

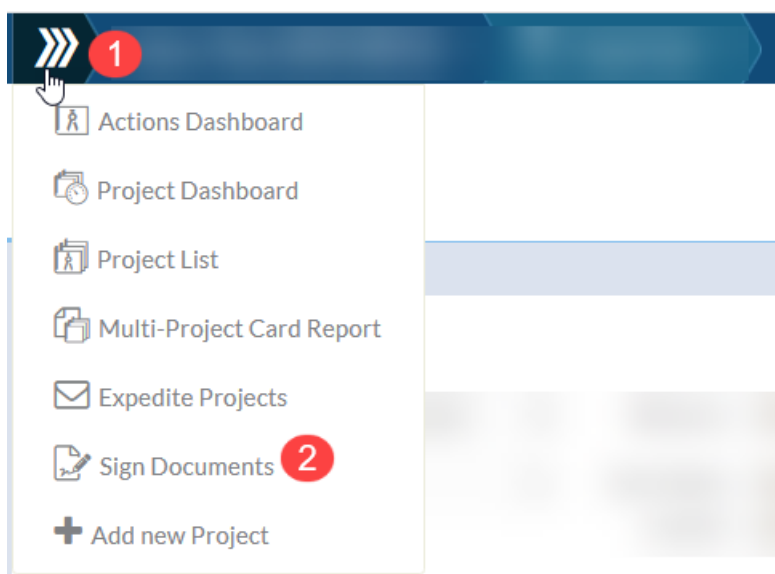
Signing files with eSignature (User action)

10/01/2025 4:10 pm MDT

This article explains step 4 in the eSign process, the final step prior to the documents being submitted to your customer.

Navigate to eSign screen

If cards have been assigned to you for signing, navigate to the actions list.



Once looking at the list of cards to sign, click on the card name to open for signature.

Sign Documents

Signatories (same color/bolding pattern as actions)

Error note	Project name	Card name	Submittal Number	Doc Contol	Engineer	Drafter	Manager
	Level Transmitters	E02_FTL51-QAE2BB4E5C+KGZ1[FTL51-72XK1/0]	TRANS-234234-002	Brad Bowyer	John Smith		
	Level Transmitters	E02_FTM51-HAF2L4A57AY [2200.00]	TRANS-234234-002	Brad Bowyer	John Smith		

No more pages | Show on Page: 10

NOTE: The eSignatories are defined on the DOC CODE and are locked, once you issue the submittal. If you open the card and are not the one scheduled to sign, you will not be able to apply your signature.

If you need to change the signatories after a submittal has been issued:

- VOID the submittal
- change the signatories on the doc code

- apply the changes to the card
- re-issue the submittal.

Apply Signature

The screenshot shows a document titled "Level Transmitters" with project number 234234. A signature box is placed on the document. The sidebar on the right contains the following information:

Document
Card: FTL51-QAE2BB4E5C+KGZ1[FTL51-72XK1/0]
Signing progress: Doc Control → Engineer → Send to Delta Engineering

Linked Equipment Sub-Suppliers	PC Malburg
Document Title	Cross Sect Dwg / Exploded View Diagram
Submittal Number	TRANS-234234-002

Status

Stage	IFA
Doc Status	X
Approval Doc Status	

Document Card Numbers

Is Drawing	N
Doc No. (Customer)	234234-E02-001-01
Doc No. (Wolfe PA)	S1234599-E02-0001-001
Wolfe PA Rev #	000
Customer Doc #	

At the bottom right, there are buttons: "Skip adding signature", "Cancel", and "Apply signature".

1. Click the "Apply Signature" icon in the top left
2. Drag the signature box to the appropriate place on the document. Resize as necessary.
3. Click "Apply Signature" to complete the task.

To remove your eSignature (prior to "apply signature button"), just click on the signature, and you will be given a "remove signature" option at the top of the screen.

The screenshot shows the same document as before, but with a red arrow pointing to a "Remove signature" button at the top of the screen. The signature box is still present on the document.

Once complete - the user will be returned to the list of remaining signatures (similar to action routing).

A notification will be sent to the user who started the eSignature process to let them know the document has been signed and is now ready to send.

For information on how to Generate eSignature Certificates (Step 1), see our article [here](#).

For information on how to Set eSignature requirements per Doc Code (or Card) (Step 2), see our article [here](#).

For information on Applying eSignatures to Outgoing Submittals (Step 3), see our article [here](#).
