citrix™

Electronic signature

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About

February 23, 2022

Citrix delivers electronic signature capability using Citrix RightSignature. Once integrated with your Citrix Workspace or Content Collaboration account, you have the ability to obtain legally binding signatures on documents entirely online. This allows documents to be completed quickly and securely.

Use electronic signature to send a document to obtain online signatures. Simply upload your document, enter the email address for each signer, and place any text fields and signature locations. Electronic signature emails recipients a unique link sign your document and automatically guides them through the document to fill out any necessary text fields and sign online.

For more information on administrative tasks in electronic signature, see Electronic signature in Citrix Product documentation.
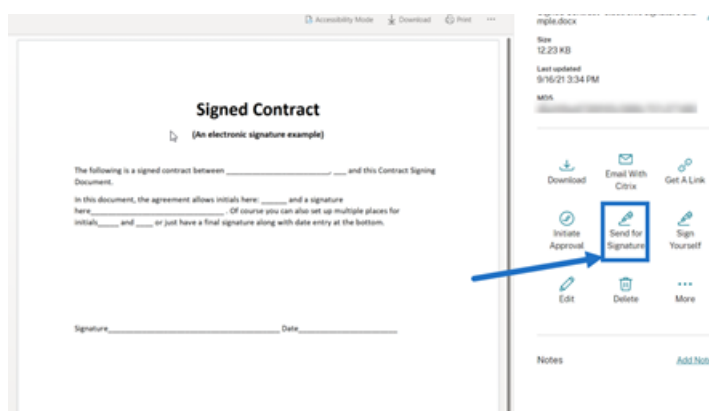
Send for signature

September 30, 2022

The following instructions provide the steps necessary to send a document for signature in both **Files for Citrix Workspace** and **ShareFile**.

Once electronic signature is enabled for your Workspace or ShareFile account, you can send documents for signature. For more information on enablement, see Getting started.

1. From either your Files for Citrix Workspace or ShareFile account, select the document you want to send for signature. The preview window opens.
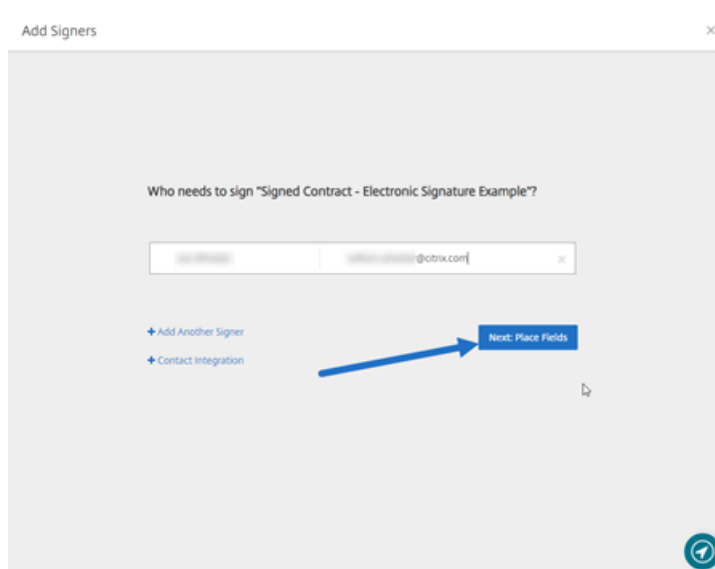

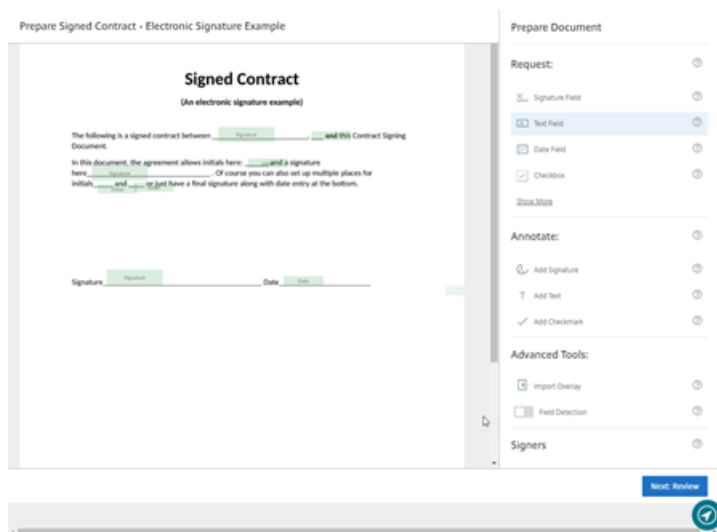2. Select **Send for Signature** to open RightSignature.
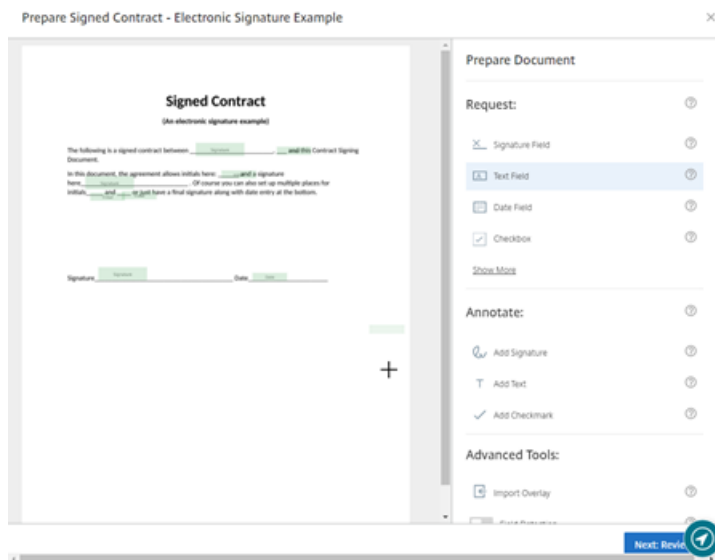
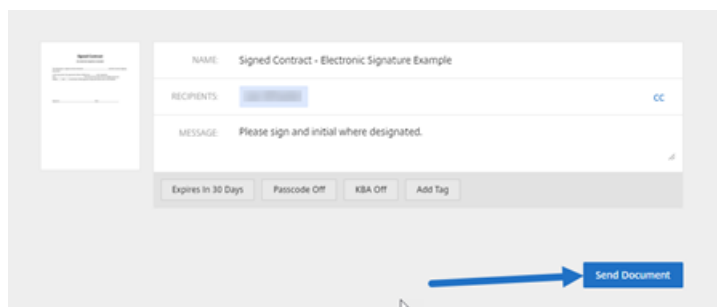3. Select **Prepare Document** then type the name of the signer and their email address.

4. Select **Next: Place Fields** to create the signer and annotation fields for the document's recipients.

5. Select **Next: Review** to type a personalized message, set an expiration date, and add security settings such as passcode and KBA for the signer, if necessary.

6. Select **Send Document**.

Message status

The signer receives an email requesting the signature for the document. You can monitor the status by selecting the document in the RightSignature dashboard.

The **Overview** provides the following information.

- **People involved**: receipient names and email addresses.
- **Security Options**: including expiration date, passcode, and signer sequencing, if selected.
- **Tags**: if selected.
- **Message to Recipient(s)**: the message you provided to the recipients when you requested their signature.

The **History** provides a timeline of actions from signature request creation to the document siganture being executed by the signer(s).

Bulk send for signature

February 16, 2022

The following instructions provide the steps necessary to send multiple signers their own copy of a document to sign via an e-mail.

1. Select **Bulk send for signature**.
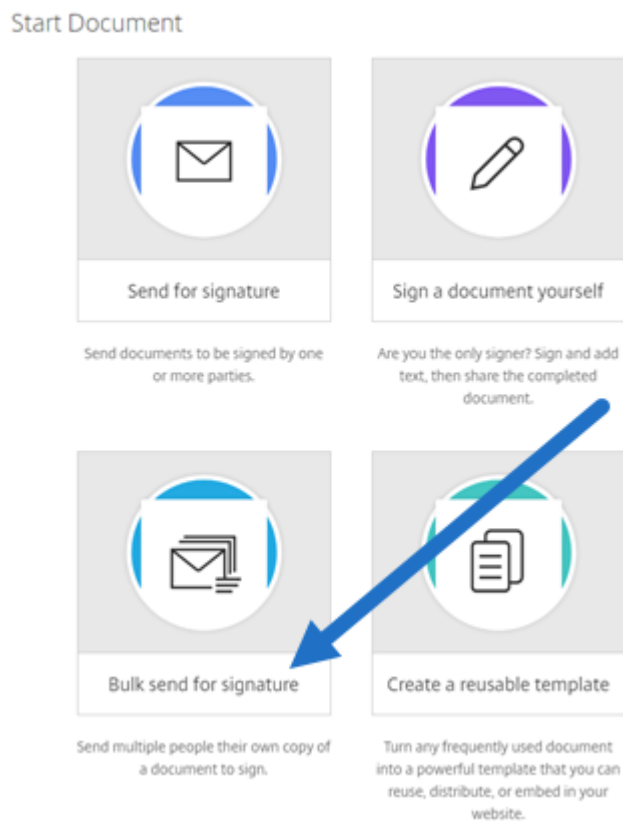
2. Select a template to bulk send.

Note:

Only templates with a single signer role are available for selection. If a valid template is not available, create one from the **Templates** tab. For more information on creating a tem-

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> plate, see Create a template.

3. Select **Upload Signers**.
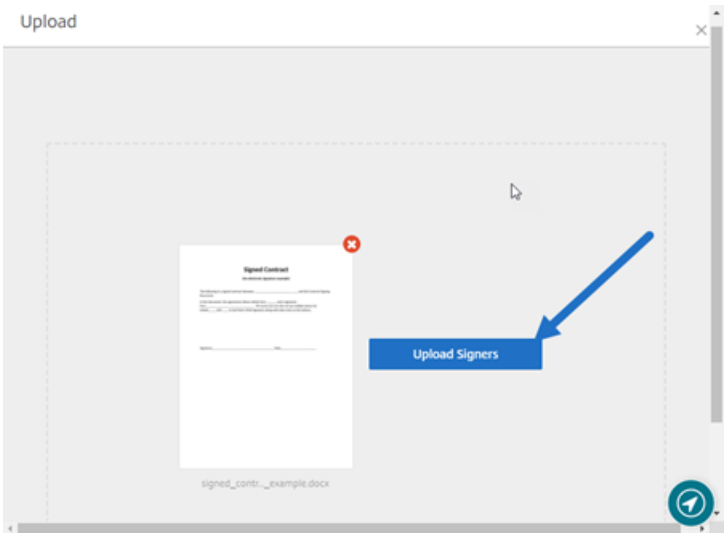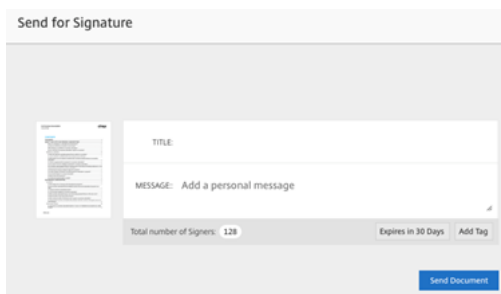
4. Upload a CSV file. The CSV should not contain empty signer name or signer email ID values. The number cannot exceed 100 signers.

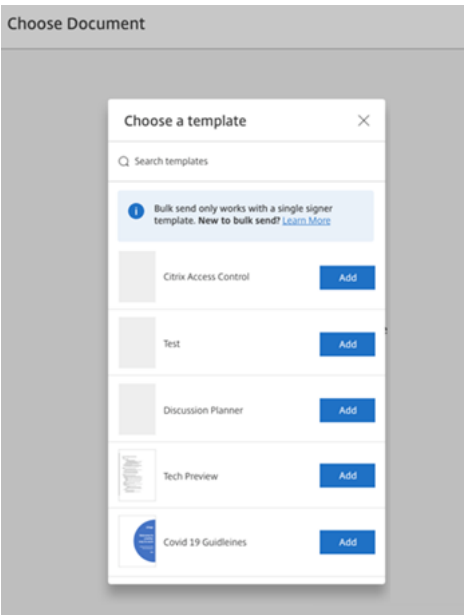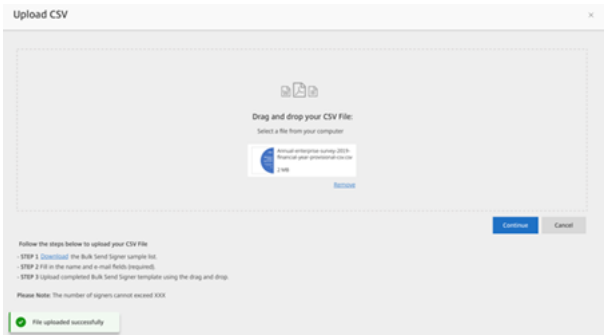- If the CSV has errors, and error message might display. Correct the issues with the CSV file and upload the CSV file again.
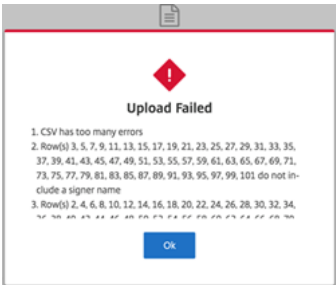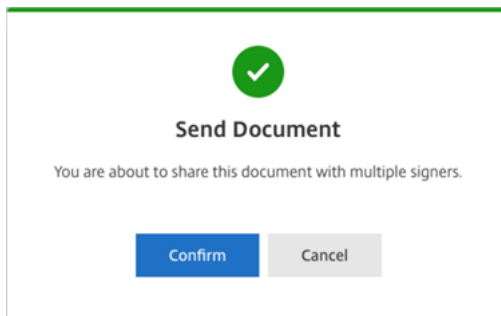
5. Type a message, set an expiration date, and add tags, if necessary.

6. Select **Confirm**.

The document status is displayed on the dashboard.

Search for bulk send documents

There are two ways to search for documents sent using bulk send:

- **Dashboard**: search using tags you added before sending the document or use the document name.

- **Template**: select the template used to send and then select **View Responses**.
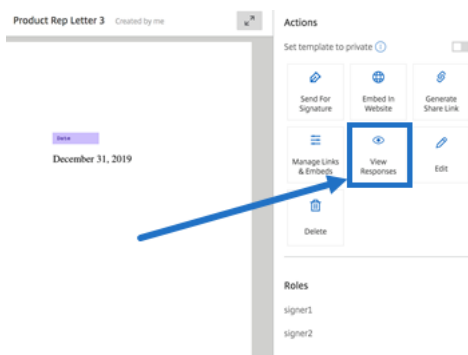
Send a document package

February 23, 2022

This electronic signature capability allows you to merge multiple documents and send it to the signer as a single document for signature. This removes the issue of merging documents outside of Citrix RightSignature. Users are able to prepare the document on the go. Signers also have the ability to access, organize, and sign a single file as well as the ability to save and come back later.

Instructions

The following instructions provide the steps necessary to merge documents into one and send to be signed by single or multiple parties.

1. Select **Start Document** to open the dashboard.

2. Select **Send document package**.
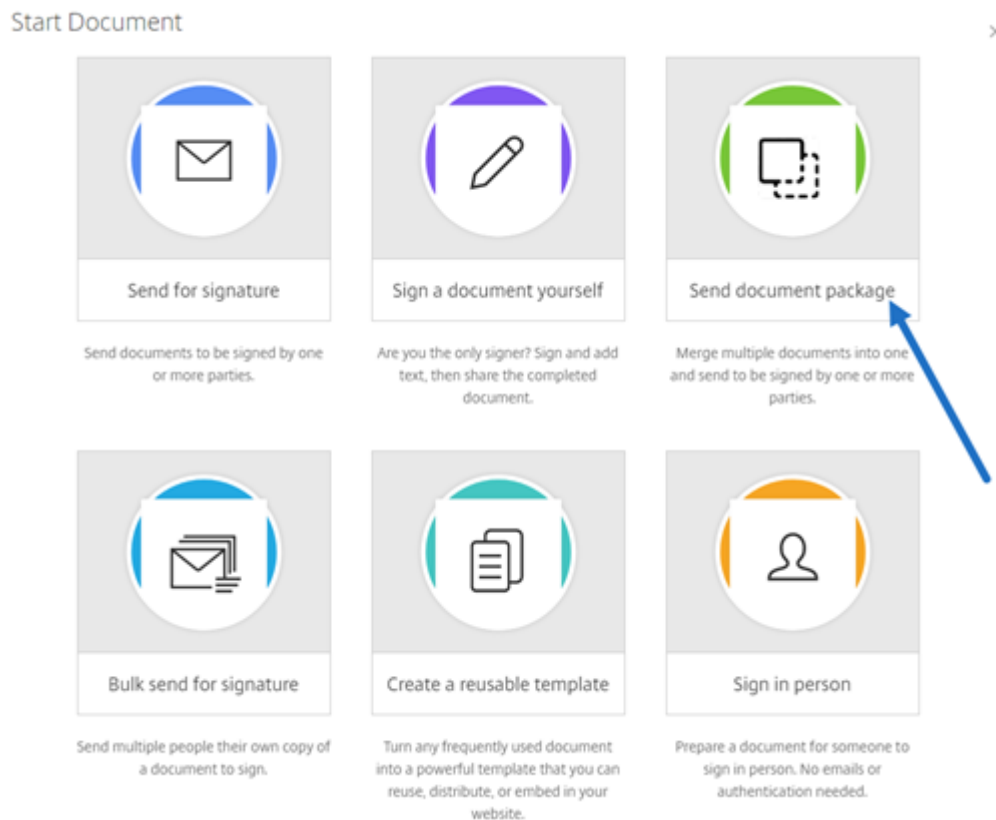
3. Choose more than one document to utilize this feature. You can choose up to 5 files and a maximum file size of 20MB in total. The sequence of the files is determined by the sequence of selecting the files while uploading.
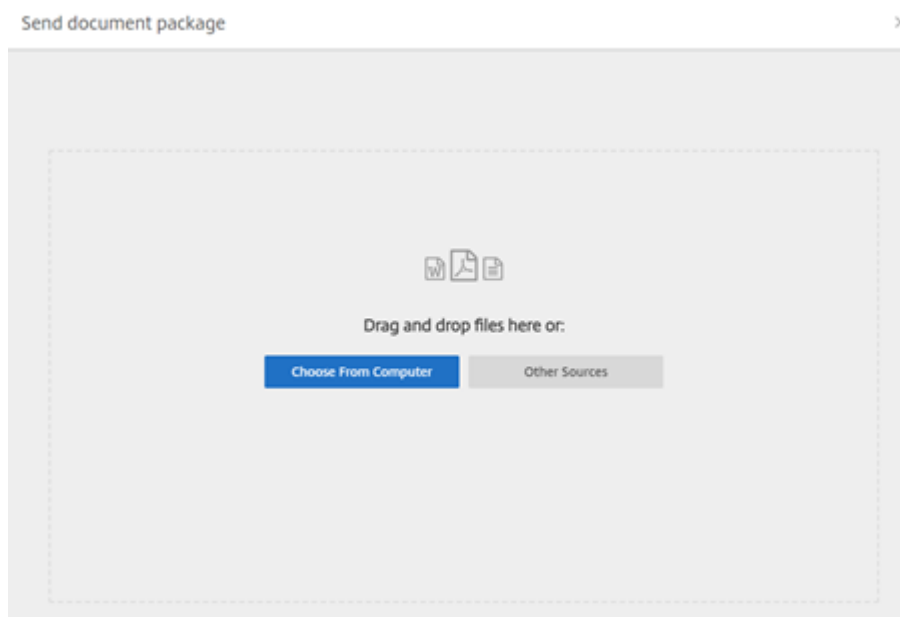
4. Select **Prepare Document**.

5. When prompted, type the name of the signer and their email address.

Notes:

- Email addresses for each signer needs to be unique. Be sure to enter each signer's name and email correctly - once the document is sent, email addresses cannot be changed. The document will need to be recreated.
- If you add multiple signers to a single document, you can designate signers to their own Request Field. After placing a Request Field in the document, double-click the field to open up additional options. Use the drop-down menu to assign the appropriate signer to complete the field.

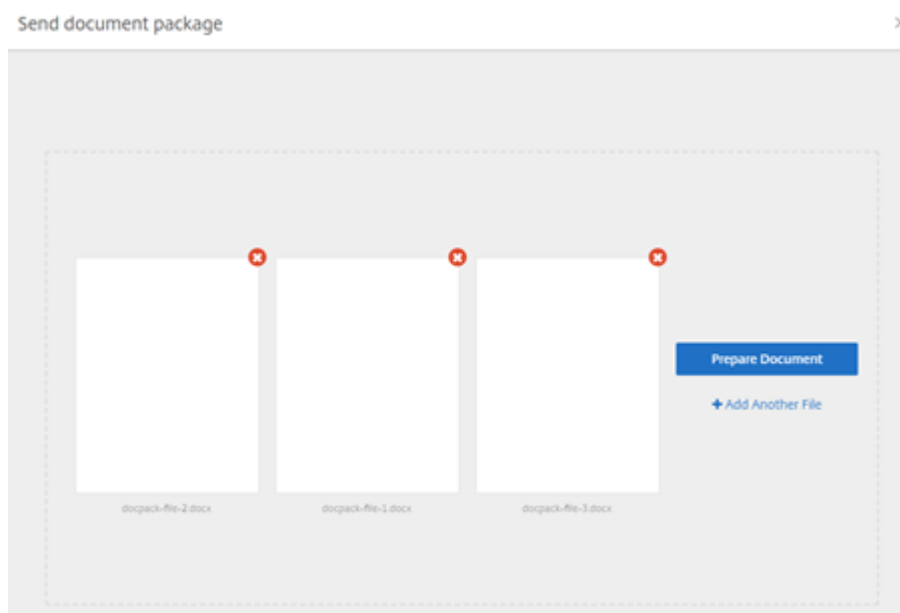6. Select **Set signer order** if necessary. Once enabled, the document will send to each signer in order as listed rather than sending the document to all the signers at once.

   Note:

   For more information, see Assign an Order for Signers on the Same Document.

7. Select **Next: Place Fields** to create the signer and annotation fields for the document package recipients.
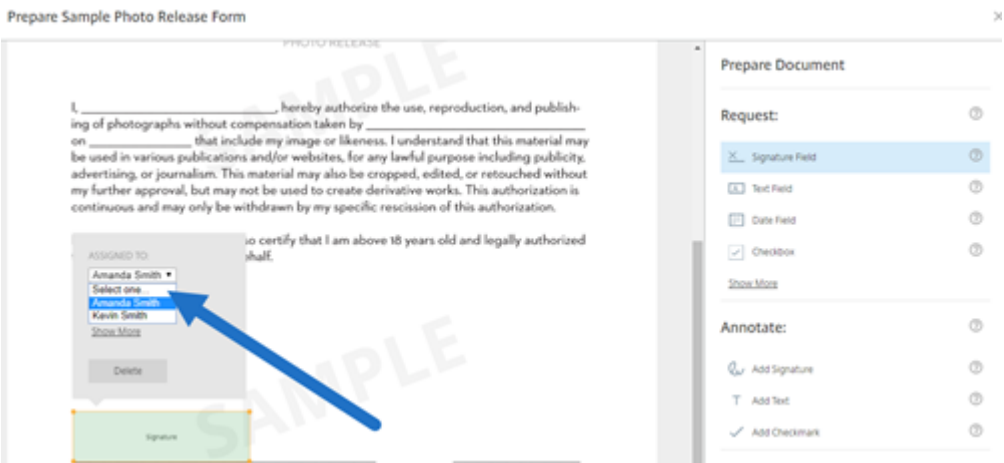
8. Select **Next: Review** to type a personalized message, set an expiration date, and add security settings such as passcode and KBA for the signer, if necessary.
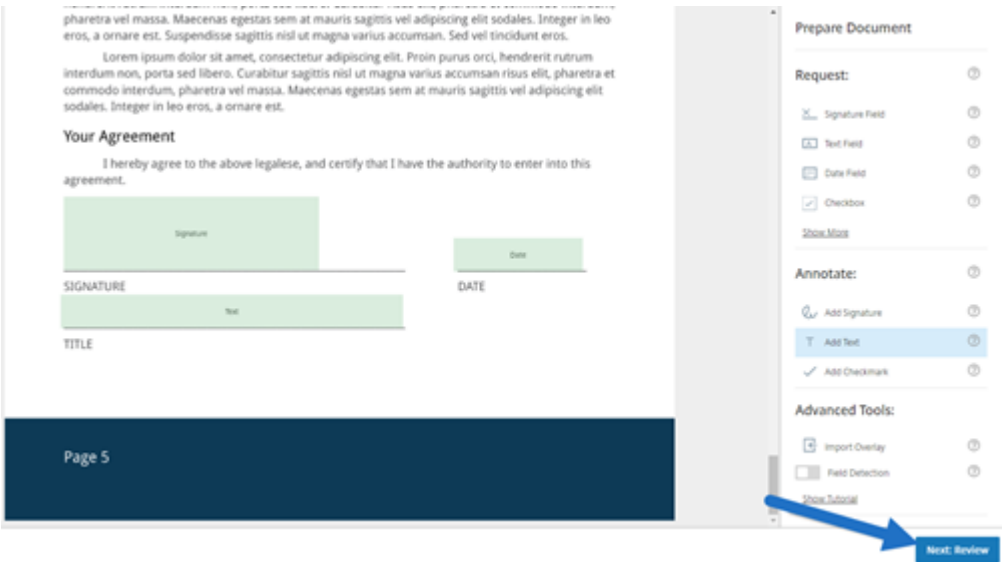
9. Select **Send Document**.
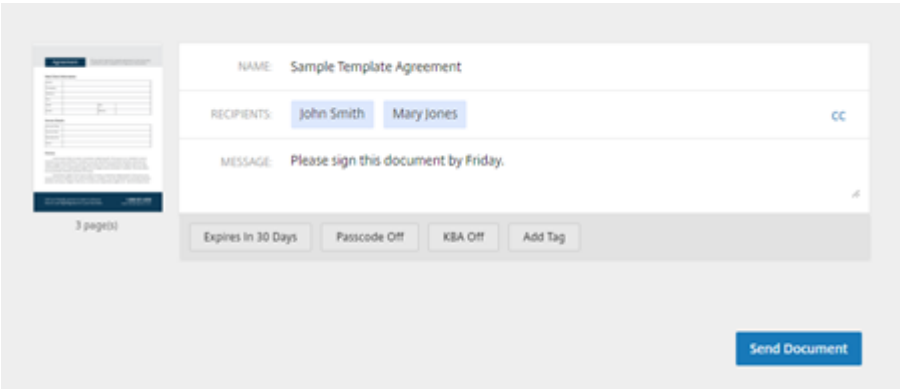
The signer receives an email requesting the signature for the document package. You can monitor the status by selecting the document in the RightSignature dashboard.

Video: Document Packager Feature

The following two and a half minute video provides a quick review of how to utilize the document packager feature.

This is an embedded video. Click the link to watch the video

Create a template

July 25, 2022

Follow these steps to create a template:

1. From the Citrix RightSignature dashboard, select **Templates** in the left menu bar, then select **Create Template**.

2. Select **Upload A File** to open the document you want to build a template with.

3. If replacing the underlying source file used to create the template, select the red x. Afterwards, select the new source file of the template.

4. Select **Prepare Document** to continue editing.

5. First, edit the roles on the template - change the role names, edit the order, or add/delete roles.
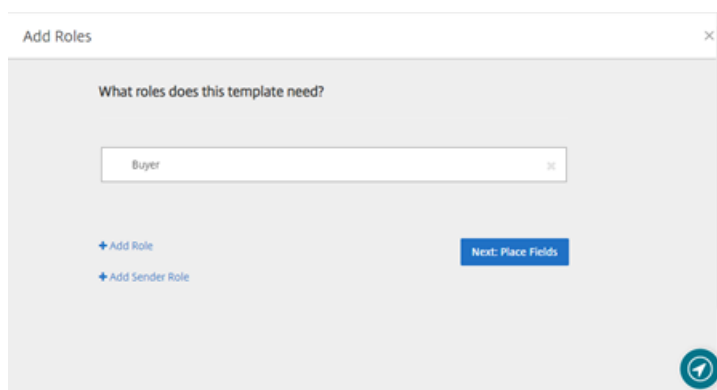

6. Select **Next: Place Fields** to create the signer and annotation fields for the template.
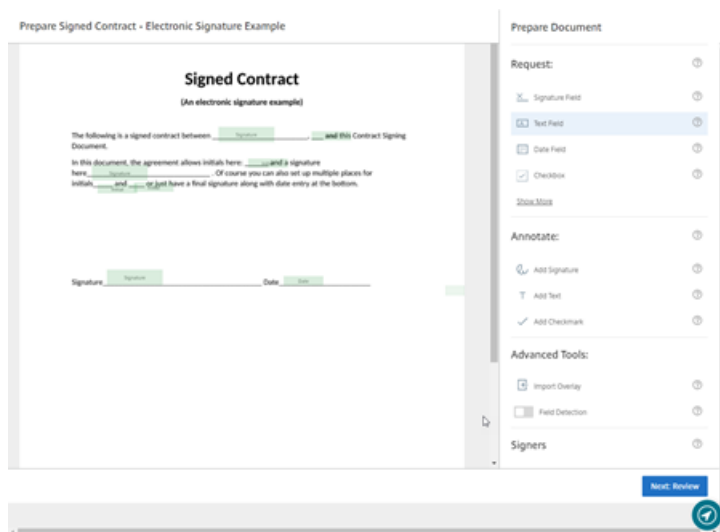
7. Next use the document overlay options to add, change, and remove various types of fields. When finished with edits to the document, click Next: Review.
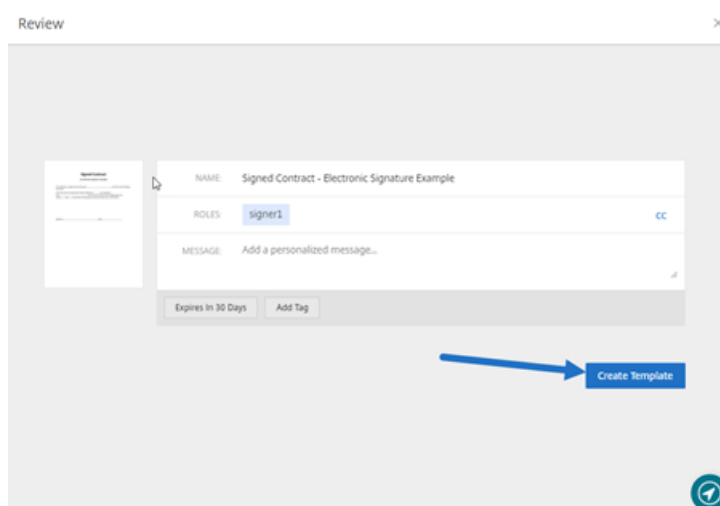
8. When you are finished editing, select **Create Template**.

Delete saved signature
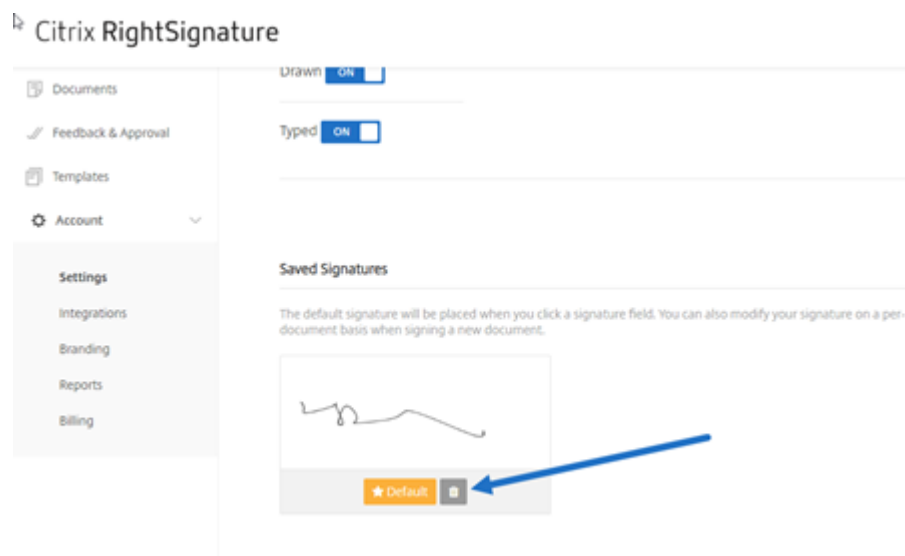
July 25, 2022

Follow these steps to delete your saved signature.

1. From the Citrix RightSignature dashboard, select **Account** > **Settings** in the left menu bar, then scroll to the bottom of the page to **Saved Signtures**.

2. Select the trashcan icon to delete the signature.

3. Select **Delete** to confirm you want to delete the signature.
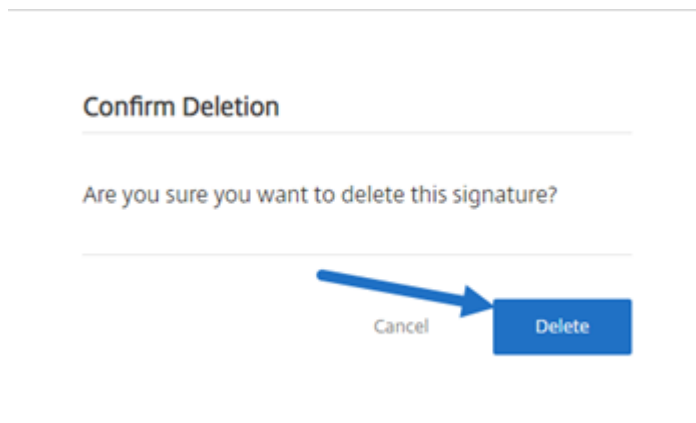
Decline to sign

February 8, 2023

RightSignature provides signers the ability to decline to sign a document.

Instructions for the signer

The following instructions explain the process of a signer declining to sign a document.

1. You, the signer, receive a signature request email and you are asked to **Review & Sign Document**.
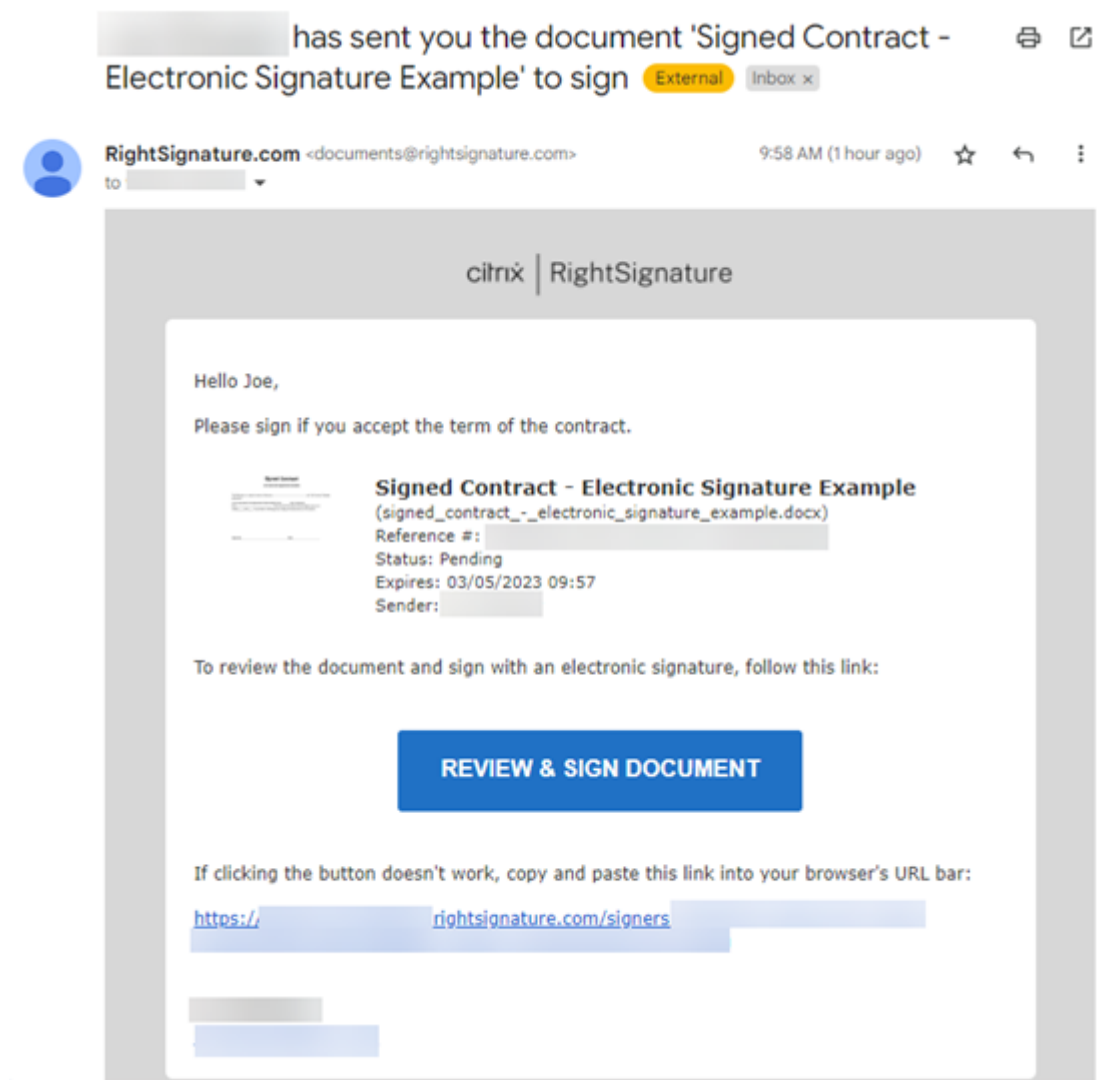
2. Open the document using the link in the email.

3. After reviewing the document, if you decide not to sign, select **More Options**. The **Decline Document** option displays.
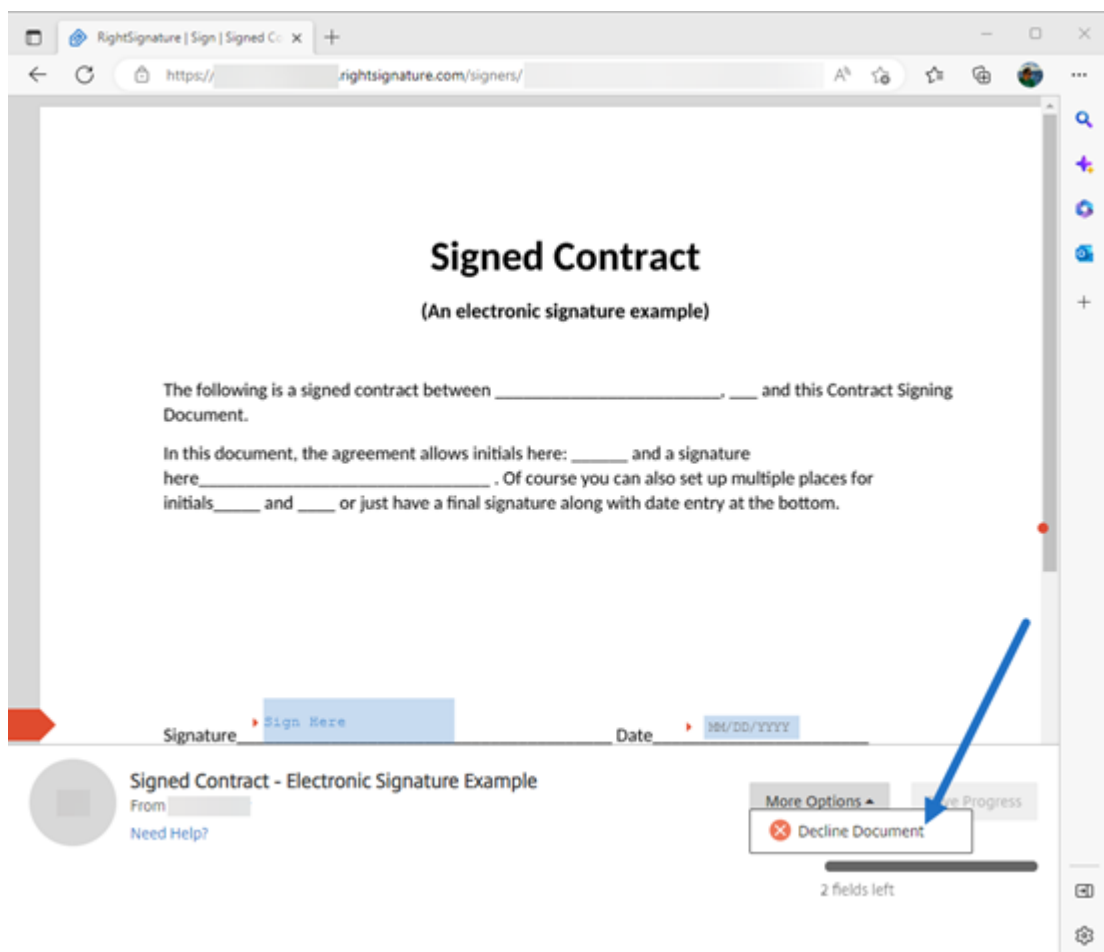
4. Select **Decline Document**. The **Decline Document Confirmation** displays requesting that you provide a reason for declining to sign.

> **NOTE:**
>
> If the document is declined, there is no way to cancel and an automatic notification email will be sent to all relevant participants.
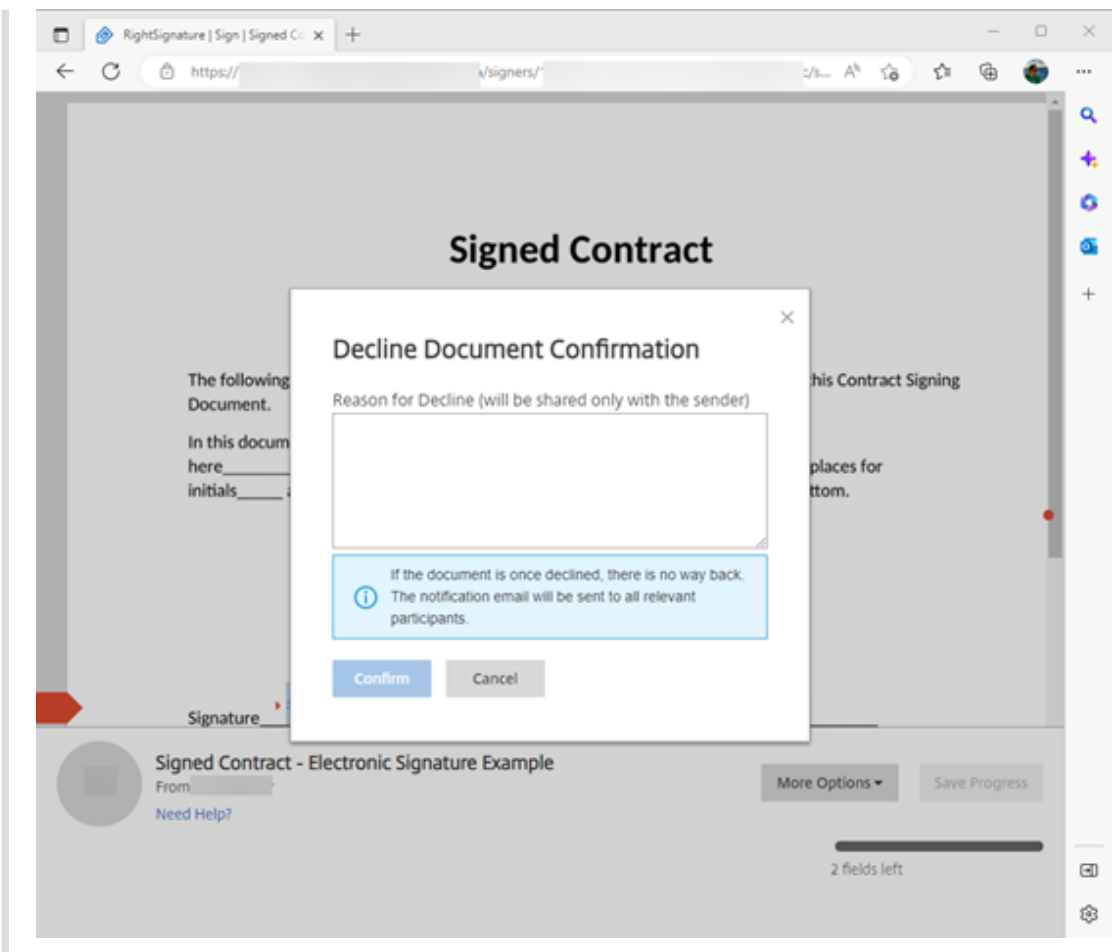
5. Select **Confirm** to complete the **Decline Document** process.
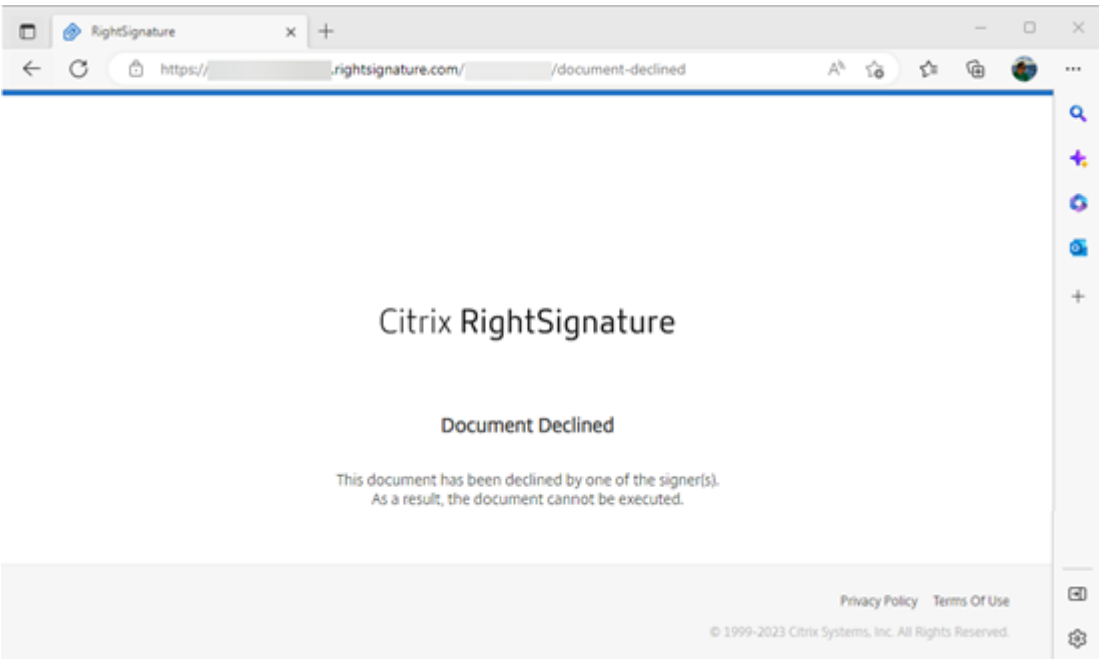
The **Decline** confirmation email is immediately sent to all relevant participants.

- **Sender received**

- **Signer received**

FAQ for the sender regarding Decline to sign feature

What is this new feature?

When a signer receives a document to sign, RightSignature provides the signer the option to decline to sign.

If I send to multiple signers, what happens when a single signer declines to sign?

The signing process stops as soon as one of the signers decline the document. A notification email is sent to all of the participants.

What happens if I send to multiple signers with a set order for signatures and one signer declines?

The signing process stops with the signer who declines the document. The signers in order after the decline will not be notifed.

**What happens if I change my mind after I select Decline Document?**

Unfortunately, there is no way to cancel the decline process once you select **Decline Document**. The sender will have to start the process over again.
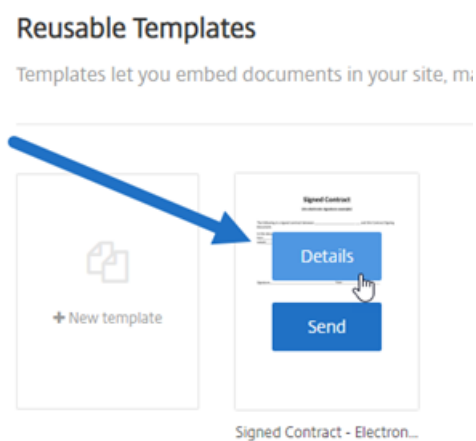
Edit a template

July 26, 2022

Follow these steps to edit an existing template:

1. From the Citrix RightSignature dashboard, select **Templates** in the left menu bar, then select the template that you want to edit from **Reusable Templates**.
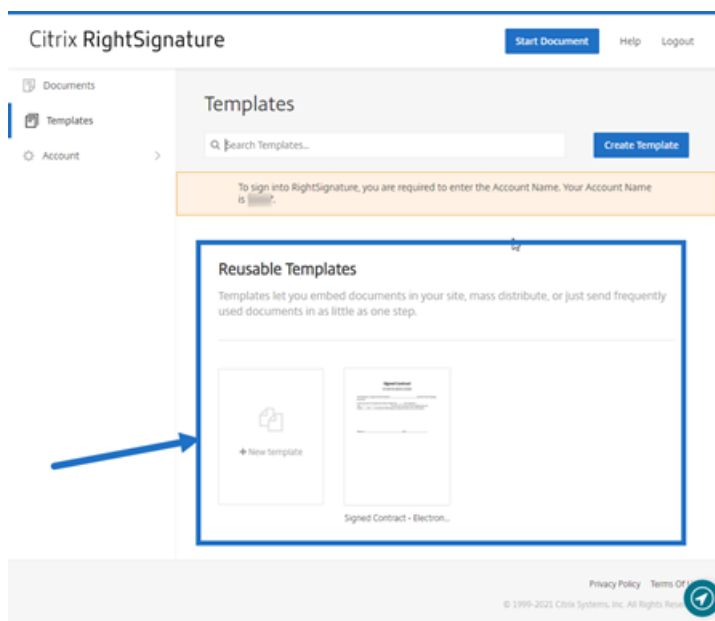
2. Select **Details**, and on the Details screen select **Edit**.

3. If replacing the underlying source file used to create the template, select the red x. Afterwards, select the new source file of the template.

4. Select **Prepare Document** to continue editing.
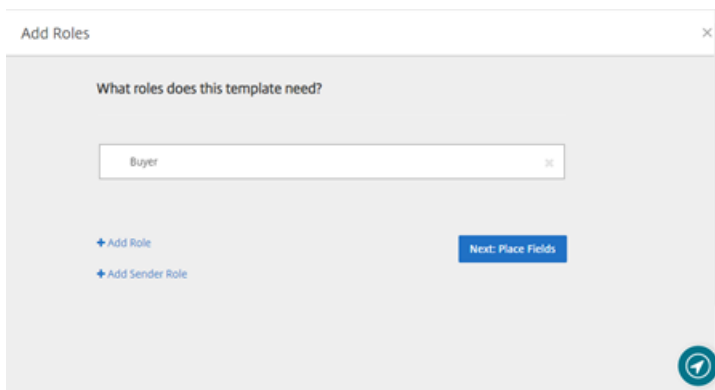
First, edit the roles on the template - change the role names, edit the order, or add/delete roles. When finished with editing the roles, click **Next: Place Fields**.
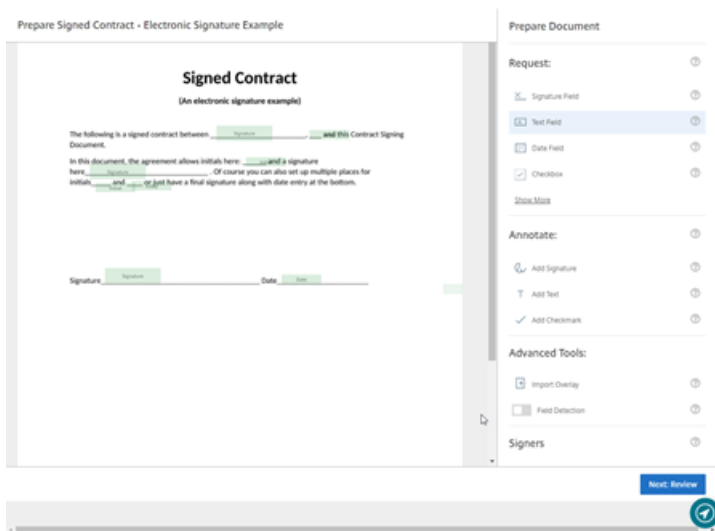
5. Next use the document overlay options to add, change, and remove various types of fields. When finished with edits to the document, click Next: Review.

6. Edit the name, message, tags, expiration, and carbon copies for this template.

7. When you are finished editing, select **Create Template**.

Merge fields with signature templates

February 23, 2022

Merge Fields give document senders the ability to pre-fill each copy of a template with custom text before the document is sent.

This article outlines the basic steps to merge fields when creating or editing a template. To create a merge field, use the Document Overlay tools when preparing a document.

1. From the Citrix RightSignature dashboard, select **Templates** in the left menu bar, then select **Create Template**.

2. Select **Prepare Document**.

3. Select **Next: Place Fields** to place a Text Field, Date Field or Checkbox to the desired location in the document.

4. Once you place the field on the document, double-click on the object box.

5. Once prompted to name the merge field, type in a name for Text Field 1.
This is the name of the field that the sender will be prompted to fill each time a copy of the Template is sent.

When preparing a copy of the Template to send, the sender can enter custom information into each **Merge Field**.

> **Note:**
>
> Once the document is sent, the merge data is locked and cannot be edited by other parties.

## Generate a share link for templates

July 26, 2022

The following instructions provide the steps necessary to create a link to a document for signing.

1. From the Citrix RightSignature dashboard, select **Templates** in the left menu bar, then select the template that you want to use from **Reusable Templates**.
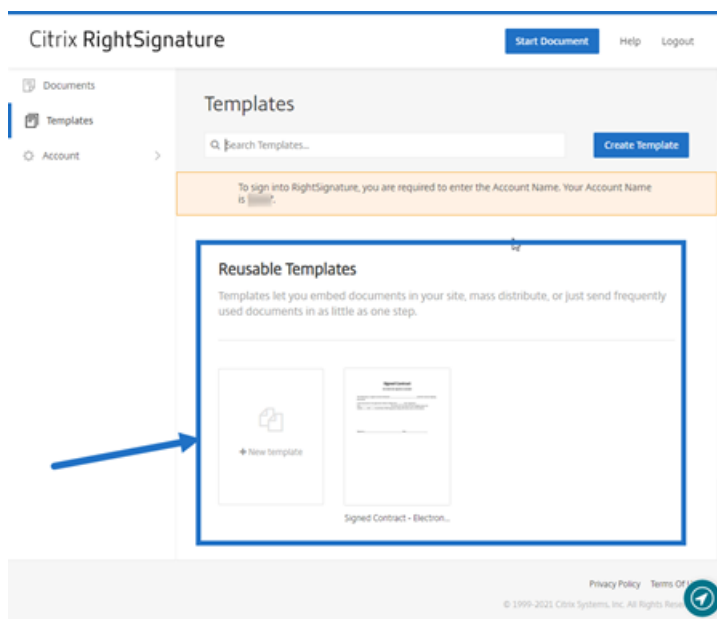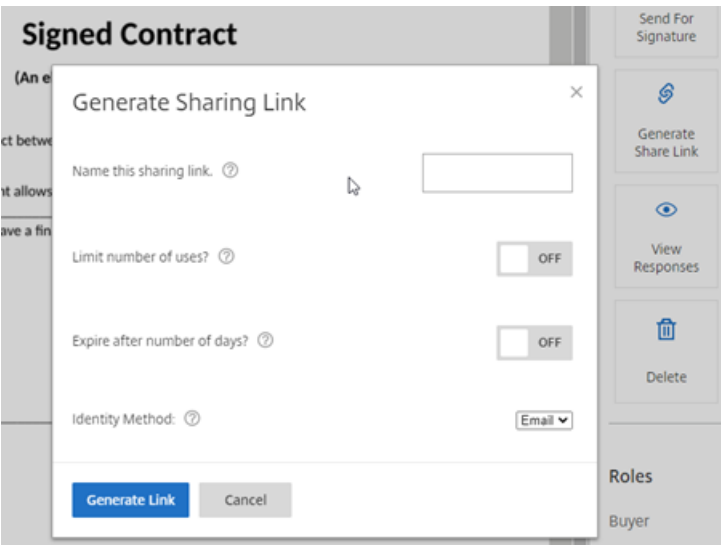
2. Select **Details**.

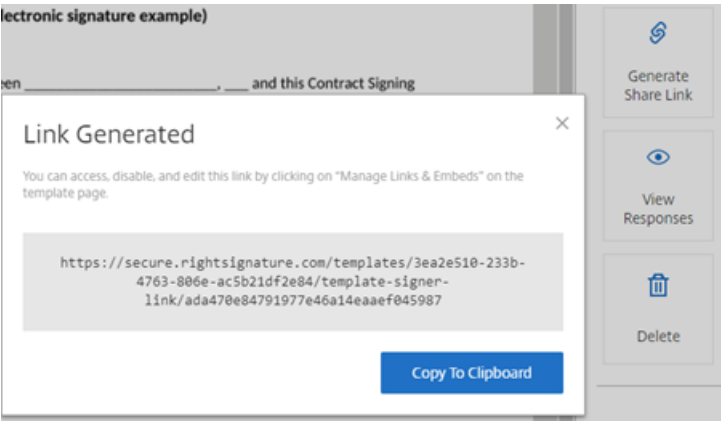3. From the Templates Details screen, select **Generate Share Link**.
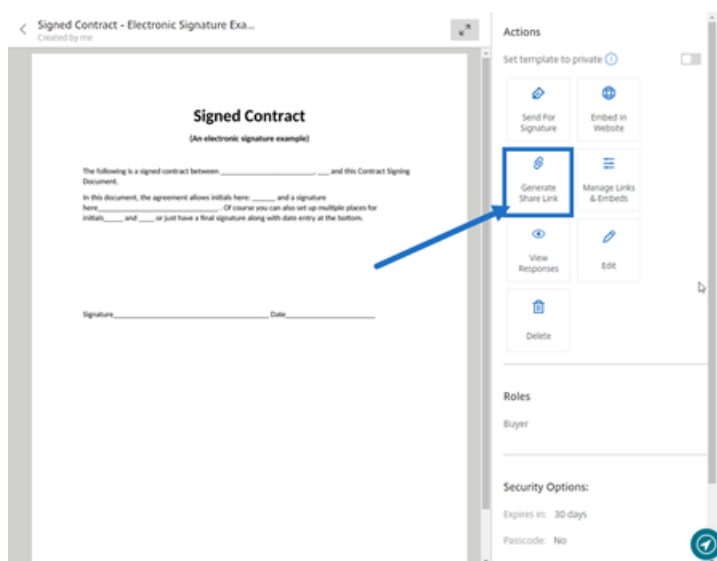
4. On the Generate Sharing Link screen, review and edit the following fields as needed:

   - **Name this sharing link.**: Use this to make managing links easier.
   - **Limit number of uses?**: Use the toggle to limit the number of times the link can be signed.
   - **Expire after number of days?**: Use the toggle to set a number of days for the link to be valid.
   - **Identity Method**: Select the method to identify the signer with email, SMS, and none as options.

5. Select **Generate Link**. Use the **Copy to Clipboard** option to paste the link into messages.
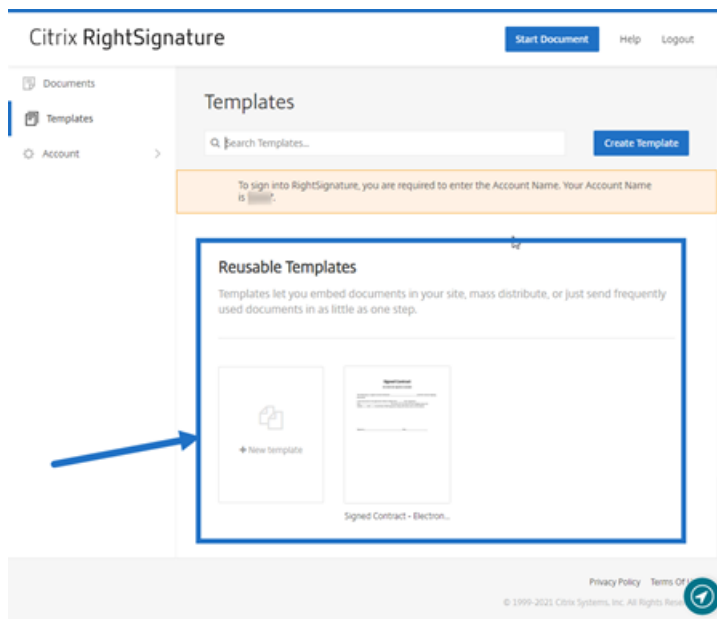

# Embed template document into a website

July 26, 2022

The following instructions provide the steps necessary to add an electronic signature document directly to your website for easy signing.

1. From the Citrix RightSignature dashboard, select **Templates** in the left menu bar, then select the template that you want to use from **Reusable Templates**.

2. Select **Details**.

3. From the Templates Details screen, select **Embed in Website**.
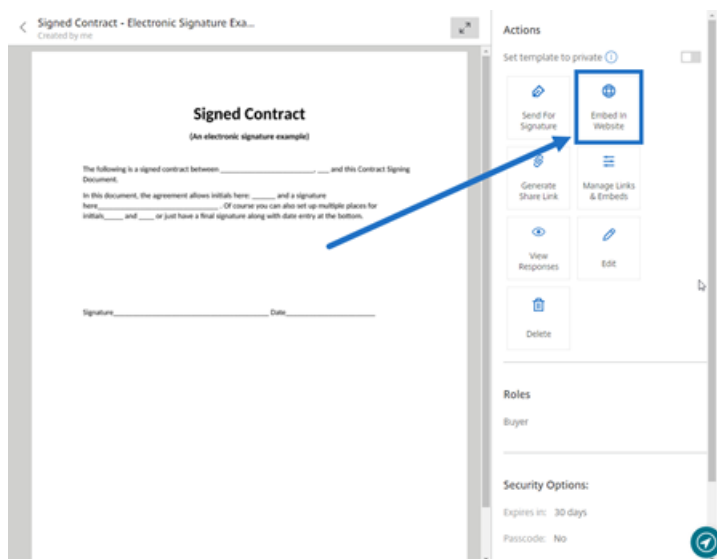
4. On the Generate Embed Code screen, review and edit the following fields as needed:

   - **Name this code.**: Use this to make managing code easier.
   - **Display Type**: Choose button, image, or inline text to display on your webpage.
   - **Limit number of uses?**: Use the toggle to limit the number of times the link can be used to sign the document.
   - **Expire after number of days?**: Use the toggle to set a number of days for the link to be valid.
   - **Identity Method**: Select the method to identify the signer with email, SMS, and none as

options.

5. Select **Generate Link**. Use the **Copy to Clipboard** option to paste the code into your HTML editor.

Sign your own document

November 30, 2021

This article outlines the basic steps to send yourself a document for signature. Electronic signature supports PDF, Microsoft Word, RTF, and TXT file types for upload.
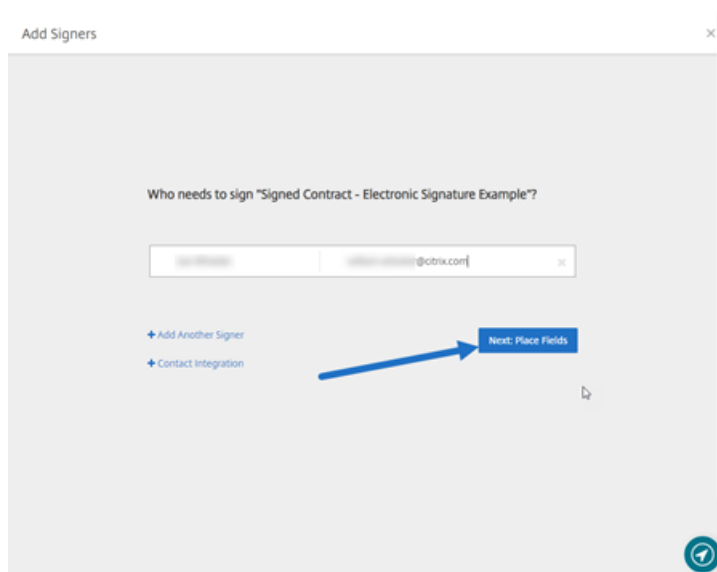
1. From either your Files for Citrix Workspace or ShareFile account, select the document you want to send to yourself for signature. The preview window opens.
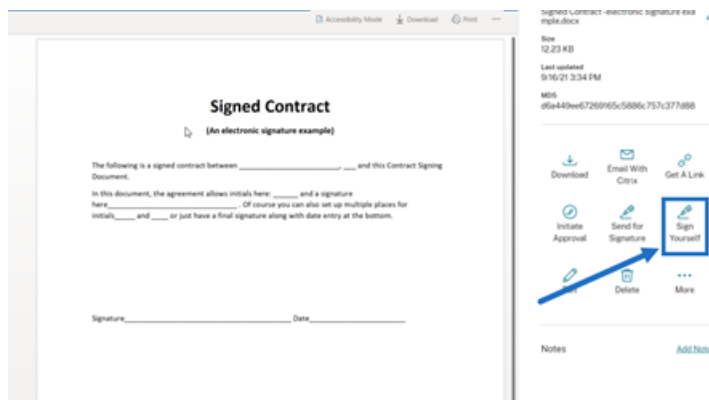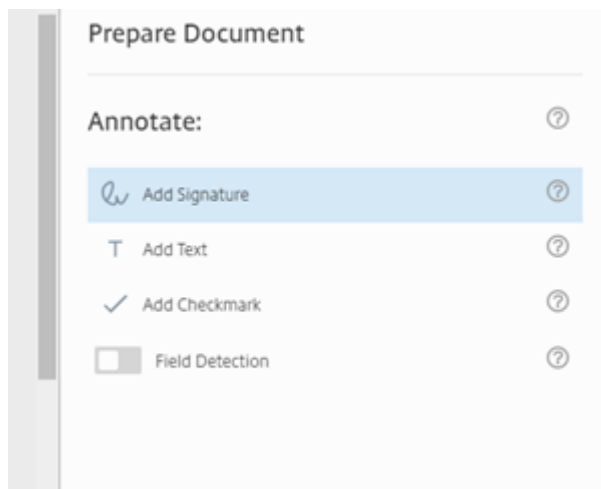

2. Select **Sign Yourself** to open RightSignature.
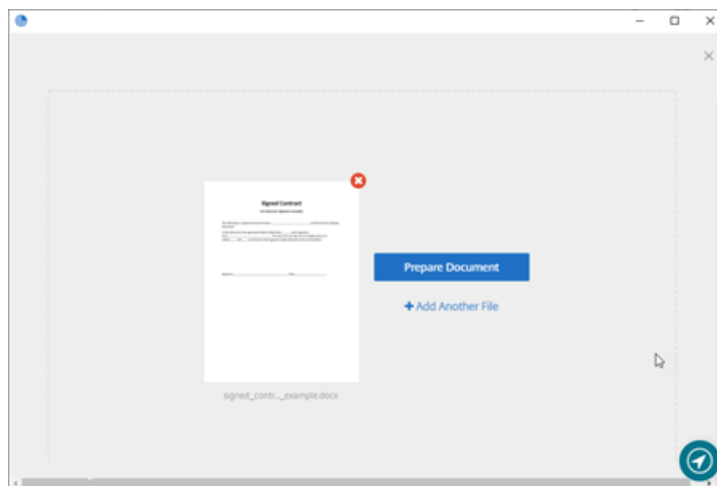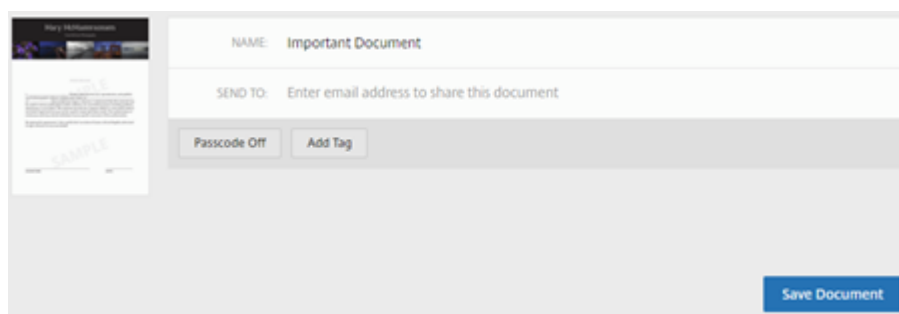

3. Select **Prepare Document**.

4. Under **Annotate:**, select **Add Signature**.

5. In the signature box, you can use your mouse to create a handwritten signature, use a saved signature, or use the type-to-sign feature. Click **Apply** when finished.

6. Select **Next: Review**.

7. Select **Save Document**.

Reminder emails

February 23, 2022

There are two ways to send reminder emails to gently remind the signers to complete an unsigned document. The first is enabled in settings and will automatically send a either a daily or weekly reminder. The second is a manual reminder that you can use at any time before the set expiration period.

Auto reminder

1. Under **Account** > **Settings**, navigate to **Send reminder emails**.
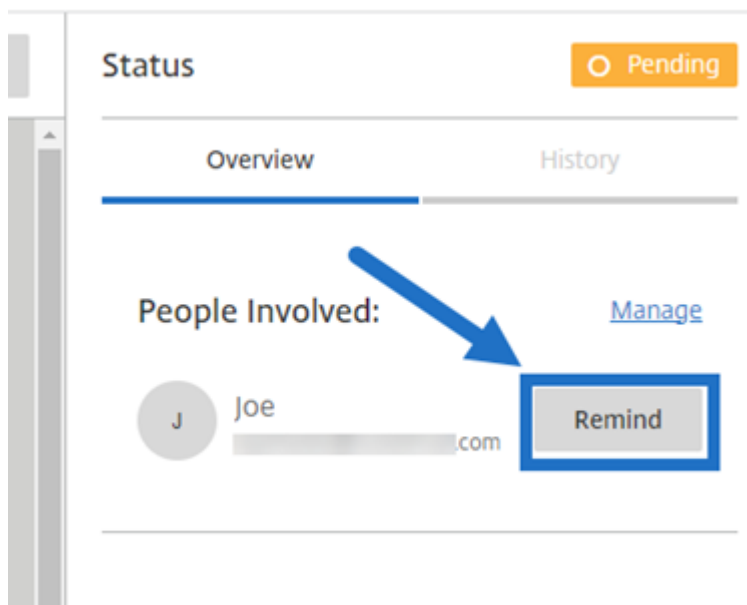

2. Select one of the following options:

   - **No auto reminders**: This is the default and no reminders will be sent.
   - **Weekly**: Select to send a weekly reminder.
   - **Daily**: Select to send a daily reminder.

This setting can be changed at any time.

Manual reminder

1. In the **Documents** dashboard, select the document you want to send a reminder for.

2. Click **Remind** by the name of the signer under the **People Involved** section of the Status column.

A reminder email is sent.

## Saving signature progress

October 6, 2021

Recipients of electronic signature requests can save their work before completing the required signatures tasks. This ability to save allows the signer to step away from large documents without losing their place in the signing process. Utilizing the original link from the signature request email, the signer can complete the task from the point they saved their progress.

The following instructions provide the steps necessary for a signer to save their progress when signing large documents.

1. After opening the document from the link provided in the signature request email, select **Save Progress** at any point while signing.
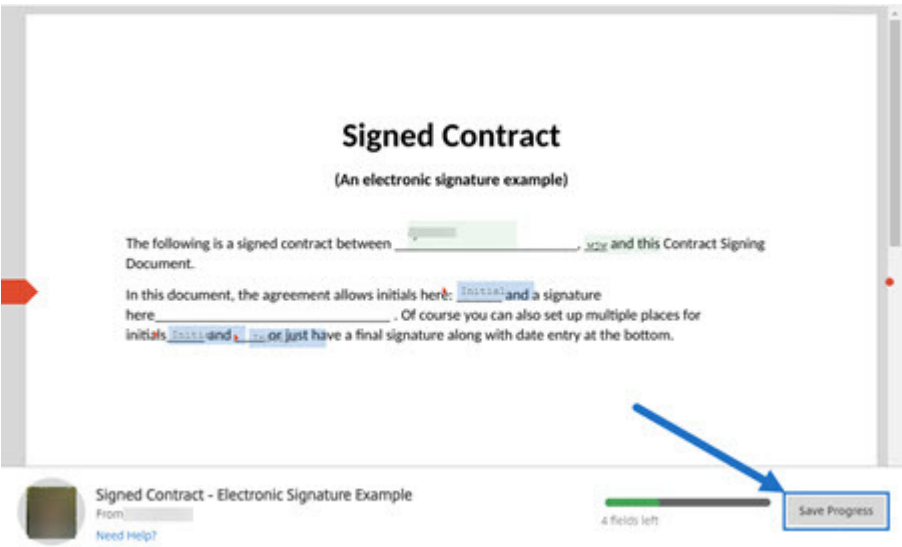
The saved message displays.
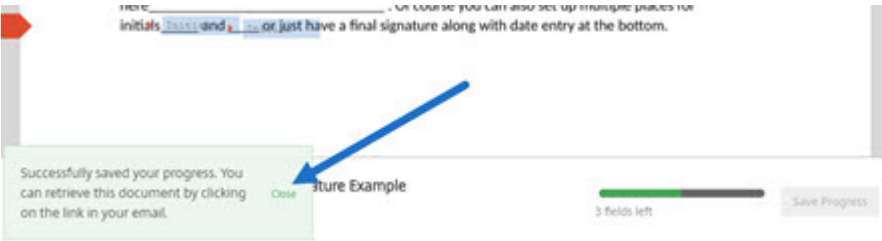
2. To return to the document and sign at a later time, select **Review & Sign Document** in the original signature request email.

Hello Joe,

As the buyer, complete the template.

Signed Contract - Electronic Signature Example
(signed_contract_-_electronic_signature_example.docx)
Reference #: ▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓
Status: Pending
Expires: 11/03/2021 13:40
Sender: ▓▓▓▓▓▓▓

To review the document and sign with an electronic signature, follow this link:

REVIEW & SIGN DOCUMENT

If clicking the button doesn't work, copy and paste this link into your browser's URL bar:

https://secure.rightsignature.com/signers/▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓

▓▓▓▓▓▓▓▓@citrix.com