Engineering Document Repository & Electronic Signature (E-Sign) Tutorial
# Tutorial Index

<table>
<thead>
<tr>
<th>Topic</th>
<th>Slide Number(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Index</td>
<td>2</td>
</tr>
<tr>
<td>Introduction</td>
<td>3</td>
</tr>
<tr>
<td>Getting Started</td>
<td>4</td>
</tr>
<tr>
<td>Searching the Repository</td>
<td>5-10</td>
</tr>
<tr>
<td>Viewing and Exporting Documents</td>
<td>11-12</td>
</tr>
<tr>
<td>Requesting Large Format Prints</td>
<td>13</td>
</tr>
<tr>
<td>Electronic Signature (E-Sign)</td>
<td>14</td>
</tr>
<tr>
<td>Initiating an E-Sign</td>
<td>15-16</td>
</tr>
<tr>
<td>Adding Document Attributes</td>
<td>17</td>
</tr>
<tr>
<td>Adding Signers (Approvers)</td>
<td>18-20</td>
</tr>
<tr>
<td>Completing an E-Sign</td>
<td>21</td>
</tr>
<tr>
<td>Creating and Adding Favorites</td>
<td>22-23</td>
</tr>
<tr>
<td>Replacing a Document / Stopping the E-Sign Process</td>
<td>24</td>
</tr>
<tr>
<td>Administratively Rejecting a Document</td>
<td>25</td>
</tr>
<tr>
<td>Editing an E-Sign (Attributes)</td>
<td>26-28</td>
</tr>
<tr>
<td>Resubmitting a Rejected E-Sign</td>
<td>29-30</td>
</tr>
<tr>
<td>Adding A Document Revision</td>
<td>31-32</td>
</tr>
<tr>
<td>Approving an E-Sign</td>
<td>33</td>
</tr>
<tr>
<td>Rejecting an E-Sign</td>
<td>34</td>
</tr>
</tbody>
</table>
Introduction

The Document Repository is a electronic database designed to:

1) Manage and retain all released Engineering drawings, Specifications and other Design documentation
2) Perform searches of retained documents
3) Provide viewing of retained documents
4) Acquire a copy (Export) of the document for storage in an alternate location (folder, desktop, etc.)
5) Request paper print service for large format and quantity needs
6) Initiate and manage the document signature process (E-Sign)
Getting Started

• Click on either Document Control Group link
Searching the Repository

Find a document by selecting from the Document Category

OR for all document types (Drawings, Specification, etc.), use this Search
Searching the Repository

• Click the “Search” Link in the upper right side of the Category page

<table>
<thead>
<tr>
<th>Type</th>
<th>Document Number</th>
<th>Owner</th>
<th>Modified</th>
<th>Size</th>
<th>Action(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>67165-00152-Rev-Sh1</td>
<td>Steve Furches</td>
<td>4/15/2013</td>
<td>160 kb</td>
<td></td>
</tr>
<tr>
<td></td>
<td>67165-00152-Rev-Sh2</td>
<td>Steve Furches</td>
<td>4/15/2013</td>
<td>43 kb</td>
<td></td>
</tr>
<tr>
<td></td>
<td>67165-00152-Rev-Sh3</td>
<td>Steve Furches</td>
<td>4/23/2014</td>
<td>24 kb</td>
<td></td>
</tr>
<tr>
<td></td>
<td>71200-2904</td>
<td>Sasa Radovic</td>
<td>10/2/2013</td>
<td>1 mb</td>
<td></td>
</tr>
<tr>
<td></td>
<td>00-C-8-2161, Revision: 1, Sheet No.: S1</td>
<td>Terrie Fuell</td>
<td>3/14/2013</td>
<td>490 kb</td>
<td></td>
</tr>
<tr>
<td></td>
<td>010601176, Revision: A, Sheet No.: 1</td>
<td>Terrie Fuell</td>
<td>3/14/2013</td>
<td>1 mb</td>
<td></td>
</tr>
<tr>
<td></td>
<td>010601251, Revision: A, Sheet No.: 1</td>
<td>Terrie Fuell</td>
<td>3/14/2013</td>
<td>351 kb</td>
<td></td>
</tr>
<tr>
<td></td>
<td>010601252, Revision: A, Sheet No.: 1</td>
<td>Terrie Fuell</td>
<td>3/14/2013</td>
<td>546 kb</td>
<td></td>
</tr>
<tr>
<td></td>
<td>01100-0004, Revision: -, Sheet No.: 1</td>
<td>Bridget Paul</td>
<td>3/14/2013</td>
<td>220 kb</td>
<td></td>
</tr>
</tbody>
</table>
Searching the Repository

• Click on the Document link to view document details
Searching the Repository


![View Document Screenshot]

- Document Number: ACC0222201-0000
- Approval Status: Document is approved
- Description: Current Revision B
- Document Type: File Upload
- File: ACC-002-2201-0000 REV B.pdf
- Owner: Gary E. Hays
- Parent: JLab Drawings
- Category: MEG
- Document Number: ACC0222201-0000
- Drawing Size: E
- Drawing Title: WEST SPREADER REGION 1 (22)
- Drawn Date: 05APR10
- Sheet Number: 7
- Expiration Date: 06MAR16
- Contributors

Currently showing 2 significant versions of this document. Show all versions.
Searching the Repository

You can see assigned Approvers by clicking the Magnifying glass icon in the Approval Status box.
Viewing Documents

• Click on the document link under “Name”

A Status symbol beside the name indicates:

✔ Released    ⚠ In Progress    ❌ or Rejected
Exporting Documents

- Export a document by checking the box(es) to the left of the document link and clicking the “Download” button.
- Multiple files will load into a “zip file” for saving to your PC.
Requesting Large Format Prints

For large quantity and/or large format paper prints, check the box to the left of the item line and

• Click the “DCG Print Request” button
Electronic Signature (E-Sign)

Many steps make up the Engineering Design Process before a Controlled Document (drawing, spec., etc) is approved for release. These include having your documents reviewed in advance for accuracy and completeness.

The E-Sign procedure is not a review process but a signature process to release a document for fabrication and storage.
Initiating an E-Sign (Document Turn in)

*To start the signing process,*

- Click on the Document Category for the type of document requiring signatures
Initiating an E-Sign
(Document Turn in)

**Note:** pdf must be downloaded in original size (D size drawing is downloaded as Ansi D or 22x34)

- Click on “Add Document” button
Adding Document Attributes

• Enter required information (* required)
• Click “Browse” to add pdf to be signed
• Click on the “Save and Add Approvals” button

Once “Favorites” are created, this button will open a favorites listing
Adding Signers (Approvers)

• Add one or more Signers by typing their Name or User Name and selecting from the drop down list.

(Adding multiple signers allows one OR the other to sign but NOT BOTH)
Adding Additional Signers

For Documents requiring more than one Signature: Enter the type of Signer (Approver 2, Weldment Approver, etc) in the Signature Label Box, find the signer in the Search for Signer Box and then:

• Click the Add Signature Button
Adding Additional Signers

Upon clicking the “Add Signature” button; the label and signer name appears under the “User Defined Signature” area.

Once All Signers are added:  **Click Proceed**
Completing an E-Sign

The “Confirm Signatures” panel will show all approvers assigned to this document. 

• Click “Submit Signatures”

The document gets sent by e-mail to the approvers/signers. You will get a response e-mail once the E-sign has been Approved or Rejected.
Creating Favorites

In the “Confirm Signatures” panel you can create and save the latest grouping of Signers:

- Click to open this link
Adding Favorites
Name your new favorite grouping of signers- a description is optional.

• Click “Submit Signature(s) and Save as Favorite” button
Replacing a Document in E-Sign OR Stopping the E-Sign Process

While you may Add approvers or Edit an e-sign in progress, you CANNOT remove, replace or change a document or assigned approvers. If a correction is needed, the e-sign in progress must be first be rejected. This can be done by the initiator as an “Administrative Rejection”.

Revision C
Administratively Rejecting an E-Sign

Search and Open file to the “View Document” page.

• Click the ID Number to view version details.

• Click the “Administratively Reject” button to stop the E-Sign process.
Editing an E-Sign’s Attributes

Changing Attribute information does NOT require adding a new document

- Search and click on link to open the “View Document” page
- Click the Edit button

- Make changes to the information
- Click Save  (Do not reload document)
Resubmitting a Rejected E-Sign

Find Rejection Notifications through email and Click on the link

OR

Under “My Approvals” in the Document Repository (Left side Index)

• Click the Document link to open the View Document

View Document Version

Location Home > Document Control Group > JLab Drawings

Details for version 2

Document: D000000106-1008
Content: D000000106-1008.pdf
Approval Status: REJECTED
Approval ID: 202005

This document was submitted for approval on 3/07/2014 07:59 AM and REJECTED on 3/07/2014 08:38 AM:

Signature Label | Signer Type | Signer/Authorized Signer(s) | Status | Date Submitted | Date Signed | Action(s)
--- | --- | --- | --- | --- | --- | ---
Approver 1 | Single Signer | Hutton, Chuck | UNSIGNED | 3/07/2014 7:59 AM | N/A | (null)
Approver 1 | Multiple Signer | Whitt, Timothy | UNSIGNED | 3/07/2014 7:59 AM | N/A | (null)
Checker | Multiple Signer | Hutton, Chuck | UNSIGNED | 3/07/2014 7:59 AM | N/A | (null)
DOG | Multiple Signer | Bridget Paul | REJECTED | Wrong size drawing | 3/07/2014 7:59 AM | 3/07/2014 8:38 AM | (null)
Resubmitting a Rejected E-Sign

NOTE: Changes made to a “rejected” Document are resubmitted into the same E-Sign as a new version

- Click the “Edit” Button
- Browse and Add the Revised document
- Click “Save”
Resubmitting a Rejected E-Sign

• Click on Add Approvals and re-enter the signer’s names.
  
  (When adding a corrected document, you must also re-add approvers)
Adding A Document Revision

To Add a Revision to an existing (released) document, first find and open the latest revision of a document in the Repository.

- Click the “Edit” Button
- Browse and Add the Revised document
- Change Revision level
- Click “Save”
Adding A Document Revision

• Click on “Add Approvals” and enter the signer’s names.

The document gets sent by e-mail to the approvers/signers. You will get a response e-mail once the E-sign has been Approved or Rejected.
Approving an E-Sign

Find approval requests through email and Click on the link OR

• Click “My Outstanding Approvals” in the Menu to the left of page
  • Click the Document number/name link to see Document details
  • Open the pdf for review under “download”
Approving an E-Sign

- Click the ID number on the View Document page to see Approval details.

- Then Click the “Approve” or “Reject” button here OR on the “Outstanding Approvals” page.
Rejecting an E-Sign

When Rejecting a Document you are required to provide a Reason

- Click Save to continue