



# ReposiTrak Essentials

A Webinar Series for Customers of ReposiTrak

[REPOSITRAK.COM](https://REPOSITRAK.COM)

Today's Presenter:



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ReposiTrak*

# eSign Documents:

*How, Why and Which Docs work Best?*



# Today's Learning Objectives...

*E-sign Documents: Why, How and Which Docs Work Best?*

- What is an e-Sign document?
- Why should you utilize e-Sign documents?
- How does it work?
- Which documents should you utilize for e-Sign?



# What is an e-Sign Document?

*Any document that can be signed as a paper document may be “e-Signed.”*

- Subject to the Electronic Signatures in Global and National Commerce Act (ESIGN) June 30, 2000
- Electronic Document must accurately reflect the substance of the same non-electronic form.
- Must contain an “electronic signature” based upon the Digital Signature Standard



# Why are e-Sign Documents used?

*To obtain approval of a document or set of information that is not altered and where the approval is captured electronically*

- The document is read and approved by an electronic signature without changes.
  - Since the document is not altered, it may be verified as accurate without human review.
  - This saves time and effort for the “requester” and “provider”
- Additional information, in limited quantity, may be captured along with the electronic signature.



# Which Documents are Better in e-Sign Format?

*Any document currently collected in paper that is not subject to change*

- Supplier Agreements
- Indemnification documents (Hold Harmless, Letter of Continuing Guarantee)
- Compliance Statements (Social Compliance, Certification Verifications, Read and Review Requirements)
- Non Disclosure Agreements
- Contact information requests
  - Emergency Contacts
  - Food Safety Contacts
  - Any other specialty contact requirements



# Which Documents may not be Appropriate in the e-Sign Format?

*Not all documents work in the eSign format*

- “Negotiated” documents
- Unique documents
- Forms with large data, fields or questions requirements



# Example e-Sign Docs

*Specific Examples of agreement are shown below*

**NONDISCLOSURE AGREEMENT**  
THIS NONDISCLOSURE AGREEMENT ("Agreement") is made and entered into as of ("Effective Date") between [REDACTED] ("Company") and [REDACTED] ("Recipient").

1. **Definition of "Confidential Information."** Any and all information of the Company and each of its related companies (if any), which is not generally publicly available and which is commercially valuable and is related to the business of such party, including without limitation any and all trade secrets, techniques, methodologies, methods, product specifications, volume information, manufacturing, marketing, development, financial or operations information, technical, scientific, laboratory, experimental, research or statistical data, tooling, machinery, diagrams, drawings, forecasts, business and new product plans, reports, procedures, designs, formulae, recipes, improvements, processes, customer information, records, or knowledge, processes, formulas, know-how or data, from disclosed by the Company to Recipient either directly or indirectly, whether written, oral, photographic, electronic, magnetic, computer, by any means, or otherwise (including without limitation materials, records, reports, documents, prototypes, samples, plant and equipment, computer files, or other information or data) that is labeled in any manner as "Confidential", "Proprietary" or some similar designation or which information would, under similar circumstances, be reasonably understood by the Recipient to be confidential and proprietary information of the Company or is, or should be, reasonably understood by the Recipient to be confidential and proprietary information of the Company.

**VENDOR INDEMNITY AGREEMENT**  
[REDACTED] is made and entered into by the entity identified as "Vendor" below ("Vendor") in favor of [REDACTED] ("Buyer") and their affiliates, subsidiaries, and parent companies, and their employees, officers, directors, lenders, and agents. This Agreement will remain in effect unless and until a master supply, service, or other specific vendor agreement (each a "Vendor Agreement") such a contract is in force and contains a provision addressing indemnification that conflicts with this Agreement. In the event such a contract is terminated, expires on its own terms, is deemed invalid, or is unenforceable, this Agreement governs.

**SUPPLIER LETTER OF GUARANTEE**  
The supplier indicated below sells products to [REDACTED]. In consideration of current and future purchases, the supplier guarantees that all products are unadulterated and safe for human consumption and in compliance with the **Federal Food, Drug & Cosmetic Act**. The supplier further guarantees that it has a documented food safety program that incorporates **Good Manufacturing Practices**, **Good Agricultural Practices** and maintains a formal **HACCP** plan that is constantly reviewed with results documented to provide ongoing quality assurance.

Company Name: 1426828 ONT INC O/A M  
Title: Senior Director of Sales

Agreement

Company agrees to keep our Company Notice contact information updated and accurate in ReposiTrak®.

Company Legal Name:	[REDACTED]
Street Address:	[REDACTED]
City, State, Zip:	St Paul [REDACTED]
Contact Name:	Randal W [REDACTED]
Contact Phone Number:	623-466 [REDACTED]
System Company Name:	[REDACTED]
Signature Time:	09/17/2018 18:25:39
Signed by User:	[REDACTED]
Signed by IP Address:	70.150.98.46





# As a Requester, How do I Switch to e-Sign?

*To Switch to an e-Sign document is simple*

- Provide ReposiTrak the requested document in an HTML or Word format
- Provide any additional information to be collected
- Determine a date to make the switch
- Review and approve the document in the e-Sign format
- On the date of the switch, the original, non-e-Sign documents will be marked as “optional” and will be retained and the new e-Sign will be required



# Forwarding an eSign Document

*Compliance Management*



# Viewing “Become Compliant”

*My list of outstanding documents contains an Esign document that I am not authorized to sign, so I must FORWARD it.*

I may forward it to **anyone** in my organization to sign.

- 

I may also forward it to a recipient with a different email domain than my company

- 

The recipient **DOES NOT** have to be registered as a user in my account.

DOCUMENT	STATUS	EFFECTIVE PERIOD	PARTNER
Agreement to Indemnify	Missing	N/A	Frieda's Inc. (18189)
Allergen Control Program (ACP)	Missing	N/A	
Certificate of Analysis	Expired	09/15 09/15	
Hold Harmless	Expired	09/15 09/15	
Letter of Continuing Guarantee	Pending Review s4 Specs not met	09/12 N/A	
Partner Code of Conduct	Missing	N/A	
Partner Code of Conduct	Expired Verification Past Due	07/01 N/A	

**BECOME COMPLIANT**

- ESign Document For Frieda's Inc.
- Forward ESign Request To Email

**DOCUMENT**

- Add Note
- View Notes

**HELP**

- View Requirements For Frieda's Inc.
- Why Is It Listed For Frieda's Inc.?
- View Contact Info For Frieda's Inc.
- View Instructions



# Fill in the required fields; Validate the Recipient is Correct

*Enables sending the eSign request outside of the account's email domain*

### Signee

Signee First Name:

Signee Last Name:

Signee Email Address:

### Disclaimer

*I acknowledge and agree, that this message and any links or other information contained herein or where directed is confidential information of the Sender and intended only to be used by me or another authorized employee of my employer. By "forwarding" this message I confirm that the intended recipient is such an authorized employee of my employer and that this person is the individual who is authorized to follow through with the instructions contained in this message.*

[Send ESign Request](#)

→ Entered email address jjamrich@parkcitygroup.com doesn't match your domain info.co.in.

Press the Yes button to continue or No button to return to the previous page.

→

Enter the recipient (signee) first name, last name and email address

- If the recipient's email address domain differs from your domain you will be required to confirm the request

- The recipient **DOES NOT** have to be registered as a user in my account.

# Signee is Required to Enter a Verification Code

*Clicking the link generates a Verification Code to the Signee's email that they must copy and insert in the Verification Code field*

The screenshot shows the ReposiTrak Document ESign interface. At the top left is the ReposiTrak logo. Below it is a dark blue header with 'Document ESign' in white. The main content area has a message: 'A verification code has been sent to jamrich@parkcitygroup.com. Please enter the code to continue.' Below this is a 'Verification Code:' label followed by a text input field and a blue 'Continue' button. A red arrow points from the verification code field in the email snippet below to the input field in the webpage. The email snippet shows a subject line 'FW: Document ESign Email Verification Code' and a body with the text: 'On 11/14/18, 11:50 AM, "StagingSupport@ReposiTrak.com" <StagingSupport@ReposiTrak.com> wrote: Your verification code to ESign document Agreement to Indemnify (Frieda's Inc.) is: 4TXWB8R3UEOZWRBIWQDUPB25J'. The verification code '4TXWB8R3UEOZWRBIWQDUPB25J' is highlighted with a red box.

Webpage

Signee's Email

Clicking the link in the initial email opens this webpage AND generates a Verification Code to the Signee

- Single Use Verification Code

- If the Signee gets distracted or doesn't complete at this time, they must click the link in the original email to generate another verification code

# Signee Reviews, Enters Info and eSigns

Document ESign > ESign

Document: Agreement to Indemnity (Frieda's Inc.)

Document General Attributes

Document Effective Date:

Version:

Instructions

Test Esign

EDocument

Document Attributes

ATTRIBUTE	VALUE	WONT PROVIDE
Approver:	<input type="text"/>	<input type="checkbox"/>
Company Name:	<input type="text"/>	<input type="checkbox"/>
Title:	<input type="text"/>	<input type="checkbox"/>

Esign Document

All fields with leading red pipe are required

- 

If the Signee gets distracted or doesn't complete at this time, they must click the link in the original email to generate another verification code to begin again



# eSign Agreements Cannot be Overwritten

*Once signed, an error will present should a second eSign request be initiated*



# Change Your Mind? Get Authorized?

*You may delete a forwarded eSign request and eSign the document yourself*

The screenshot displays a web interface with a 'Documents' table and a 'Confirmation' dialog box. The table lists documents with columns for Document, Status, Effective Period, and Partner. The dialog box asks for confirmation to delete an existing document ESign request forwarded by Karen Sickles to Jozef Jamrich on 11/14/2018 12:46:10. A red arrow points to the 'Yes' button.

DOCUMENT	STATUS	EFFECTIVE PERIOD	PARTNER	
Agreement to Indemnify	Missing	N/A	Frieda's Inc. (18189)	Action
Allergen Control Program (ACP)	Missing	N/A	Frieda's Inc. (18189)	Action
🔍  Certificate of Analysis	Expired	09/15/2016 09/15/2017	Frieda's Inc. (18189)	Action
Product Recall Contact List	Missing	N/A	Frieda's Inc. (18189)	Action
Third Party Audit for facility May_12 - 3M Central Station	Missing	N/A	Frieda's Inc. (18189)	Action
🔍  W-9 Taxpayer Identification Number Form	Expired Verification Past Due	07/01/2017 N/A	Frieda's Inc. (18189)	Action

**Confirmation** [X]

Do you want to delete the existing document ESign request forwarded by Karen Sickles to Jozef Jamrich on 11/14/2018 12:46:10?

Press the Yes button to continue or No button to return to the previous page.





***Reserve your spot now!***

*Register using the link you'll receive in the follow-up from today's webinar*

March 26      Managing Compliance with Distributors & Brokers

April 30      Getting the Most from an Automated Document Review  
Process

## **ReposiTrak Essentials**

*A Webinar Series for Customers of ReposiTrak*

Questions? [webinars@repositrak.com](mailto:webinars@repositrak.com)

