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Overview

The Adobe Sign integration for Microsoft SharePoint provides an integrated solution for creating, sending, tracking, and managing electronic signatures. The integration is available for Microsoft SharePoint 2013 or 2016 on-premises instance of SharePoint. The solution is developed as a farm solution for Microsoft SharePoint and provides:

- Ability to add the Adobe Sign Manage page as a SharePoint web part, which can be used by SharePoint users for tracking and updating Agreements
- Send any document from a SharePoint document library for signature
- Ability to send documents to a single recipient or sending to a batch of recipients using SharePoint lists and mapping data from SharePoint lists into documents when the documents get sent for signature
- Archival of all signed agreements within SharePoint

Within this document, the term "Agreement" is used loosely to describe transactions or documents that have been (or are yet to be) sent out for signature/approval.

"Recipient" is the generic term used for any signer, approver, or delegator of an Agreement (basically anyone you send the document to for some action).

For Users that are updating from a previous version

If you are updating from a previous version of eSign (or EchoSign) for SharePoint, be advised that any previous Agreement template defaults will need to be recreated as described in the Define your Personal Settings section.
Accessing the Adobe Sign Features

Adobe Sign is a farm solution package that is installed by your SharePoint Admin. As a User, you will see the Adobe Sign tab at the top of your SharePoint site.

Clicking the Adobe Sign tab exposes the ribbon with all the available Adobe Sign features.

The ribbon consists of five icons:

- Send for Signature
- Agreement Status
- Library Template
- Manage Agreements
- Settings

Of these, the first four are the actions you might use on a regular basis for creating and sending agreements.

The last icon, Settings, is where you can define your Agreement template. And once defined, you won’t likely return to the page, unless you want to adjust the template. So let’s start there.
Define your Personal Settings

Your personal settings allow you to define a default agreement name and message for all the agreements that you send from SharePoint using the Adobe Sign app.

The **Agreement Name** field (255-character max) allows you to enter any string that will identify the agreement. This string populates in the Subject line of the recipients’ email (highlighted in yellow below), and also as the name value on the Manage page. Providing a unique and meaningful agreement name will help your recipients identify your email more readily, and can improve your ability to search for the agreement if needed.

The **Agreement Message** is a plain text field where you can enter any instructions or comments that are warranted (highlighted in green below). The message appears on the *Please Sign* email sent to all recipients and should not be used like the personal notes you can attach for each recipient.
Custom Lists Document Templates

Just under the default agreement name and message fields are two settings that govern how documents can be attached when sending an agreement from a List.

The default behavior is to allow the sender to select a document from within SharePoint.

Two options are available for the user to alter the default experience:

- **For custom lists, use a document template from outside of SharePoint** – When enabled, the sender bypasses the option to attach a document from within SharePoint. Instead they are presented with the file attachment options as configured within the Adobe Sign system. This can include one or more of the following:
  - Attach from the local system
  - Attach from the Adobe Sign template library
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► **For custom lists, use a document template from outside of SharePoint** – When enabled, the sender bypasses the option to attach a document from within SharePoint. Instead they are presented with the file attachment options as configured within the Adobe Sign system. This can include one or more of the following:
  - Attach from the local system
  - Attach from the Adobe Sign template library

  When the option is not enabled, you are prompted to select a document template from the SharePoint document list.

► **For custom lists, always use the designated document template** – When enabled, SharePoint remembers the file that you attach, and automatically attaches that file on the next agreement that you create from a list, bypassing the file selection step. Great for when you use the same document multiple times.
Sending an Agreement

Starting the Agreement

Sending Agreements and getting signatures is what Adobe Sign is all about, and in the SharePoint environment there are three methods to begin that process:

- Sending from the Ribbon
- Sending via Right-click
- Sending from Lists

All three of these options open the configuration page that allows you to define the Recipients, and the signature order if more than one signature is needed.

Sending from the Ribbon

Sending from the ribbon is the method to use if you need to attach multiple SharePoint documents:

1. Select the document(s) to be sent by clicking the check to the left of the document name
2. Click the tab in the ribbon at the top of the page
   - All the selected documents are attached automatically
3. Click the **Send for Signature** icon
Send via Right-click

Sending by right click lets you quickly send any document in a list of documents, but only attaches that one file to the Agreement:

1. Right Click the document you want to send for signature
2. Select the ellipsis (…) to open the context menu
3. Select **Send for Signature** from the menu
Send from Lists

Sending from a list is the same process as sending a Document in that you can send either from the ribbon or using the right-click method.

There are two important differences:

• No documents are automatically attached. Based on your personal settings, you have to either:
  o Explicitly add a file from SharePoint
  o Attach the files on the Agreement page

• The returned signed copy (and possibly Audit Trail) PDF will be attached to the list instead of being delivered to a new folder.
  o Unless a Document Storage folder has been defined by the SharePoint Admin, in which case the PDF will be delivered to that folder.
Configure the Agreement

Once a new Agreement is open, you will see the configuration page which can be viewed in four task-specific sections:

A. Recipients – The people signing or approving the Agreement
B. Message Details – The name and global message for the Agreement
C. Options – Optional features related to the Agreement
D. Files – The actual documents/files that you need to be signed/approved

○ Note that the Document you used to open the Agreement will automatically be attached to the Agreement.
Recipients Section

In the Recipients section, the very top switch asks you select the basic signature order workflow:

- When *Complete in Order* is enabled (as shown below), recipients are numbered to indicate the participation order and a sequential signing process is observed from one signing step to the next
  - Within the sequential steps, it is possible to define “container” steps that allow:
    - A subset of signers to sign in parallel (Hybrid Workflow)
    - A group of people, any one of which can sign for the entire group (Recipient Group)
- When *Complete in Any Order* is enabled, recipients are not numbered, and parallel signing can take place.

![Screen shot of Recipients Section with options](image)

To the right of the signature order switch, you will see two links:

- **Add Me** – Click this link to insert yourself as the next signer in the signing order
- **Add Recipient Group** – Click this link to create a “container” step where you can define a group of signers, any one of which can sign. e.g. Create a group for the HR team, but only one person from HR actually signs.

Each recipient is created with five elements:
A. **Signature Step** – Defines when in the process the recipient gains access to the Agreement (when *Completed in Order* is enabled)

B. **Role** – Defines how the recipient can interact with the document
   - **Signers** (default) – Recipients that are expected to apply at least one signature
   - **Approvers** – Recipients that review and approve the document, but do not need to legally sign
   - **Delegators** – Recipients that are not expected to either Sign or Approve. They will delegate the ability to sign or approve to another party

C. **Email address** – Who is the recipient? This should be a personal email address

D. **Verification process** – How should the recipient be vetted?
   - **Email** (default) – Authentication is based on access to the email box
   - **Password** – A sender generated alpha/numeric password that has to be communicated to the recipient out of band
   - **Social** – Authenticate to a third-party social network like Facebook or LinkedIn
   - **KBA** (USA only) – Knowledge Based Authentication requires the recipient to enter their Social Security Number and then generates a number of non-trivial questions based on public databases
   - **Phone** – Requires the sender to supply the recipient’s phone number so an SMS code can be sent when their signature is needed

E. **Private note** (optional) – The sender can supply individual instructions to each recipient which appears when the recipient is viewing the Agreement

The Show CC link under the recipient list exposes a field where you can carbon copy (CC) any email address that you want to view the agreement, without them having signing/approval access.
Hybrid Workflows

A "Hybrid" workflow is an instance of the sequential signing order where one or more of the signature steps includes two or more recipients gaining access to the document at the same time. All the signers of the “parallel” step will need to complete their part before the sequential process moves to the next signature step.

For example, in the above image we have a three-step signature cycle:

Step 1 is fclarke@gmail.com. When the agreement is sent out for signature, only fclarke will be notified. Once fclarke signs the document, we proceed to the next step.

Step 2 is the hybrid step. You can see that all three recipients are given the same number (2), and this means that Adobe Sign will notify all these recipients at the same time. They can apply their signatures in any order, but all of them must complete their part before the signature cycle moves to the next step.

Step 3 is another individual recipient, but this time they are defined as an Approver (the check icon vs the pen tip). Once the “Step 3” recipient applies their approval, the agreement is completed, the document is fully executed, and all parties will be notified with a copy of the document in PDF format.

To create a hybrid group, enter the email addresses of each party as if they were individual recipients, and then click and drag the recipient field over another one in the hybrid group. You will see on screen the message that you are creating a parallel group.
Recipient Groups

Recipient Groups are useful when you need sign-off from an organization, but not a specific individual in that group.

For example, in the above image you can see a three-step signature cycle:

Step 1 (JohnDoe) is a signer and will be notified that their signature is required as soon as the agreement is sent. Once JohnDoe applies their signature, the agreement moves on to step 2
Step 2 is an approver Recipient Group given the name "HR Group". Four signers have been entered into the group, and each has been given a different verification process (just as an example). Once any one of the identified recipients applies their approval, the agreement will progress to the third step.

Step 3 is an individual signer. Once this final signature is completed, the document is fully executed, and all parties will be notified with a copy of the document in PDF format.

To create a Recipient Group, click the Add Recipient Group link at the top-right of the recipient field. This creates the container where you will be asked to enter the group name, and the potential recipients.

**Note:**

All members of the Recipient Group will receive the final PDF copy of the signed document even if they did not specifically sign the document.

**Message Section**

The Message section contains two fields that can dramatically improve your success, and if you have configured your personal template, these fields will be auto-populated with the values you have defined.

The **Agreement Name** field allows you to enter any string that will identify the agreement.

**Note:** This value can be edited until the agreement is sent.

The **Agreement Message** is a plain text field where you can enter any instructions or comments that are warranted.

- If your account is configured to use Message Templates, the link to access the templates is displayed at the top right of the message section.

**Options Section**

The Options section allows you to better control the document after it has been sent:

- **Password Protect** - Require recipients to enter a password to open and view the signed PDF file. This password is defined by the sender and would be communicated out of band. Adobe Sign does not record this password, so don’t forget it!
- **Completion Deadline** - Set the number of days after which the agreement expires and can no longer be completed.
- Completion Deadline is only visible if enabled by your admin
- **Set Reminder** - Set the frequency of reminders to be sent until the agreement is completed. Only the current recipients will be notified.
• **Recipients' Language** - Select the language to be used in emails sent to recipients and during the signing experience

**Files Section**

The File section is where you attach the documents to the transaction. The original document you used to start the Agreement should already be attached.

Adobe Sign will combine all documents into one inclusive PDF for the signature process, and will build that PDF based on the order that the documents are listed. Documents can be rearranged by clicking and dragging one document to a new list location.

Files can be attached from either the Adobe Sign library, Google docs, Box.net, Dropbox, or uploaded from your local system using file search or drag and drop.

File types allowed are: Word, Excel, PowerPoint, WordPerfect, PDF, JPG, GIF, TIF, PNG, BMP, TXT, RTF, HTML
Preview & Add Signature Fields

Just under the Files list you will see the **Preview & Add Signature Fields** check box. This option allows you to open the documents that you upload and place form fields as needed on the document.

You should place at least the signature fields, but there are many other fields you can use to build complex forms if you like.

**Note:**

If no signature fields are placed, Adobe Sign will automatically place a signature block at the bottom of the document. If there is no space, a new page will be added to accommodate the signatures.
Tracking your Agreements

Agreement Status

Once an Agreement is sent, tracking its progress is best done on the Agreement Status page, accessed through the Agreement Status icon on the Adobe Sign ribbon.

The Agreement Status page will show all the Agreements that you have authority to view that were sent from within the SharePoint environment.

The default listing order is by sending date, with the most recent at the top of the list:

To filter the agreements in your view, you can use the Search field in the upper-right corner of the page. This search field will search for any string stem in any of the fields, and return all matches:
Searching Agreement Status by Document or List

You can easily search for all the Agreements sent using a SharePoint document or list by:

1. Find and select the document/list item you want to search against
2. Click the Agreement Status option (either in the ribbon or right-click context menu)

Refreshing the Agreement Status

The far right column in the Agreement Status table is a “Refresh” action that will actively query Adobe Sign for an update to the agreement status. SharePoint will automatically update all Agreements that are still waiting for Recipient action on a regular basis. The Refresh action allows you to update the agreement outside of that cycle when you need to know the real-time status.
Deleting the Agreement Record

The last icon to the far right of the Agreement Status page is the Delete icon. This action will delete the Agreement record in SharePoint, but does not cancel or delete the Agreement in Adobe Sign. This action should be used with caution as it cannot be reversed.

Note:
- If the Agreement is completed (Signed or Approved), the name of the Agreement will be link enabled, and will show the completed document when clicked.
- If the Agreement is in a terminal state (Signed, Cancelled/Declined, Expired) then the Refresh action will be disabled.
- If the Agreement is not in a terminal state, the Delete action will be disabled.

Signed Documents

Depending on how your SharePoint Admin has configured the Adobe Sign package, signed documents will be pushed back into either:

- A Global folder – All completed documents will be in this folder if configured this way.
- A new folder in the source library – If no Global folder is identified, a new folder called “Signed Agreements” will be created in the Document library from which the Agreement was created/sent. All completed Agreements sent from the same library will have the completed PDFs returned to the same Signed Agreements folder.
- Attached to the List item – If you sent an agreement from a list item, the attachments will be contained in the list.

<table>
<thead>
<tr>
<th>Vendor_Name</th>
<th>Earl's Fun Time Camp</th>
</tr>
</thead>
<tbody>
<tr>
<td>Street_Address</td>
<td>768 Pepperdine way</td>
</tr>
<tr>
<td>Street_Address_2</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>Kelmscot</td>
</tr>
<tr>
<td>Country</td>
<td>France</td>
</tr>
<tr>
<td>Attachments</td>
<td>Vendor Application27-10-2016 74240137.pdf</td>
</tr>
<tr>
<td></td>
<td>Vendor Application27-10-2016 74242652-AuditTrail.pdf</td>
</tr>
</tbody>
</table>
Managing Agreements

The Manage Agreements icon opens a different and more enabled view of the Agreements related to your user. Where the Agreement Status page shows a simple view of all Agreements with the option to update their status, the Manage Agreements view offers a deeper view into the Agreements, and additional options to modify the Agreement properties.

Manage page structure

The Manage page has a lot of embedded features to explore. For simplicity it can be broken up into four functional areas:

A. Agreement filters
B. Agreement list
C. Agreement meta-data
D. Agreement tools
Agreement Filters

Along the top of the page we have four tools to help find specific agreements by filtering the lists below. The drop-down lists are dynamically populated from the loaded agreements in the lists. They are:

- **Filter by Name or Company** – This is a list of every Name and Company name that has been entered as a signer field on your agreements. Selecting any item on the picklist will filter out all other agreements.
- **Filter by Document Status** – This list effectively collapses all the list sections except the one you select.
• **Filter by Document Owner** – Useful if you view the agreements of other Adobe Sign users, this option will constrain the lists to only show the agreements from the owner (sender) you select.

The text field on the far right allows you to search for any string that would be a recipient name, a company name, a recipient email, or the name of the document.

**Agreement lists**

The main body of the page contains the lists of agreements that you are connected to. Every agreement that involves you (meaning the email address you log in to Adobe Sign with) will be reflected somewhere on the list. Not just the agreements that you have issued, but the agreements that have been sent for you to sign/approve, as well as any agreement you have been CC’d on.

The list is divided into collapsible sections indicating the status of the agreement. Starting from the top:

- **Waiting for you to approve/sign** – These agreements are at the top of the list because they are all waiting for your action.
- **Draft** – These agreements were created up to the point where they were sent to the Authoring environment, but never sent for signature.
  - Click the edit link to open the document in the Authoring environment and complete the sending process.
- **Out for Signature** – These agreements are in the signature process and waiting for other people to sign/approve.
- **Signed** – Fully executed/completed agreements.
- **Cancelled/Declined** – Any agreement that was cancelled by you, or declined by a recipient for any reason.
- **Archived** – Files that have been uploaded to the Adobe Sign system. These documents are not part of a legal signature process managed through Adobe Sign.
- **Library Templates** – Any template created by you, or shared to you by someone else in your group/account.
  - The ability to edit the template is reserved for the owner (creator) of the template.
  - Clicking the send link will start a new Agreement with the template already attached.
- **Widget** – A list of all Widgets created by you.
- **Use the get code link to expose the URL, HTML code or the JavaScript code.**

The headers along the top of the lists will sort the contents of each section by single clicking them. Clicking them again will reverse the sort order.
The individual records contain the following information:

- **Name** – The name value will reflect either the name or email address of the first recipient that is not the sender
  - An email address is used if the recipient has never signed a document through the Adobe Sign system.
  - Once a name value is entered during the signature process, the email will be replaced by the name
- **Company** – If the first recipient has entered a company name, either through a signature field or by logging in and updating their profile, that name value will reflect here.
  - If you do not include Company Name fields in your agreements, this column will remain largely empty
- **Document Title** – This is your Agreement Name
- **Iconic indicators** – There are four icons indicating that additional controls are in place:
  - **Notes** - A word balloon icon indicates that there are notes attached to the agreement which can be viewed by clicking the Notes tab in the tools section
  - **Reminders** - The bell icon indicates that at least one reminder is set for the agreement that can be reviewed by clicking the Reminders tab in the tools section
  - **Password Protection** - A pad lock icon indicates the document is password protected against viewing
  - **Field content** - Found only on Signed agreements, this icon opens a CSV file that shows all the field data collected on the document
- **Date** – This date shows the last modified date, meaning the last time the document was updated as a sending event, or a signing/approval event
Agreement Metadata

When any agreement is selected from the lists, the metadata for that agreement is displayed in this small panel. The included data is:

- **Name of the Agreement** – The name provided to the Agreement when it was created
  - Modify Agreement - If the agreement is eligible to be modified, the Modify Agreement will appear next to the Agreement Name.
- **From** – Who sent the agreement (and their Company name if known)
- **To** – The first signer of the agreement (and their Company name if known)
- **Date** – The Time/Date stamp for the last modification to the Agreement
- **Status** – The current functional status of the agreement
  - Replace Signer link – If the agreement will allow the sender to replace the current signer, a link will appear under the Status. This is useful if you have sent the agreement to the wrong email, or the current signer is unavailable
  - Upload a signed copy – If the account settings allow for it, a link to Upload the signed document will appear under the Status. This is useful for the odd occasion when someone prints the document, signs it, and then mails it back to you
- **Message** – The original message entered in the Message field
- **Expiration Date** – This field will display the date that the agreement will self-cancel
  - Add/Edit - If your account is configured to allow expiration dates, a link to add or edit the expiration date for the agreement will be available
**Agreement Tools**

The Agreement Tools panel will allow you to access a few controls to better manage or understand your agreements.

- **View** – A thumbnail of the agreement in its current state will be shown
- **Share** – Sharing a document with this feature will ask you to enter an email address and a message, and then email that address a copy of the agreement in its current state as well as adding the document to the Manage tab of the designated email address
- **Protect** – Only available as long as the document isn’t yet completed, this tab will allow you to establish document viewing protection after the agreement is sent.
- **Remind** – Reminders can be created or deleted after the agreement is sent using this panel. Additionally, you can send a reminder in real-time, or on a specific date.
- **History** – This tab is an inclusive list of all events the agreement has logged, starting with the Send event, and ending with the final signature event.
  - **Audit Report** – This link generates an extended PDF report of the agreement history including deeper parameters like the IP address for each event
- **Notes** – You can add a personal note to any agreement. This note is personal to just you, and is not shared to any other user or the signer
Quick links to common tasks

Below is a quick reference for the most common tasks you may need to use, followed by a high-level survey of the manage page itself and the feature landmarks.

- Setting Reminders
- Replace Signer in an Agreement
- Modify an Agreement “in-flight”
- Upload a Signed Copy of an Agreement
- Sharing an Agreement
- Viewing the Agreement Audit Trail
Library (Document) Templates

The Library Templates icon on the Adobe Sign ribbon will allow you to send a SharePoint document to the Adobe Sign Authoring environment where you can place form fields, and then save the field enabled form in your Adobe Sign library.

Note:
The original document in SharePoint will not be changed. The new document template exists only on the Adobe Sign site, and must be attached via the Document Library option in the Files section of the Agreement.

To create a document template:

1. Click on the document you want to build into a template
2. Click the Library Template icon on the ribbon (or right click and choose from the menu)
   - The Adobe Sign Authoring environment will open showing you the full document
3. Place the fields needed on the document
   - If you are creating a template that will need input/signatures from two people, place all of the fields for the first recipient. Then, change the Recipients field to Participant 2, and then place the fields for the second signer/approver.

Note:
When creating a template through the Authoring environment, you can only build the document for up to two recipients. If you require more, then the document has to be built with Acrobat or using Text Tags

4. Once the template is complete, click the Save button in the lower-right corner.
   - This saves the template to the Adobe Sign library.