



RightSignature

Contents

RightSignature	3
Getting started	4
Configure electronic signatures	6
Account	11
Account	14
Billing and invoices	17
Account	17
Send and prepare documents	20
Security	21
Legal	22
RightSignature user guidance	25
Sign into RightSignature	25
Send for signature	28
Bulk send for signature	32
Send a document package	35
Create a template	40
Delete saved signature	41
Decline to sign	42
RightSignature Firewall Configuration - IP addresses	48
Edit a template	50
Merge fields with signature templates	51
Generate a share link for templates	52
Embed template document into a website	54

Sign a document	56
Sign your own document	60
Reminder emails	62
Saving signature progress	63

RightSignature

December 8, 2023

ShareFile delivers electronic signature ability using RightSignature. An electronic signature, sometimes known as an e-signature, is the same as your handwritten signature on a paper document, except electronic—a mark on an electronic contract or document you make to demonstrate your intent to agree to the terms of that document.

Integrating ShareFile RightSignature with ShareFile gives you the power to obtain legally binding signatures on documents entirely online, being completed more quickly and securely than executing paper documents. ShareFile delivers electronic signature capability at different levels:

- ShareFile electronic signature lets you send files stored in your ShareFile account for electronic signature. For integration steps, see [Getting started](#).
- RightSignature is also available as a stand-alone solution. To get started, see [RightSignature](#).

TIP:

Visit the [RightSignature user guidance](#) for electronic signature user information.

Fixed issues

December 11, 2023

Attempting to upload a file using periods in the filename might fail to upload. [ESPILET-351]

February 6, 2023

This release addresses a number of issues that help to improve overall performance and stability.

June 26, 2022

This release addresses a number of issues that help to improve overall performance and stability.

January 20, 2021

This release addresses a number of issues that help to improve overall performance and stability.

RightSignature FAQs

For more information about RightSignature, see [RightSignature FAQs](#).

Getting started

August 29, 2023

Electronic signatures are an easy and fast way to get documents signed online. These features give your organization the power to obtain legally binding signatures on documents entirely online — faster and more secure than paper documents.

ShareFile licenses are required to enable electronic signature features for your employee users.

Note:

See [RightSignature user guidance](#) for electronic signature user information.

Supported content

Electronic signatures are supported for documents that are fewer than 150 pages and less than 20 MB. Supported document types include:

- PDF
- Microsoft Word documents
- Plain text files
- Rich text files

Note

Format 3D PDFs to 8.5x11 and the same orientation on all pages.

Activate electronic signature licenses for ShareFile users

ShareFile administrators can log in to the web application to verify electronic signature licenses are allocated and activated with in their ShareFile account.

1. Select **Settings**.
2. Select **Admin Settings**.
3. Select **Admin Overview**.

Under **Allocated licenses**, view a number of employee licenses available for Electronic Signature features. See Add employee users with e-signature access in Configure to enable employee users with e-signature sending capabilities and other permissions.

Note

Electronic signatures licenses allow 100 documents per employee license to be sent per month. For example, an account with 10 employee licenses can send 1,000 documents in a month. These licenses are pooled together for the entire account. An individual employee user can send 100 or more documents in a month given there are enough licenses available in the pool.

Firewall considerations

Allow web traffic To connect users from your on-premises environment to communicate with the RightSignature Control Plane for Electronic signature features, authorize HTTPS/TLS 1.2 traffic to the following IPv4 addresses and *.rightsignature.com domain:

Control Plane IP addresses

CIDR Notation	IP Address	Netmask
199.255.192.0/22	199.255.192.0	255.255.252.0
199.127.232.0/22	199.127.232.0	255.255.252.0
54.240.0.0/18	54.240.0.0	255.255.252.0

Allow email notifications Enable incoming email notifications for users on your on-premises environment. Configure email security gateways and spam filters for trusted hosts using the IPv4 and email addresses to receive Electronic signature-related email notifications:

Notification IP address

208.117.51.168

Notification email addresses

documents@rightsignature.com

support@rightsignature.com

For other ShareFile related Firewall Configurations, see [CTX208318](#).

Integrations

See [Enable integrations](#) for more information on available integrations to configure for RightSignature electronic signature capabilities.

Two-step verification

ShareFile strongly recommends the use of two-step verification as an extra layer of security to reduce the likelihood of any unauthorized access to Citrix accounts. Two-step verification uses your phone to provide an extra layer of security for your user name. After you sign in, you are asked to enter a verification code that is sent to your phone using a text message (SMS) or voice call. Some apps require an app-specific password that must be generated each time you want to sign in to the app.

Configure electronic signatures

March 14, 2024

RightSignature allows you to customize your account including branding, integrations, and more.

Requesting API keys

Log into your RightSignature account to request an API key and manage your API credentials. For more information on requesting API keys, see [RightSignature Resources](#).

Send and prepare documents

Electronic signature allows you to send documents to one or more parties. You can prepare a document for someone to sign in person. No emails or authentication needed.

Send document for signature

There are several ways to begin sending a document for electronic signature. Some workflows can begin in the Content Collaboration account or directly start a document in the RightSignature app.

After selecting a document to send for signature, employee users will be automatically redirect to the RightSignature browser app to prepare the document for sending.

Start Documents for signature in RightSignature and select from the following options:

- [Bulk send for signature](#)

Note:

To send each signer their own copy of the document, select an existing template.

- [Send for signature](#)
- [Sign a document yourself](#)
- [Create a reusable template](#)
- [Send a document package](#)

Prepare a document for signature

After selecting a sending method, select a supported file type (PDF, TXT, DOC, DOCX or RTF) from an available storage source.

Select **Prepare Document** to continue. The document will automatically convert into a PDF file to serve as the background for preparing a form or document ready for signature.

For more information on sending a document for signature, see the Citrix User Help Center article [Send for signature](#).

Templates

Utilizing templates allow employee users to skip the document creation process with reusable documents ready to send for signature. Users with electronic signature sending capabilities can create template documents when logged into the RightSignature App.

Manage template settings

For employee users, select **User Access**. Under **E-signature settings**, select **Manage e-signature templates**. Users with the base level permission can create, edit, and delete their own templates and send template documents created by others. With Manage e-signature templates permissions, users can edit, delete, and send template documents created by others.

Create a template

Users can choose a new document to upload or select an existing document from storage. The template editor allows the user to prepare a document by adding signer and sender roles, document overlays, and merge field options.

A templates creator or employee users with the permissions to manage e-signature templates can edit or delete templates on the RightSignature app.

For more information on creating an electronic signature template, see the Citrix User Help Center article [Create a template](#).

Edit a template

Follow these steps to edit an existing template:

1. Select **Templates** in the left menu bar, then select the template that you want to edit from the menu.
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. You will first be able to 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**.

For more information on editing an electronic signature template, see the Citrix User Help Center article [Edit a template](#).

Verify account settings

Use the account section in RightSignature to configure the settings for administrative tasks. Use **Settings** to verify changes to your account including:

- Your Information - this includes your name, email, and avatar.
- Account Information - this includes your company name, account name, and your current plan.
- Verified Emails - You can add email addresses to send for signature. The dashboard displays all documents sent to any of these verified email addresses.

Require passcode for documents

Once enabled, a passcode is necessary to sign the document.

Default token expiration period

This feature lets you set an expiration for the request signature links sent.

Blue ink signatures

Select blue ink signature to distinguish a signed original from a photocopy. All original copies will display the signature in blue.

Enable integrations

Allow all your users to view and set the connection with other apps you use. By toggling it off, none of the users will be able to view the Integrations settings to enable/ disable the out-of-box integrations. This is to help centrally control all your users' access to the available integrations.

Customize branding for signing experience

Branding options include setting up your company logo, color background and email header options.

1. Select **Account**.
2. Select **Branding**.

For more information on branding, see [Set up your company branding in RightSignature](#).

Reports

The following reports are available in RightSignature:

- **Overview report** - displays the total number of documents sent. This report also provides the average number of documents sent, viewed, and signed. Users are ranked in this report on the number of documents sent each month.
- **Efficiency report** - compares the number of signed documents and the total number of documents sent each month. This ratio, presented as a percentage, reflects how efficiently each user collects signatures when sending documents.
- **Cycle time report** - displays the average amount of time required to view and sign each users document. These figures reflect how quickly recipients are to execute each users document on a monthly basis.

- **Data exporter** - exports the signing data from every copy of a Reusable Template, or every document with a shared tag. The data can be exported as a CSV file. The Data Exporter only pulls data from documents completed from the latest version of a template. Editing a template creates a new version so the Data Exporter will not return data from documents completed before the template was edited.
- **Enterprise report** - provides account administrators on Enterprise level accounts the ability to export a complete list of all of the documents sent during a particular month. The data can be exported as a CSV file.
- **New usage report** - provides account administrators on Enterprise level accounts the ability to export the number of sent and signed documents, as well as the median cycle time, for each user.

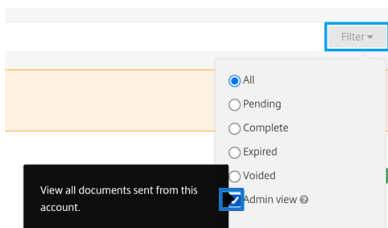
Add employee user

To add an employee user with electronic signature access, create or edit an employee user in the [People](#) section of your Content Collaboration account. Under User Access then E-signature settings, select Send documents for e-signature. The base level permission is suitable for standard users. One e-signature license is required to grant the permissions to electronic signature sending capabilities for supported files. Users can sign in and access templates and additional settings for the files they send for signature directly from the RightSignature app.

View all electronic signature documents

From User Access and E-signature settings, select View all e-signature documents. Users with the base level permission can also view all e-signature documents if logged into the RightSignature App. Use the base level permission when creating or editing an employee permitted to view all legal and secure documentation sent by other users with electronic sending capabilities.

Login into the RightSignature app, to view all the documents sent from this account. On the Documents tab, in the Search Documents bar, click Filter, select All and check the Admin view box.



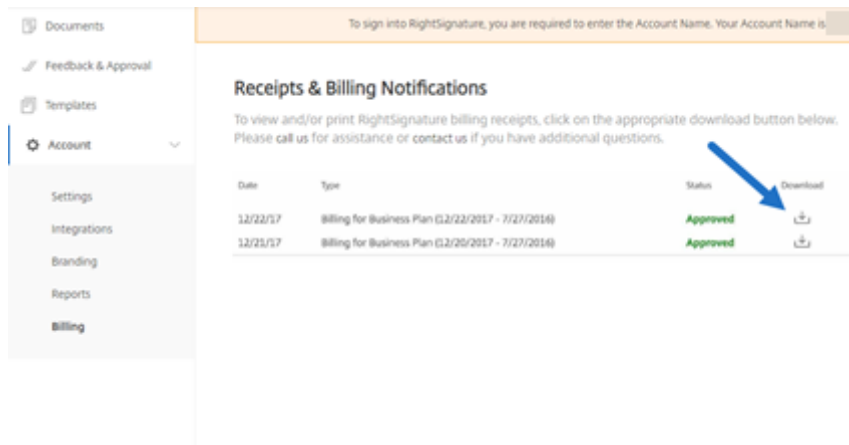
Billing and invoices

Receipts & Billing Notifications

To view or print billing receipts for your account, click the appropriate date on this page. You can request an email notification when your account is billed.

View receipts and billing notifications

The **Receipts & Billing Notifications** link in the **Admin Settings > Admin Overview > Billing** section allows any user with this permission enabled to download copies of any receipt or invoice for the account.



Account

December 8, 2023

Settings

In settings you can verify and make changes to your account.

Your Information

The **Your Information** section includes your name, email, and avatar.

Account Information

The **Account Information** section includes the company name, account name, and your current plan.

Verified Emails

You can add email addresses to send for signature. The dashboard will display all documents sent to any of these verified email addresses.

Account Settings

Account Settings

Require passcode for documents OFF
Passcode will be required to sign the document. Senders can generate passcode during the send for signature process.

Default token expiration period Do not expire links
Set the expiration length for all emailed links to documents including signing links and share links.

Blue ink signatures OFF
All signatures captured on documents sent from this account will be blue. This is to help distinguish a signed original from a photocopy.

Integrations ON
Allow all your users to view and set the connection with other apps you use. By toggling it off, none of the users will be able to view the Integrations settings to enable/ disable the out-of-box integrations. This is to help centrally control all your users' access to the available integrations.

Signer document download ON
Allow signers to download the original document before signing.

Require passcode for documents Select this to require passcodes to sign the document.

Default token expiration period This allows you to set an expiration for the request signature links sent.

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Signer document download Use the toggle to allow signers to download a document before signing. The default is **ON** and will allow recipients to download the document before signing.

Branding

Customize Branding for signing experience

Branding options include setting up your company logo, color background and email header options.

1. Select **Account**.
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For more information on branding, see [Set up your company branding in RightSignature](#).

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- **Data exporter** - exports the signing data from every copy of a Reusable Template, or every document with a shared tag. The data can be exported as a CSV file.

The Data Exporter only pulls data from documents completed from the latest version of a template. Editing a template creates a new version so the Data Exporter will not return data from documents completed before the template was edited.

- **Enterprise report** - provides account administrators on Enterprise level accounts the ability to export a complete list of all of the documents sent during a particular month. The data can be exported as a CSV file.
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Billing and invoices

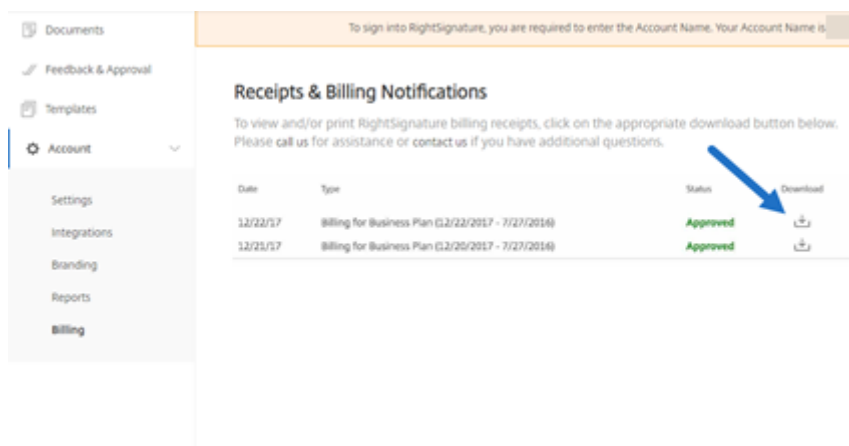
September 22, 2021

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December 8, 2023

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Send and prepare documents

August 22, 2023

Send document for signature

There are several ways to begin sending a document for electronic signature. Some workflows can begin in the Content Collaboration account or directly start a document in the RightSignature app.

Send a Document for electronic signature in Content Collaboration:

- Select the check box next to a file, click Share and select the Send for signature or the Sign a document yourself option.
- Right-click a file and select Send for signature or the Sign a document yourself from the context menu.

After selecting a document to send for signature, employee users will be automatically redirect to the RightSignature app in their default web browser to prepare the document for sending.

Start Documents for signature in RightSignature and select from the following options:

- Bulk send for signature

Note:

To send each signer their own copy of the document, select an existing template.

- Send for signature
- Sign a document yourself
- Create a reusable template
- Sign in person

Prepare a document for signature

After selecting a sending method, select a supported file type (PDF, TXT, DOC, DOCX or RTF) from an available storage source.

Select **Prepare Document** to continue. The document will automatically convert into a PDF file to serve as the background for preparing a form or document ready for signature.

For more information on creating an electronic signature template, see the Citrix User Help Center article [Create a template](#).

Security

April 4, 2022

This article applies to electronic signatures using RightSignature. Utilizing up to 256-bit EV SSL encryption by DigiCert and the world-class server infrastructure of Amazon Web Services (AWS), our electronic signature capability ensures the privacy of our users' data. RightSignature incorporates the most advanced security solutions, giving you the same level of data protection and redundancy as an online bank.

Backups

RightSignature user data is stored in Amazon S3 data centers. Every document and piece of data is automatically and immediately copied to multiple locations for redundancy. Therefore, there is no lag time in backup creation, ensuring data would be available instantly after an interruption in any one location.

Physical security

Critical AWS facilities boast substantial setbacks and military-level perimeter control barriers. Professional security teams control physical access at the perimeter and building entrances with intrusion detection systems, video monitoring, and other electronic techniques. Only after passing two-factor authentication tests may authorized staff access data center floors.

Online security

Once logged in, your connection with RightSignature is secure and encrypted using industry-leading SSL technology. RightSignature's data storage on Amazon S3 is accessible only via SSL encrypted

endpoints, ensuring your electronic signature data cannot be viewed or compromised in transit from your internet node to the AWS secured facility. In addition, a firewall with default deny mode and definitive traffic restrictions protects your data in storage.

Legal

August 29, 2023

The U.S., Canada, the UK, Australia, New Zealand, and many countries around the world have enacted laws providing electronic contracts the same legal validity and enforceability of pen-and-paper contracts. Electronic signature is the trusted and secure solution for obtaining electronic signatures that fulfill key requirements of the Electronic Signatures in Global and National Commerce (E-SIGN) Act and the National Conference of Commissioners on Uniform State Laws' Uniform Electronic Transactions Act (UETA). The world's largest companies rely on electronic signature, and users have executed millions of contracts using electronic signature.

“There is a significant movement toward signing legal documents electronically. You can sign legally binding contracts online and even from your phone. With electronic signature you can upload contracts and have them signed in a faster, cheaper, and more secure way than paper documents.”- GP Solo

E-signature laws

ShareFile electronic signature capability utilizing RightSignature is designed to address the key requirements of:

The Electronic Signatures in Global and National Commerce (E-SIGN) Act, Pub. L. No. 106-229, 114 Stat. 464 (2000) (15 U.S.C. §§7001-7031);

The Uniform Electronic Transactions Act (UETA), as approved by the National Conference of Commissioners on Uniform State Laws in 1999 (7A Pt. 1 U.L.A. 211, 211-99 (2002)); and many state laws modeled after UETA.

These e-signature laws are intended to encourage the rapid adoption of digital signatures and decrease the use of antiquated paper methods. Under E-SIGN, a contract “may not be denied legal effect, validity, or enforceability solely because an electronic signature or electronic record was used in its formation.”¹⁵ U.S.C.A. § 7001(a)(2). Similarly, under Section 7(d) of UETA, if a law requires a signature, an electronic signature satisfies the law. Furthermore, E-SIGN provides that any state's law is preempted if and to the extent that it does not comply with UETA or its substantial equivalent. 15 U.S.C.A. § 7002. While these e-signature laws reinforce the validity of many types of electronic agreements, the laws do not cover certain types of documents, such as statutes, regulations, or other rules

of laws governing wills, codicils, testamentary trusts, adoption, divorce, or other matters of family law, certain commercial transactions, certain court documents, and certain notices, generally do not affect substantive requirements of otherwise applicable substantive law, and contain requirements for creating enforceable agreements.

Intent to sign

One of the primary criteria for a valid e-signature is whether the e-signature evidences a clear intent by the signatory to sign. Electronic signature's capture of a real handwritten signature provides evidence of the signer's intent to execute the document. Furthermore, electronic signature's second-generation handwritten signature capture technology addresses potential legal issues that may arise with first-generation click-to-sign systems, because handwritten signatures cannot be inadvertently affixed to contracts and uniquely identify a signer whereas click-to-sign buttons can easily be inadvertently clicked and clicked by others who have access to a signer's computer or smartphone.

Signature associated with document

Under E-SIGN and UETA, a compliant electronic signature must be an electronic sound, symbol, or process, attached to or logically associated with a contract or other record and executed or adopted by a person with the intent to sign the record. 15 U.S.C.A. § 7006(5); UETA §2(8). Electronic signature locks down the executed document with the signature record and produces a Signature Certificate that includes the handwritten signature graphic and an auditable activity log. In addition, when you use our drag-and-drop signature boxes, electronic signature places the handwritten signature at the appropriate locations inside the document.

Consumer disclosures

E-SIGN allows electronic documents and records with electronic signatures to comply with statutes, regulations, or other rules of law that require that information relating to a transaction or transactions in or affecting interstate or foreign commerce be provided or made available to a consumer in writing if the consumer has provided affirmative consent to such use and has not withdrawn the consent, and the consumer, prior to consenting, receives a clear and conspicuous statement of certain information and provides certain consents. 15 U.S.C.A. § 7001(c). Electronic signature users may address the E-SIGN disclosure and consent requirements by enabling a Consumer Disclosure Page for each document and requiring other parties to consent to certain terms prior to executing contracts. Electronic signature also allows potential signatories the ability to opt out from receiving or executing electronic contracts.

Tamper-proof record

After signing, electronic signature secures your executed document with a complex hash algorithm to ensure the permanent record is tamper-proof.

Document access and storage

Section 7001(d) of E-SIGN and Section 12(a), (b), (d) and (e) of UETA contain requirements for record-keeping. Contracts executed with electronic signatures are delivered in Portable Document Format to signatories so that they can retain them for the periods prescribed by any applicable statutes of limitations. Electronic signature stores your documents in a secure archive for the duration of the time you maintain a paid account, utilizing the world-class data infrastructure of Amazon Web Services for security and redundancy.

Audit log

Section 13 of UETA states that evidence of a record or signature may not be excluded from being admissible evidence solely because it is in electronic form. Every document sent through electronic signature includes a detailed audit log, complete with time stamps, identity authentication, and other critical information. Electronic signature can provide a legal foundation to introduce the documents as evidence and have courts enforce them.

Authentication

Electronic signature employs a proprietary, multivariate identity authentication system. Components include email address validation, biometric signature analysis, IP address capture, and the collection of other identifiers unique to each signing party.

Technology neutrality

Electronic signature is platform-agnostic. Parties e-sign on any computer, using any web browser, with no downloads and no plug-ins. This technological neutrality gives all recipients an equal opportunity to execute documents without impediment.

Disclaimer

This overview of particular e-signature laws is not a comprehensive overview of the requirements of e-signature laws in the United States or other countries, is for educational and informational purposes only, and is not intended, and should not be construed, as legal advice.

RightSignature user guidance

January 26, 2023

ShareFile delivers electronic signature capability using RightSignature. Once integrated with your ShareFile 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 [Getting started](#)

To learn more about RightSignature features and common tasks, choose from the following list of actions for step-by-step instructions:

- [Send for signature](#)
- [Bulk send for signature](#)
- [Send a document package](#)
- [Create a template](#)
- [Delete saved signature](#)
- [Edit a template](#)
- [Merge fields](#)
- [Generate a share link for templates](#)
- [Embed a template document into a website](#)
- [Sign your own document](#)
- [Reminder emails](#)
- [Saving signature progress](#)

Sign into RightSignature

August 31, 2023

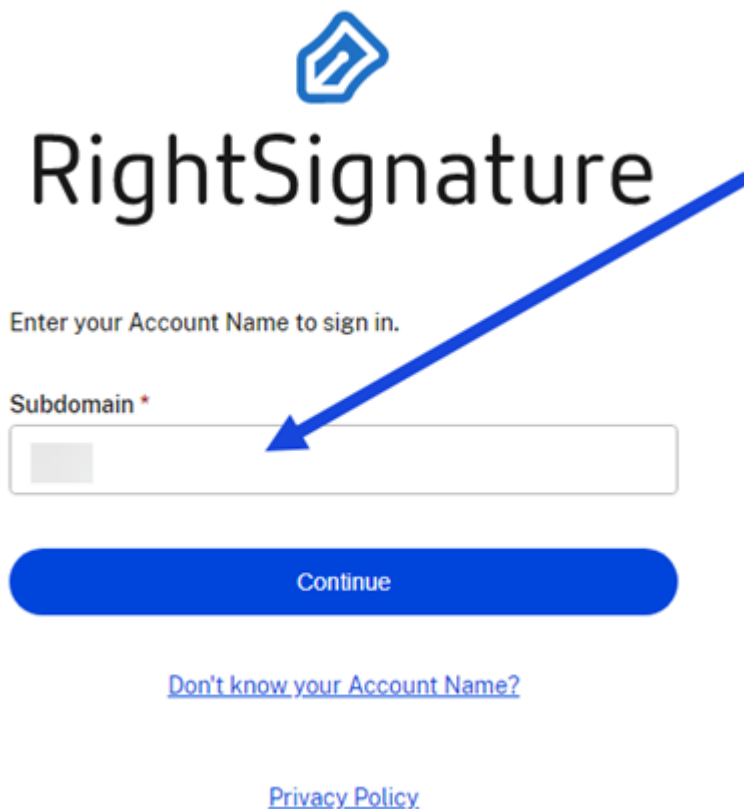
Use the following instructions to sign into your RightSignature account.

Instructions

Note:

Your subdomain can be found by navigating to **Account > Settings** and note the **Account Name** under the **Account Information**.

1. From your browser, type <https://secure.rightsignature.com/> to log directly into RightSignature. ShareFile recommends you bookmark this page for future sign-in.
2. Type in your company subdomain.



3. Select **Continue**.

The sign-in screen displays.



RightSignature

Email *

Password *

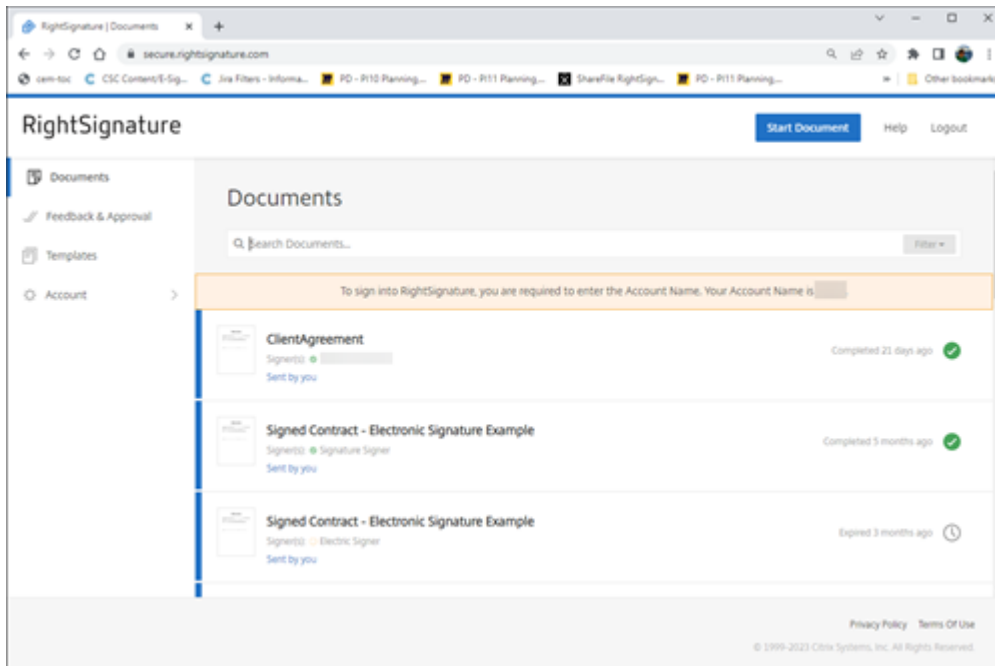
[Forgot Password?](#)

[Sign in to a different account](#)

[Privacy Policy](#)

4. Type in your credential information then select **Sign In**.

The RightSignature dashboard displays.



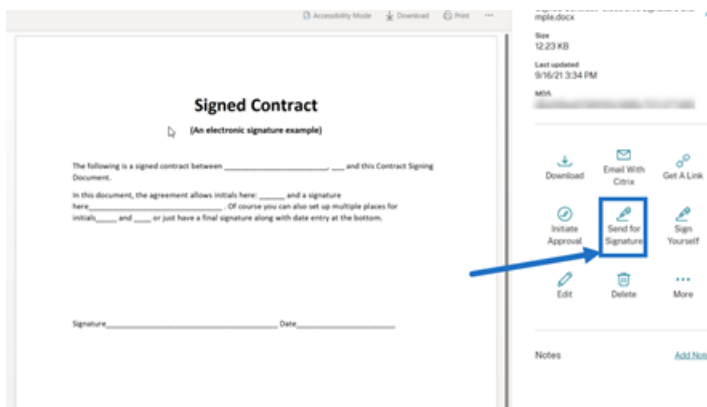
Send for signature

January 25, 2023

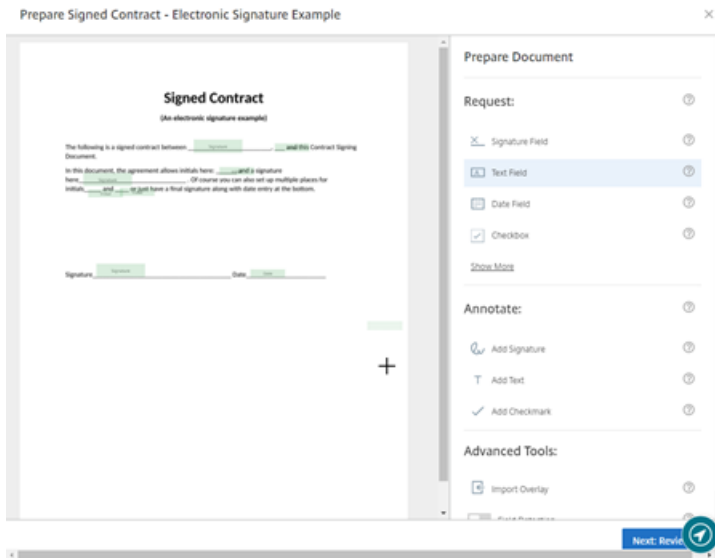
The following instructions provide the steps necessary to send a document for signature in **ShareFile**.

Once electronic signature is enabled for your ShareFile account, you can send documents for signature. For more information on enablement, see [Getting started](#).

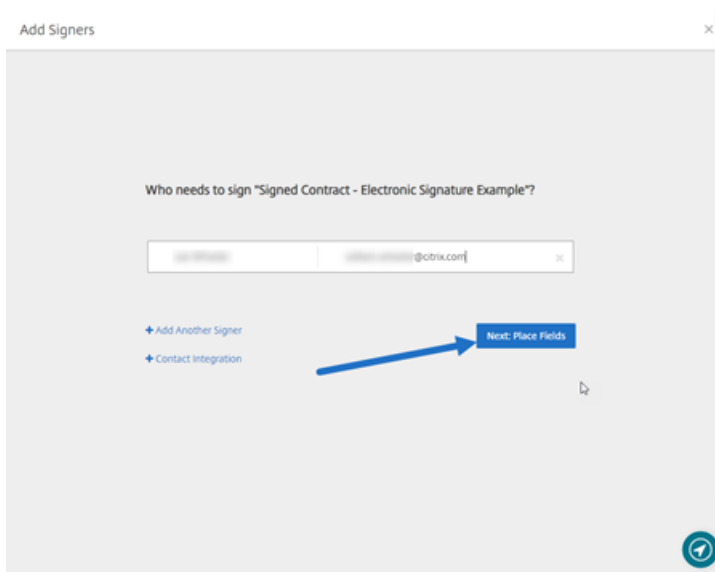
1. From your ShareFile account, select the document you want to send for signature. The preview window opens.



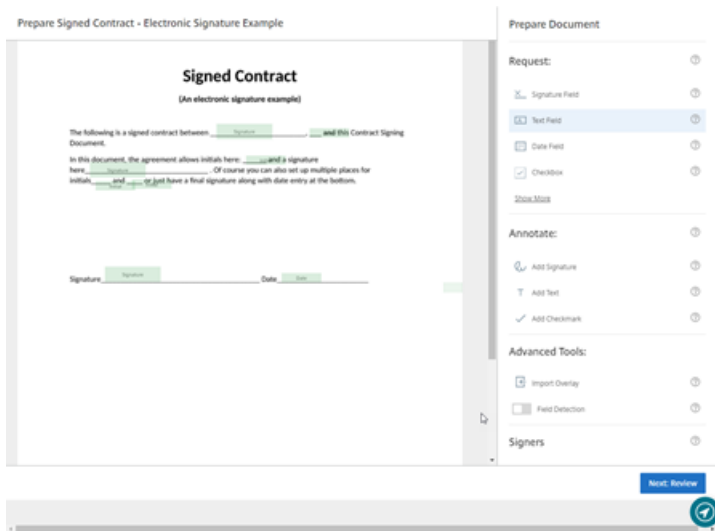
2. Select **Send for Signature** to open RightSignature.



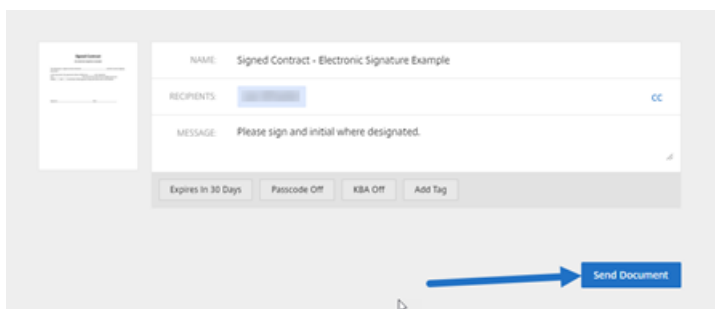
3. Select **Prepare Document** then type the name of the signer and their email address.



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.

Status ○ Pending

Overview History

People Involved: [Manage](#)

W

@i.com

Remind


Security Options:

Expires 07/08/2022 Actions ▾


Passcode No

Signer Sequencing No

Tags: [Add](#)

Message to Recipient(s): 

As the buyer, complete the template. And let me know if you have any issues.

Reference ID: 

The **Overview** provides the following information.

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

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

Status ✔ Executed

Overview History

- 4 minutes ago** All signers have signed and the document is now executed. Copies have been sent to [redacted].
- 4 minutes ago** [redacted] authenticated via email on Chrome via Windows from [redacted]
- 4 minutes ago** [redacted] signed the document on Chrome via Windows from [redacted]
- 5 minutes ago** [redacted] viewed the document on Chrome via Windows from [redacted]
- 25 minutes ago** [redacted] created document 'signed_contract_-_electronic_signature_example.docx' on Chrome via Windows from [redacted]
- 25 minutes ago** [redacted] was emailed a link to sign.

Bulk send for signature

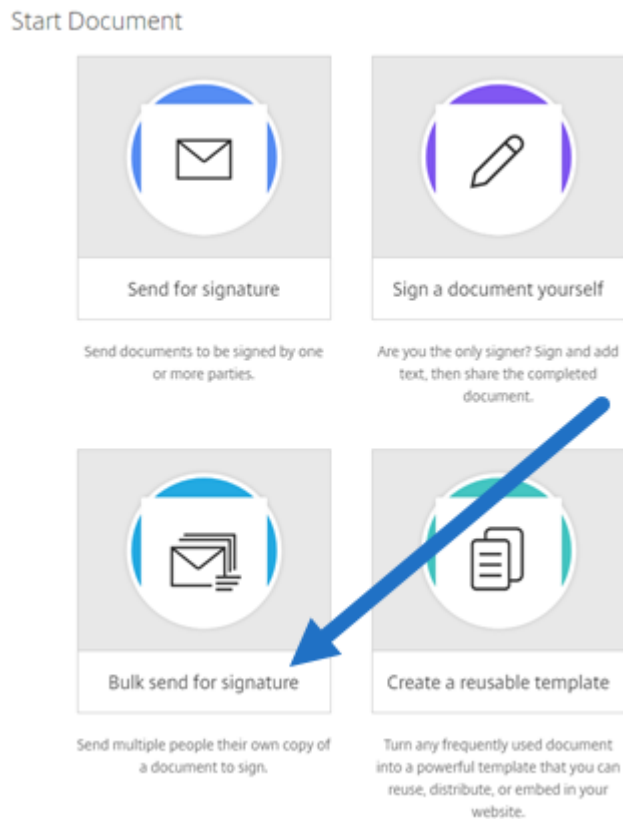
April 25, 2023

Use **Bulk send for Signature** to send multiple signers their own copy of a single document.

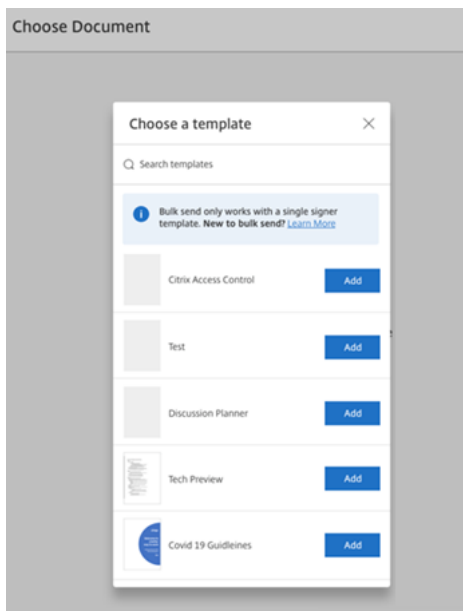
Instructions

The following instructions provide the steps necessary to send to multiple signers.

1. Select **Bulk send for signature**.



2. Select a template to bulk send.

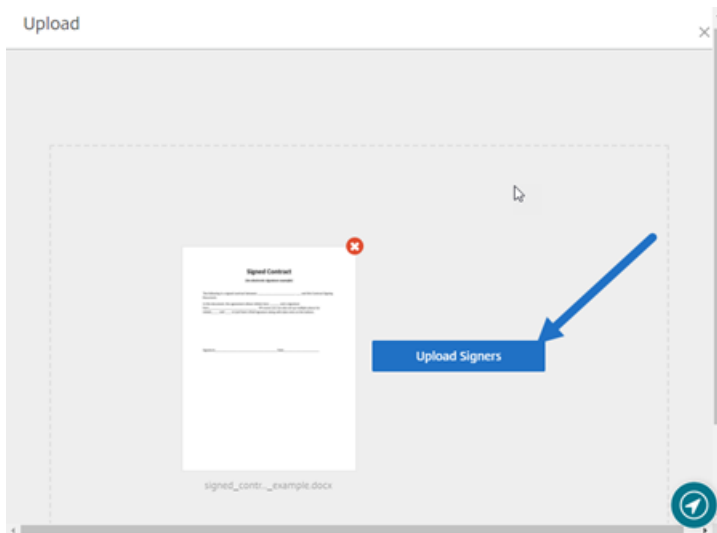


Note:

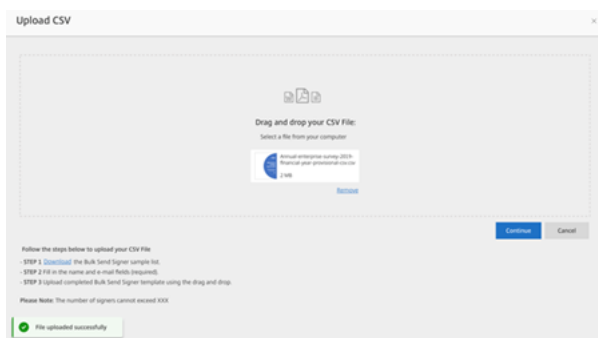
Only templates with a single signer role are available for selection. If a valid template is

not available, create one from the **Templates** tab. For more information on creating a template, see [Create a template](#).

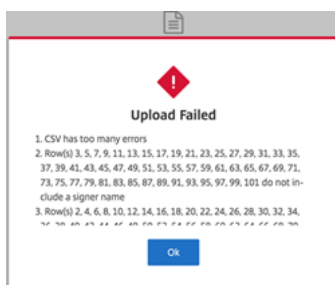
3. Select **Upload Signers**.



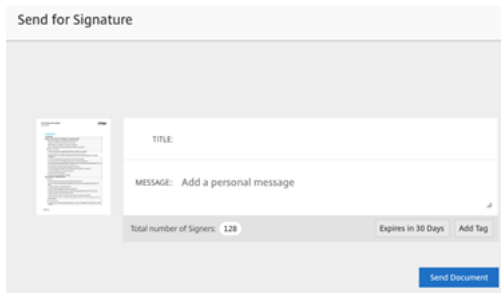
4. Upload a CSV file. The CSV should not contain empty signer name or signer email ID values. The number cannot exceed 300 signers.



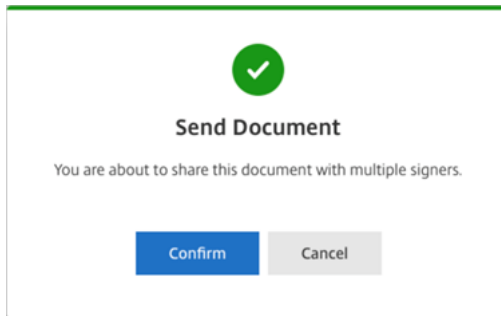
- If the CSV has errors, an error message might display. Correct the issues with the CSV file and upload the CSV file again.



5. Type a message, set an expiration date, and add tags, if necessary.



6. Select **Confirm**.

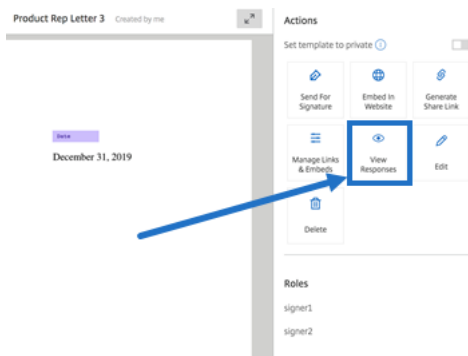


The document status is displayed on the dashboard.

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

October 2, 2023

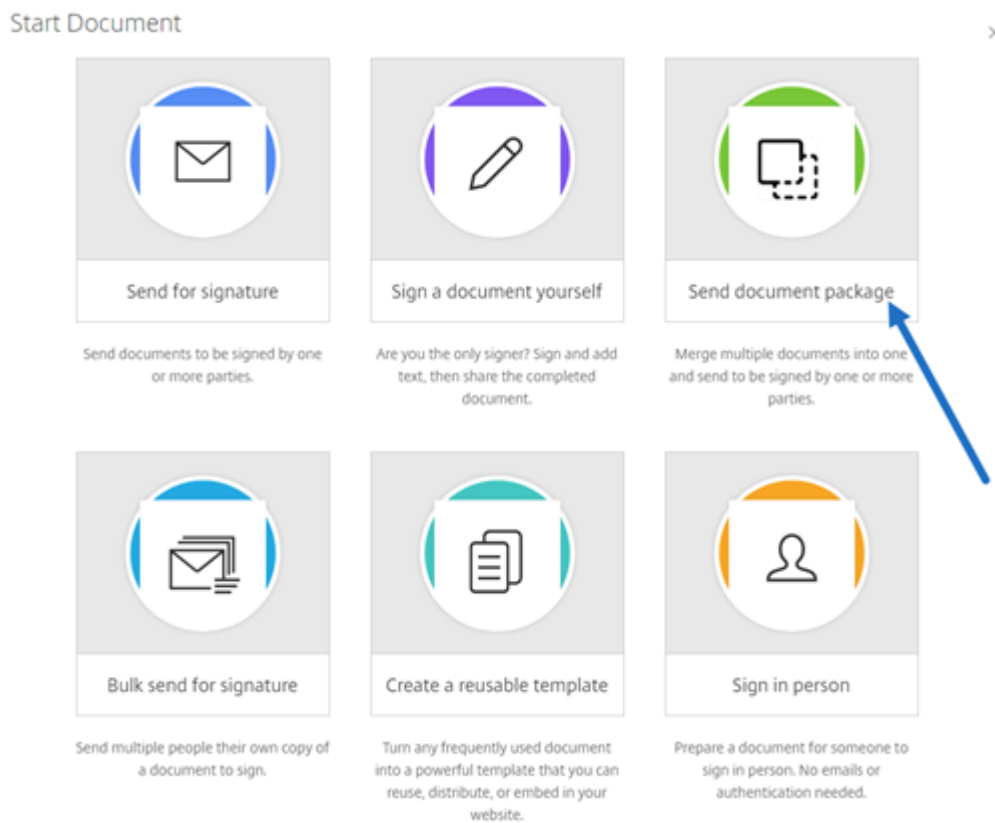
Send a document package allows you to merge multiple documents and send it to the signer as a single package for signature. The document package feature removes the issue of merging documents outside of RightSignature. Users are able to prepare the document on the go.

Signers can access, organize, and sign a single file. Signers can save their progress and return later.

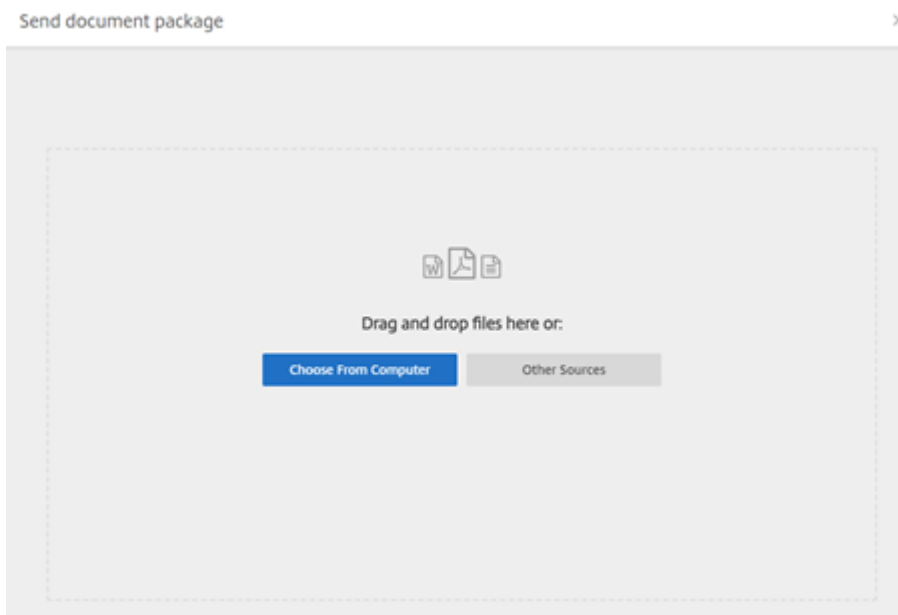
Instructions

The following instructions provide the steps necessary to merge documents into one and send for signatures.

1. Select **Start Document** to open the dashboard.
2. Select **Send document package**.



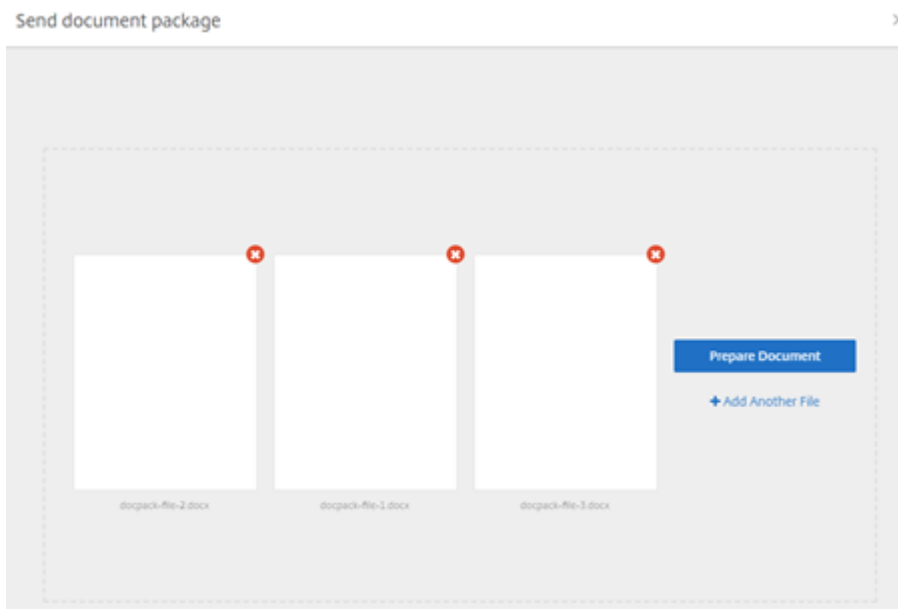
3. Choose more than one document to use this feature.



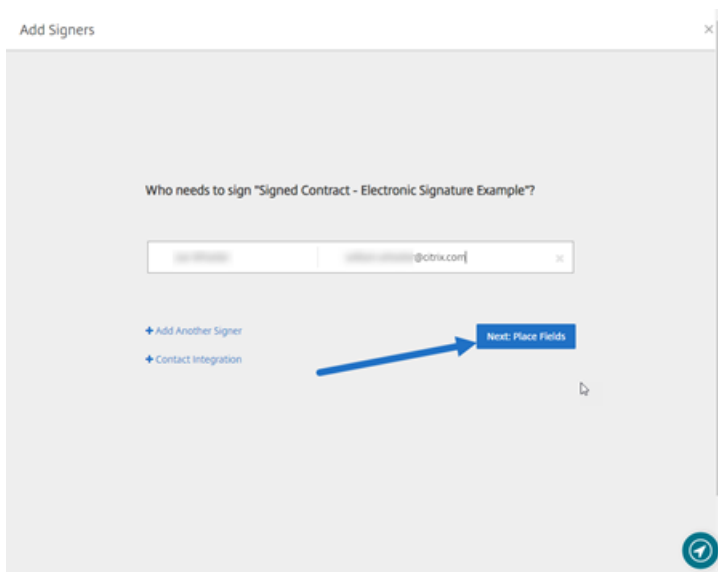
NOTES:

- You can choose up to 5 files and a maximum file size of 20 MB 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 must be unique. Be sure to enter each signer's name and email correctly because, once the document is sent, email addresses cannot be changed. The document must 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 more 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 sends to each signer in order as listed rather than sending the document to all the signers at once.

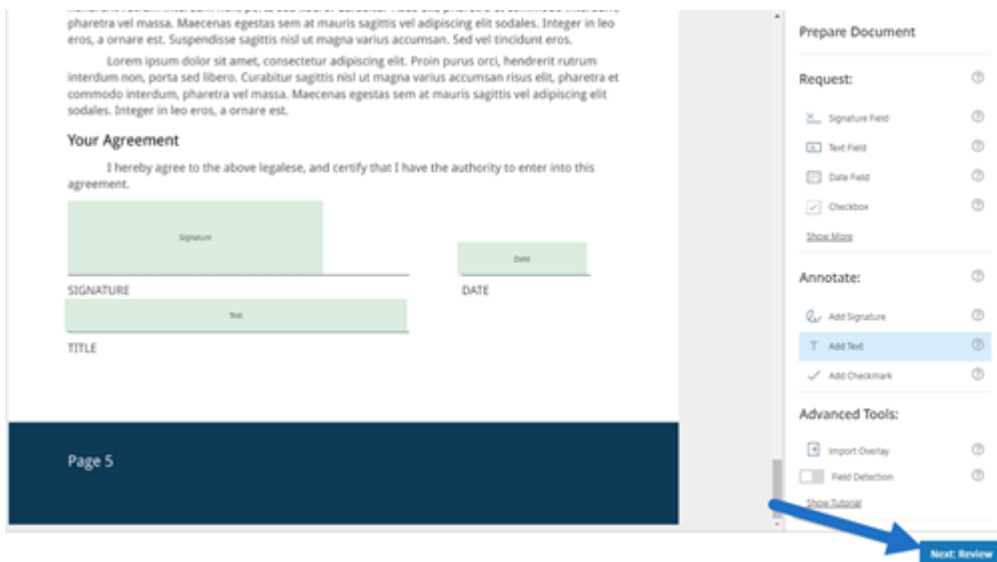
NOTE:

For more information, see [Assign an Order for Signers on the Same Document](#).

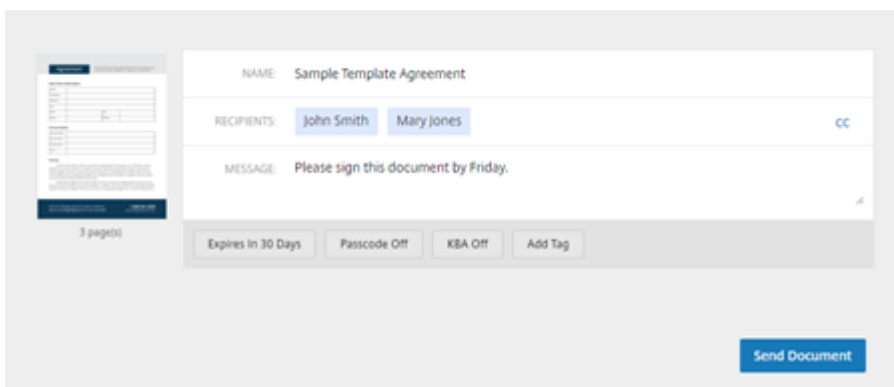
7. Select **Next: Place Fields** to create the signer and annotation fields for the document package recipients.



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 use the document packager feature.

[This is an embedded video. Click the link to watch the video](#)

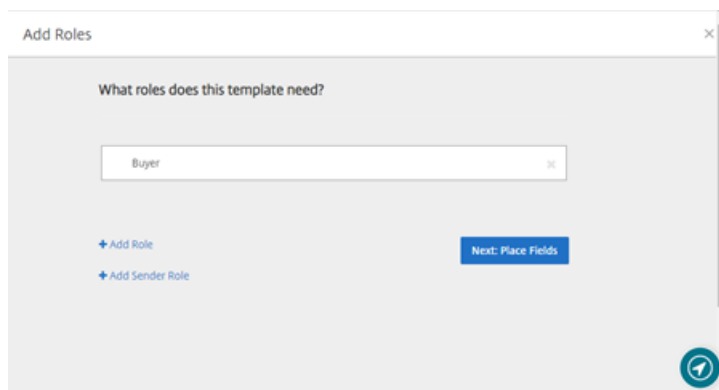
Create a template

January 25, 2023

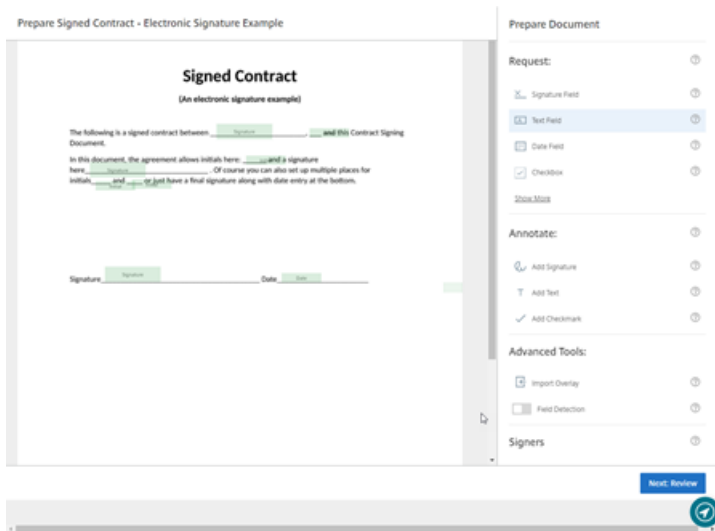
Use the following set of instructions to create templates in RightSignature.

Instructions

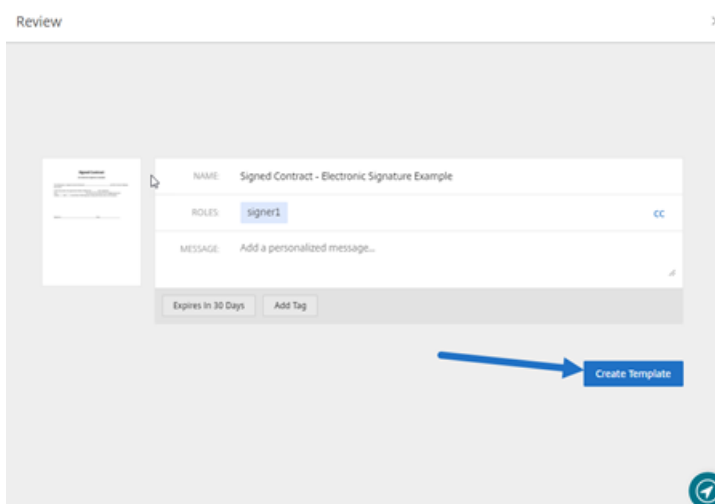
1. From the RightSignature dashboard, select **Templates** in the left menu bar, then select **Create Template**.
2. Select **Upload A File** to open the document you want to build a template with.
3. If replacing the underlying source file used to create the template, select the red x. Afterwards, select 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. Select **Create Template**.

Delete saved signature

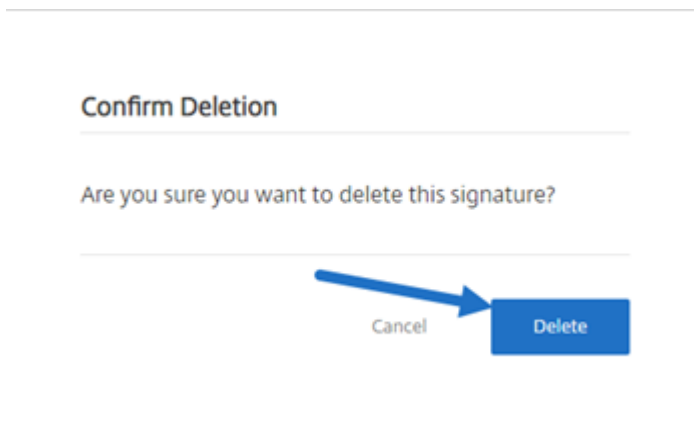
August 22, 2023

Follow these steps to delete your saved signature.

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



2. Select the trashcan icon to delete the signature.
3. Select **Delete** to confirm you want to delete the signature.



Decline to sign

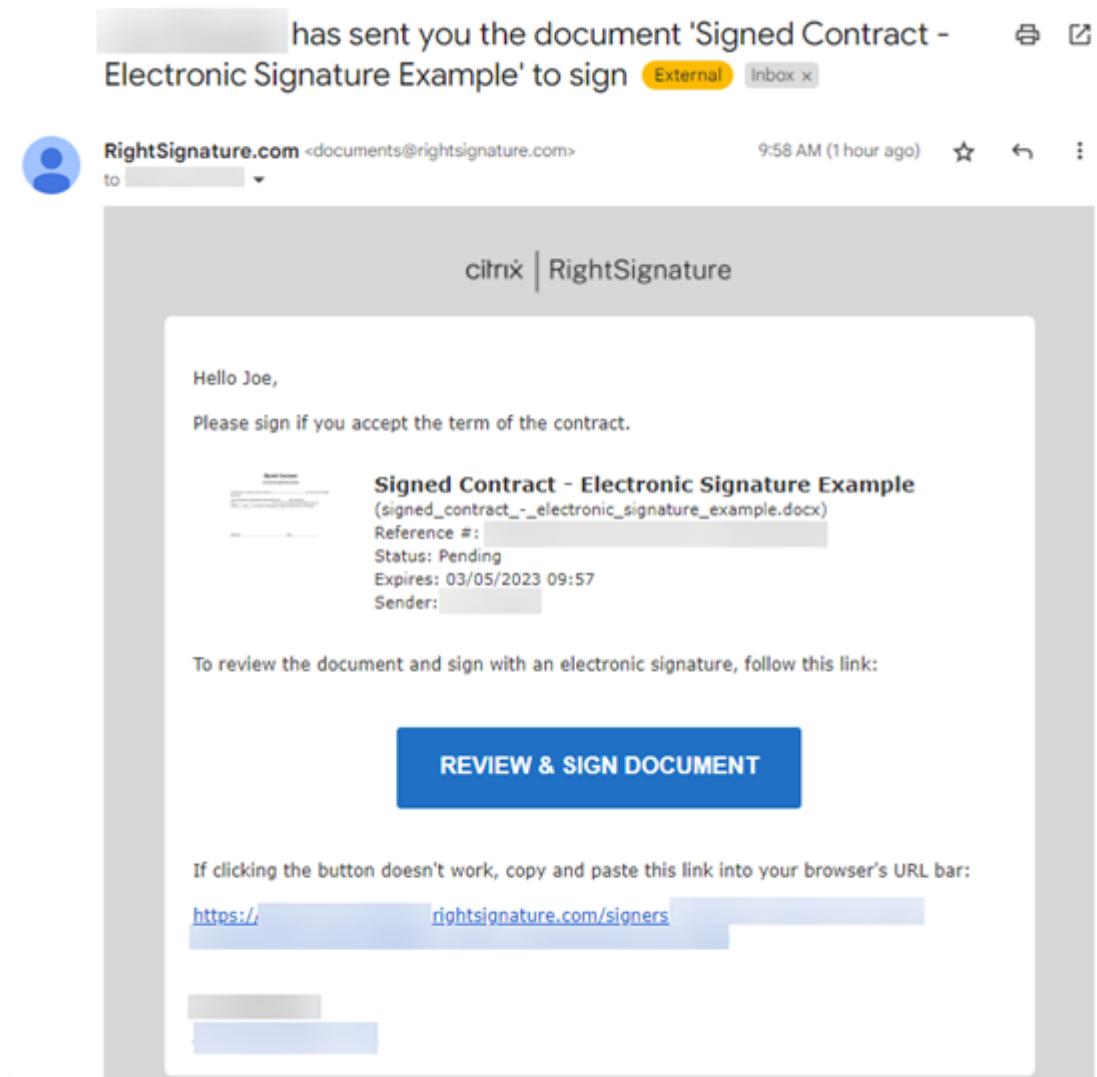
March 23, 2023

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

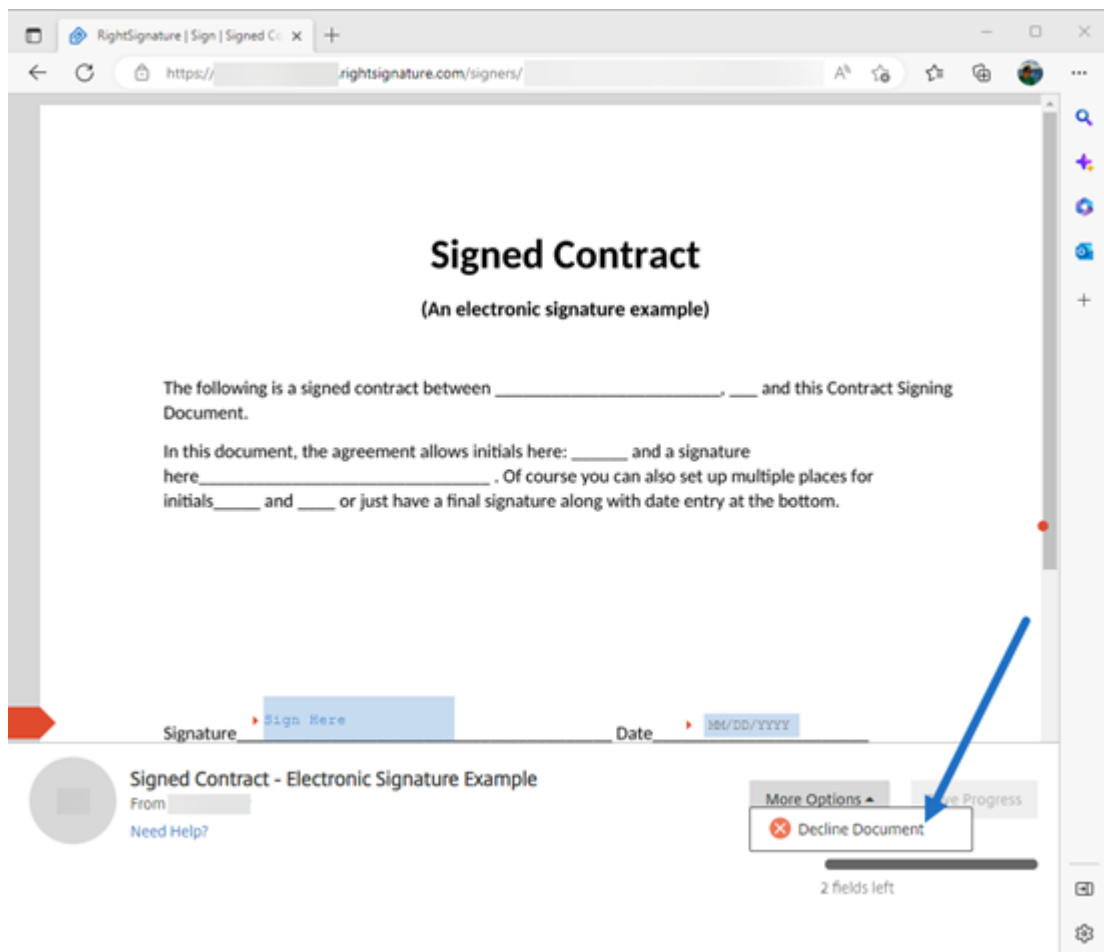
Instructions for the signer

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**.



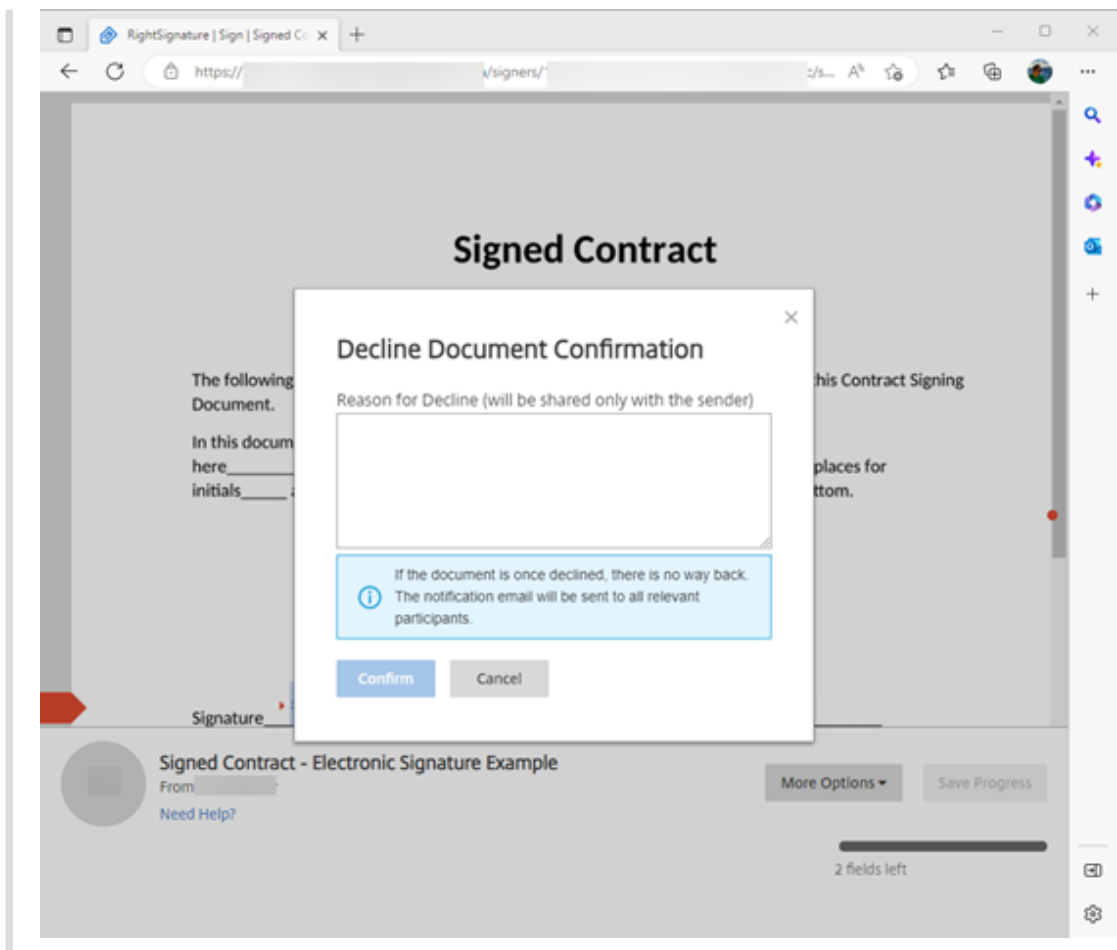
2. Open the document using the link in the email.
3. After reviewing the document, if you decide not to sign, select **More Options**. The **Decline Document** option displays.



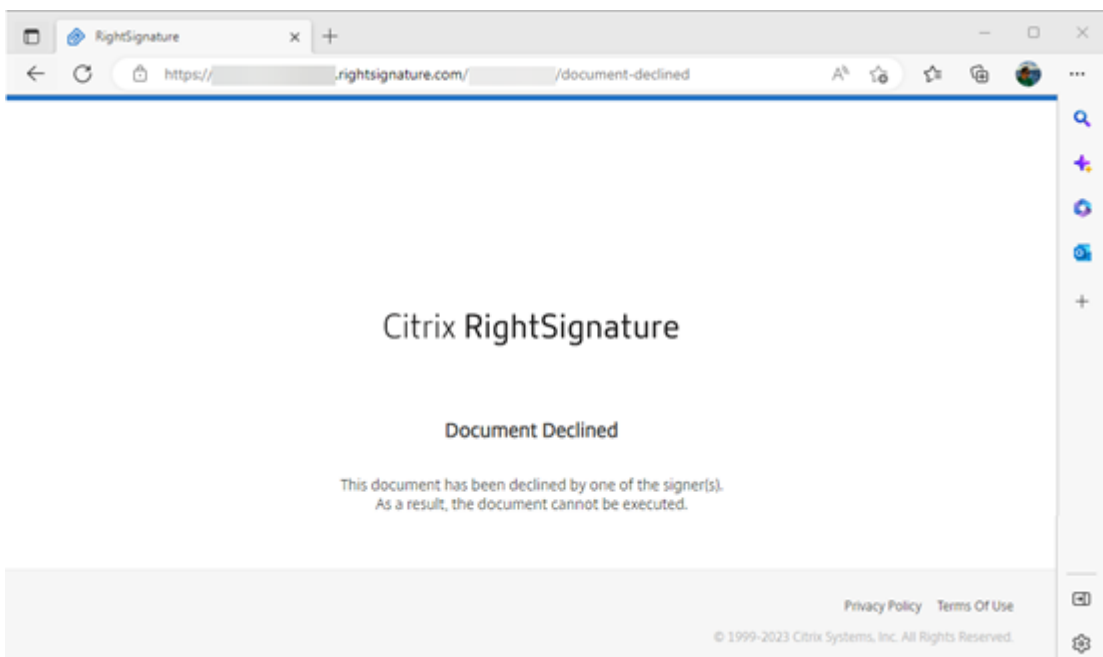
4. Select **Decline Document**. The **Decline Document Confirmation** displays requesting that you provide a reason for declining to sign.

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**

nature Example' has been declined External Inbox



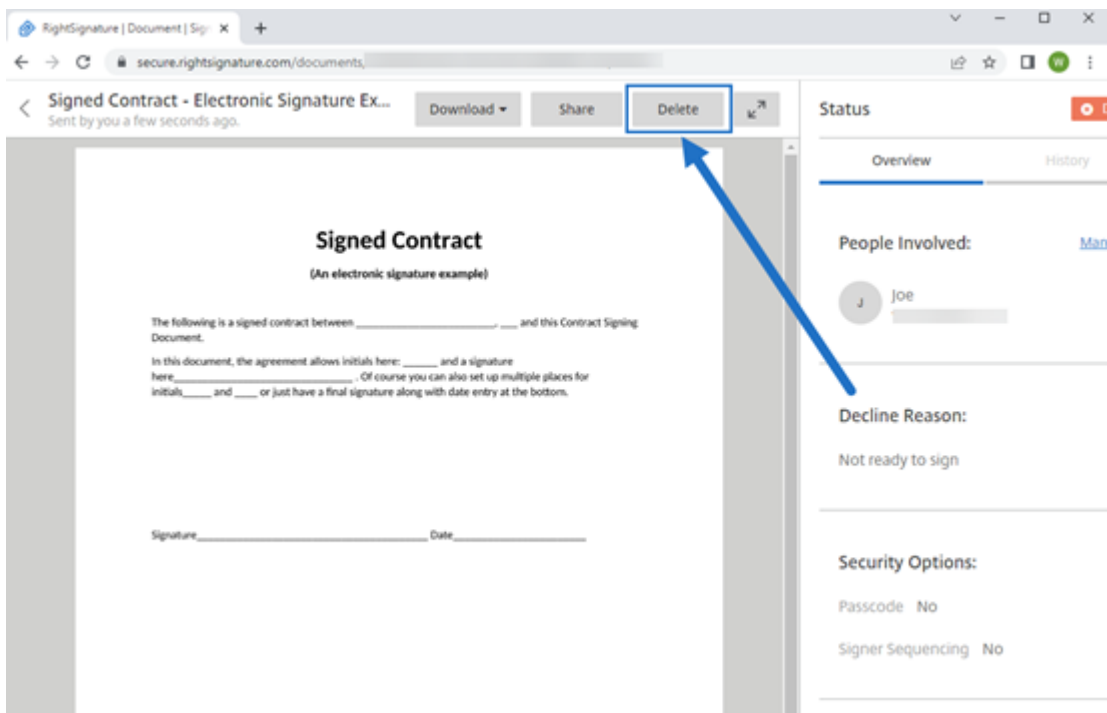
- **Signer received**



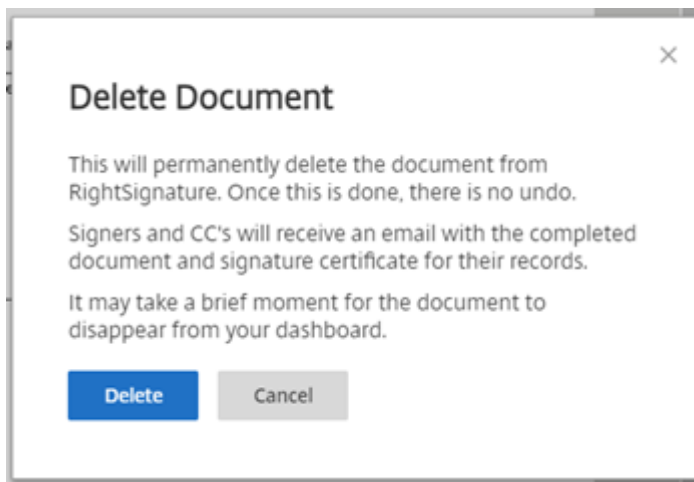
Delete declined document

After you receive notification that your signature request was declined, you have the option to delete the declined document.

1. Select the declined document from the list under the **Documents** dashboard.
2. Select **Delete**.



3. Confirm the deletion by selecting **Delete** in the confirmation window.



The declined document is removed from the **Documents** dashboard.

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 notified.

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.

RightSignature Firewall Configuration - IP addresses

June 26, 2023

ShareFile recommends as a best practice that customers leverage domain inclusion instead of IP address inclusion. This is due to frequent changes of cloud services to scale up and to introduce new services.

Domains to allow

- *.rightsignature.com
- *.amazonaws.com

RightSignature Control Plane IP Ranges

RightSignature utilizes a wide range of IP ranges to maximize performance. If domain inclusion is not possible, the IP ranges are available from Amazon Web Services. All IP ranges in the [AWS](#) list which meet the following criteria can be utilized by RightSignature.

```
“region”: “us-east-1”,  
“service”: “AMAZON”,  
“network_border_group”: “us-east-1”
```

Email Notifications

Add the following email address to your allowed list: documents@rightsignature.com

Add the following email domain to your allowed list: [amazonses.com](#)

RightSignature IP ranges

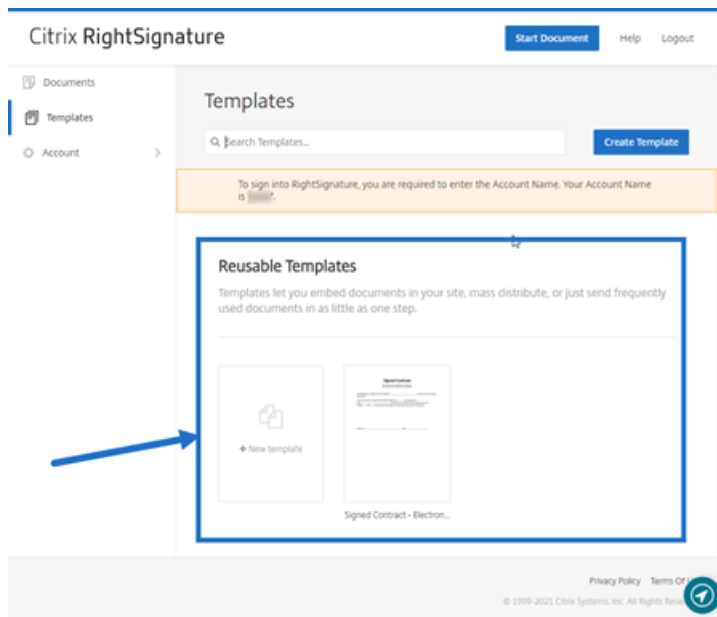
CIDR Notation	Netmask
199.255.192.0/22	255.255.252.0
199.127.232.0/22	255.255.252.0
54.240.0.0/18	255.255.192.0
69.169.224.0/20	255.255.240.0
23.249.208.0/20	255.255.240.0
23.251.224.0/19	255.255.224.0
76.223.176.0/20	255.255.240.0
54.240.64.0/19	255.255.224.0
54.240.96.0/19	255.255.224.0
52.82.172.0/22	255.255.252.0
76.223.128.0/19	255.255.224.0

Edit a template

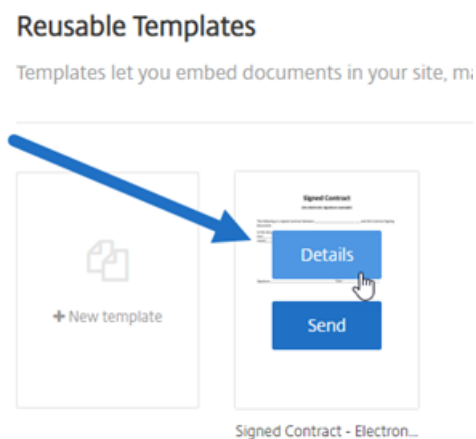
January 25, 2023

Follow these steps to edit an existing template:

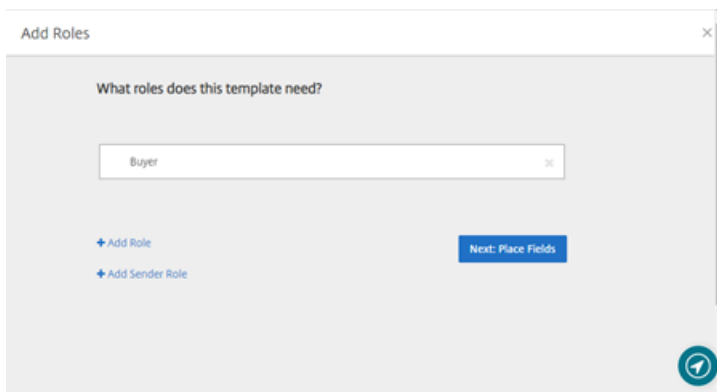
1. From the RightSignature dashboard, select **Templates** in the left menu bar, then select the template that you want to edit from **Reusable Templates**.



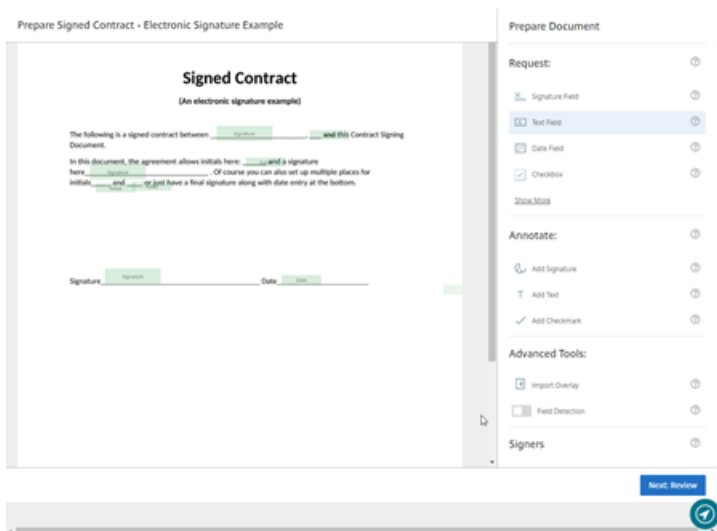
2. Select **Details**, and on the **Details** screen select **Edit**.



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. 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

January 25, 2023

The **Merge Fields** feature provides 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.

Instructions

To create a merge field, use the Document Overlay tools when preparing a document.

1. From the 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 check box 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 is prompted to fill each time a copy of the Template is sent.

The screenshot shows the 'Prepare Document' interface. On the left, a form titled 'New Client Information' contains a 'Merge Field: Text' box. The form fields include Name, Company, Address, City, State, Zip, Email, and Phone. Below this is a 'Service Details' section with 'Account Rep' and 'Service Plan' fields. On the right, a sidebar titled 'Prepare Document' lists various field types: Request (Signature Field, Text Field, Date Field, Checkbox), Annotate (Add Signature, Add Text, Add Checkmark), and Advanced Tools (Import Overlay). The 'Text Field' option is currently selected.

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.

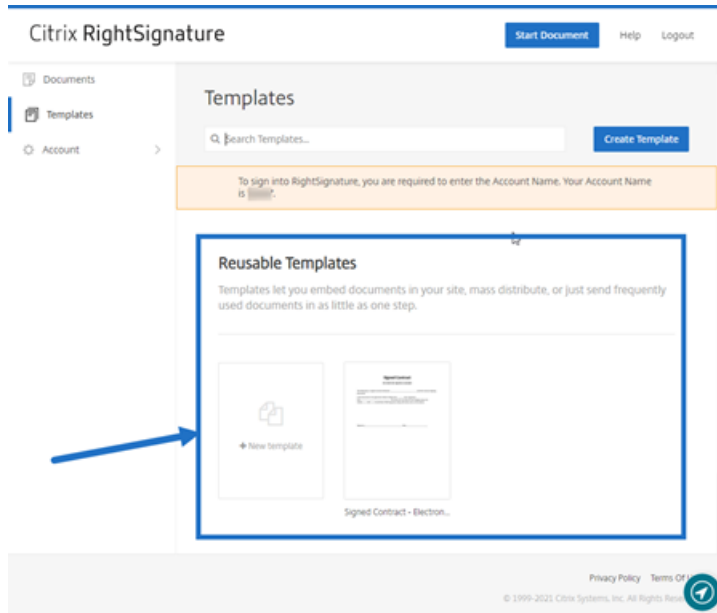
Generate a share link for templates

January 25, 2023

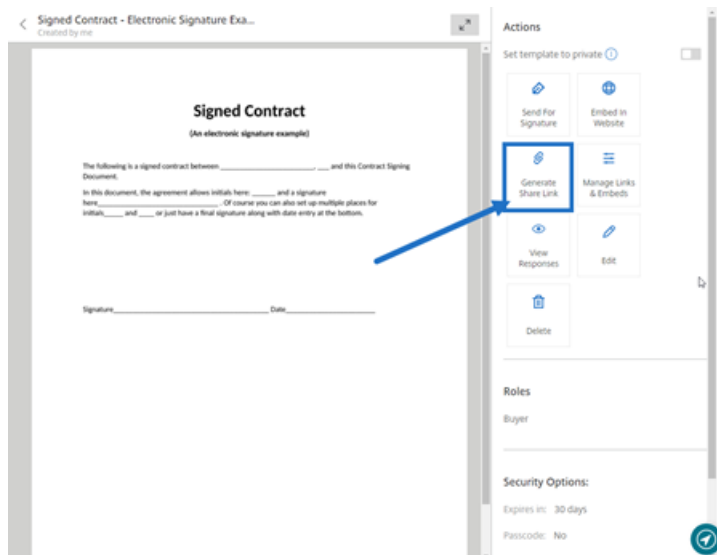
Instructions

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

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

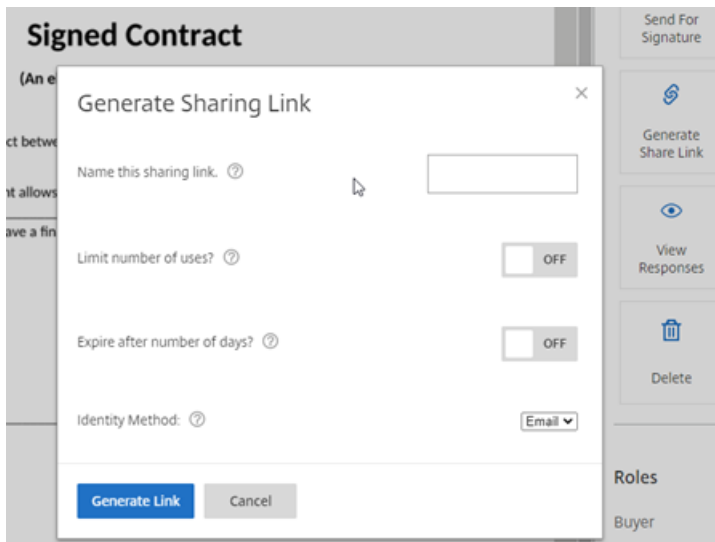


2. Select **Details**.
3. From the Templates Details screen, select **Generate Share Link**.

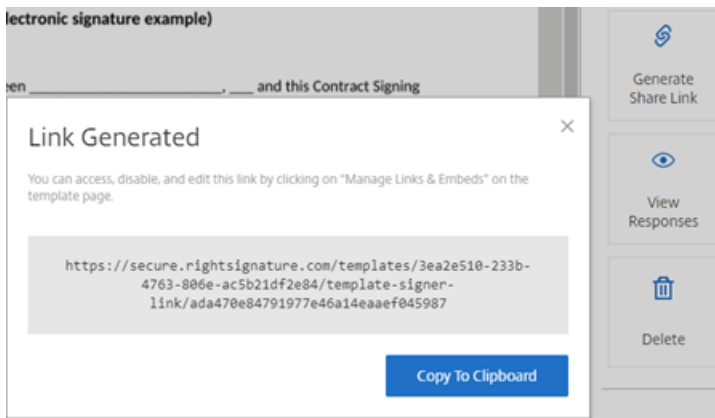


4. On the **Generate Sharing Link** screen, review and edit the following fields as needed:
 - **Name this sharing link.:** Use this to make managing links easier.
 - **Limit number of uses?:** Use the toggle to limit the number of times the link can be signed.

- **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.

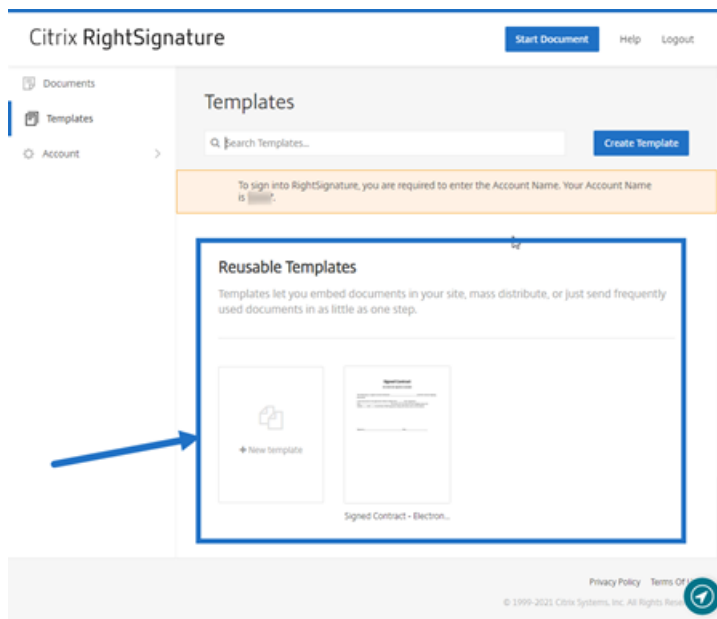


Embed template document into a website

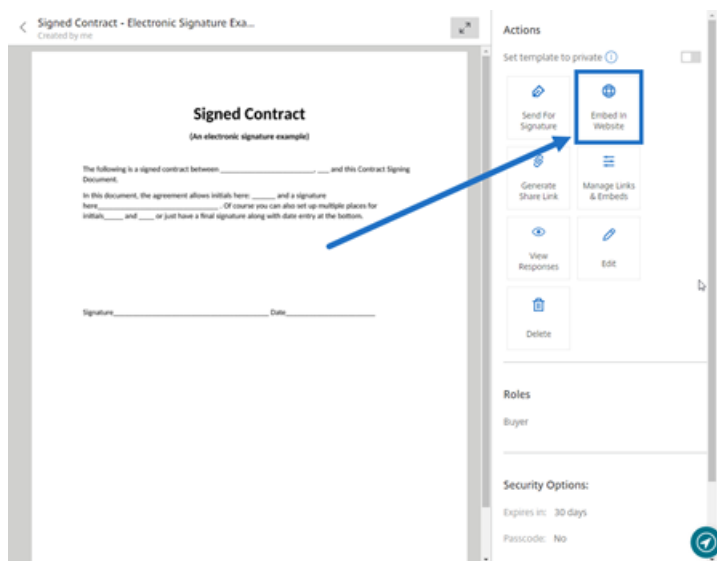
January 25, 2023

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

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

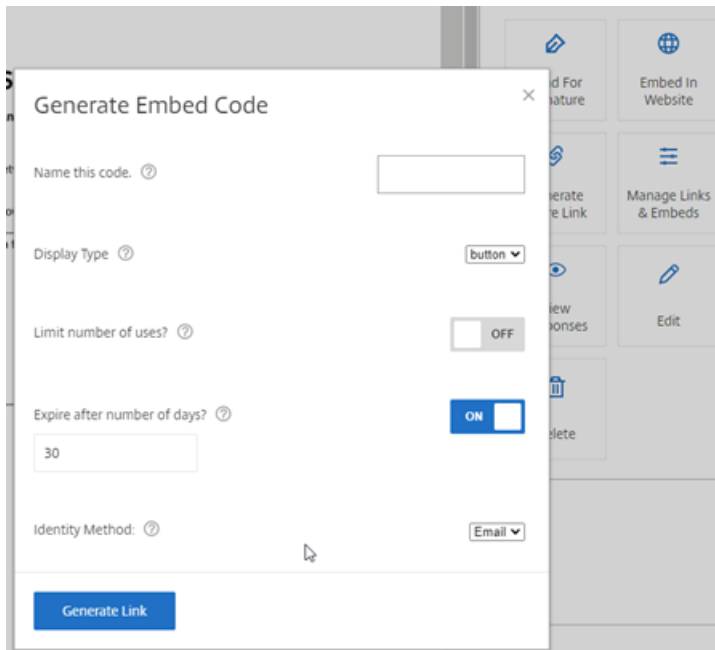


2. Select **Details**.
3. From the Templates Details screen, select **Embed in Website**.

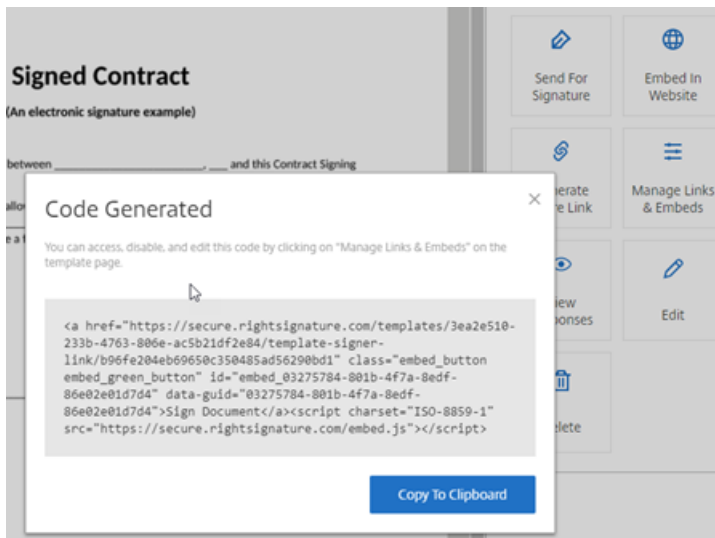


4. On the Generate Embed Code screen, review, and edit the following fields as needed:
 - **Name this code.:** Use this to make managing code easier.
 - **Display Type:** Choose button, image, or inline text to display on your webpage.
 - **Limit number of uses?:** Use the toggle to limit the number 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 a document

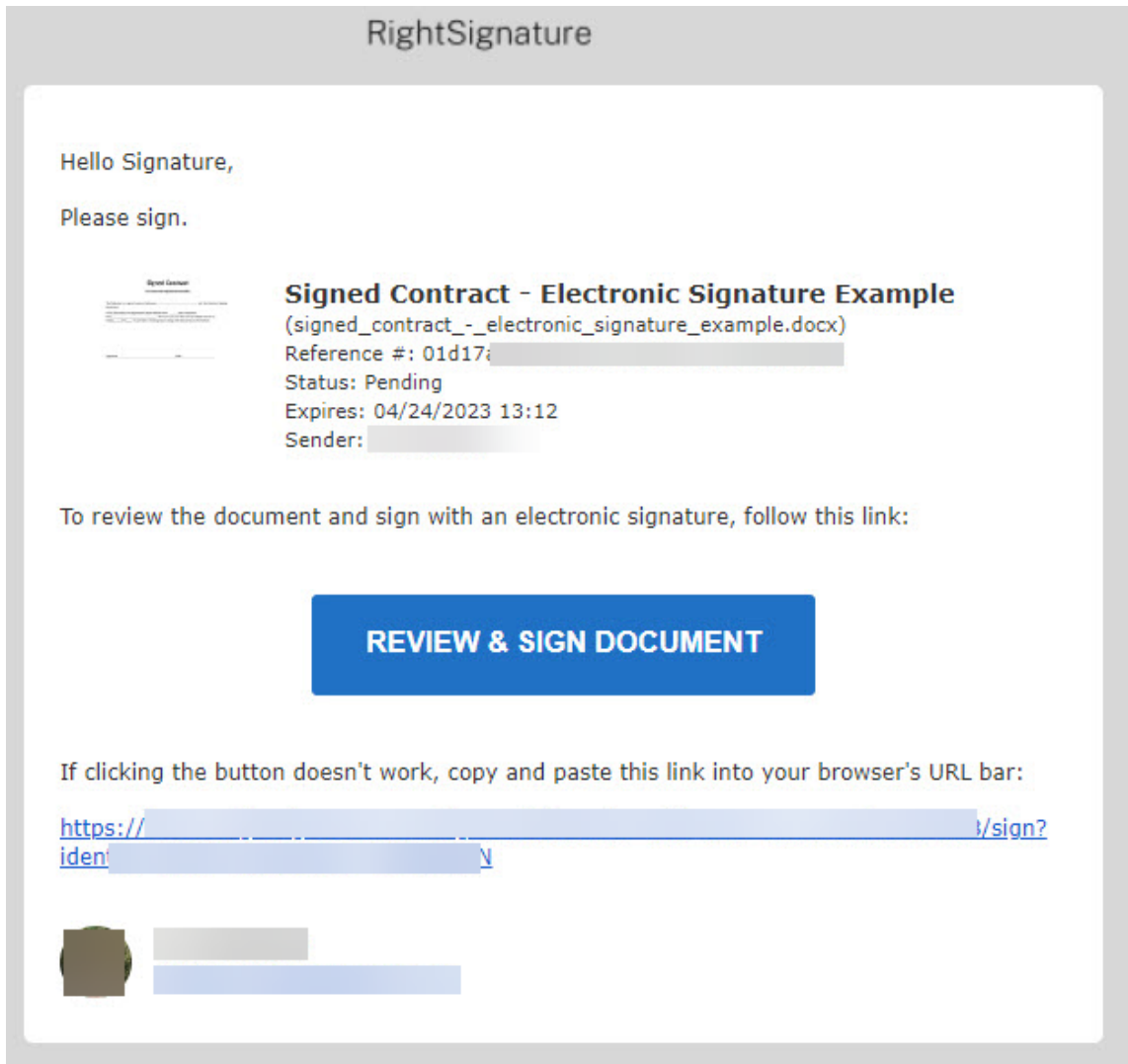
March 25, 2023

Electronic signature requests might come from an email or embedded in a form you fill out on a website. The signing process is the same.

Instructions on signing a document

The following instructions explain the process of signing a document.

1. Open the document by selecting **Review & Sign Document** in your email or from an online form in your browser.



2. Complete the highlighted editable fields that are flagged with a red tick mark.

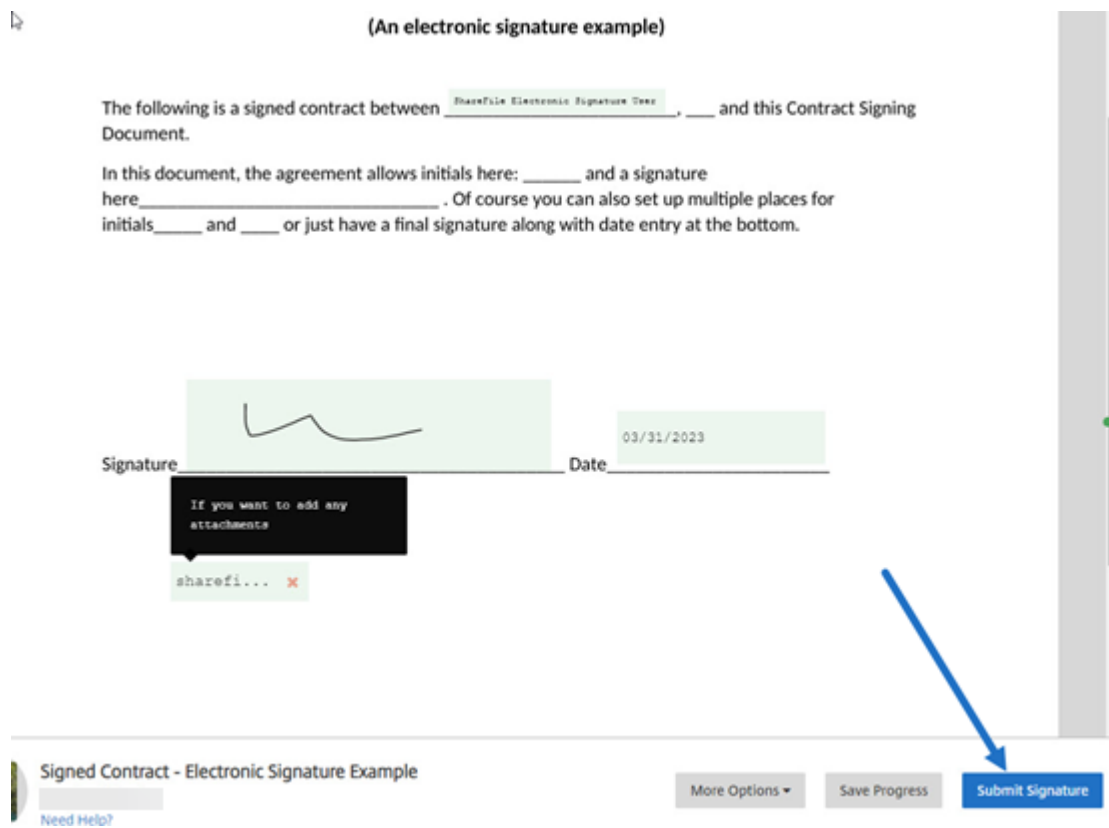


Note:

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



3. Select **Submit Signature**.



4. Confirm the signature and agree to the RightSignature Terms of Use, Privacy Policy, and E-Sign Consent, by selecting **Submit**.



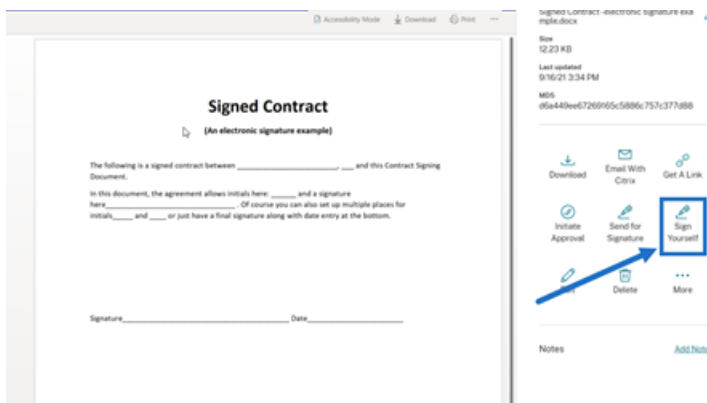
You have now electronically signed the document.

Sign your own document

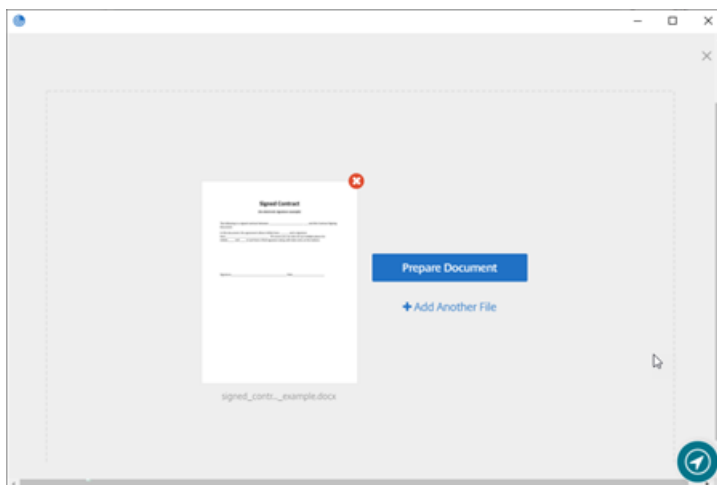
January 25, 2023

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.

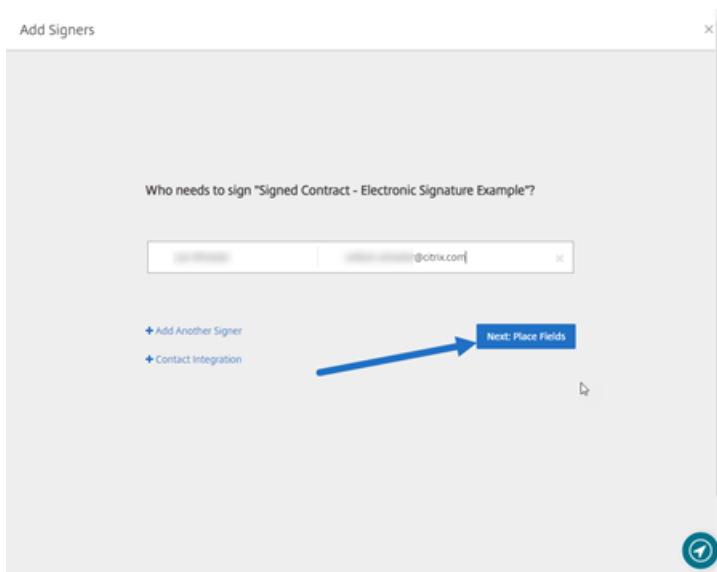
1. From your ShareFile account, select the document you want to send to yourself for signature. The preview window opens.



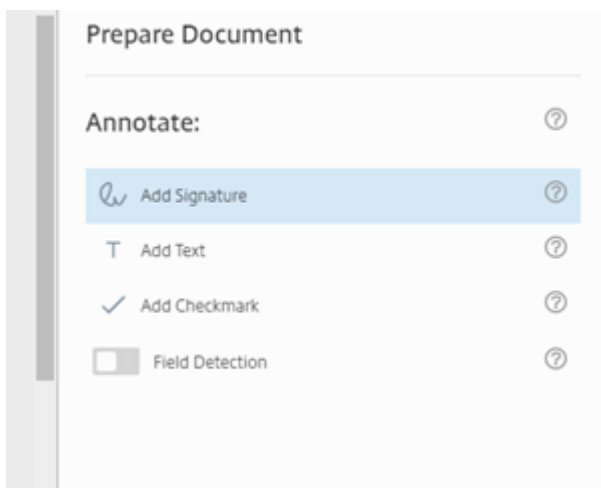
2. Select **Sign Yourself** to open RightSignature.



3. Select **Prepare Document**.



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

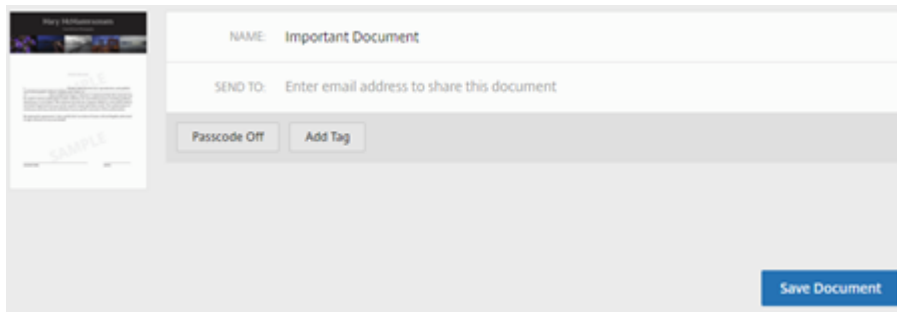


5. In the signature box, you can use your mouse to create a handwritten signature, use a saved signature, or use the type-to-sign feature. Click **Apply** when finished.



6. Select **Next: Review**.

7. Select **Save Document**.



Reminder emails

July 17, 2023

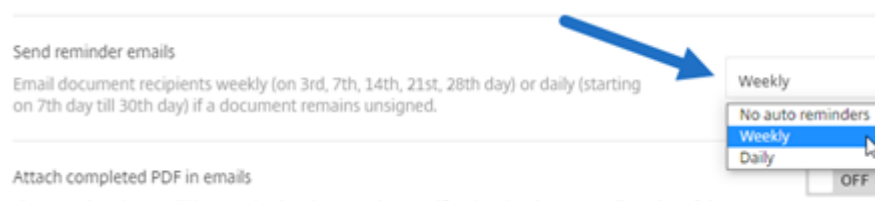
There are two ways to send reminder emails to gently remind the signers to complete an unsigned document. The first is enabled in **Settings** and will send either a daily or weekly reminder. The second is a manual reminder that you can use at any time before the set expiration period.

Auto reminder

Tips:

- Weekly reminder automatically notifies the signer on 3rd, 7th, 14th, 21st, and 28th day
- Daily reminder automatically notifies the signer starting on the 7th day through the 30th day
- Reminders are sent only on active documents (not expired/ not voided/ not executed)

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



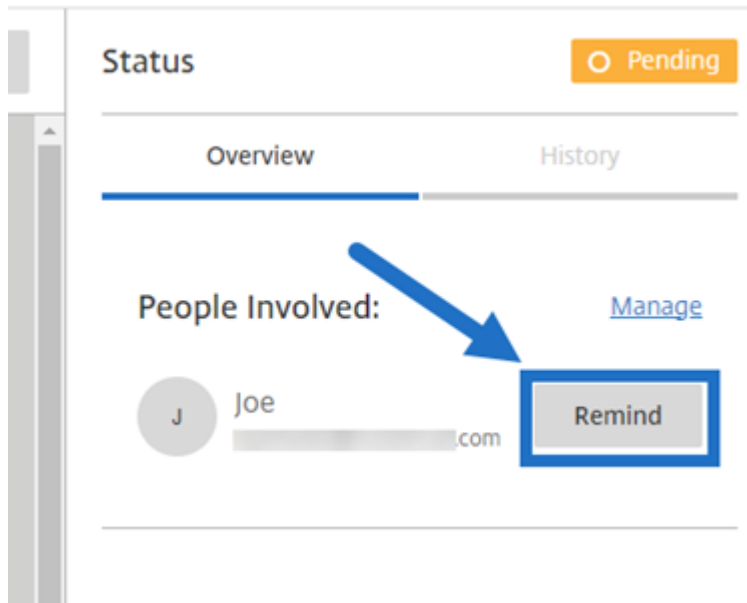
2. Select one of the following options:

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

Reminders can be disabled in the **Settings** section of your account. These settings can be changed at any time.

Manual reminder

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



2. Select **Remind** by the name of the signer under the **People Involved** section of the Status column. The **Remind** button is only available to the sender of the document.

A reminder email is sent.

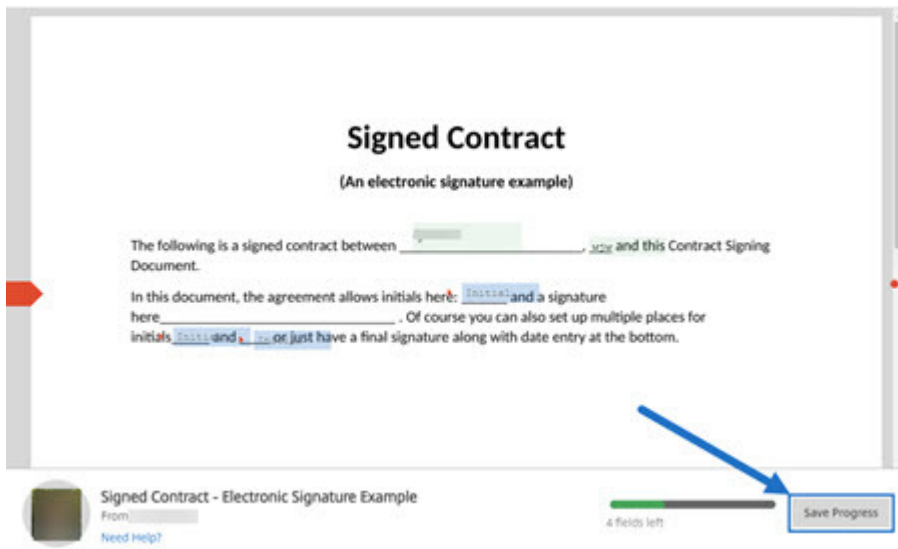
Saving signature progress

January 25, 2023

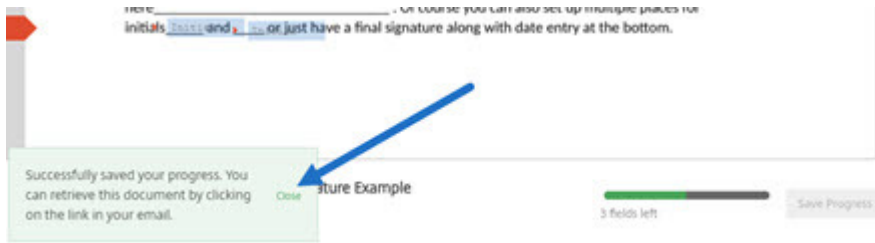
Recipients of electronic signature requests can save their work before completing the required signature tasks. This ability to save allows the signer to step away from large documents without losing their place in the signing process. Utilizing the original link from the signature request email, the 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 #: [REDACTED]

Status: Pending

Expires: 11/03/2021 13:40

Sender: [REDACTED]

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/\[REDACTED\]](https://secure.rightsignature.com/signers/[REDACTED])



[REDACTED]@citrix.com



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