Creating eSignature Transactions in OneSpan

- **Accessing the eSignature Portal**

Go to MiLogin and select Enterprise eSignature Sender.

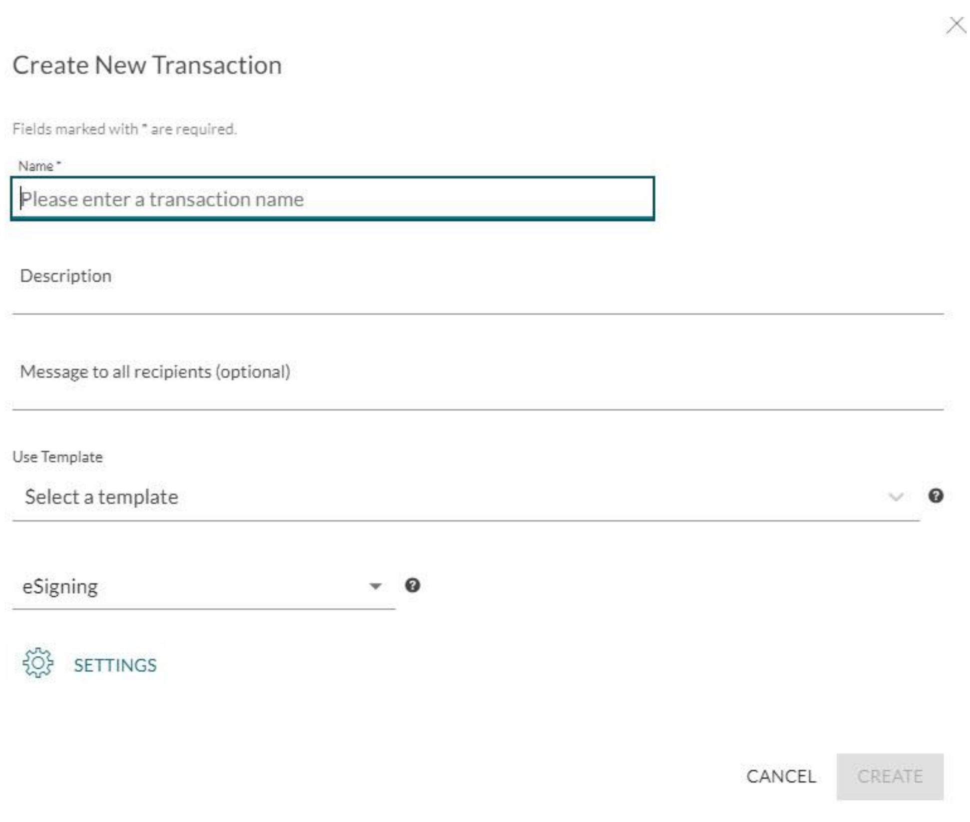
Note: Senders are encouraged to use the Google Chrome or Microsoft Edge internet browsers.

- **Creating Transactions**

In the dashboard, click on the New Transaction button, and the Create New Transaction screen will open.

- **Naming Transactions**

The transaction name is a required field. See the [Naming Transactions Tip Sheet] for important information about naming strategies for transactions. Once your transaction is named click the Create button.

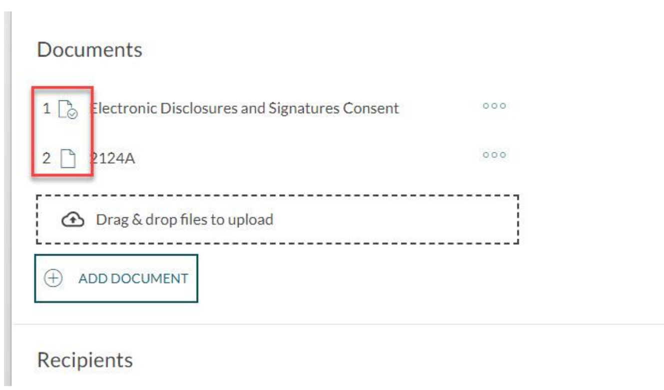


- **Adding Document(s)**

Each transaction can contain one or multiple documents. To add document(s), either drag and drop the files to upload, or click on the "Add Document" option to navigate to where the documents are stored.

Note: By default, the Electronic Disclosures and Signatures Consent form is attached to each transaction.

The documents will be listed in numerical order. Re-arrange the document order as needed by dragging a document up or down the list.

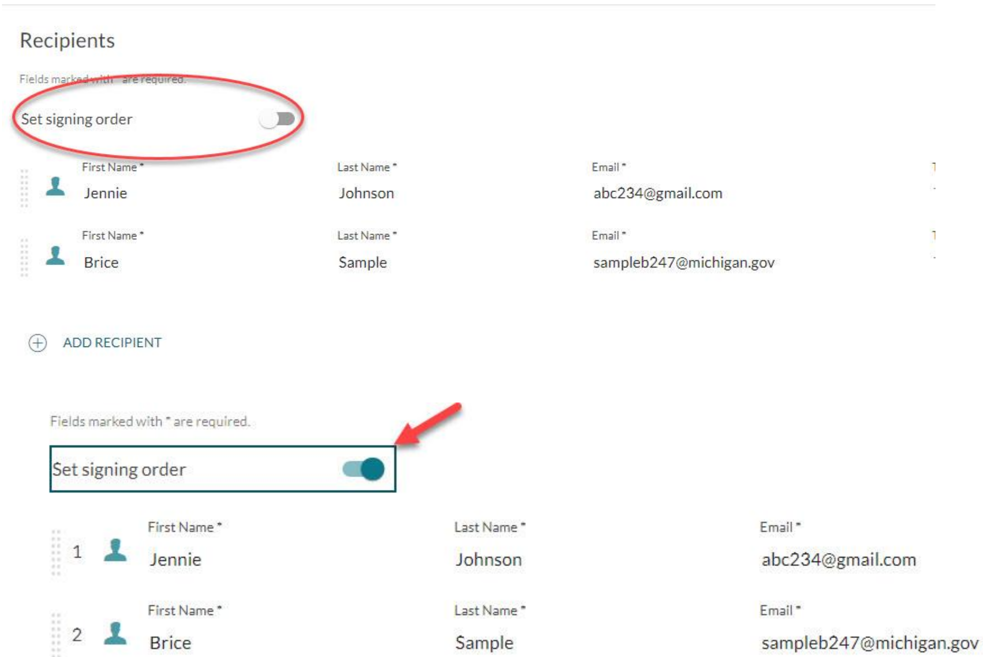


- **Adding Recipients**

After the document(s) have been added to the transaction, add the recipients (signers and reviewers) to the transaction. First Name, Last Name, and Email are required fields for recipients.

Parallel Signing: If the transaction needs to be sent to all recipients at the same time (concurrently), do not click on the Set Signing Order slider.

Sequential Signing: If the recipients should receive the transaction in the order of the list (consecutively), click on the Set Signing Order slider. You can change the signing order by dragging a recipient up or down on the recipient list.

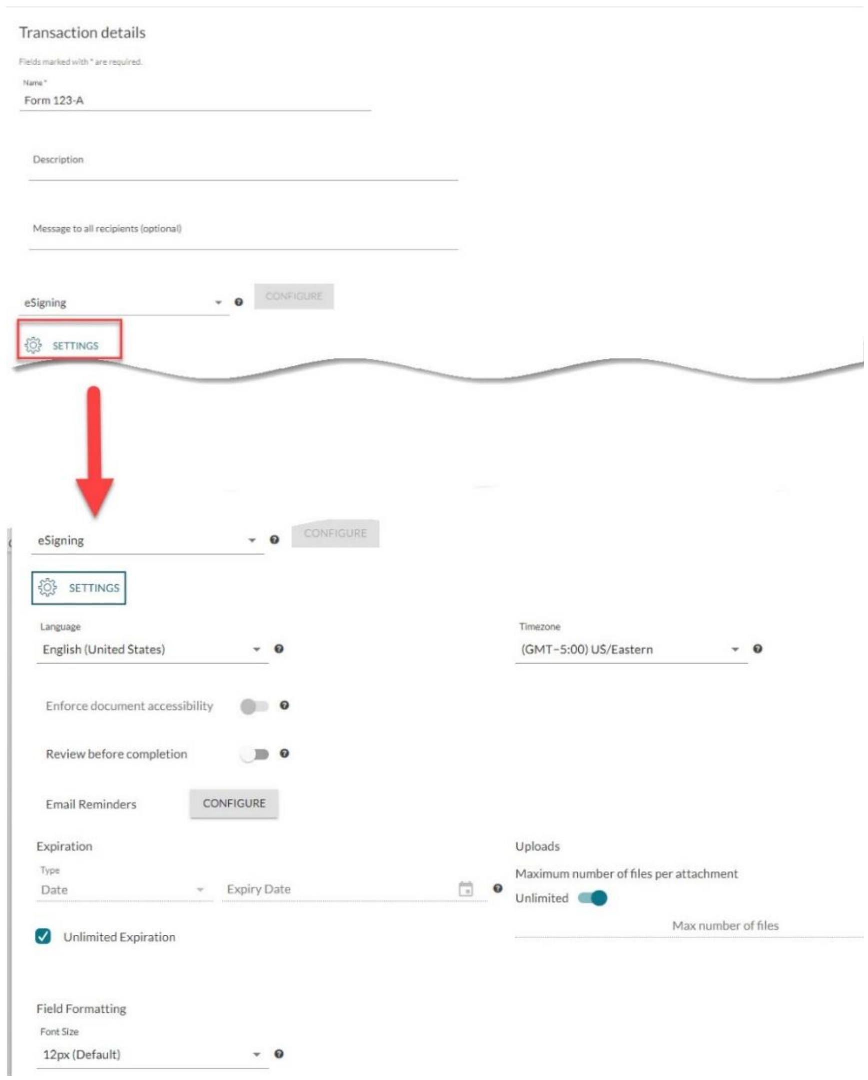


- **Recipient Settings**

Review and customize the settings for each recipient by clicking on the 3 dots to the right of the recipient name and selecting Settings.

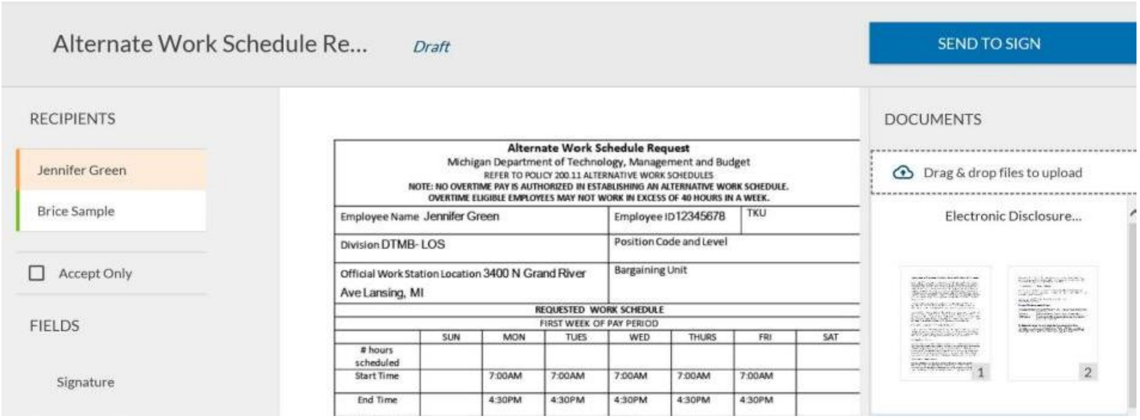
- **Transaction Settings**

Click on the SETTINGS button at the bottom of the create new transaction screen to review and modify the Transaction Settings. Most transactions will not require the use of these options.

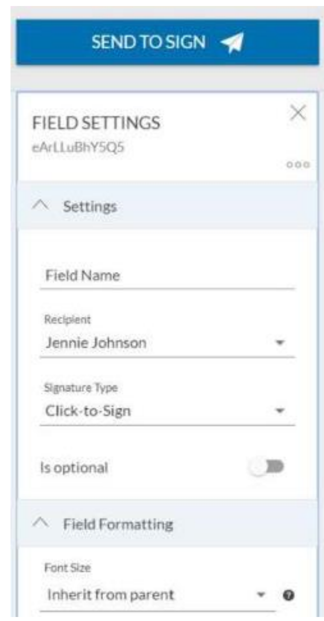


- **Designer Screen**

Click the Next button in the Create New Transaction screen, and the Designer screen will open. The Designer screen has three sections: Recipients and Fields are on the left side, the document(s) to be signed are in the middle, and documents and settings are on the right side. The Designer screen is used to designate the actions that recipients will take when receiving the document. If no actions are assigned to a particular recipient, they will receive the transaction for review. For reviewers, you can select the Accept Only option. When doing so, the document will not pass on to the next signer until they review and confirm. If the document does not require their confirmation before passing on to the next person, you can leave the Accept Only option unchecked.

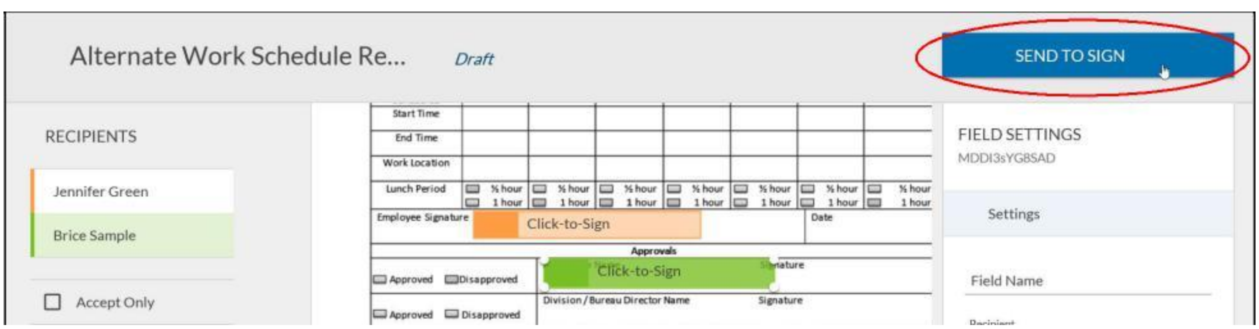


A list of the recipients will be seen on the right side of the screen. Each recipient is assigned a unique color code for the fields that they need to act on. First, select a recipient, then choose the fields that apply to that recipient. If they just need to sign the document, simply select the 'Signature' option in the list of fields.



When a field is highlighted, the "Field Settings" become available on the right side. These settings can be used to make a field required or optional, to allow different types of signatures, to specify the values of drop-down fields, etc.

After the necessary fields are added to the document(s), the transaction is ready to be sent for signing. Click "Send to Sign." A confirmation screen will pop up asking you to confirm.



- **Transaction Starts**

After the transaction is sent, recipients will receive an email inviting them to the signing ceremony. Recipients will be prompted to complete the transaction by signing or filling out the fields that were assigned to them.

After all recipients complete their role in the signing ceremony, the document will indicate the transaction is complete, and each recipient will be able to view and download the documents.