Refining the Adobe Sign Routing Document

By Zachary Deorksen
March 20, 2024

Agenda

- Defining 'Signature Package'

- Discussion Best Practices

- Sharing Tips

- Demonstration

- Questions

Defining Signature Package

Definition:

- The sum of all documents being routed required for an informed review associated with the approval of one of the documents

- The Signature Package documents should stand alone in explaining the requirements and background

- Examples of common documents in a Signature Package:

  - Routing slip

  - Executive Summary

  - Documents to be signed

  - Additional backup documents

Setting Up Signature Package Recipients
Best Practice: Include Document Originator

- If you are not the document originator, always include yourself AND the document originator as recipients of the Signature Package.

  Example: If you are a Budget Officer uploading a document for a Business Administrator, include yourself as the first recipient and then the Business Administrator as the second recipient.

Setting Up Signature Package Recipients
Best Practice: Setting up the order of the recipients

- Time and consideration should be taken in setting up the order of recipients

- The recipient order should be set up based on compliance requirements and other administrative considerations

- For contracts:
  - all specialist reviews must be completed before Signatory 1
  - The Signatory 2 signature must follow Signatory 1

- Do not use "Complete in Any Order"
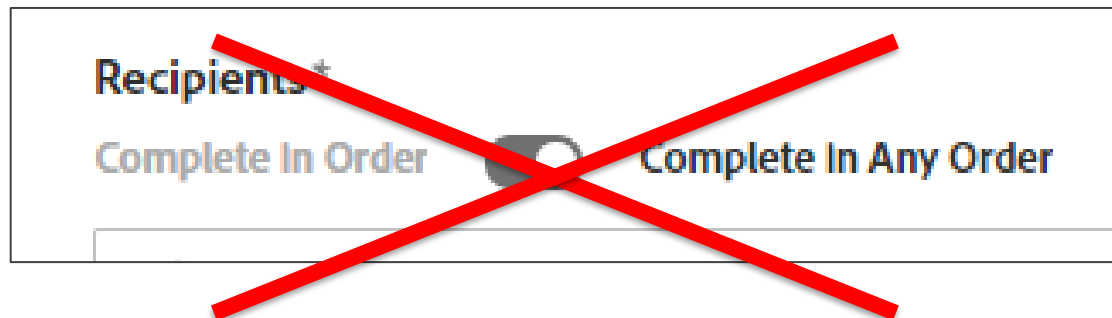
Setting Up Signature Package Recipients
Best Practice: Setting up the order of the recipients

- Example: For a revenue-generating document, the following is the required recipient order:
    1. Signature Package Creator (you, example: Budget Officer)
    2. Document originator (if not you, example: Business Administrator)
    3. Specialist reviewers (order is dependent on the business requirement and are authorized decision makers):
        i. HR
        ii. ITS
        iii. Facilities
        iv. Others as required
        v. Risk Management
        vi. Financial Services
    4. Signatory 1
    5. Signatory 2

Setting Up Signature Package Recipients
Tip: Recipient Groups & Executive Assistants

- For recipients wanting to engage their Executive Assistants in the review process, include the recipient and the Executive Assistant as a single "recipient group". This allows the Executive Assistant to facilitate processing the Signature Package.

- **CAUTION:** Any member of a "recipient group" can sign on behalf of the entire "recipient group". The "recipient group" feature should only be used when requested by the recipient. When a member of a "recipient group" signs on behalf of the intended recipient, there is no notification that the signature is on behalf of intended recipient.

- **NOTE:** The "CC" function should not be use. The CC function only provides a one-time notification of the existence of an Adobe Sign package and does not provide further notifications in the completion order.

AC

Setting Up Signature Package Recipients
Tip: Recipient Groups & Executive Assistants

- Use the "Add Recipient Group" option to create a group.

Creating a Relevant Message
Best Practice : Use Meaningful Signature Package Name

- Include a meaningful name for the Signature Package.

- The "Agreement Name" will default to the name of the first file uploaded to the package.

- Change "Agreement name" before setting up signature fields.

	Example
Poor Naming	"ROUTING SLIP – ABC"
Preferred Naming	"MLITSD - Academic Building Contract 2024-25 (ABC)"

Creating a Relevant Message
Best Practice: Include and Define a Deadline Date

- Provide clarity related to the deadline date(s)

- Define Due Date specifics

- Example: An "All Review Completed by" date should be included in the message text box as a best practice. The "All Review Completed by" date should allow for 2 business days for each recipient to review.

Message *

MLITSD - Academic Building Contract 2024-25

Please review and complete MLITSD - Academic Building Contract 2024-25. All reviews to be completed by March 21, 2024

Order of Signature Package Documents
Best Practice: Document Order
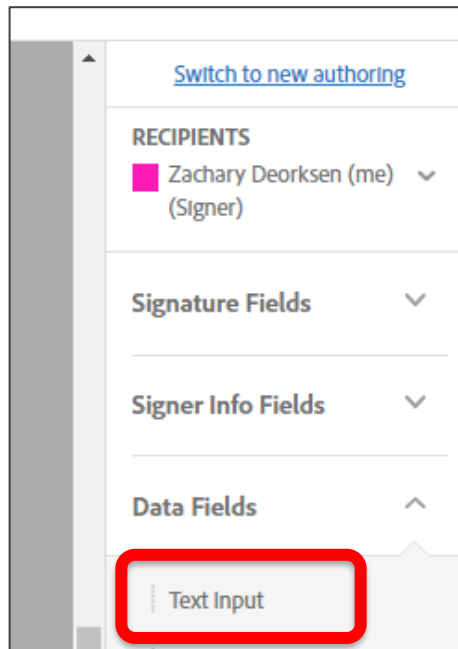
- Order the Signature Package files (where applicable) to be uploaded in Adobe Sign in the following order:

    1. Routing Slip

    2. Executive Summary

    3. Cover Memo, if applicable

    4. Document(s) for signature.

    5. Additional backup documents as required in the following order:

        I. Detailed budget spreadsheets

        II. Financial Statements, including historical performance

        III. Reconciliations

        IV. Relevant and supporting email correspondence

Adding Signature Fields
Best Practice: Provide Comment Boxes

- Each recipient should be provided with the space to enter their comments.

- A separate "Text Input" field must be added for each recipient. This may be on the Routing Slip, Executive Summary, etc.

- This is done using a "Text Input" field.

Adding Signature Fields
Tip: Enable Word Wrapping On Text Inputs

- When the "Text Input" field is being used to capture recipient comments, allow for text to be wrapped and visible.

Poor– Word wrapping not enabled	Preferred– Word wrapping enabled
There is a reporting requirement (30 days following Project Period, 11.1); however no financial reporting is required (for this or th	Financial Services' concerns r/ admin overhead are addressed with the additional clause H2.1.3 Monthly Actuals reporting requirement noted. tracking for Interest Earned on cash balance also noted.

Adding Signature Fields
Tip: Enable Word Wrapping On Text Inputs

Word wrapping in Adobe Sign is called: Multi Line Data Entry"

- Right-click on the "Text Input" field

- Select "Edit"

- Select "Multi-Line data entry" from the Custom Field menu

This will format the field to use word-wrapping
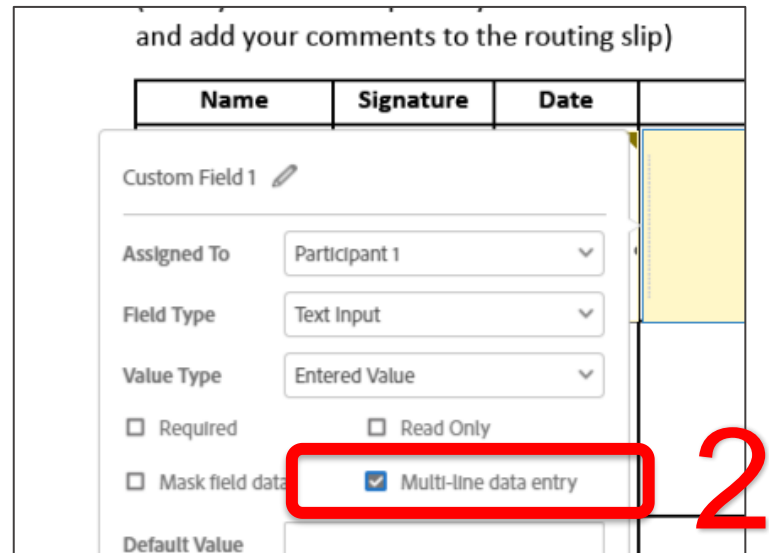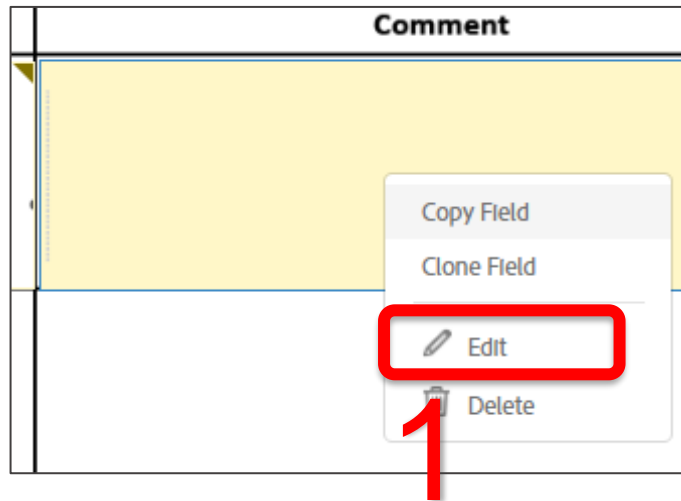
Adding Signature Fields
Tip: Copy Fields

Adobe Sign has the ability to copy-paste existing fields.

- Right-click on the field you wish to copy

- Select "Copy Field"

- Position and right-click the newly created field

- Select "Edit"

- Select the intended recipient from the "Assigned To" dropdown menu
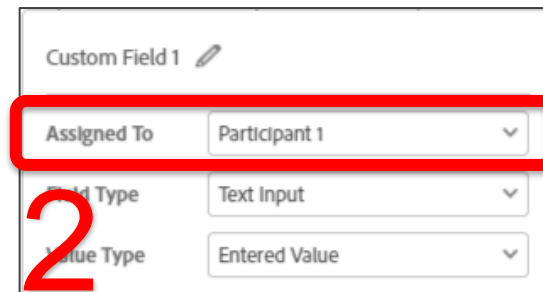
Managing Signature Packages
Tip: Send Adobe Sign Reminders to Recipients

- The Adobe Sign email might become 'lost' in a recipient's Inbox

- Check in on the routing of sent Adobe Sign Signature Packages

- If a recipient needs to be reminded of a pending Signature Package:
  - Select "Manage" from the top menu in Adobe Sign
  - Select "In Progress" from the left-side menu
  - Select the relevant Signature Package
  - Select "Remind" from the right-side menu
  - Select the "Right now" option from the Add a Reminder menu
  - Select the recipient you wish to send the reminder to.
  - Type a message with additional relevant information, such as restating the Deadline Date
  - Select the "Create" button

Managing Signature Packages
Tip: Send Adobe Sign Reminders to Recipients

Managing Signature Packages
Tip: Send Adobe Sign Reminders to Recipients

18

Managing Signature Packages
Tip: Re-directing the Signature Package

- If a Signature Package review is in progress and a recipient is absent, you can redirect the Signature Package to the person who is has been delegated the absent recipient's authority

NOTE: Re-directing Signature Packages is timing-specific. Re-directing can only be performed when it is waiting for the absent recipient to review and sign.

Managing Signature Packages
Steps: Send Adobe Sign Reminders to Recipients

- Select "Manage" from the top menu in Adobe Sign

- Select "In Progress" from the left menu

- Select the relevant absent Signature Package

- Hover your mouse over the absent recipient's email requiring the delegated update.

- Select "Add Alternate Recipient"

- Enter the email of the person delegated for the absent recipient

- Include a message the delegated recipient will receive with the prompt to review and sign the Signature Package.

- Click on the "Add" button.

Managing Signature Packages
Tip: Send Adobe Sign Reminders to Recipients

Managing Signature Packages
Tip: Send Adobe Sign Reminders to Recipients

Add Alternate Recipient

The original recipient will still be allowed to access the agreement and participate, but only one recipient can take action and complete their part.

doucetk@algonquincollege.com ✓

Redirecting document to K.Doucet, acting Manager, Financial Services for March 13, 2024.

6

Cancel   Add

7

Dispersing Signed Documents
Tip: Returning appropriate file

! External parties should not receive the entire Signature Package which includes Algonquin-internal documents

External parties should only receive the document they need to sign (usually a contract or funding agreement)

To download individual documents:

- Select "Manage" from the top menu in Adobe Sign
- Select "Completed" from the left side menu
- Select the relevant Signature Package
- Select the "See 5 more" option from the Actions menu on the right side
- Select "Download Individual Files"
- Select the file you wish to download

NOTE: Downloading an induvial file can only be performed by the person who uploaded the documents in Adobe Sign

Dispersing Signed Documents
Tip: Returning appropriate file

Dispersing Signed Documents
Tip: Returning appropriate file

Dispersing Signed Documents
Tip: External Recipient Access to Files

- Adobe Sign encrypts the Signature Package, preventing edits

- Some external party require an unencrypted copy

- For legal purposes, Algonquin requires that the external recipient receives the encrypted signed file (contract, funding agreement, etc.)

- When Algonquin is requested to send an unencrypted copy of the encrypted version, both the encrypted and unencrypted files must be sent in the same email to the external recipient, and the email must be retained in the contract file

- To create an undecrypted copy of the encrypted version, print using the printer "Microsoft print to PDF" and label as "unencrypted"
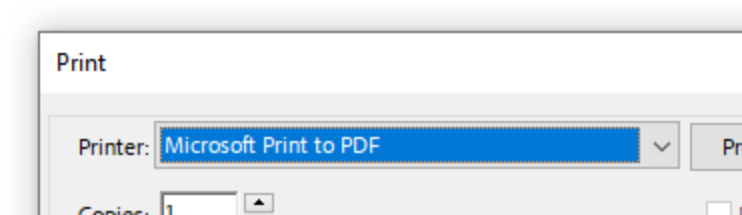
DEMO
Creating A Routing Slip Template

[Signature Slip Template](#)

Questions?