



# eSignature Usage Guide

Updated: 05/12/2023

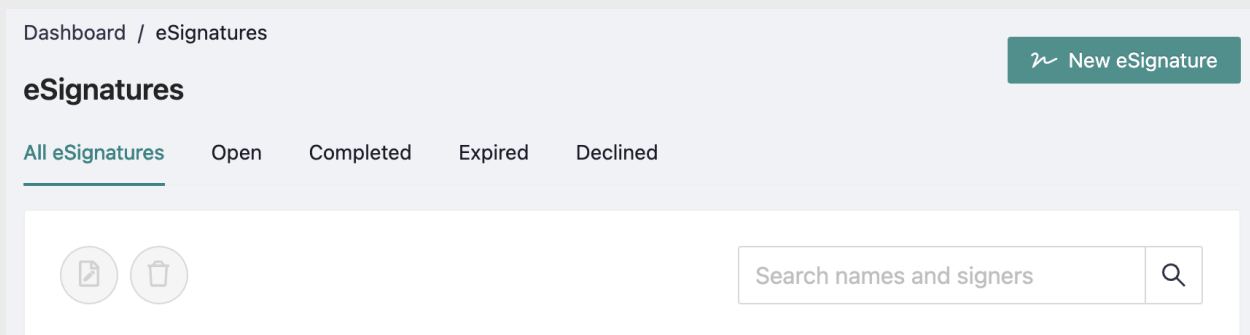
## What are eSignatures?

Govenda’s eSignatures functionality allows companies to gather signatures from directors on a variety of documents. eSignatures was designed for Unanimous Written Consent so that boards can vote on important issues between in-person meetings. eSignatures can also be used when individuals are required to sign annual forms or other types of documents.

## Creating an eSignature

To create a new eSignature, enter a name for your eSignature, add the document(s) to be signed, choose who will be signing, set signature locations on your documents, and publish the eSignature. The following explains those steps in detail.

By clicking on the eSignatures tab in the left-hand navigation, Admins can access the main eSignatures page. From this page, All eSignatures, Open, Completed, Expired, and Declined eSignatures are visible. To create a new one, click ‘New eSignature’.



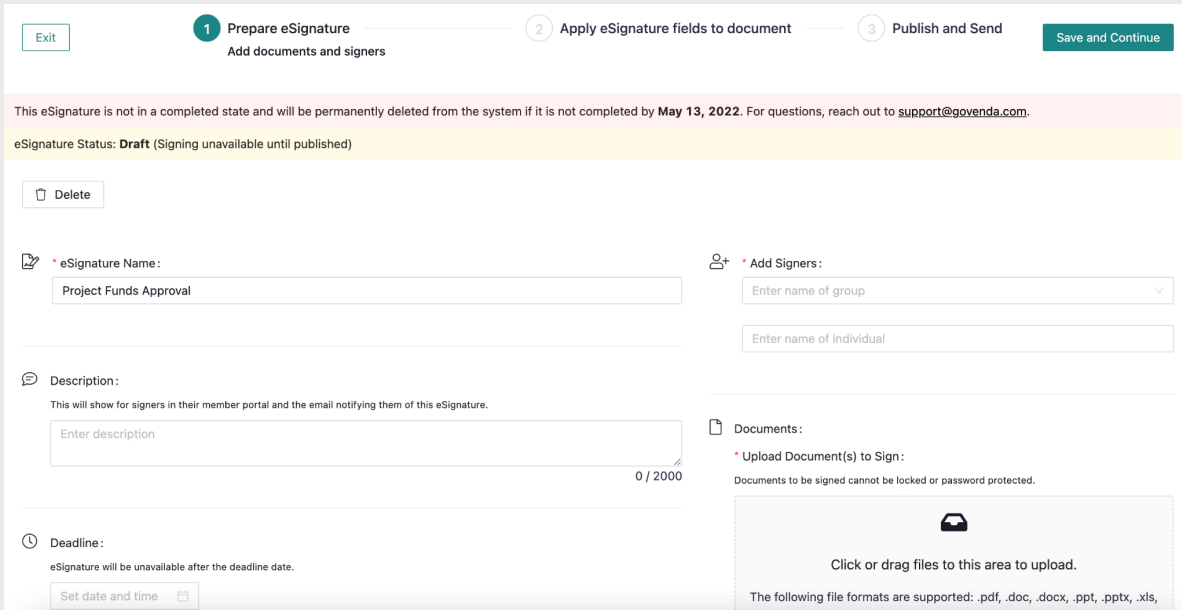
### Name and Description

The first step is to provide a name for the eSignature. A field to enter an optional description is also available. This is a good place to provide directors an overview of what they are being asked to sign.

Click Save and Continue.

## Adding the Components

On this screen, Admins can create a deadline for the eSignatures, upload supplemental materials necessary for directors to understand the approval, upload the document or documents to be signed, and choose the signers to be added to the eSignature.



Exit

1 Prepare eSignature  
Add documents and signers

2 Apply eSignature fields to document

3 Publish and Send

Save and Continue

This eSignature is not in a completed state and will be permanently deleted from the system if it is not completed by **May 13, 2022**. For questions, reach out to [support@govenda.com](mailto:support@govenda.com).

eSignature Status: **Draft** (Signing unavailable until published)

Delete

\* eSignature Name:  
Project Funds Approval

\* Add Signers:  
Enter name of group  
Enter name of individual

Description:  
This will show for signers in their member portal and the email notifying them of this eSignature.  
Enter description  
0 / 2000

Deadline:  
eSignature will be unavailable after the deadline date.  
Set date and time

Documents:  
\* Upload Document(s) to Sign:  
Documents to be signed cannot be locked or password protected.

Click or drag files to this area to upload.

The following file formats are supported: .pdf, .doc, .docx, .ppt, .pptx, .xls,

## eSignature Status

The top of this page will always show the status of the eSignature - Draft, Published, Expired, Completed.

## Deadline

If a deadline is set, the eSignature will expire on that date even if all users have not signed. At that point, the document can no longer be signed until the deadline is extended. Only use the deadline option if there is a legal reason that would prohibit the signing of the eSignature after a specific date.

## Documents

### Upload Document(s) to Sign

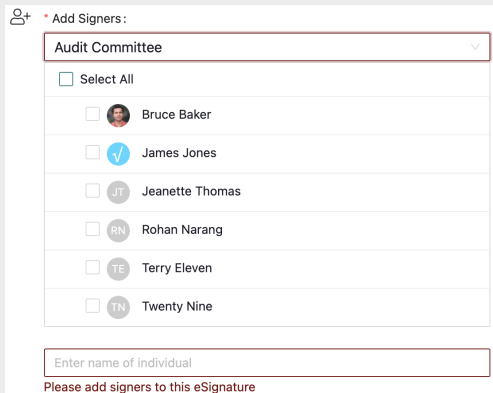
Add the documents you need to have signed in this area by either clicking or dragging files into the gray upload area from your desktop. If you have multiple documents that require e-signatures, you can add them all at once. Govenda eSignatures support Adobe PDF and Microsoft Office (.doc, .xls, .ppt) documents.

### Upload Supporting Documents

These documents will not have e-signatures but may be important for directors to fully understand the approval. Similar to adding documents that need e-signatures, you can hit “Choose Files” or drag and drop documents into this area to upload into Govenda.

## Add Signers


In this section, you will choose which signers to add to your eSignature. Under Add Signers you can add signers by group name or by individual users. To choose individual signers, begin typing a name in the box. Choosing a group in the box on the right will allow you to choose an entire group or specific members of a group.





**Add Signers:**


Audit Committee


Select All


 Bruce Baker

 James Jones

 Jeanette Thomas

 Rohan Narang

 Terry Eleven

 Twenty Nine

Enter name of individual \*

Please add signers to this eSignature

Once you have completed the required eSignature details indicated by the red asterisk \*, click the Save and Continue button at the top of the page.

Exit **1** Prepare eSignature **2** Apply eSignature fields to document **3** Publish and Send Save and Continue

Add documents and signers

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eSignature Status: **Draft** (Signing unavailable until published)

Delete

\* eSignature Name:  \* Add Signers:

## Placing the Signatures and Publishing the eSignature

You will be directed to the signature placement page. On this screen, select each of your signers in the left pane and click the Signature field to add the signature block to the page. Once the block is on the page, you can move it to the correct location.

Exit ✓ Prepare eSignature **2** Apply eSignature fields to document **3** Publish and Send Save and Continue

Click on the fields you need the user to complete and position them as desired

Project Funds Approval *Draft*

RECIPIENTS

Hether Guinn >

Accept Only

FIELDS

Signature

HG Signer Initials

Signing Date

Signer Name

Select a Signer

Demo – eSignature Document

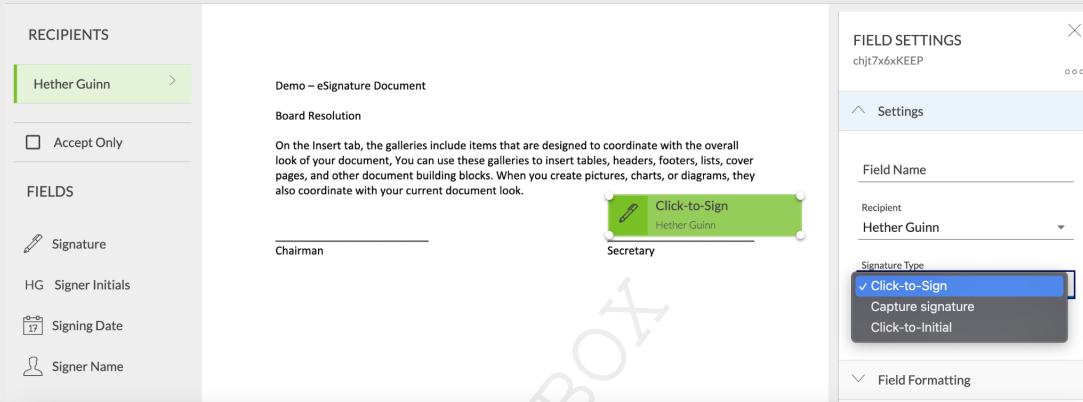
Board Resolution

On the Insert tab, the galleries include items that are designed to coordinate with the overall look of your document, You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. When you create pictures, charts, or diagrams, they also coordinate with your current document look.

Chairman \_\_\_\_\_ Secretary \_\_\_\_\_

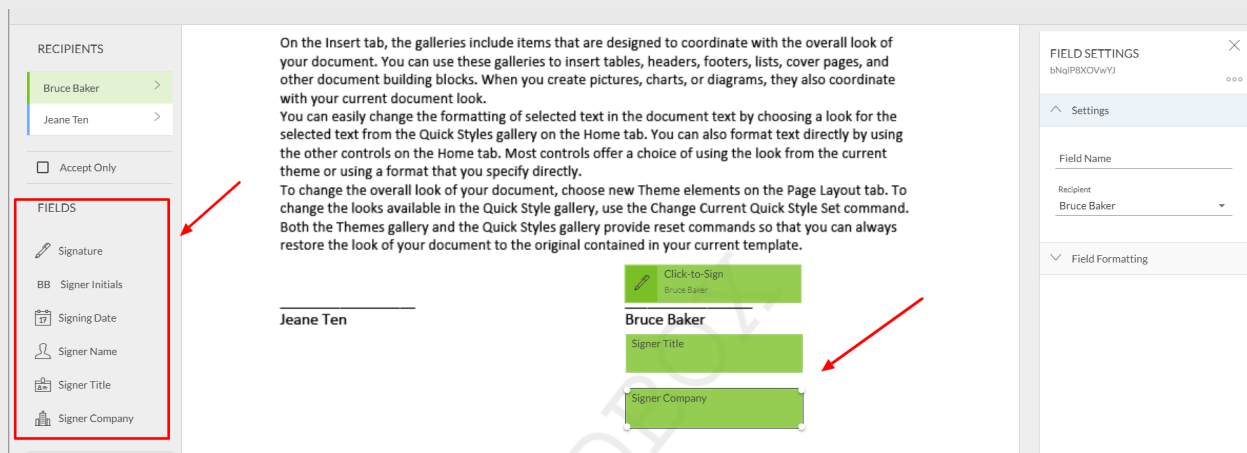
DOCUMENTS

Demo esig

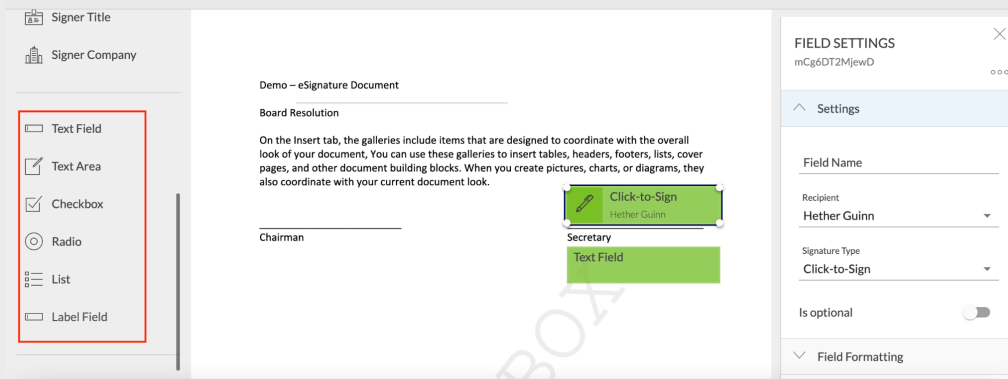


You can also change the field type by clicking the Signature Typed drop-down on the right-hand side of the screen. Your choices are Click-to-Sign, Capture Signature, and Click-to-Initial.

Once the signature block is in place for a user, you can also select to add more fields for that same user such as Title and Company. The values for these fields must be included in the Directory section of Govenda.



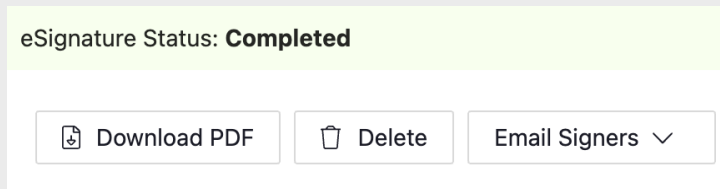
You can also add additional fields that the user can complete prior to submitting their eSignature. These include text field, text area, checkbox, radio, list, and label field. Select the user signature box and then click any of the fields you would like to add. You can then drag it to the correct location on the page.



When all e-signatures have been added, click Save and Continue at the top of the page. Your eSignature is now published and the signers have been notified by email that their e-signature is requested.

### eSignature Progress

The Govenda administrator that created the eSignature will be notified every time a signature has been added. When the entire approval has been signed by everyone it will be marked as “Completed” and you will be able to download the PDF with all signatures included.



The eSignature will be moved under the “Completed” section. The completed eSignature is now available to download and remains available for all signers to review from their member apps as well.

## What Platforms Support eSignatures

eSignatures works on all Govenda supported devices across all of our platforms, Govenda for Web, iPad, iPhone, and Android. eSignatures are not supported on Internet Explorer.

