

# Refining the Adobe Sign Routing Document

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# 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.

Get documents signed [Switch to new experience](#)

Send an agreement to others for e-signing, approval, or other processing.

Recipients\*

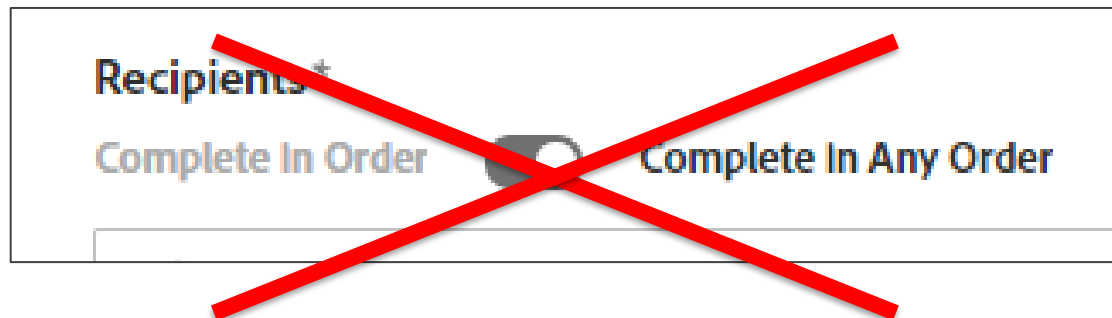
Complete In Order ☐ Complete In Any Order [Add Me](#) | [Add Recipient Group](#) | ?

1		Myself	Person tasked with uploading document
2		jansd@algonquincollege.com	Person requesting document be signed

# 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.

# Setting Up Signature Package Recipients

## Tip: Recipient Groups & Executive Assistants

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








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Send an agreement to others for e-signing, approval, or other processing.

**Recipients\***

Complete In Order ☐ Complete In Any Order ☒

[Add Me](#) [Add Recipient Group](#) ?

1	 <span>Myself</span>	 <span>Email</span> <span>×</span>
2	 <span>jansd@algonquincollege.com</span>	 <span>Email</span> <span>×</span>
3	 <span> VPF</span> <span>mcnaird@algonquincollege.com</span> <span>×</span> <span>buglari@algonquincollege.com</span> <span>×</span> <input type="text" value="Enter recipient email"/>	<span>×</span>
4	 <span><input type="text" value="Enter recipient email"/></span>	<input type="text"/>

Recipient group with intended recipient and their Executive Assistant



# 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

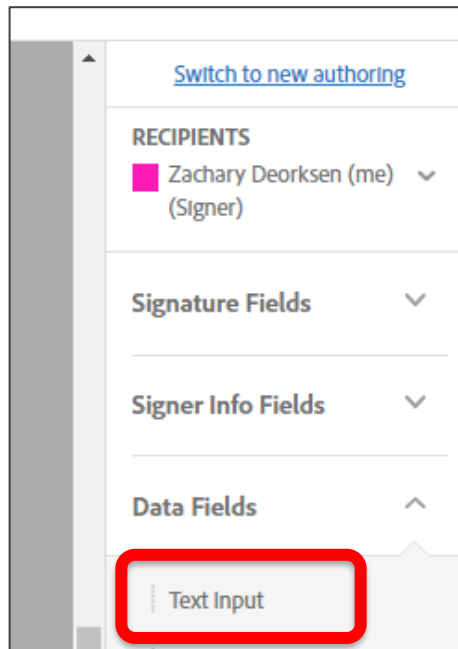
## Best Practice: Document Order

- 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.



The screenshot shows a document interface with a sidebar on the left. The sidebar contains a link "Switch to new authoring" at the top, followed by a section titled "RECIPIENTS" with a pink square icon and the text "Zachary Deorksen (me) (Signer)". Below this are three expandable sections: "Signature Fields", "Signer Info Fields", and "Data Fields". At the bottom of the sidebar, a "Text Input" field is highlighted with a red rectangular box.

# 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

There is a reporting requirement (30 days following Project Period, 11.1); however no financial reporting is required (for this or th
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### Preferred– Word wrapping enabled

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.

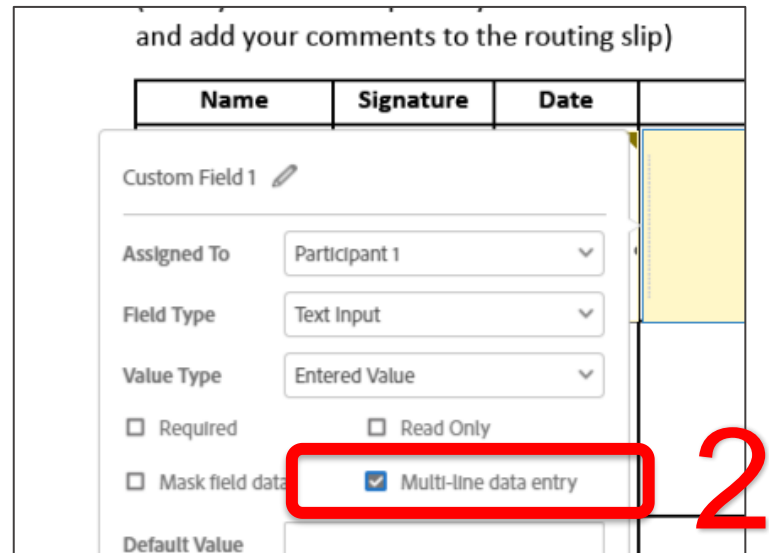
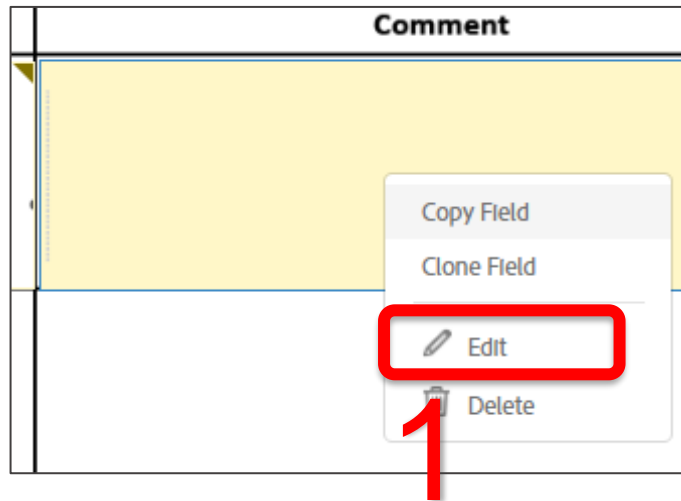
# Adding Signature Fields

## 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

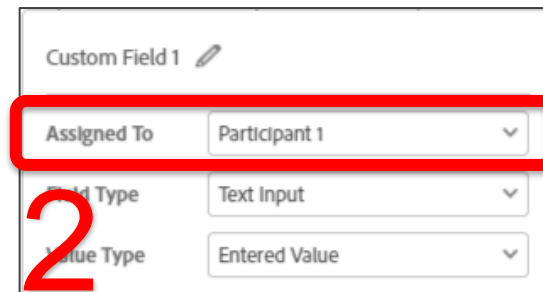


# Adding Signature Fields

## 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

The screenshot displays the Adobe Sign interface for Algonquin College. The top navigation bar includes 'Home', 'Send', 'Manage' (highlighted with a red box and number 1), 'Workflows', and 'Reports'. The left sidebar shows 'Your agreements' with a filter for 'In progress (1)' (highlighted with a red box and number 2). The main content area, titled 'In progress', shows a table of agreements. The first row is highlighted with a red box and number 3, showing the recipient 'jansd@algonquincollege.com' and the document 'MLITSD - Academic Building Contract 2023-24 (ABC) - EXAMPLE DOCUMENT ONLY'. The right sidebar shows the document details, including the status 'Out for Signature' and the message 'Please review and complete MLITSD - Academic Building Contract 2023-24 (ABC) - EXAMPLE DOCUMENT ONLY'. The 'Actions' section on the right includes 'Open Agreement', 'Create a Template', 'Remind' (highlighted with a red box and number 4), 'Cancel', and 'Download PDF'. A 'See 7 more' link is at the bottom right.

**ALGONQUIN COLLEGE** | Powered by **Adobe Acrobat Sign** | Home | Send | **Manage** | Workflows | Reports

**Your agreements** | Filters | Search

**STATUS**

- In progress (1)**
- Waiting for you (0)
- Completed
- Canceled
- Expired
- Draft
- Templates
- Web forms
- Bulk sends

**In progress**

RECIPIENTS	NAME
<input type="checkbox"/> jansd@algonquincollege.com 1 of 2 completed	<b>MLITSD - Academic Building Contract 2023-24 (ABC) - EXAMPLE DOCUMENT ONLY</b> Out for signature 3/18/2024

**MLITSD - Academic Building Contract 2023-24 (ABC) - EXAMPLE DOCUMENT ONLY**  
Created Mar 18, 2024 10:23 AM

**Status:** Out for Signature

**Message:** Please review and complete MLITSD - Academic Building Contract 2023-24 (ABC) - EXAMPLE DOCUMENT ONLY.

**Actions**

- Open Agreement
- Create a Template
- Remind**
- Cancel
- Download PDF

[See 7 more](#)

# Managing Signature Packages

## Tip: Send Adobe Sign Reminders to Recipients

The screenshot shows the 'Add a reminder' dialog box in Adobe Sign. It contains several steps highlighted with red boxes and numbers:

- 5**: The 'Right now' radio button is selected under the 'Add a reminder' section.
- 6**: The checkbox for 'jansd@algonquincollege.com' is checked under the 'Who do you want to remind?' section.
- 7**: The text area for 'Include a message with your reminder?' contains the message: 'Please review the pending signature package. All reviews due by March 21, 2024'.
- 8**: The 'Create' button is highlighted at the bottom right of the dialog.

Other visible elements include the 'Daily until completed' and 'yyyy-mm-dd' options, a 'Myself' checkbox, and a 'Cancel' button.

# 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 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

The screenshot displays the Adobe Sign interface for Algonquin College. The top navigation bar includes 'Home', 'Send', 'Manage' (highlighted with a red box and number 1), 'Workflows', and 'Reports'. The left sidebar shows the 'Your agreements' section with a status filter 'In progress (2)' (highlighted with a red box and number 2). The main table lists signature packages, with one row for 'jansd@algonquincollege.com' (1 of 4 completed) highlighted with a red box and number 3. The right sidebar shows the 'Actions' menu and the 'Recipients (1 Completed)' list, which includes '1. Zachary Deorksen' and '2. jansd@algonquincollege.com' (highlighted with a red box and number 4). The bottom right shows the 'Add Alternate Recipient' button (highlighted with a red box and number 5) and the 'Delivery: Email' option (highlighted with a red box and number 5).

ALGONQUIN COLLEGE

Powered by Adobe Acrobat Sign

Home Send **Manage** Workflows Reports

Your agreements

STATUS

**In progress (2)**

Waiting for you (0)

Completed

Canceled

Expired

Draft

Templates

Web forms

Bulk sends

In progress

Filters Search

STATUS MODIFIED

Out for signature 3/13/2024

jansd@algonquincollege.com 1 of 4 completed

Out for signature 3/12/2024

Actions

Open Agreement

Create a Template

Remind

Cancel

Download PDF

See 7 more

Recipients (1 Completed)

1. Zachary Deorksen Signed on Mar 12, 2024

2. jansd@algonquincollege.com Signer viewed on Mar 12, 2024

3. clb (3) Signer

4. vpf (2) Signer

jansd@algonquincollege.com

Add Alternate Recipient

Role: Signer

Authentication: None

Delivery: Email

# 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.

Cancel

Add

6

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 individual file can only be performed by the person who uploaded the documents in Adobe Sign

# Dispersing Signed Documents

## Tip: Returning appropriate file

The screenshot displays the Adobe Acrobat Sign interface for Algonquin College. The top navigation bar includes 'Home', 'Send', 'Manage' (highlighted with a red box and number 1), 'Workflows', and 'Reports'. The left sidebar shows the 'Your agreements' section with a 'Filters' dropdown and a search bar. The 'STATUS' filter on the left is set to 'Completed' (highlighted with a red box and number 2). The main content area shows a list of completed agreements. One agreement is highlighted with a red box and number 3, showing the title 'URGENT: 2023-24 Monitoring Report' and the date '1/8/2024'. The right sidebar contains the 'Actions' section with options like 'Open Agreement', 'Create a Template', 'Download PDF', 'Download Audit Report', and 'Download Form Field Data'. A 'See 5 more' link is highlighted with a red box and number 4. The bottom right corner features a blue graduation cap icon.



# Dispersing Signed Documents

## Tip: Returning appropriate file

The screenshot displays a user interface for managing signed documents. On the left, under the heading "Original Files", there is a large dark grey rectangular area. To its left are three download icons (a downward arrow inside a square). The bottom-most icon is highlighted with a red square, and a large red number "6" is positioned to its left. Below the dark grey area is a "Close" button. To the right of the main content area is a vertical menu with various options, each preceded by an icon. The option "Download Individual Files (3)" is highlighted with a red rectangle, and a large red number "5" is positioned to its left. At the bottom right of the menu is a blue circular button with a white graduation cap icon and the text "See less".

Original Files

Click on the file to download in PDF format

6

Download Individual Files (3)

5

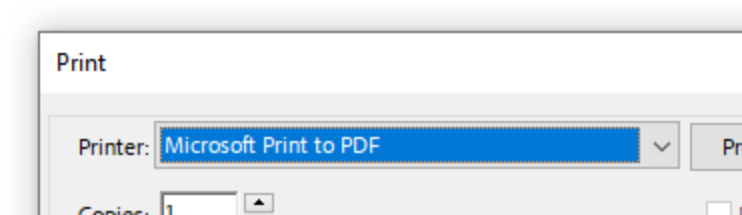
Close

See less

# 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?**