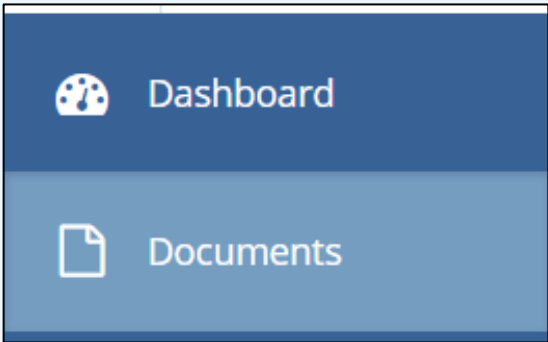


- APPLICABLE TO:
- Admin
  - Manager
  - Editor
  - Reader
  - Collaborate
  - eTMF

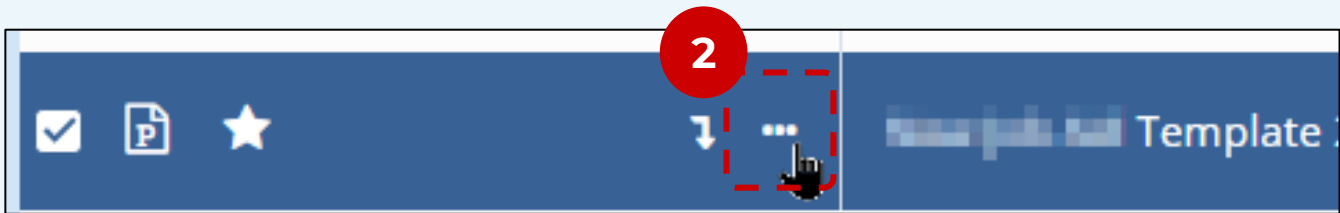
## Part 1: Setup

[ Only Editor and above users with eSignature action and Admins. ]


**1** **Navigate** to the document to be signed in Documents or Documents Library.

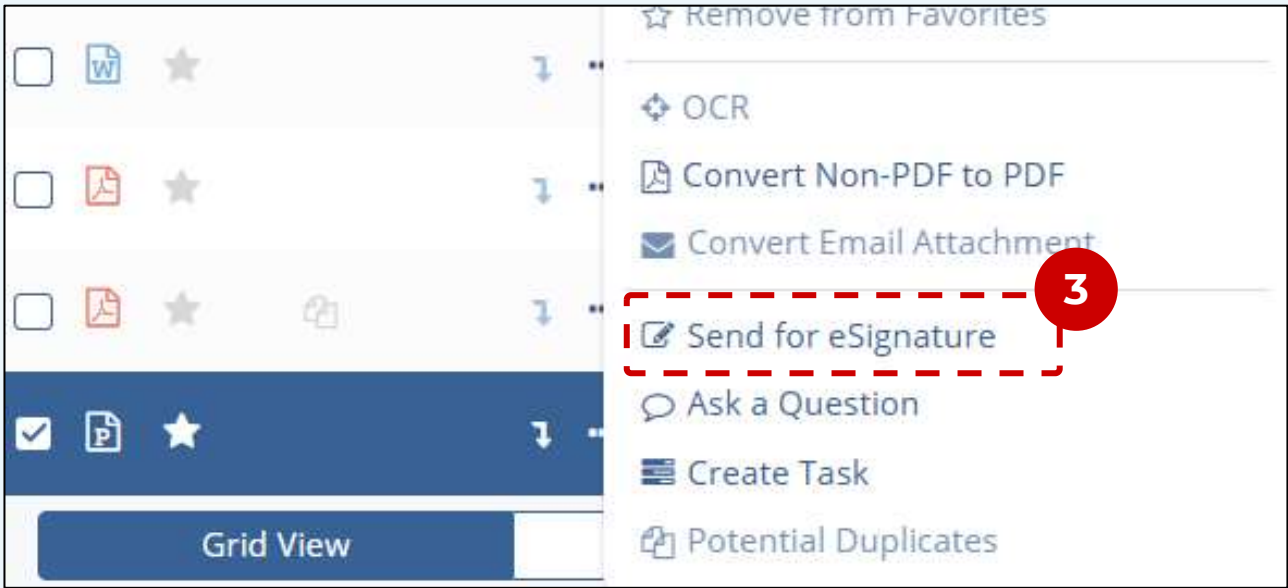


**2** **Right-click** on the document line, or click on the **ellipsis**, to open the Document Actions menu.



**3** Select **Send for eSignature**.

 Documents in intermediate processing stages may not be eligible for eSign.



**4** Set the eSignature Type to either concurrent signatures (“Parallel”) or specific order (“Serial”).

**5** Add **signatories** by drag-and-drop from the left to the right column.  
Click **OK** to Finalize.

**Send For ESignature**

eSignature Type ☒ Parallel ☐ Serial

Search

5 Columns 1 selected

	Name	Title
<input type="checkbox"/>	Editor AP	
<input type="checkbox"/>	Brad Pitt	
<input checked="" type="checkbox"/>	Sponsor Review	

1 Columns

	Name	Title
<input type="checkbox"/>	Brad Pitt	

Cancel OK

## Part 2: Signing

**6** Each signatory will receive an email inviting them to sign the document, including a **quick access link**.

Please sign 'CLO\_Checklist\_Clinical Operations List of Sites\_10/11/2024'

To: L...@trialinteractive.com

L... sent you CLO\_Checklist\_Clinical Operations List of Sites\_10/11/2024 from ... QDMS - Training Room

Please review and complete CLO\_Checklist\_Clinical Operations List of Sites\_10/11/2024

Click here to review and sign [CLO\\_Checklist\\_Clinical Operations List of Sites\\_10/11/2024](#)

If you require QDMS support, please email ...

# How to e-sign with TI Sign

TI version 10.7



**7** Users will find a Signature section in the metadata panel.  
Selecting a **Reason** is required.

**8** Clicking **Sign Document** will open an authentication window.

**9** Insert your username and password and click **OK**.  
This will sign the document.

**10** Signature progress is shown in the document's metadata panel.

