2014"/> To: <input type="text" value="7/24/2014"/></p> <p><input type="button" value="Go"/></p>						
<p>Recent Sent or Completed/Archived packages</p> <p>There are no records to show in this view.</p>	<table border="1"><tr><td>Wgt of Completed Over Sent</td><td>Average duration between Sent and Completed</td><td>Package Events</td></tr><tr><td>0.0%</td><td>0.0 days</td><td>1</td></tr></table>	Wgt of Completed Over Sent	Average duration between Sent and Completed	Package Events	0.0%	0.0 days	1
Wgt of Completed Over Sent	Average duration between Sent and Completed	Package Events					
0.0%	0.0 days	1					

4.3 Packages

The *Packages* page displays information about each package, such as its:

- Completion status
- Package owner
- Expiry date
- Date the package was created
- Date the package was last updated
- An action toolbar from which you can perform common package tasks, such as:
 - Edit a package
 - Prepare documents by inserting Signature Boxes for each signer
 - Review, accept, and sign documents
 - Change the package status from *Sent* to *Drafts*
 - Archive a package
 - Trash or permanently delete a package

4.4 Templates

Templates enable senders to save the common attributes of a package for reuse.

The rest of this section describes:

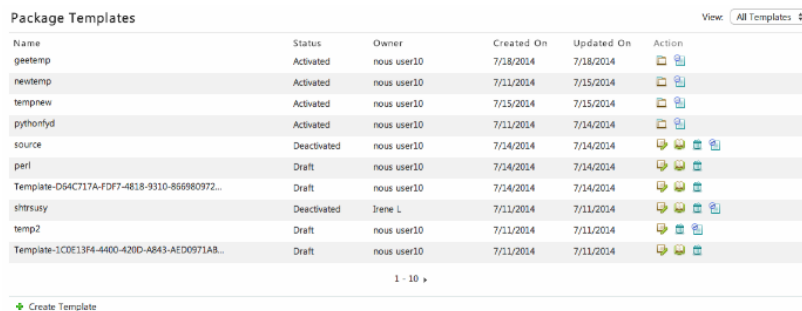
- [Creating a Template on page 25](#)
- [Using an Existing Template on page 26](#)



























4.4.1 Creating a Template

A template can be created either from scratch, or from an existing package.


To create a package template:

1. On the top navigation menu, click **Templates**. Your existing templates are listed under *Package Templates*.
2. For now, to create a new template, click **Create Template**.



Name	Status	Owner	Created On	Updated On	Action
geetemp	Activated	nous user10	7/18/2014	7/18/2014	 
newtemp	Activated	nous user10	7/11/2014	7/15/2014	 
tempnew	Activated	nous user10	7/15/2014	7/15/2014	 
pythonfyd	Activated	nous user10	7/11/2014	7/14/2014	 
source	Deactivated	nous user10	7/14/2014	7/14/2014	  
perl	Draft	nous user10	7/14/2014	7/14/2014	  
Template-D64C717A-FDF7-4818-9310-866980972...	Draft	nous user10	7/14/2014	7/14/2014	  
shtrsusy	Deactivated	Irene L	7/11/2014	7/11/2014	  
temp2	Draft	nous user10	7/11/2014	7/11/2014	  
Template-1C0E13F4-4400-420D-A843-AED0971A8...	Draft	nous user10	7/11/2014	7/11/2014	  

1 - 10 >

 Create Template

3. Give the new template a **Name** and optionally a **Description**.
 - Optionally, click **Advanced Options** to specify:
 - **Language** – The package's language
 - **Email Message** – An email message for all signers
 - **In Person Signing** – Check this option if you want the signers to sign in person.

- **Review After Completion** – Check this option if you want to review the package and its documents before marking it as *Completed*.
4. Click **Create**.
 5. Click **Add Document** to [add documents](#) to the template.
 6. Click **Add Signer**, to [add signers and/or signer placeholders](#) to the template.
 7. Click each document to access the *Designer* view, and insert **Signatures Boxes** and fields. The placement of those boxes and fields is saved automatically.

4.4.2 Using an Existing Template

To use an existing template:

1. In the top navigation menu, click **Templates**.
2. Click the template you want to use.
3. *Optional:* Modify the template to suit your needs.

4.5 Report

To view a report on your account's packages and activity:

1. On the *OneSpan Sign* toolbar, click **Report**.
2. *Optional*: Configure the report to display the activity on your account for a given date range by entering start and end dates in the **From** and **To** fields.
3. Click **Go**. The screen displays the number of packages in each status category.

Report

Package Name:

From: To:

Draft	Sent	Completed	Archived	Declined	Trashed
1	0	0	0	0	0

Package Name	Status	Owner	Expiry Date	Updated On
Contract for Bob Smith	Draft	Alan M.1	07/31/2014	07/24/2014

Documents	
Name	Description
Unsigned Document 01.pdf	

Signers	
First Name	Last Name
Alan	M.1

Signers	
First Name	Last Name
Alan	M.1

Name	Description	Added By
Unsigned Document 01.pdf		Alan M.1

First Name	Last Name	Email
Alan	M.1	amarynk+1@gmail.com

1 - 1

4. *Optional*: To learn more about the packages in a particular category, click the corresponding box.

4.6 About Us

Clicking **About Us** enables you to view product information, terms and conditions.