

# Engineering Document Repository &

Electronic Signature

(E-Sign)

**Tutorial** 





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#### Introduction

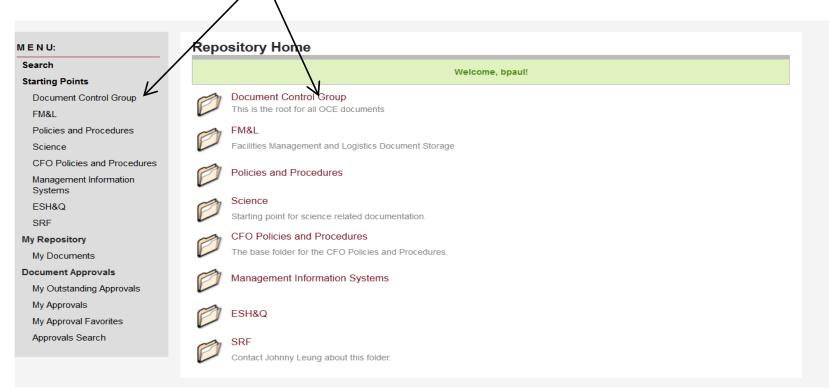
### The Document Repository is a electronic database designed to:

- 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





Find a document by selecting from the Document Category

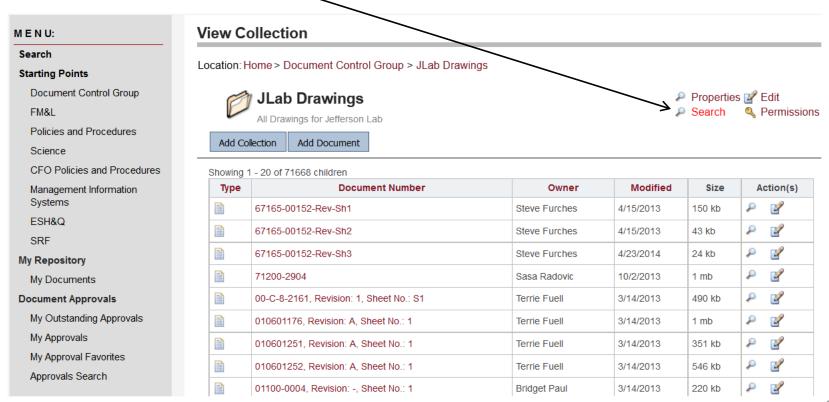
**OR** for all document types (Drawings, Specification, etc.),

use this Search

View Collection MENU: Search Location: Home > Document Control Group Starting Points Document Control Group Properties W Edit Document Control Group Permissions FM&L Policies and Procedures Add Document Add Collection Science CFO Policies and Procedures Showing all 8 children Name Owner Modified Size Action(s) Management Information Systems Calculations and Analysis Bridget Paul 3/14/2013 ESH&Q DCG Admin Daniel Moore 3/14/2013 SRF E-Sign FAQ's Bridget Paul 3/14/2013 My Repository Engineering Change Orders (ECO's) Bridget Paul 2/5/2014 3091 My Documents **Engineering Procedures** Bridget Paul 2/5/2014 92 **Document Approvals** My Outstanding Approvals JLab Drawings Bridget Paul 2/5/2014 71668 My Approvals Specifications & SOW's Bridget Paul 2/5/2014 My Approval Favorites E-Sign Tutorial- NEW VERSION\_NEW LOOK COMING SOON!! Daniel Moore 6/30/2014 23 mb Approvals Search

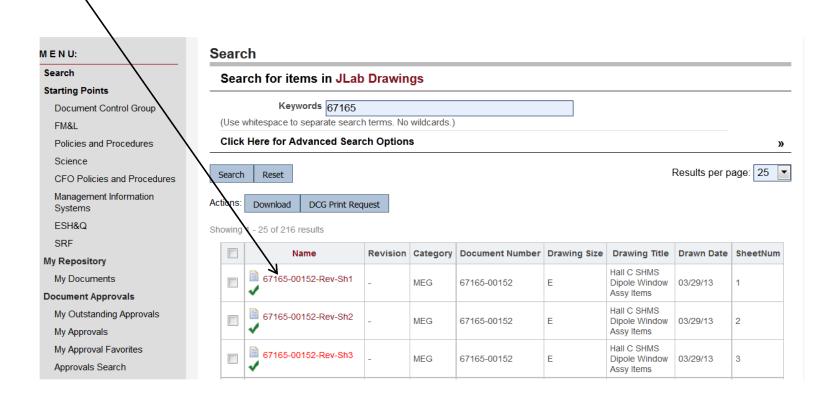


•Click the "Search" Link in the upper right side of the Category page





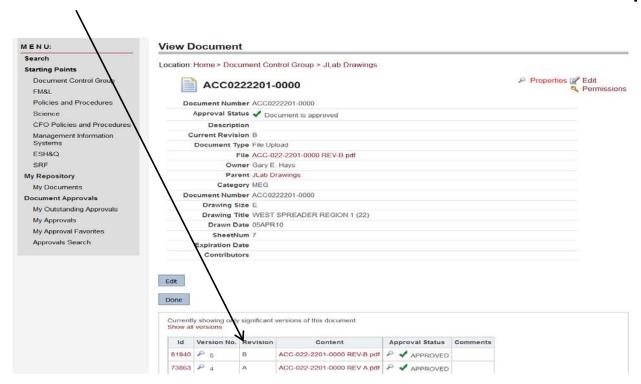
Click on the Document link to view document details



7

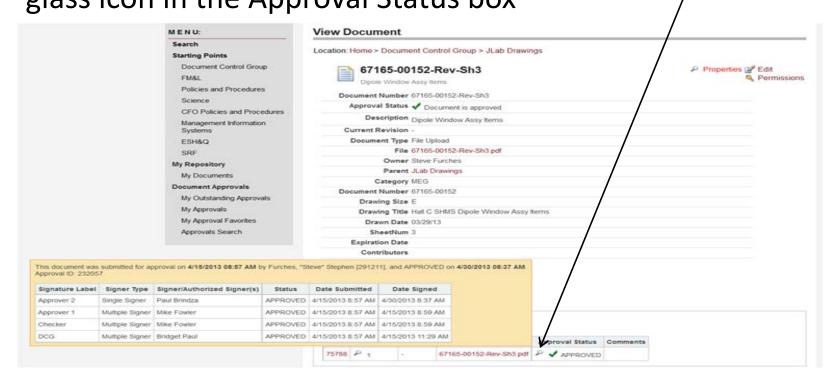


The "View Document" page displays all attributes of a document and the Revisions of a document entered into the Repository.





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

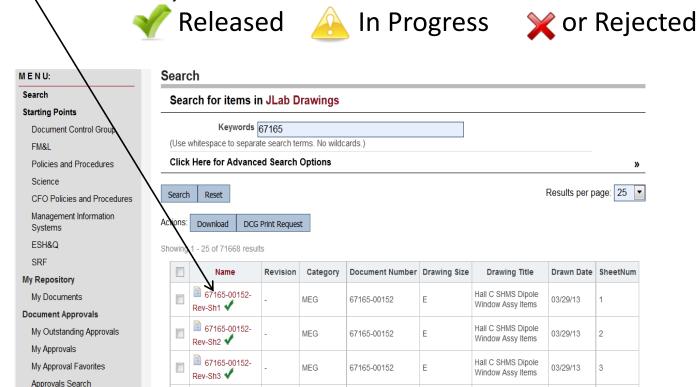




#### Viewing Documents

Click on the document link under "Name"

A Status symbol beside the name indicates:



CHL2 SYSTEM

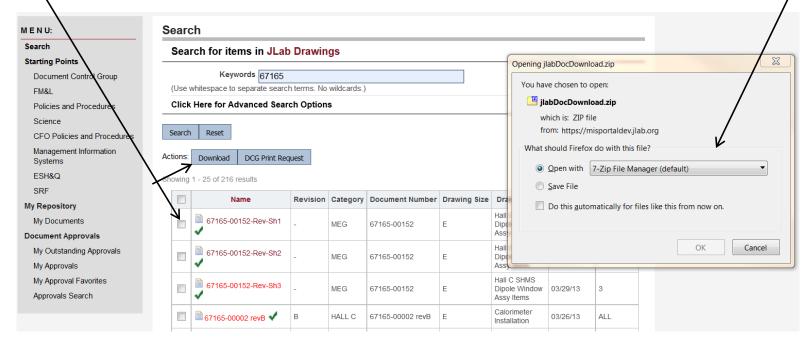
10

Revision C



#### **Exporting Documents**

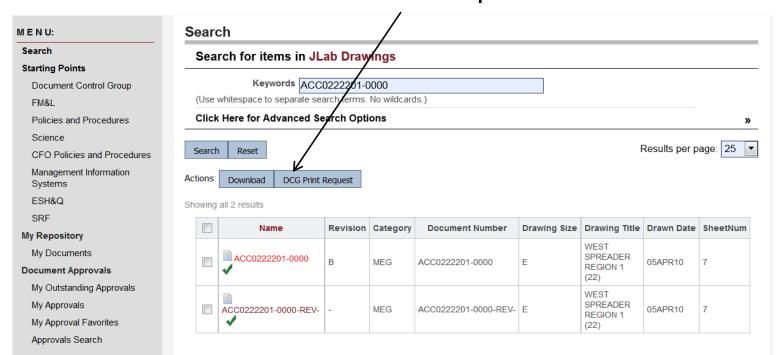
• Export a document by checking the box(es) to the left of the document link and clicking the "Download" button Multiple files will load into a "zip file" for saving to your PC





#### 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.

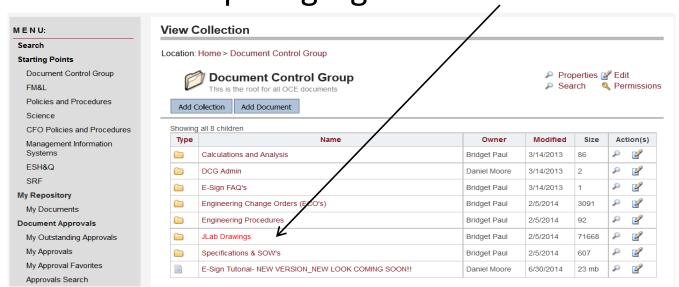
The E-Sign procedure is not a review process but a signature process to release a document for fabrication and storage.



### Initiating an E-Sign (Document Turn in)

To start the signing process,

 Click on the Document Category for the type of document requiring signatures

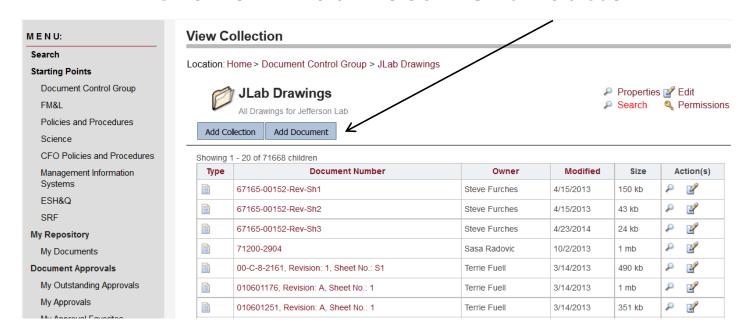




## Initiating an E-Sign (Document Turn in)

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

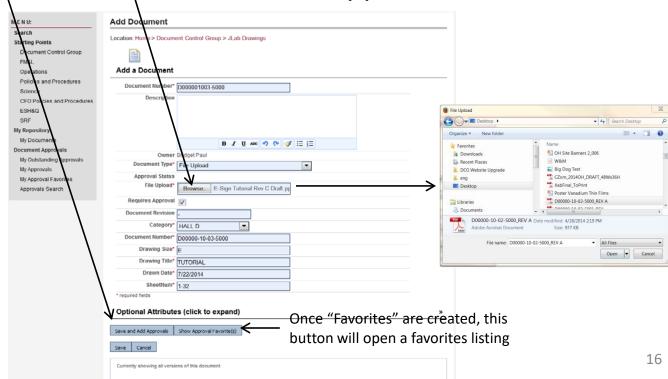
Click on "Add Document" button





#### Adding Document Attributes

- Enter required information (\* required)
- Click "Browse" to add pdf to be signed
- Click on the \"Save and Add Approvals" button





#### 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)

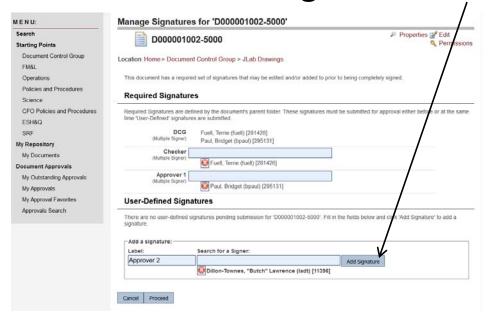
Search Starting Points	D000001002-5000		Properties Pedit Permission	
Document Control Group FM&L	Location: Home > Docume	ent Control Group > JLab Drawings		
Policies and Procedures	This document has a require	ed set of signatures that may be edited and/or added to price	or to being completely signed.	
Science	Doguirod Cianotu			
CFO Policies and Procedures	Required Signatu	res		
Management Information Systems	Required Signatures are de 'User-Defined' signatures ar	fined by the document's parent folder. These signatures mure submitted.	ist be submitted for approval	either before or at the same time
ESH&Q	DCG	Fuell, Terrie (fuell) [281426]		
SRF	(Multiple Signer)	Paul, Bridget (bpaul) [295131]		
My Repository	Checker	dave		
My Documents	(Multiple Signer)  Approver 1  (Multiple Signer)	A		
Document Approvals				
My Outstanding Approvals My Approvals	User-Defined Sign	Doughty "Dave" David (doughty) [12268]		
My Approval Favorites	There are no user-defined s		fields below and click 'Add Signa	dd Signature' to add a signature.
Approvals Search	Add a signature:	Gaskell, "Dave" David (gaskelld) [154602] Kausch, "Dave" David (kausch) [87399]	II	
	Label:	Mack, "Dave" David (mack) [11543]		
		Masden, Dave [131491]		Add Signature
		McCay, "Dave" David (mccay) [11562]		



#### 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

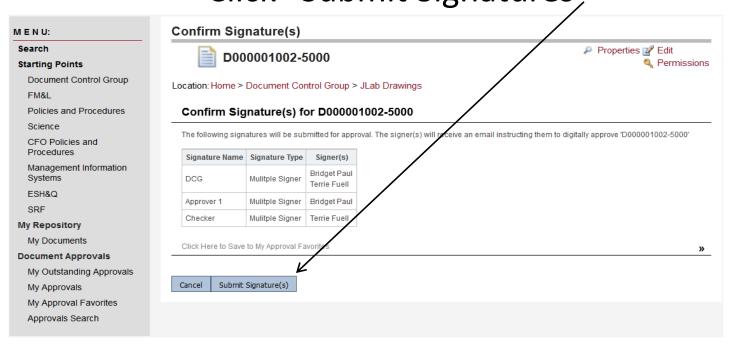




#### Completing an E-Sign

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

•Click "Submit Signatures"



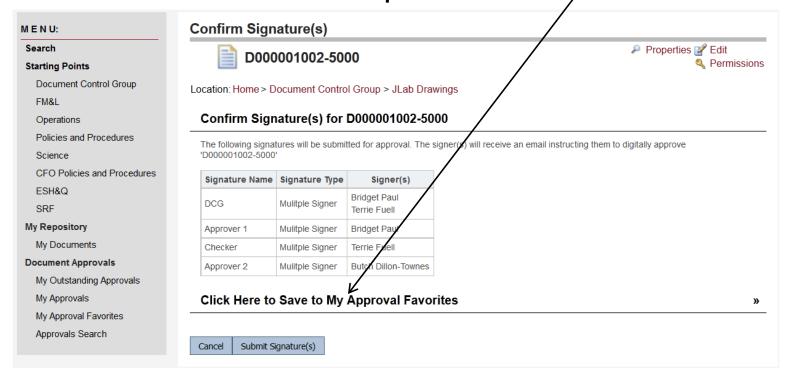
The document gets sent by e-mail to the approvers/signers. You will get a response e-mail once the E-sign has been Approved or Rejected.



#### **Creating Favorites**

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

• Click to open this link,

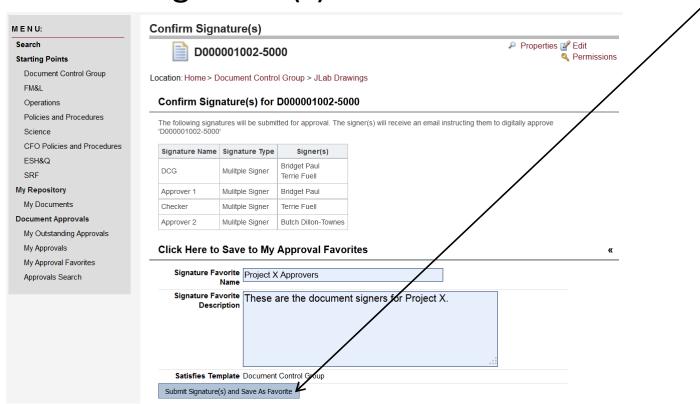




#### **Adding Favorites**

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

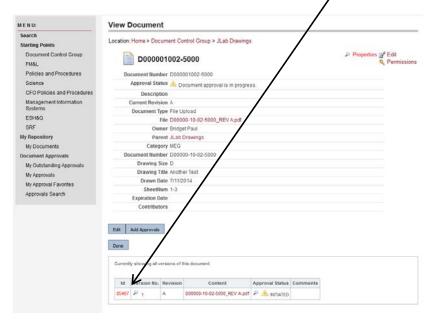
While you may Add approvers or Edit an e-sign in progress, you CANNOT remove, replace or change a document or assigned approvers. If a correction is needed, the e-sign in progress must be first be rejected. This can be done by the initiator as an "Administrative Rejection".



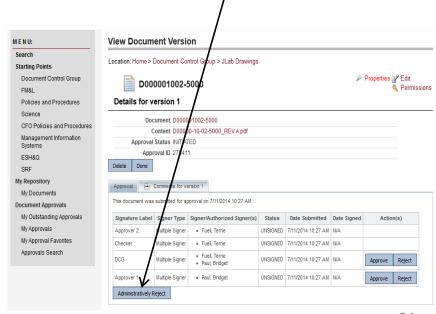
#### Administratively Rejecting an E-Sign

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

MENU:

Search

FM81

Science

ESHAO

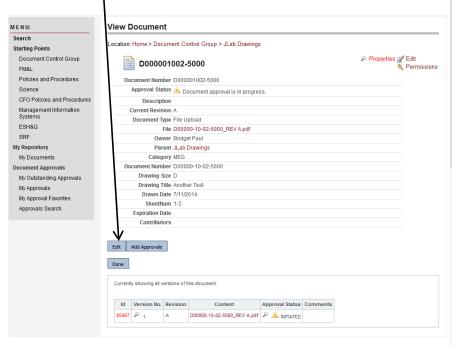
SRE

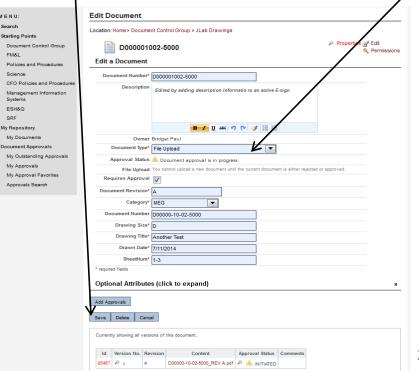
•Search and click on link to open the "View Document" page

Click the Edit button

Make changes to the information

Click Save (Do not reload document)





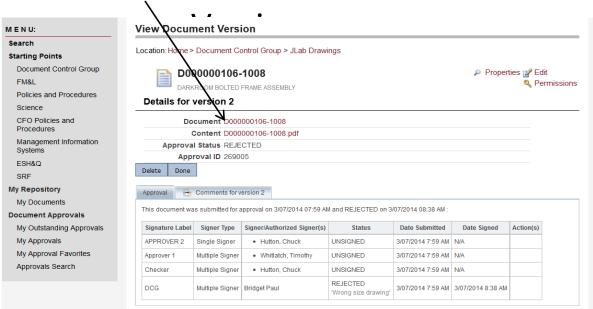


#### Resubmitting a Rejected E-Sign

Find Rejection Notifications through email and Click on the link
OR

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

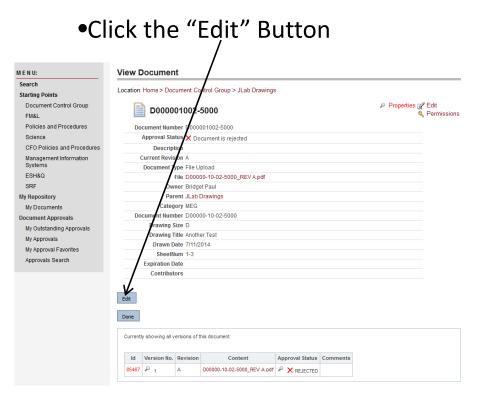
Click the Document link to open the View Document

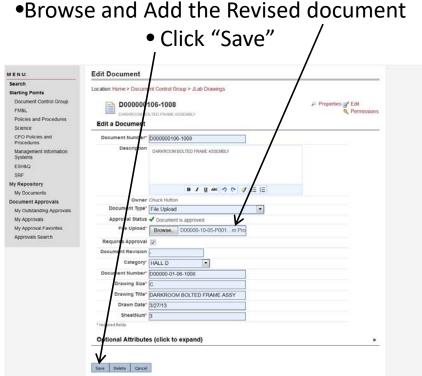




#### Resubmitting a Rejected E-Sign

NOTE: Changes made to a "rejected" Document are resubmitted into the same E-Sign as a new <u>version</u>



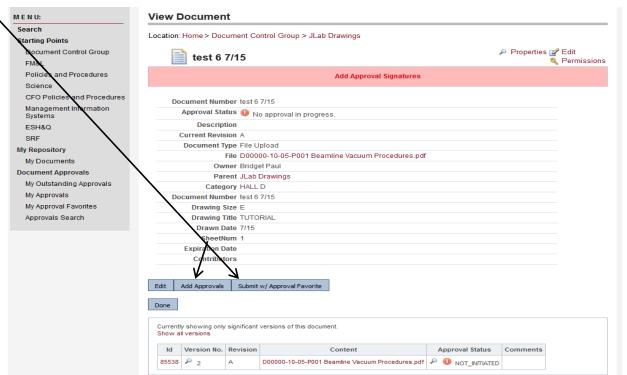




#### Resubmitting a Rejected E-Sign

Click on Add Approvals and re-enter the signer's names.

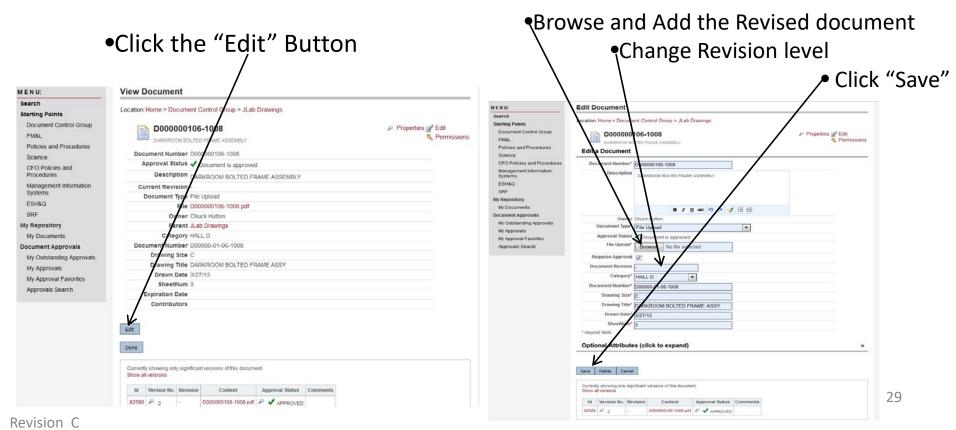
(When adding a corrected document, you must also re-add approvers)





#### Adding A Document Revision

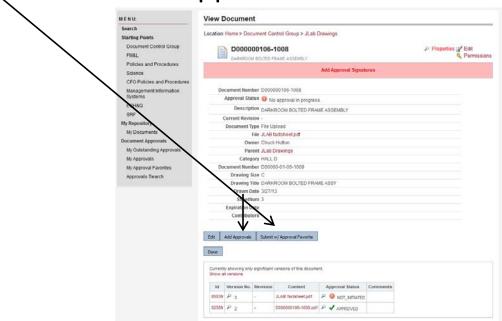
To Add a Revision to an existing (released) document, first find and open the latest revision of a document in the Repository





#### 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.



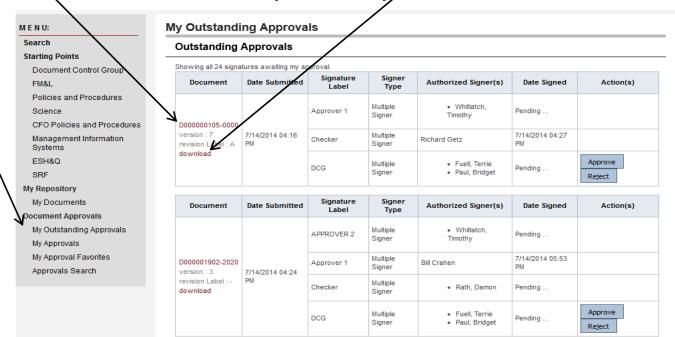
#### Approving an E-Sign

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

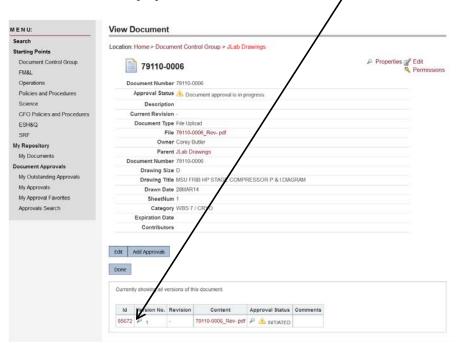
Open the pdf for review under "download"



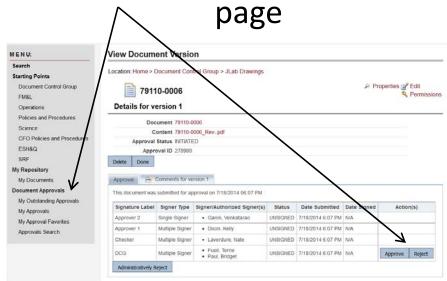


#### Approving an E-Sign

 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"





#### Rejecting an E-Sign

When Rejecting a Document you are required to provide a Reason

Click Save to continue

