

Queen Mary University of London

Digital E-Signature User Guide

Version 1.4

Version	Date Created	Created By	Reviewed By	Comment/Updates
1.0	01/08/2022	Aveek Das	William Mordaunt	First Draft
1.1	19/08/2022	Aveek Das	William Mordaunt	Updates Made. Sections Added – Additional Features, Managing Agreements and Transaction Limits
1.2	05/09/2022	Aveek Das	William Mordaunt	Added Section 9.1
1.3	09/11/2022	Aveek Das	William Mordaunt	Added Section 3.0, 5.5 and 10.0
1.4	09/11/2022	Aveek Das	William Mordaunt	Updated as per the comments shared.

Contents

1.0 Background	4
2.0 About the Vendor / Tool	4
3.0 How to access the tool?	4
4.0 What would be the login credentials?	4
5.0 Process to send a document for signing	4
5.1 Login	5
5.2 Login Details.	5
5.3 QM ID selection	6
5.4 Click on Request e-signature	6
5.5 Enter the email Ids for the intended recipients.	7
5.5.1 Alternate Authentication (For External Users ONLY)	7
5.5.1.1 Add the phone number	8
5.5.2 Signature Order	8
5.6 Agreement name and description	9
5.7 Select the required documents	10
5.8 Click on Next	12
5.9 Add the required Signature fields for the document	12
5.10 Configure the signature fields	12
5.11 Send the document	13
6.0 Sign a Document	14
6.1 Click on Review and Sign (Internal QM Signatory)	16
6.1.1 Click on Review and Sign (External Users – No QM ID)	16
6.1.2 Verify Identity with a Text Message	17
6.1.5 Click on Continue	18
6.2 Click on Start	18
6.3 Click on the signature box	19
6.4 Enter your Signature	19
6.5 Click to Sign	19
7.0 Additional Features (Signers and Senders)	20

7.1 Decline to Sign	20
7.2 Delegate Signature	21
7.2.1 Delegate a specific document	21
7.2.2 Delegate all your documents	21
7.3 Create re-usable document template	22
7.3.1 Click on “Create a reusable template”	23
7.3.2 Enter the Template Name	23
7.3.3 Upload document for the template	24
7.3.4 Select template type and user group	25
7.3.5 Preview and add additional fields	25
7.3.6 Click on save	27
8.0 Managing agreements	28
8.1 In Progress	28
8.1.1 Open the document	28
8.1.2 Send a Reminder to the recipients	29
8.1.3 Cancel the document	30
8.1.4 Save a PDF copy of the document	30
8.1.5 Share the status of an agreement with other users*	30
8.1.6 Add an alternate email for the recipient	31
8.2 Waiting for you	33
8.3 Completed	34
8.4 Cancelled	34
8.5 Expired	34
8.6 Draft	34
8.6.1 Open Agreement	34
8.6.2 Edit Agreement	35
8.6.3 Cancel	36
8.6.4 Templates	36
9.0 Transaction Limits	39
9.1 Archival of Documents	39
9.1.1 Saving the file from the Adobe sign portal	39
9.1.2 Saving a copy from the auto-generated email	40
10.0 Advanced Sharing	40

1.0 Background

Queen Mary University of London's staff and various academic departments/schools use a diverse array of documents for legal, contractual and academic operations. This results in maintaining a wide variety of document standards and the compliance requirements around these documents also make it difficult to maintain a standard document signer/agreement process.

We are introducing a digital signature mechanism for all internal/external stakeholders. This will include students, staff, contractors, vendors or any other external users. The objective will be to focus on a seamless agreement/contractual documentation experience for any of the required processes.

2.0 About the Vendor / Tool

Adobe is one of the largest image/document processing software organizations and has popular products like Photoshop and Acrobat. We have partnered with them for our business requirements around the document signing processes. Adobe has a digital signature solution which is named as Adobe Sign. The legality of the digital signature within Adobe Sign remains equivalent as a written signature. In addition, the simplicity of the access, flexibility and scalability of the solution creates an attractive proposition.

3.0 How to request access for the tool

Please request access using the link in the [ITS Website](#) under Self Service - > Guides -> E-Signature.

If there is an issue with the access request form, please raise a ticket to the Service Desk team.

Here is the link to the tool –

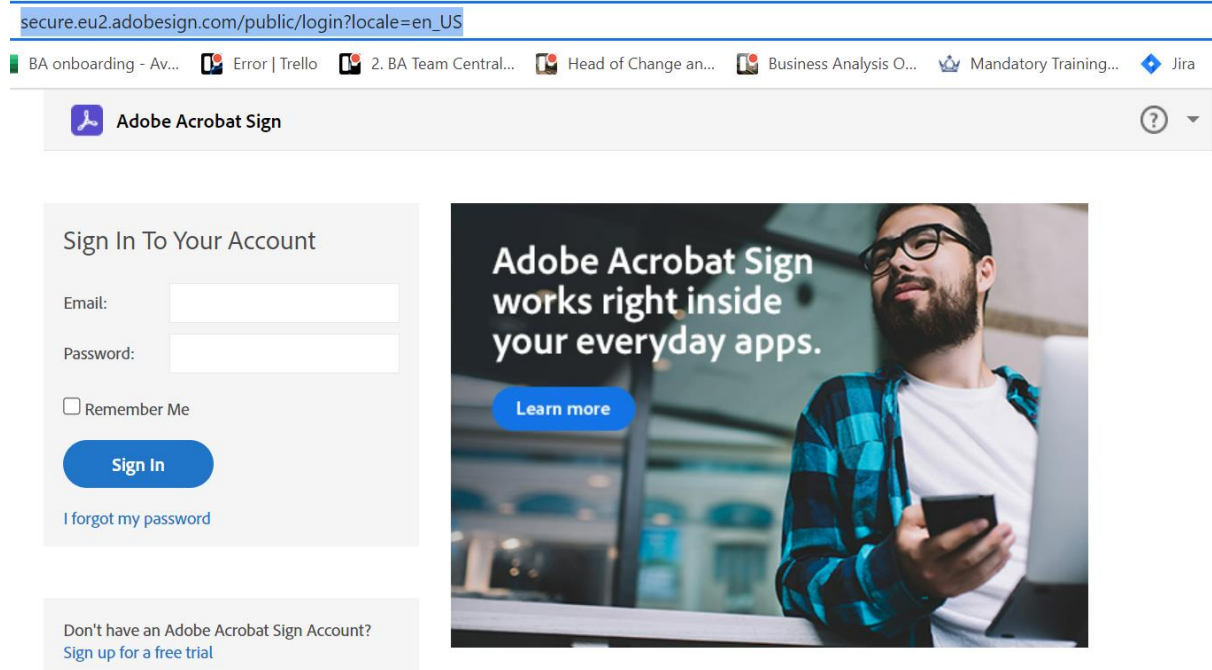
https://secure.eu2.adobesign.com/public/login?locale=en_US

4.0 What would be the login credentials?

Any Queen Mary internal user (QM User) can access the tool once an Admin adds their QM Id to the list of authorized users within the tool.

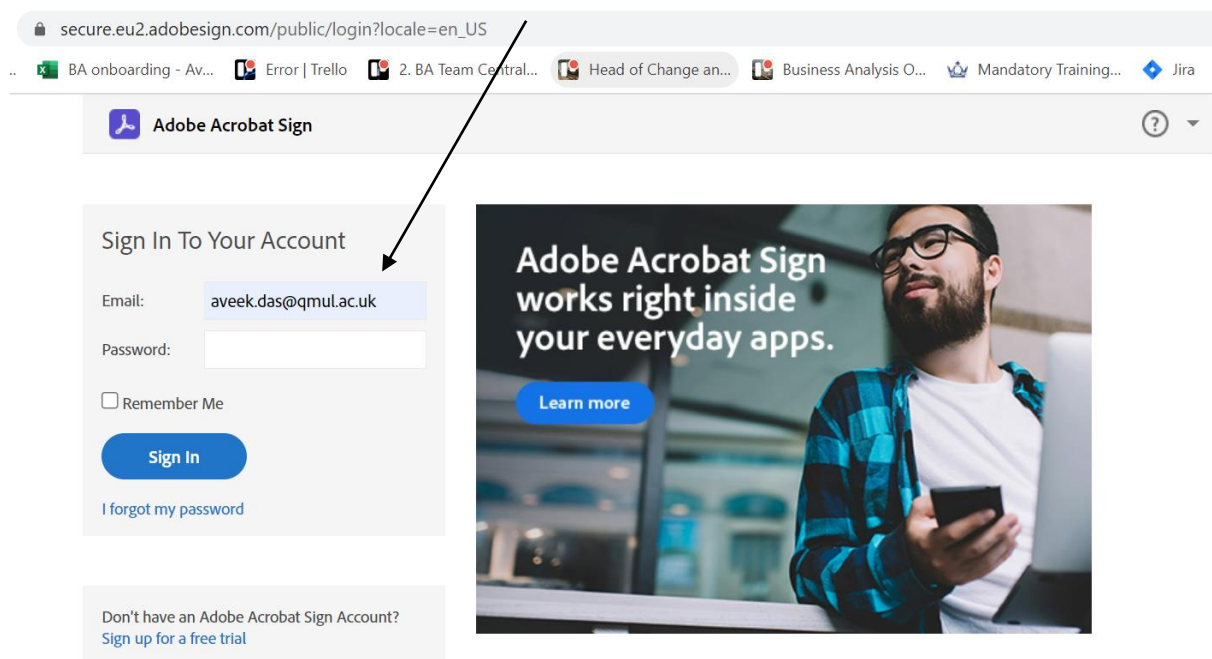
5.0 Process to send a document for signing

5.1 Login



5.2 Login Details.

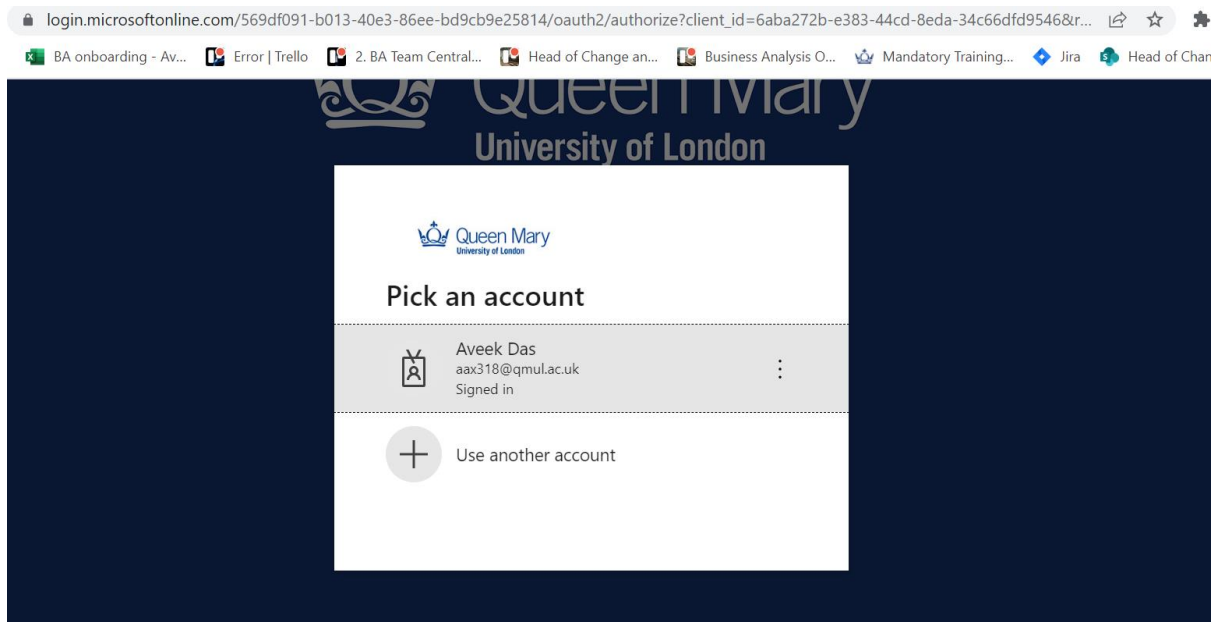
Enter the email ID (This would be the QM Email ID provided)



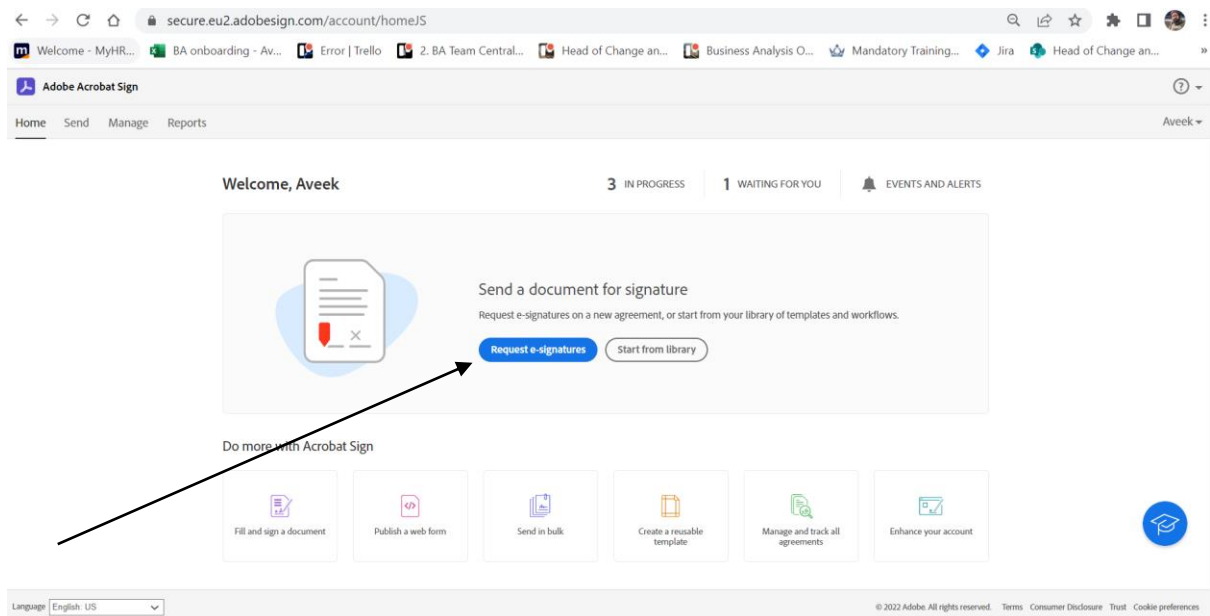
Tip: Please try to enter the email ID and then click outside of the box. The system will automatically redirect you to the Queen Mary Active Directory login (The one we use for most of our internal applications). Sometimes we need to click more than once to get the redirection.

5.3 QM ID selection

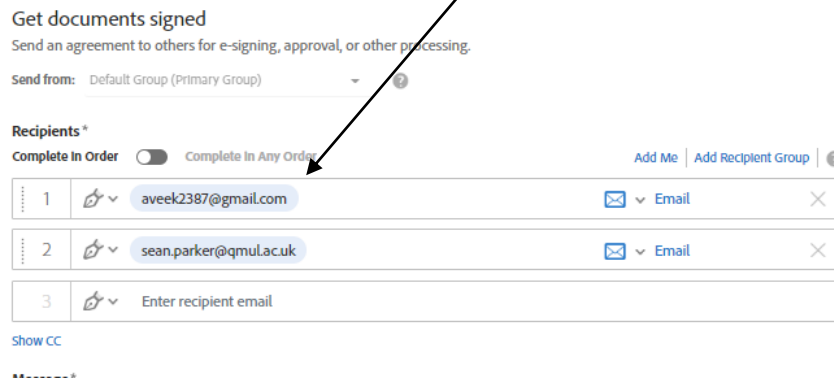
Once you click on your ID, this would automatically redirect to the tool’s home screen/ dashboard.



5.4 Click on Request e-signature










5.5 Enter the email Ids for the intended recipients.



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

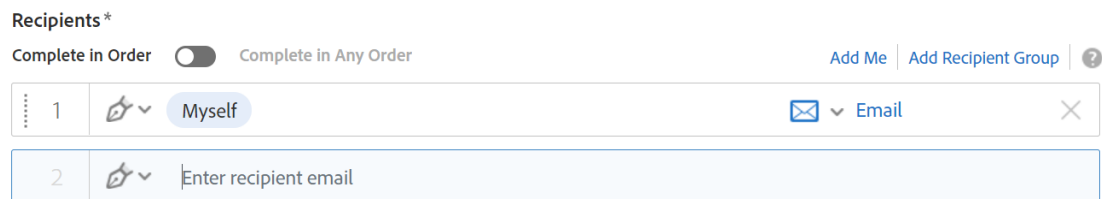
Send from: Default Group (Primary Group) ?

Recipients*
Complete In Order Complete In Any Order Add Me | Add Recipient Group ?





1		aveek2387@gmail.com	 Email	
2		sean.parker@qmul.ac.uk	 Email	
3		Enter recipient email		

Show CC
.....*

Note: You can add yourself as a signer by adding your email in the recipient list. It will be displayed as “Myself” as displayed below:



Recipients*
Complete in Order Complete in Any Order Add Me | Add Recipient Group ?

1		Myself	 Email	
2		Enter recipient email		

5.5.1 Additional Authentication (For External Users ONLY)

You can add an additional authentication factor for the non-QM/external recipients by defining a SMS-based authentication. This will ensure that the right individual gets the document and the risk of security compromise is reduced. (Like email spoofing)

Note – The SMS authentication incurs an additional cost for each external signatory. Please refer to the ITS e-Signature web page for pricing.

Get documents signed

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

Send from: Default Group (Primary Group) ?

Recipients *

Complete in Order Complete in Any Order

Add Me | Add Recipient Group ?

1		aveek2387@gmail.com		▼ Email	✕
2		Enter recipient email			

Show CC

Message*

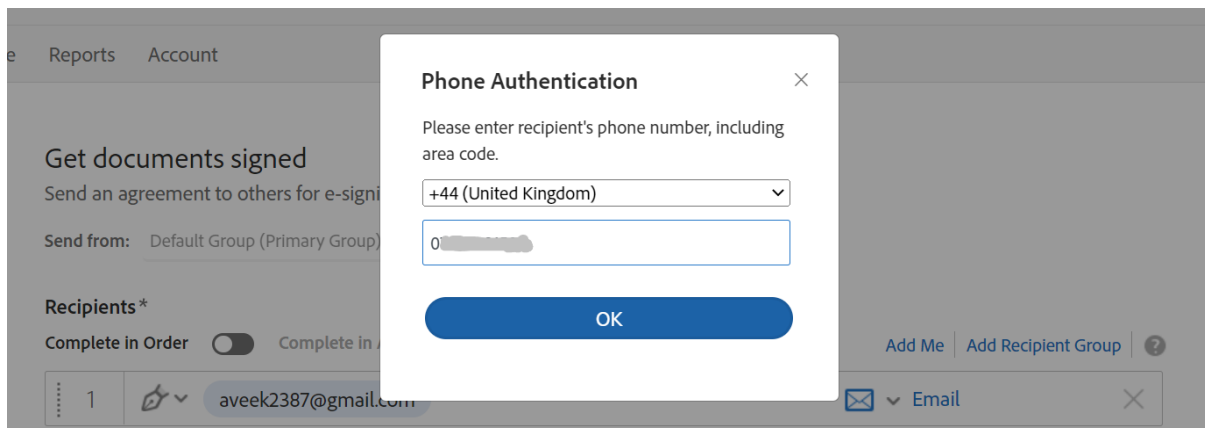
Agreement Name

Authentication ?

- ✓ Email
- Password...
- Phone...

5.5.1.1 Add the phone number.

Enter a number which the recipient will have access to and click on OK.



5.5.2 Signature Order

If you have multiple signatories, you can have a sequential or a parallel signing process. To define a signing order just drag and drop the recipients' emails.

Get documents signed

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

Send from: Default Group (Primary Group) ?

Recipients *

Complete in Order Complete in Any Order

Add Me | Add Recipient Group ?

1		sean.parker@qmul.ac.uk		▼ Email	✕
2		aveek2387@gmail.com		▼ Email	✕
3		Enter recipient email			

Show CC

OR

Enter the numbers according to the order the recipients need to sign.

Get documents signed






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

Send from: Default Group (Primary Group) ?

Recipients*

Complete In Order Complete In Any Order

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

1	 <input type="text" value="sean.parker@qmul.ac.uk"/>	 <input type="text" value="Email"/>	<input type="text" value="X"/>
2	 <input type="text" value="aveek2387@gmail.com"/>	 <input type="text" value="Email"/>	<input type="text" value="X"/>
3	 <input type="text" value="Enter recipient email"/>		

[Show CC](#)

TIP: If you write the same serial number for two recipients – say 1 for both signatories, then it will be treated as non-sequential.

Step 5(c): If there is NO ORDER needed for the signatories, please toggle the switch “Complete in Any Order”

Get documents signed

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

Send from: Default Group (Primary Group) ?

Recipients*

Complete In Order Complete In Any Order

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

	<input type="text" value="sean.parker@qmul.ac.uk"/>	 <input type="text" value="Email"/>	<input type="text" value="X"/>
	<input type="text" value="aveek2387@gmail.com"/>	 <input type="text" value="Email"/>	<input type="text" value="X"/>
	<input type="text" value="Enter recipient email"/>		

[Show CC](#)

5.6 Agreement name and description

Add an Agreement Name and the corresponding description for the agreement

Get documents signed

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

Send from: Default Group (Primary Group) ?

Recipients*

Complete in Order Complete in Any Order

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

	sean.parker@qmul.ac.uk	Email	
	aveek2387@gmail.com	Email	
	Enter recipient email		

[Show CC](#)

Message*

Test Agreement

Please review and complete Test Agreement|

Options ?

Password Protect

Set Reminder

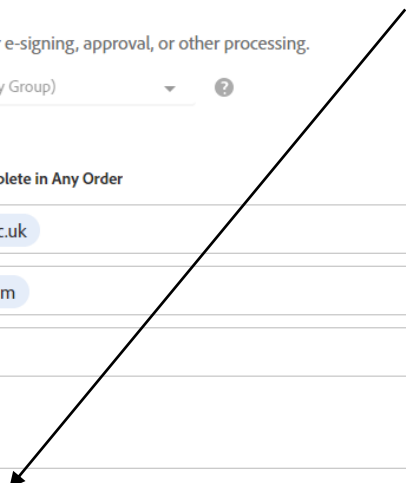
Recipients' Language

English: US

Files*

[Add Files](#)

Drag & Drop Files Here



5.7 Select the required documents.

Click on Add Files and then select the option from where you want to select the files. You can select single or multiple files.

Get documents signed

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

Send from: Default Group (Primary Group) ?

Recipients*

Complete in Order Complete in Any Order

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

	sean.parker@qmul.ac.uk	Email	
	aveek2387@gmail.com	Email	
	Enter recipient email		

[Show CC](#)

Message*

Test Agreement

Please review and complete Test Agreement|

Options ?

Password Protect

Set Reminder

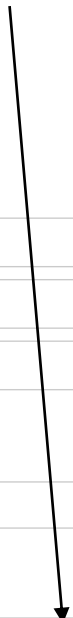
Recipients' Language

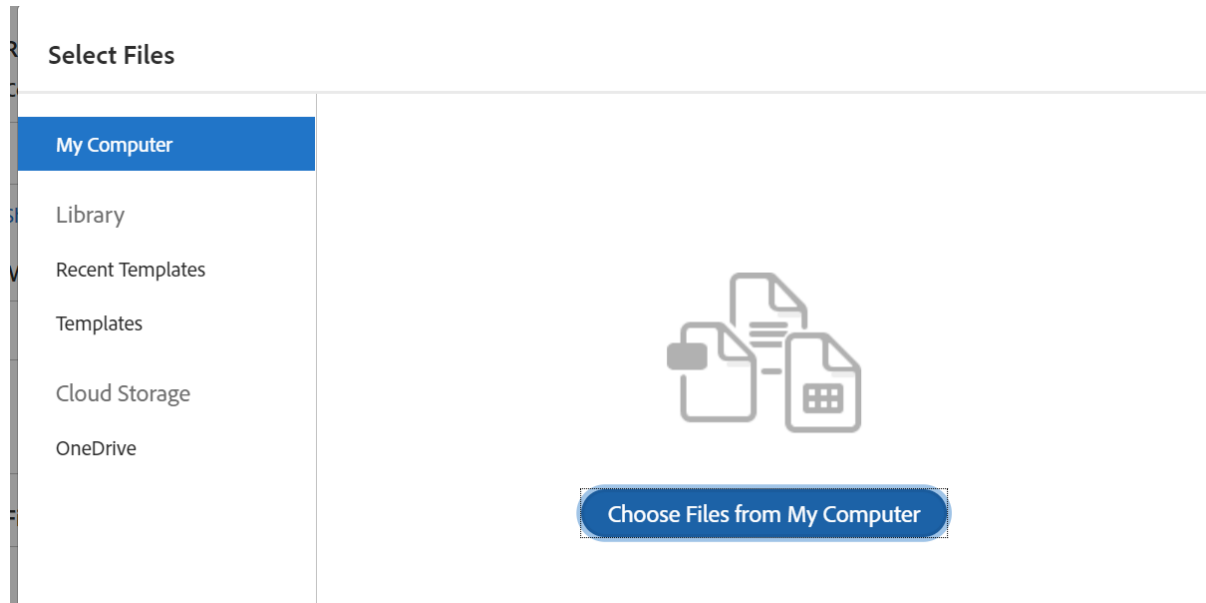
English: US

Files*

[Add Files](#)

Drag & Drop Files Here





Note:

You can also add documents from Pre-defined templates and your OneDrive. We would see this feature later.

You can add any standard document type as a part of the files within an agreement. The most common types will be DOC/DOCX/JPEG/PDF etc.





Please note that if you try to add a spreadsheet (.xls or .xlsx) the system would still accept but the final output doesn't preserve the original format. Please try to convert any spreadsheet to a PDF or JPEG before uploading.

Message*

letter of agreement 03

Please review and complete letter of agreement 03.

Files* [Add Files](#)

	letter of agreement 03.doc	×
	Sample Agreement 01 - Apprenticeship	×
	AIM_FactSheet_Business-Analyst_V1.2.pdf	×
	Flowchart.jpeg	×

Drag More Files Here

Preview & Add Signature Fields

[Next](#)

Options ?

Password Protect

Set Reminder

Recipients' Language

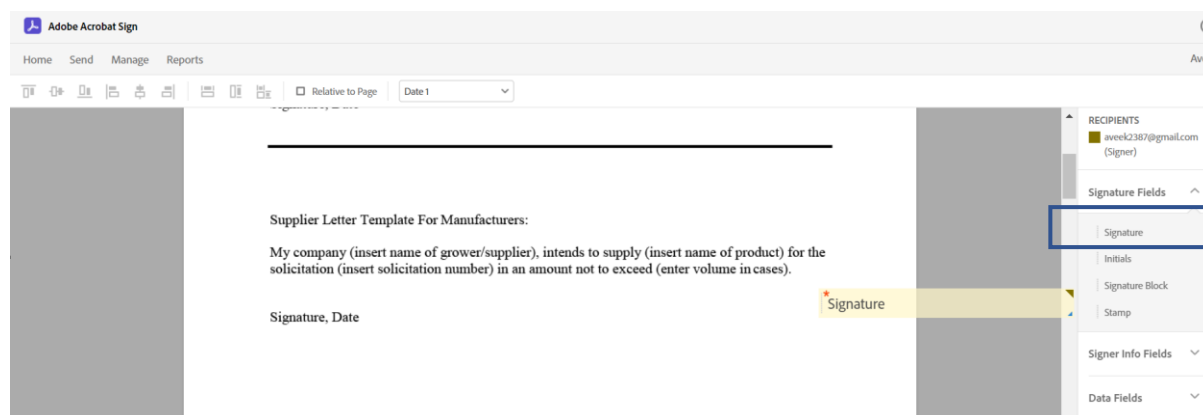
English: US

5.8 Click on Next

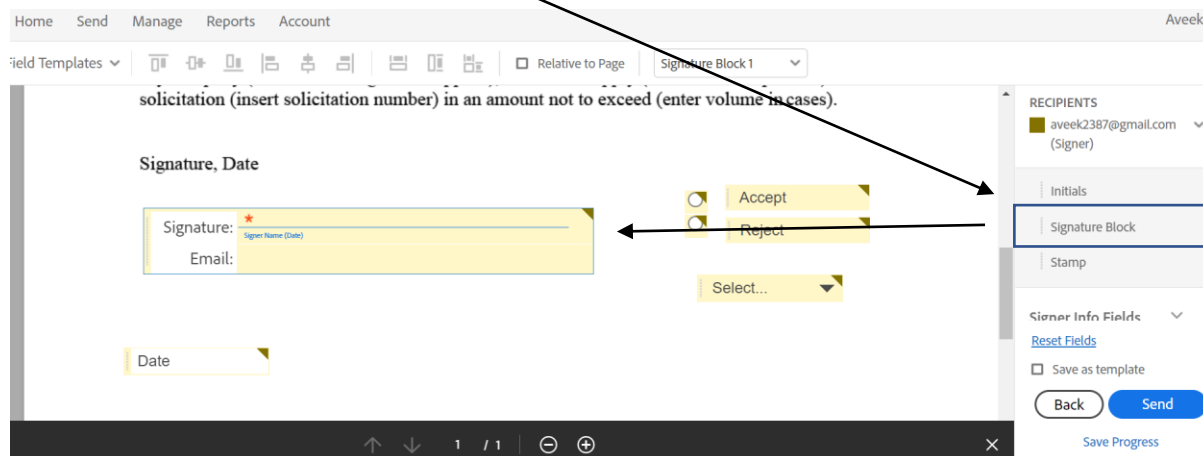
5.9 Add the required Signature fields for the document.

You can add a variety of signature and data input fields. If there are multiple signers, each field can be assigned explicitly to a specific signer. To add any field, please drag and drop the required field on the document. You can drop a field anywhere on the visible area on the document.

Below we see a signature field being dragged and dropped in the document.



Important: If you want to add a time stamp to the recipient's signature, please add a Signature Block and NOT the Signature field. (Third on the list displayed below)



5.10 Configure the signature fields.

You can configure a signature field according to the requirements we have. A signature field must be assigned to a signer (Mandatory for documents where multiple users is intended to sign).

To open the configuration of a field please double click on the field.



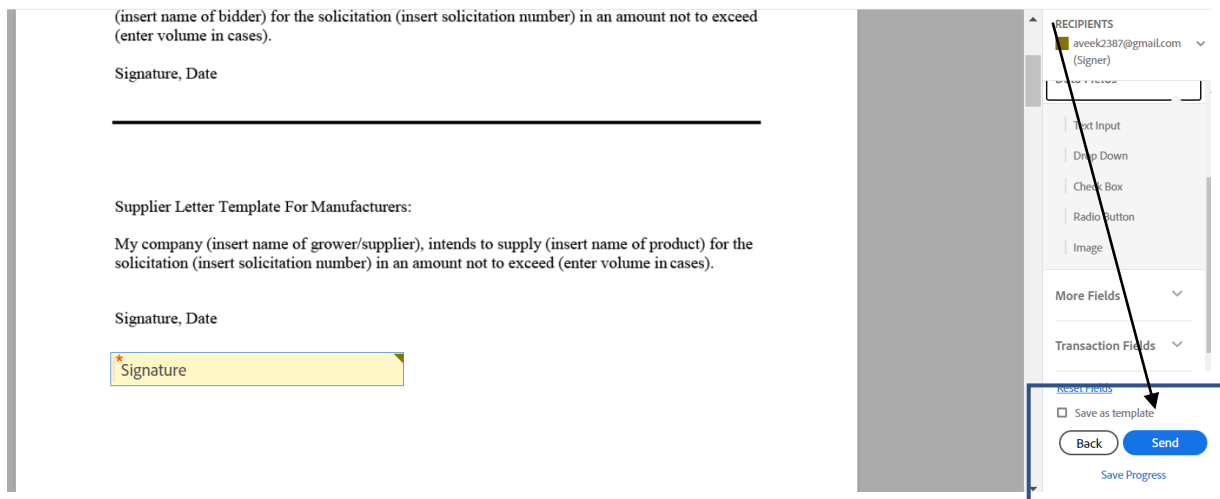
Signature, Date



Additional fields can be added and configured as per the requirements. You will get specific instructions in the Appendix Section.

5.11 Send the document.

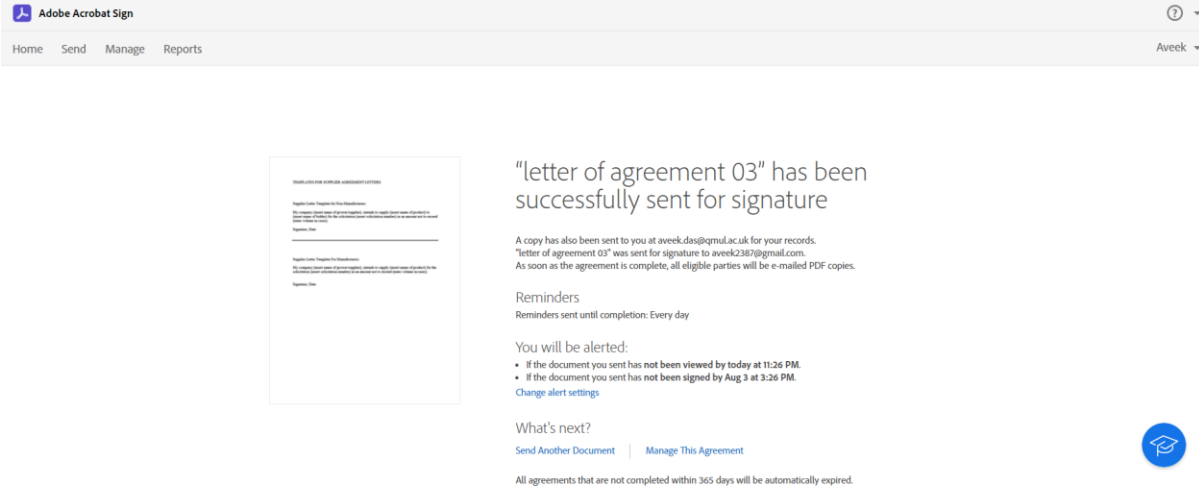
You can send the document or save the progress of the current document creation process.



Additional Note: The document can also be **saved as a Template**. You can click on the checkbox which would save the document as a template.



Once you clicks “Send” the system will show the following confirmation.



Adobe Acrobat Sign

Home Send Manage Reports

“letter of agreement 03” has been successfully sent for signature

A copy has also been sent to you at aveek.das@qmul.ac.uk for your records.
 “letter of agreement 03” was sent for signature to aveek2387@gmail.com.
 As soon as the agreement is complete, all eligible parties will be e-mailed PDF copies.

Reminders
 Reminders sent until completion: Every day

You will be alerted:

- If the document you sent has not been viewed by today at 11:26 PM.
- If the document you sent has not been signed by Aug 3 at 3:26 PM.

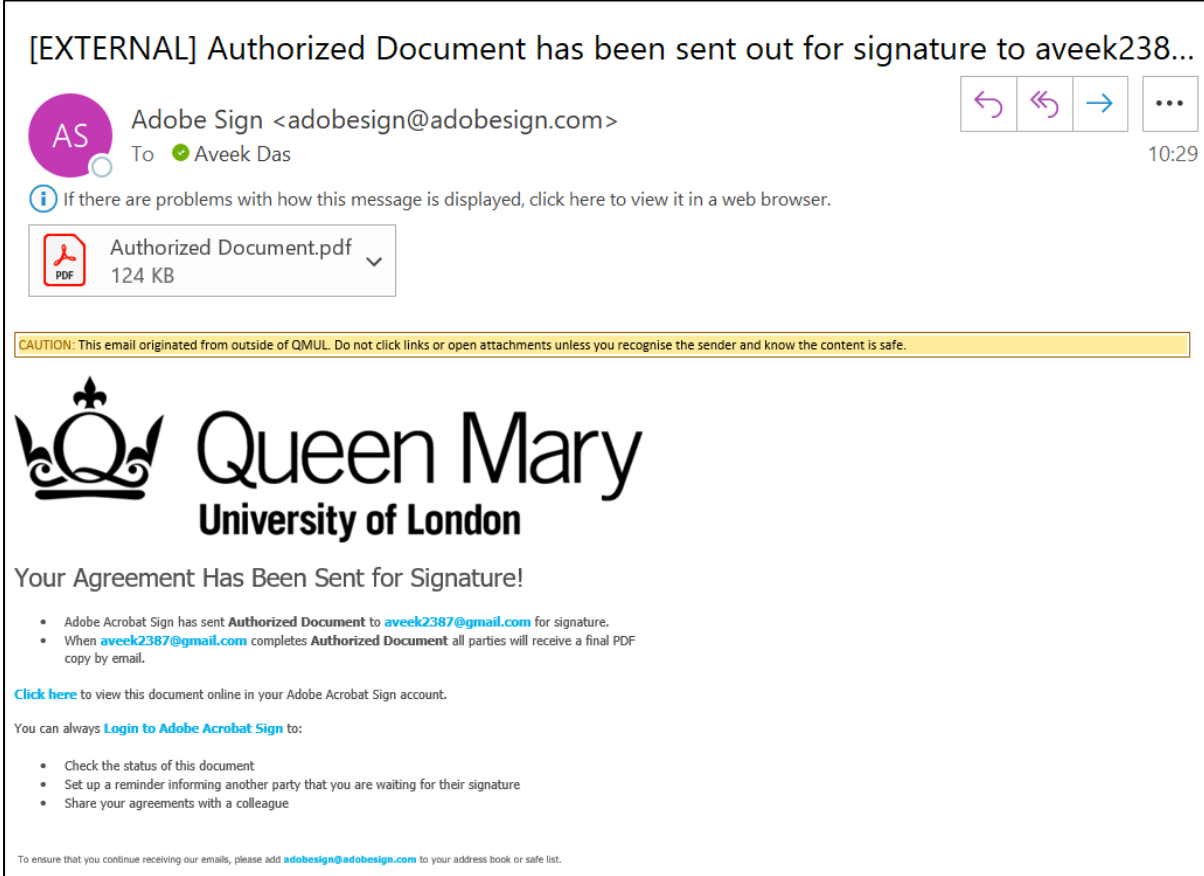
[Change alert settings](#)

What's next?
[Send Another Document](#) | [Manage This Agreement](#)

All agreements that are not completed within 365 days will be automatically expired.

An email will be triggered to you (the requestor) and the recipient(s).

Sample of an email when you send the document.



[EXTERNAL] Authorized Document has been sent out for signature to aveek238...


AS Adobe Sign <adobesign@adobesign.com>
 To Aveek Das

10:29

If there are problems with how this message is displayed, click here to view it in a web browser.

Authorized Document.pdf
 124 KB

CAUTION: This email originated from outside of QMUL. Do not click links or open attachments unless you recognise the sender and know the content is safe.

 **Queen Mary**
 University of London

Your Agreement Has Been Sent for Signature!

- Adobe Acrobat Sign has sent **Authorized Document** to aveek2387@gmail.com for signature.
- When aveek2387@gmail.com completes **Authorized Document** all parties will receive a final PDF copy by email.

[Click here](#) to view this document online in your Adobe Acrobat Sign account.

You can always [Login to Adobe Acrobat Sign](#) to:

- Check the status of this document
- Set up a reminder informing another party that you are waiting for their signature
- Share your agreements with a colleague

To ensure that you continue receiving our emails, please add adobesign@adobesign.com to your address book or safe list.

6.0 Sign a Document

A recipient will receive an email when there is a new agreement and requires a signature. The email will be received by QM and Non-QM recipients alike.

Sample 1 – Mail for an Internal QM recipient

[EXTERNAL] Signature requested on "Example document for signing"

William Mordaunt <adobesign@adobesign.com>
To Aveek Das
[If there are problems with how this message is displayed, click here to view it in a web browser.](#)

[Reply](#) [Reply All](#) [Forward](#) [More](#)
Thu 11/08/2022 12:20

CAUTION: This email originated from outside of QMUL. Do not click links or open attachments unless you recognise the sender and know the content is safe.

Queen Mary
University of London

William Mordaunt requests your signature on
Example document for signing

[Review and sign](#)

Please review and approve this document.

WILLIAM MORDAUNT
w.mordaunt@qmul.ac.uk

Sample 2 – Notification for an external recipient

Signature requested on "Authorized Document"

Aveek Das <adobesign@adobesign.com>
to me

10:29 AM (1 hour ago)

Queen Mary
University of London

Aveek Das requests your signature on
Authorized Document

[Review and sign](#)

Please review and complete Authorized Document.

AVEEK DAS
aveek.das@qmul.ac.uk

After you sign **Authorized Document**, all parties will receive a final PDF copy by email.

Don't forward this email: If you don't want to sign, you can [delegate](#) to someone else.

Powered by
Adobe Acrobat Sign

6.1 Click on Review and Sign (Internal QM Signatory)

Sean Parker requests your signature on **QMUL App Agreement**


Review and sign

Please review and complete QMUL App Agreement.

SEAN PARKER
prw186@qmul.ac.uk

After you sign **QMUL App Agreement**, all parties will receive a final PDF copy by email.

Don't forward this email: If you don't want to sign, you can [delegate](#) to someone else.


 Powered by **Adobe Acrobat Sign**


By proceeding, you agree that this agreement may be signed using electronic or handwritten signatures.


To ensure that you continue receiving our emails, please add adobesign@adobesign.com to your address book or safe list.

© 2022 Adobe. All rights reserved.

6.1.1 Click on Review and Sign (External Users – No QM ID)

Signature requested on "Authorized Document" 

 **Aveek Das** <adobesign@adobesign.com>
to me ▾ 10:29 AM (1 hour ago) ☆ ↶ ⋮



Aveek Das requests your signature on **Authorized Document**


Review and sign

Please review and complete Authorized Document.

AVEEK DAS
aveek.das@qmul.ac.uk

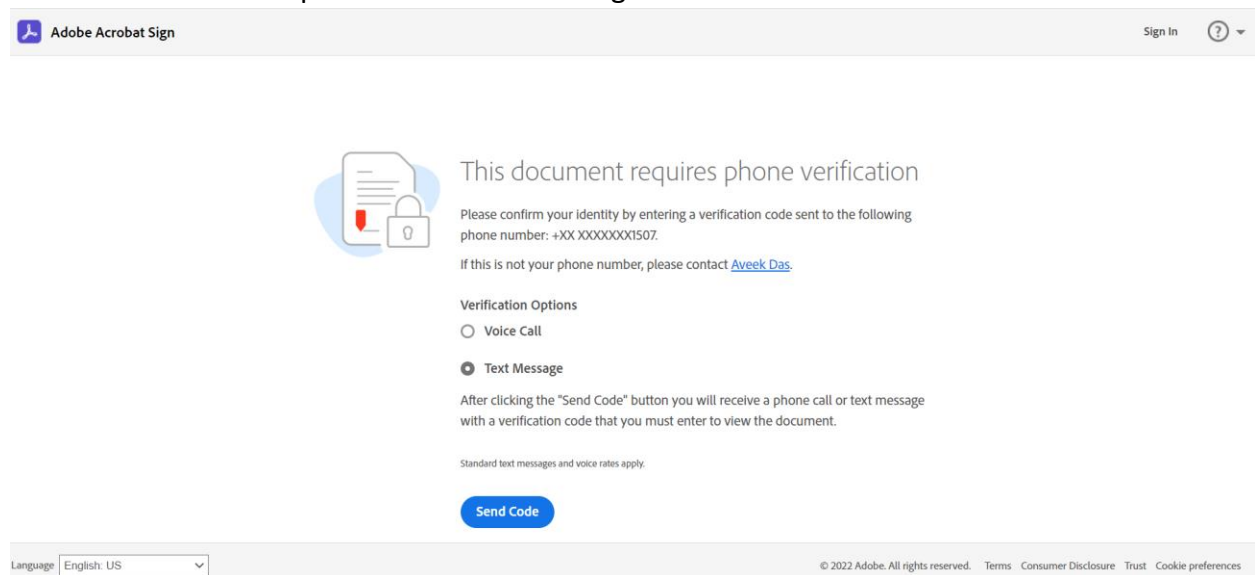
After you sign **Authorized Document**, all parties will receive a final PDF copy by email.

Don't forward this email: If you don't want to sign, you can [delegate](#) to someone else.

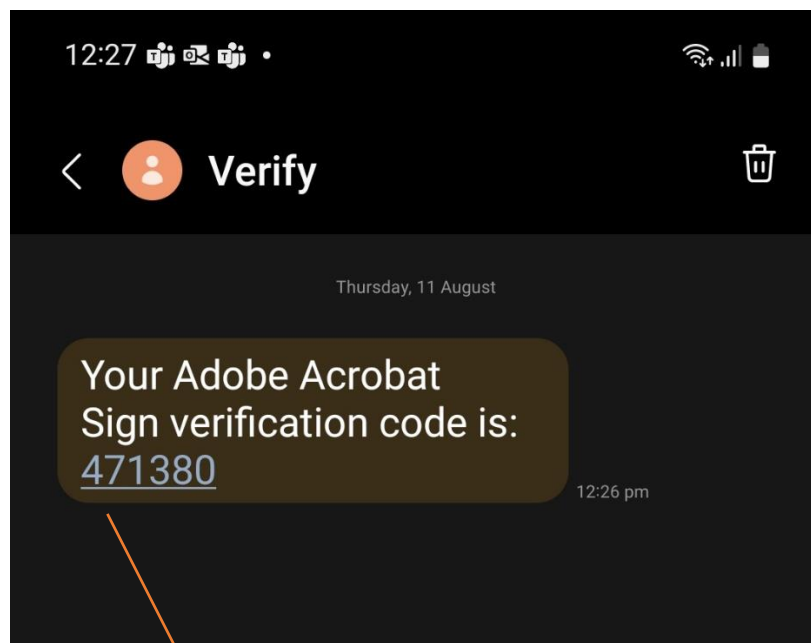
 Powered by **Adobe Acrobat Sign**

6.1.2 Verify Identity with a Text Message

Select the verification process as a Text Message and Click on Send Code.



Note the code in the text message as received from Adobe



Enter the code in the screen as follows



This document requires phone verification

Please confirm your identity by entering a verification code sent to the following phone number: +XX XXXXXXXX1507.

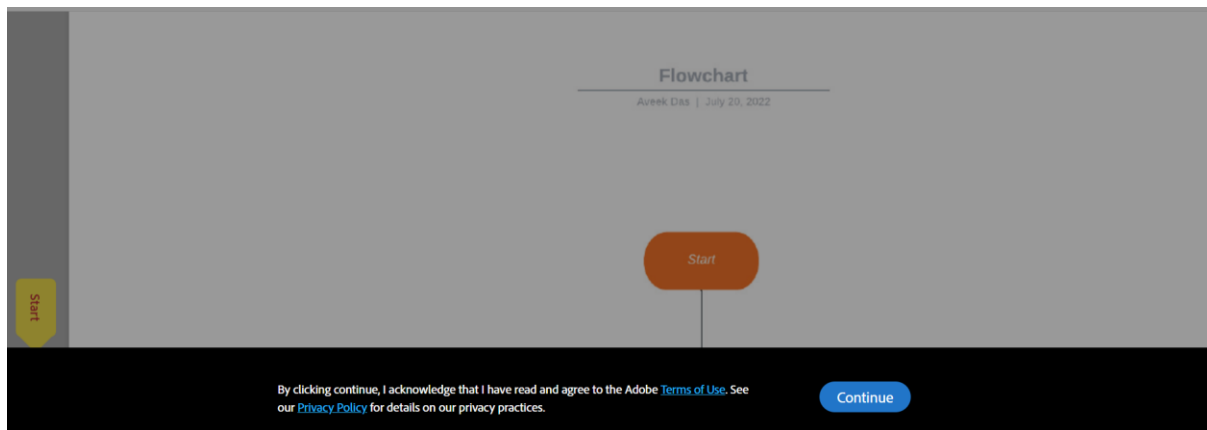
If this is not your phone number, please contact [Aveek Das](#).

Code

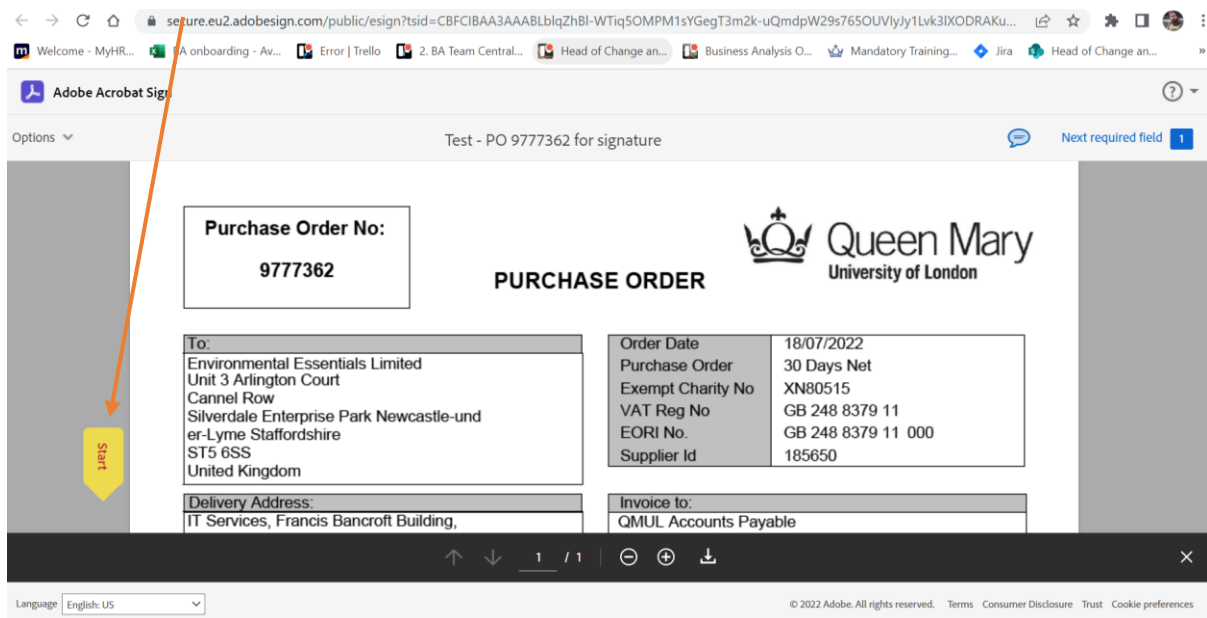
Continue

[Return to verification options](#)

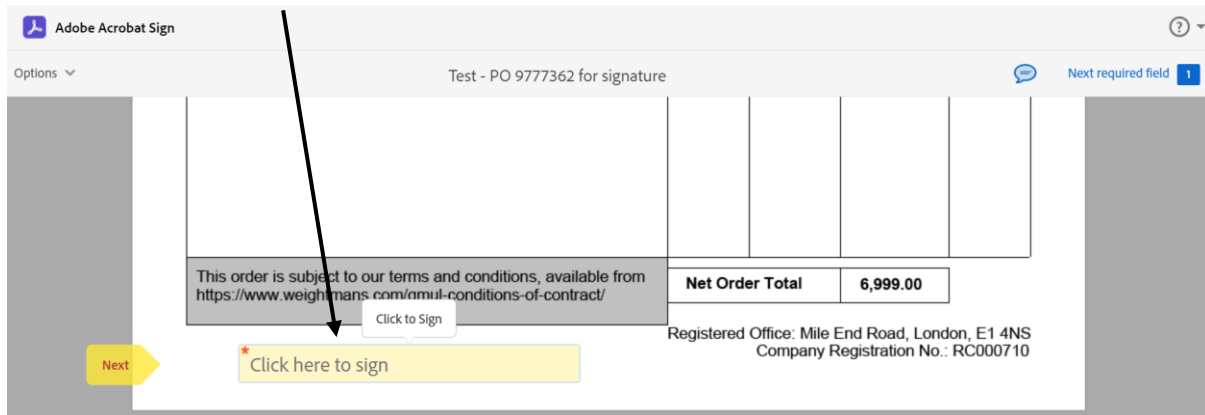
6.1.5 Click on Continue



6.2 Click on Start

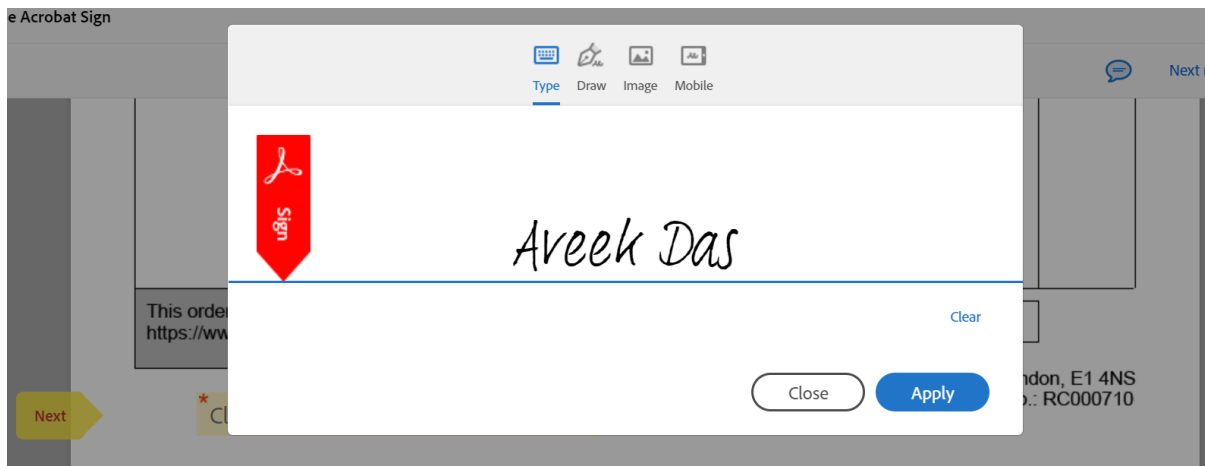


6.3 Click on the signature box



6.4 Enter your Signature

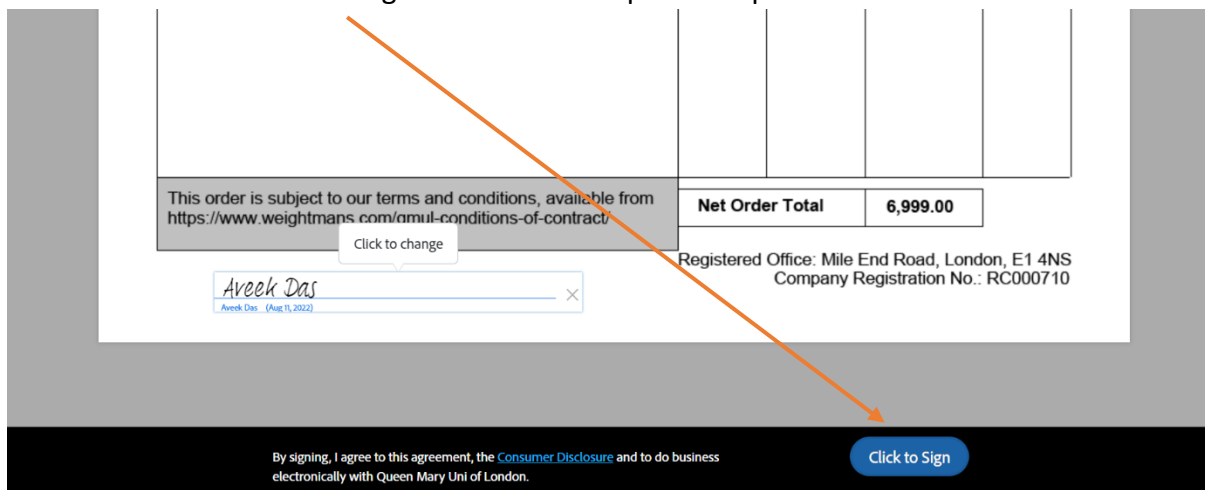
You have multiple options for Signing depending on the requirements of the agreement. The easiest is to Type your name. But you can use other options as to draw a signature or upload an image of your exact signature. These will be depend on the exact need of the document.



Once you are satisfied, you can click apply. Else you can click clear and re-type. You can also close the signature pop-up screen without signing.

6.5 Click to Sign

Once the signature is applied, you will be able to see the signature on the document. You can now click "Click to Sign" which will complete the process.

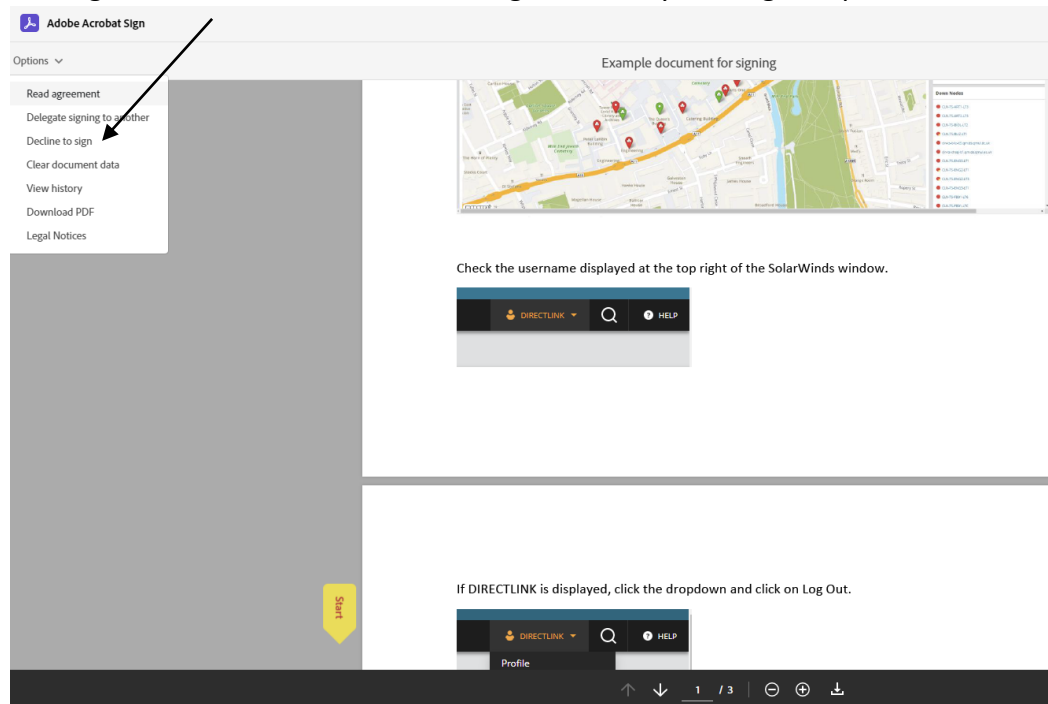


Note: The time stamp appears ONLY if you have used a Signature block in the form while sending the agreement.

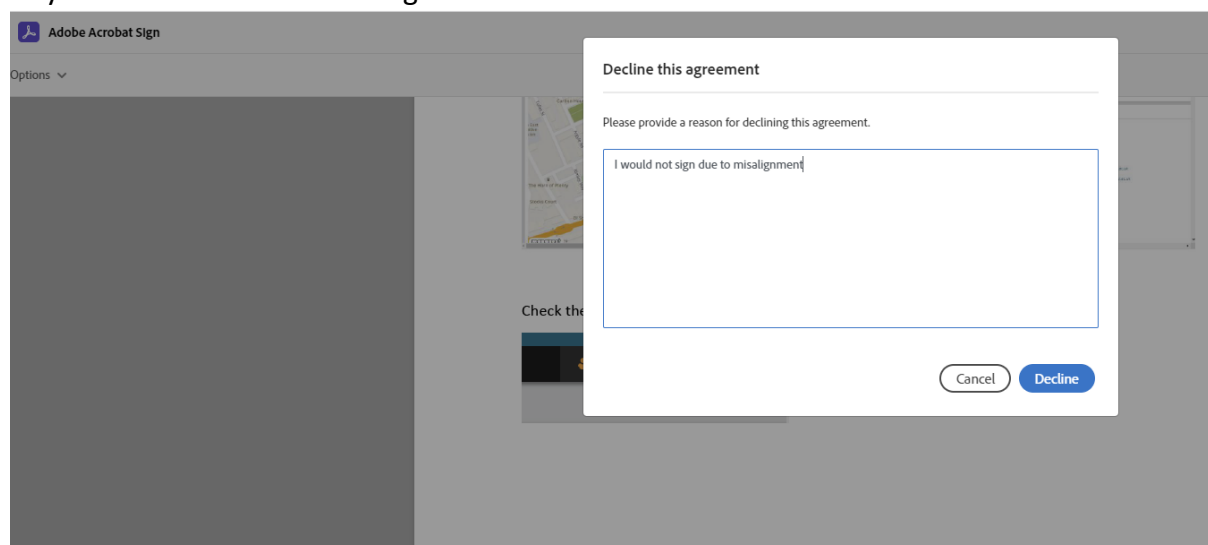
7.0 Additional Features (Signers and Senders)

7.1 Decline to Sign

The Signer can choose to decline the agreement by clicking on options



Enter a reason for declination and click on “Decline”. A notification mail would be triggered to you and the sender of the agreement.

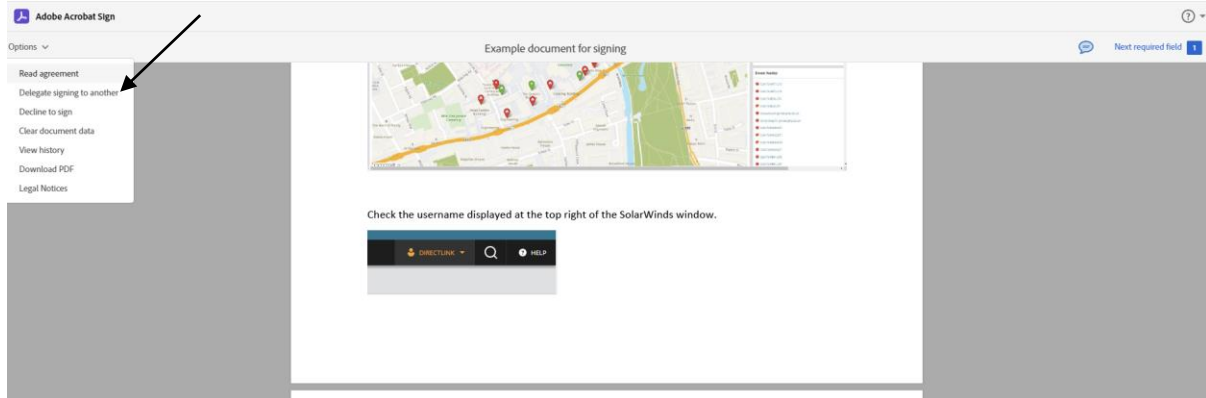


7.2 Delegate Signature

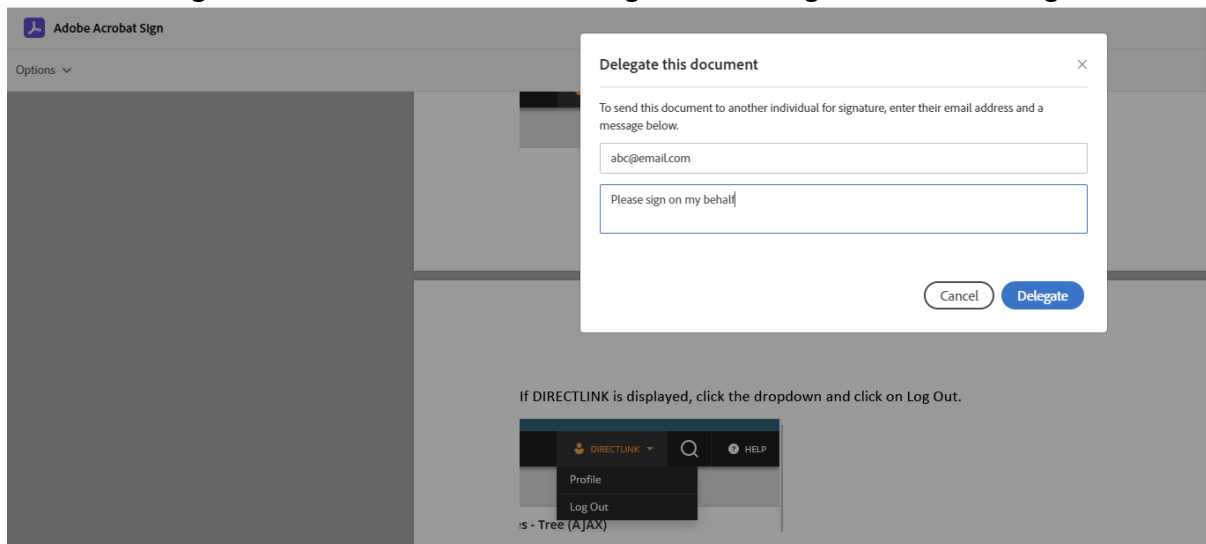
If you are not available (due to holidays or due to move out of the Department/QM) then you can delegate the task to someone who can sign on your behalf. This feature is available to QM and Non-QM users.

7.2.1 Delegate a specific document

To delegate a specific document, click on the Options and then select “Delegate Signing to Another”

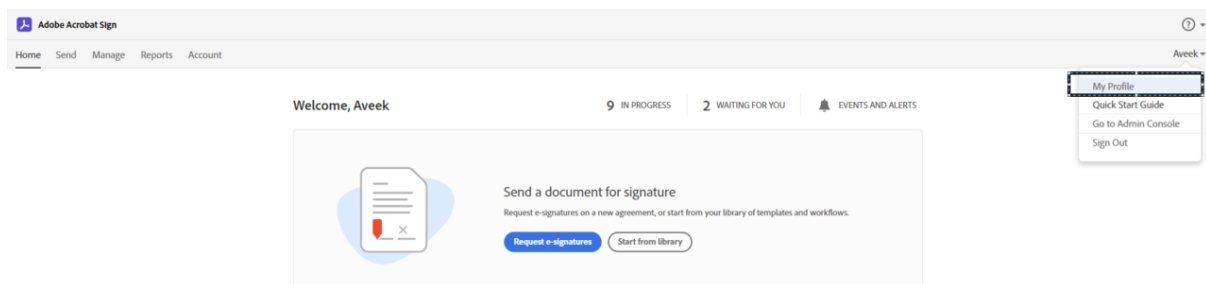


Enter the delegate's email id and enter a message to the delegate. Click on Delegate.

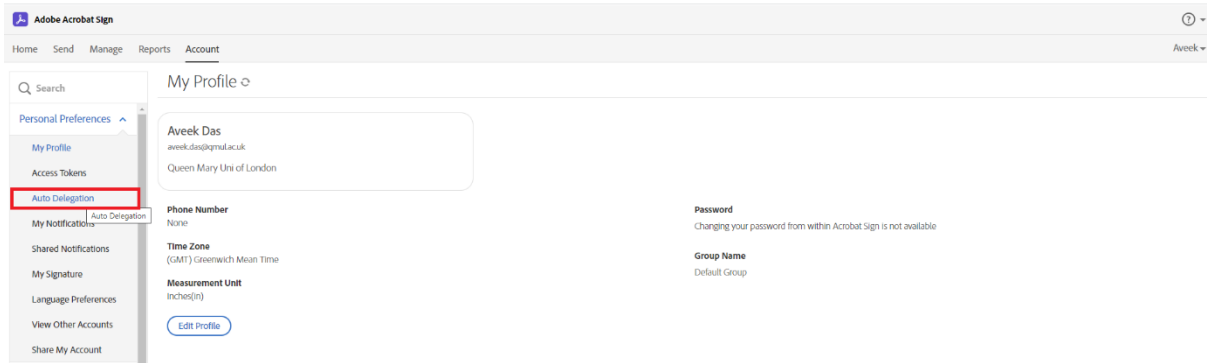


7.2.2 Delegate all your documents

If you want to delegate all your documents, click on your profile.

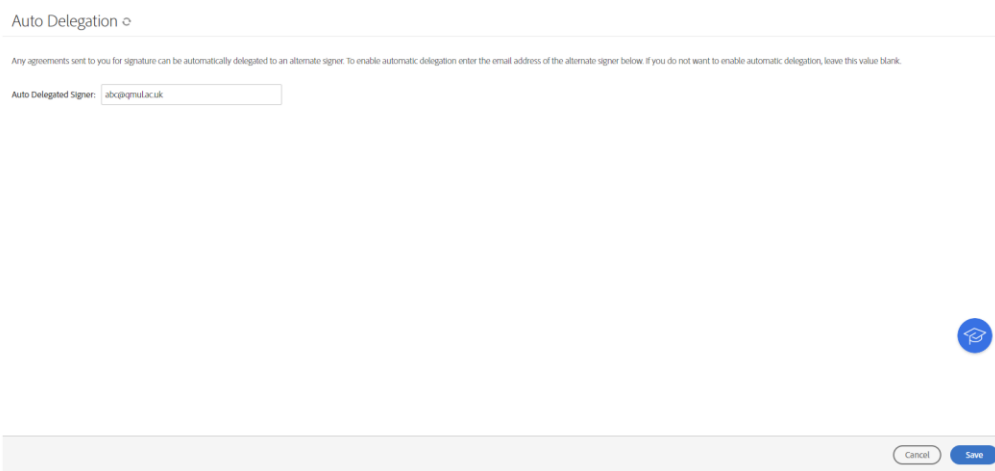


Click on Auto Delegation



The screenshot shows the Adobe Acrobat Sign interface. The top navigation bar includes 'Home', 'Send', 'Manage', 'Reports', and 'Account'. The 'Account' menu is open, showing 'My Profile' selected. The main content area displays the user's profile information for 'Aveek Das' (aveek.das@qmul.ac.uk) at Queen Mary Uni of London. Fields for 'Phone Number', 'Time Zone', 'Measurement Unit', 'Password', and 'Group Name' are visible. The 'Auto Delegation' option in the left sidebar is highlighted with a red box.

Enter the email id of the delegator you want your documents to be delegated to. Click on Save.



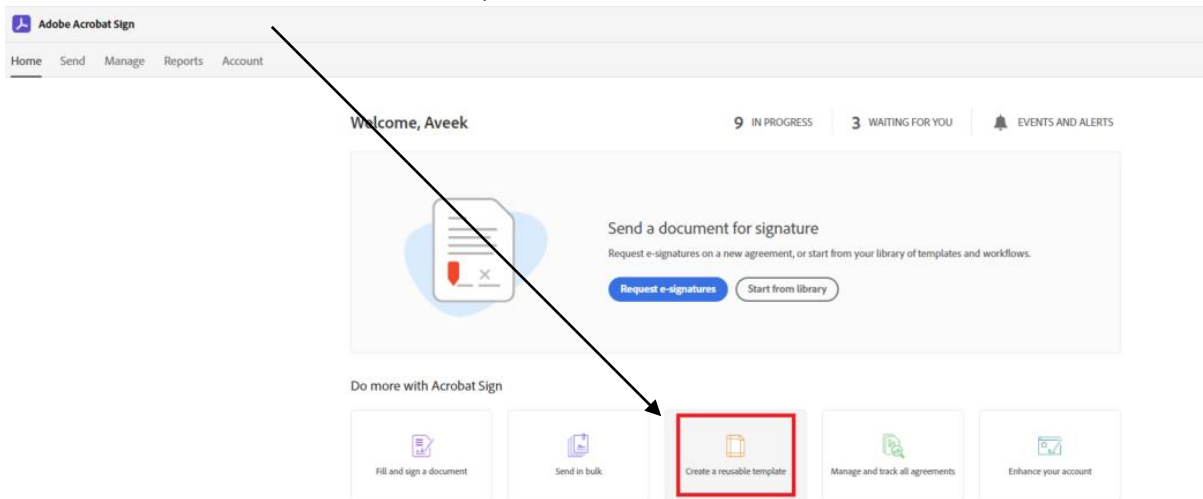
The screenshot shows the 'Auto Delegation' configuration screen. The title is 'Auto Delegation'. Below the title, there is a note: 'Any agreements sent to you for signature can be automatically delegated to an alternate signer. To enable automatic delegation enter the email address of the alternate signer below. If you do not want to enable automatic delegation, leave this value blank.' The 'Auto Delegated Signer' field contains the email address 'abc@qmul.ac.uk'. At the bottom right, there are 'Cancel' and 'Save' buttons.

Note: You must remove the email ID from this screen once you no longer require your agreements to be delegated.

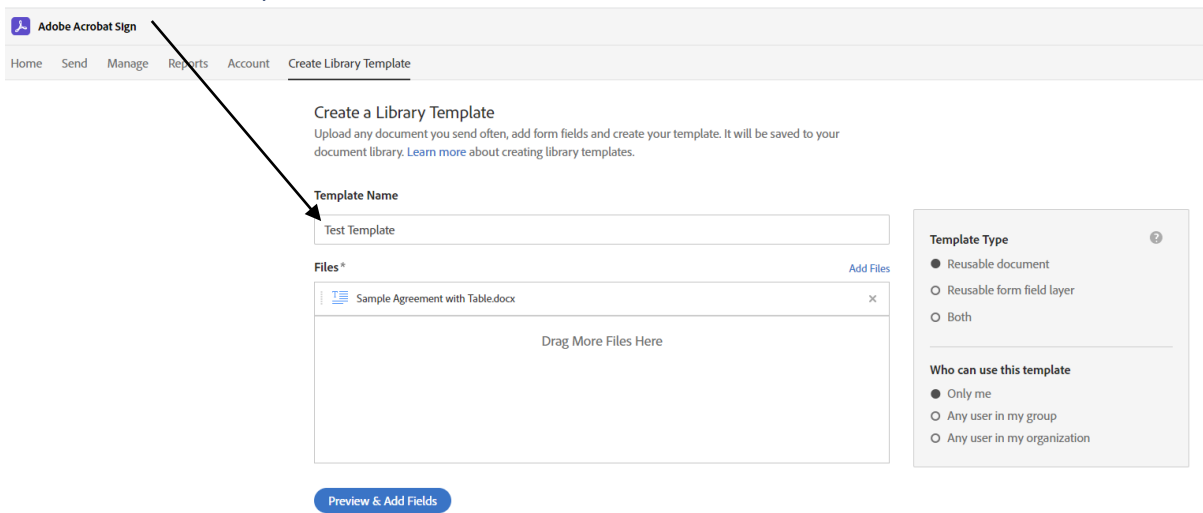
7.3 Create re-usable document template

You can create a re-usable document template in the tool. This template can be used multiple times when creating an agreement.

7.3.1 Click on “Create a reusable template”



7.3.2 Enter the Template Name



7.3.3 Upload document for the template

Create Library Template

Create a Library Template

Upload any document you send often, add form fields and create your template. It will be saved to your document library. [Learn more](#) about creating library templates.

Template Name

Test Template

Files*

Sample Agreement with Table.docx

Add Files

Drag More Files Here

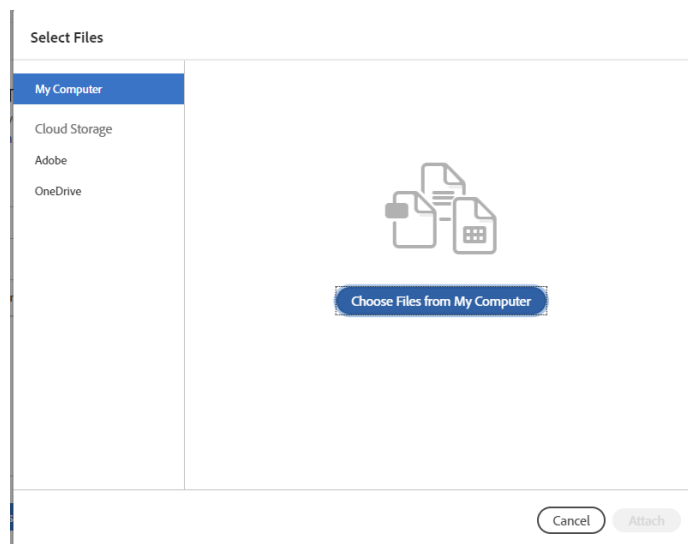
Preview & Add Fields

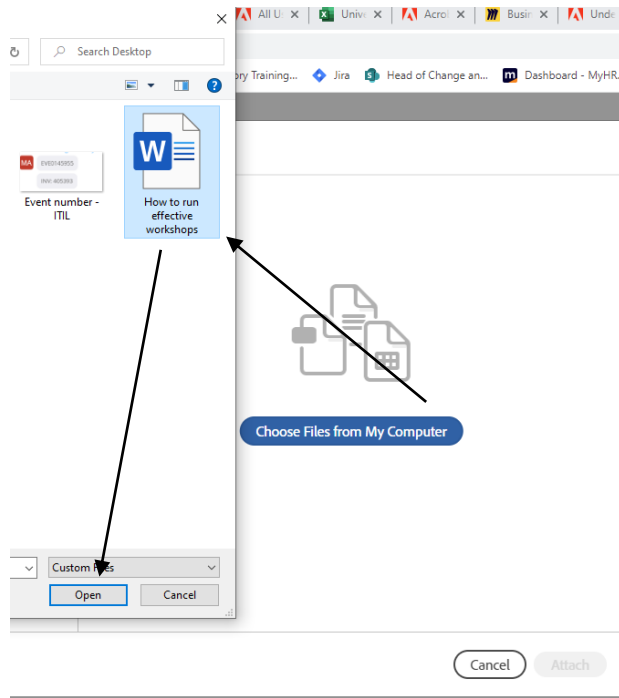
Template Type

- Reusable document
- Reusable form field layer
- Both

Who can use this template

- Only me
- Any user in my group
- Any user in my organization

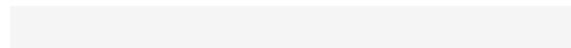




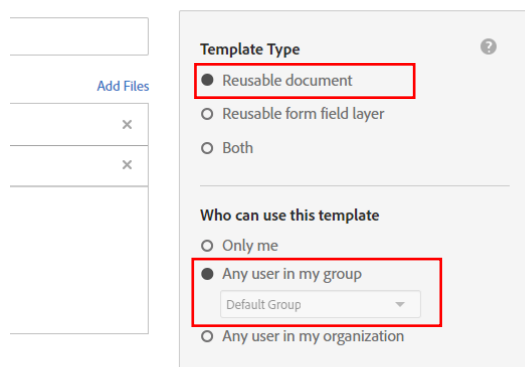
7.3.4 Select template type and user group

Select the template type as “Reusable Document” if you want the document to be added as a pre-defined template.

Also, select the option according to the requirement as to who can use the document you are creating. It could be only you, any user within the group (Department/School) or any user within QM.



ved to your



7.3.5 Preview and add additional fields

Click on Preview and Add Fields

Create Library Template

Create a Library Template

Upload any document you send often, add form fields and create your ten document library. [Learn more](#) about creating library templates.

Template Name

Files*

- Sample Agreement with Table.docx
- How to run effective workshops.docx

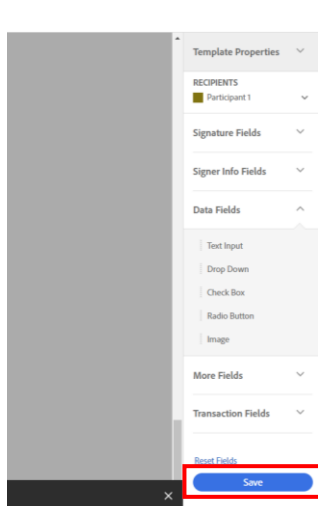
Drag More Files Here

[Preview & Add Fields](#)

Add Signature or Additional fields as required

The screenshot shows the e-signature software interface. At the top, there are navigation tabs: Home, Send, Manage, Reports, Account, and a user profile 'Aveek'. Below the navigation is a toolbar with various editing tools. The main document area contains text and a list of observations with solutions. A signature field is highlighted in yellow, and an email field is also highlighted. A sidebar on the right contains a 'Template Properties' section with expandable categories: RECIPIENTS (Participant 1), Signature Fields, Signer Info Fields, and Data Fields. The Data Fields section is expanded, showing options: Text Input, Drop Down, Check Box, Radio Button, and Image. Below these are 'More Fields', 'Transaction Fields', and a 'Reset Fields' button. A 'Save' button is at the bottom right. A blue notification box on the left says 'Form fields were detected in this document. On each page, click this button to place them.'

7.3.6 Click on save



Once saved, we can use this template to create an agreement. Instead of *MyComputer*, select *Templates* to see the current templates available and select one from the list. The rest of the process will remain same as we have seen in **5.7 Select the required documents**.

Select Files

My Computer

Library

Recent Templates

Templates

Cloud Storage

Adobe

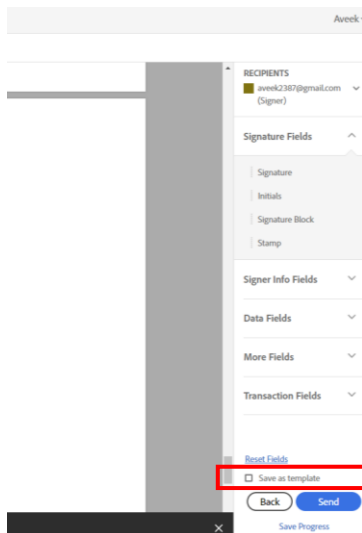
OneDrive

Search

<input type="checkbox"/>	Name	Last Modified
<input type="checkbox"/>	My Templates	
<input type="checkbox"/>	Agreement with MFA	07/22/2022
<input type="checkbox"/>	Sample Agreement 01 - Apprenticeship	07/25/2022
<input type="checkbox"/>	Sample Template	08/03/2022
<input checked="" type="checkbox"/>	Default Group Templates	
<input checked="" type="checkbox"/>	Test Template	08/17/2022
<input type="checkbox"/>	Account Templates	
<input type="checkbox"/>	Newest Sample	08/03/2022

Cancel Attach

Note: We can also convert a document into a re-usable template when we are using a document for the first time in an agreement.



8.0 Managing agreements

As an Adobe Sign user, you can manage all the agreements that you have either sent or signed.

These are the following features available to you in the “Manage” Tab.

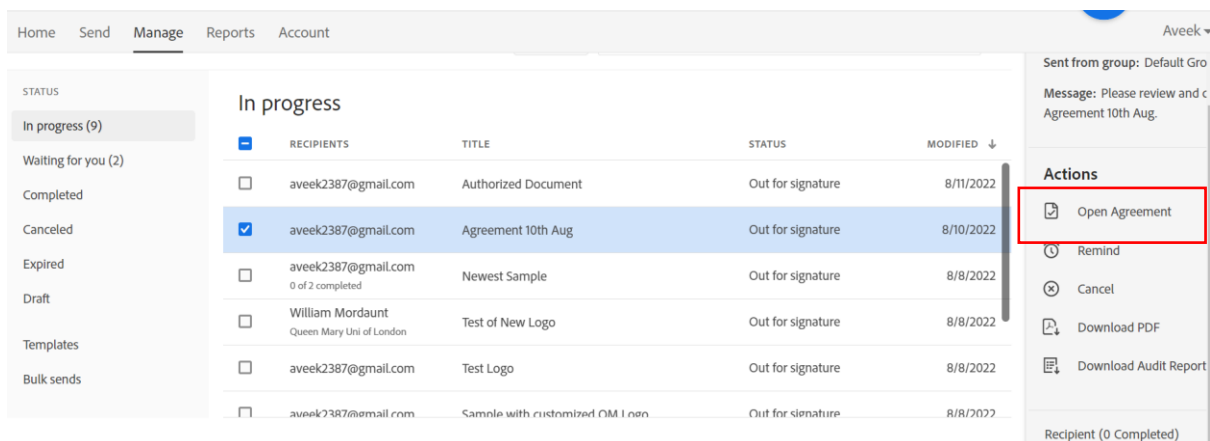
8.1 In Progress

In progress agreements are the documents which you have sent to the signers and are waiting to be signed by either all or some of the recipients. This section will show the recipients, title, status and last updated date for any agreement.

Major functionalities* available for these documents:

8.1.1 Open the document

Click on Manage tab and select the agreement you want to open. Next, select the first option on the right panel.



RECIPIENTS	TITLE	STATUS	MODIFIED
<input type="checkbox"/> aveek2387@gmail.com	Authorized Document	Out for signature	8/11/2022
<input checked="" type="checkbox"/> aveek2387@gmail.com	Agreement 10th Aug	Out for signature	8/10/2022
<input type="checkbox"/> aveek2387@gmail.com 0 of 2 completed	Newest Sample	Out for signature	8/8/2022
<input type="checkbox"/> William Mordaunt Queen Mary Uni of London	Test of New Logo	Out for signature	8/8/2022
<input type="checkbox"/> aveek2387@gmail.com	Test Logo	Out for signature	8/8/2022
<input type="checkbox"/> aveek2387@gmail.com	Sample with customized QM Logo	Out for signature	8/8/2022

Actions

- Open Agreement
- Remind
- Cancel
- Download PDF
- Download Audit Report

Note: You can simply hover your mouse over any agreement and then open the agreement.

In progress

RECIPIENTS	TITLE	STATUS	MODIFIED ↓
<input type="checkbox"/> aveek2387@gmail.com	Authorized Document	Out for signature	8/11/2022
<input checked="" type="checkbox"/> aveek2387@gmail.com	Agreement 10th Aug	Out for signature	8/10/2022
<input type="checkbox"/> aveek2387@gmail.com 0 of 2 completed	Newest Sample	Out for signature	8/8/2022
<input type="checkbox"/> William Mordaunt Queen Mary Uni of London	Test of New Logo	Out for signature	8/8/2022
<input type="checkbox"/> aveek2387@gmail.com	Test Logo	Out for signature	8/8/2022

Actions

- Open Agreement
- Remind
- Cancel
- Download PDF
- Download Audit Report
- Hide Agreement
- Share
- Add Notes

8.1.2 Send a Reminder to the recipients

You can send a reminder to the recipients (& yourself) to complete the signature process. This can be scheduled or be an instant reminder.

In progress

RECIPIENTS	TITLE	STATUS	MODIFIED ↓
<input checked="" type="checkbox"/> aveek2387@gmail.com	Authorized Document	Out for signature	8/11/2022
<input type="checkbox"/> aveek2387@gmail.com	Agreement 10th Aug	Out for signature	8/10/2022
<input type="checkbox"/> aveek2387@gmail.com 0 of 2 completed	Newest Sample	Out for signature	8/8/2022
<input type="checkbox"/> William Mordaunt Queen Mary Uni of London	Test of New Logo	Out for signature	8/8/2022
<input type="checkbox"/> aveek2387@gmail.com	Test Logo	Out for signature	8/8/2022
<input type="checkbox"/> aveek2387@gmail.com	Sample with customized QM Logo	Out for signature	8/8/2022

Authorized Document

Actions

- Open Agreement
- Remind
- Cancel
- Download PDF
- Download Audit Report

Recipient (0 Completed)

You can configure the frequency, recipient and a message of the reminder. The frequency has multiple options – like weekly, daily, specific days or instant etc.

Add a reminder

Reminder Frequency

Daily until completed

yyyy-mm-dd

Right now

Who do you want to remind?
Only active recipients can be reminded with the selected frequency

Myself

aveek2387@gmail.com

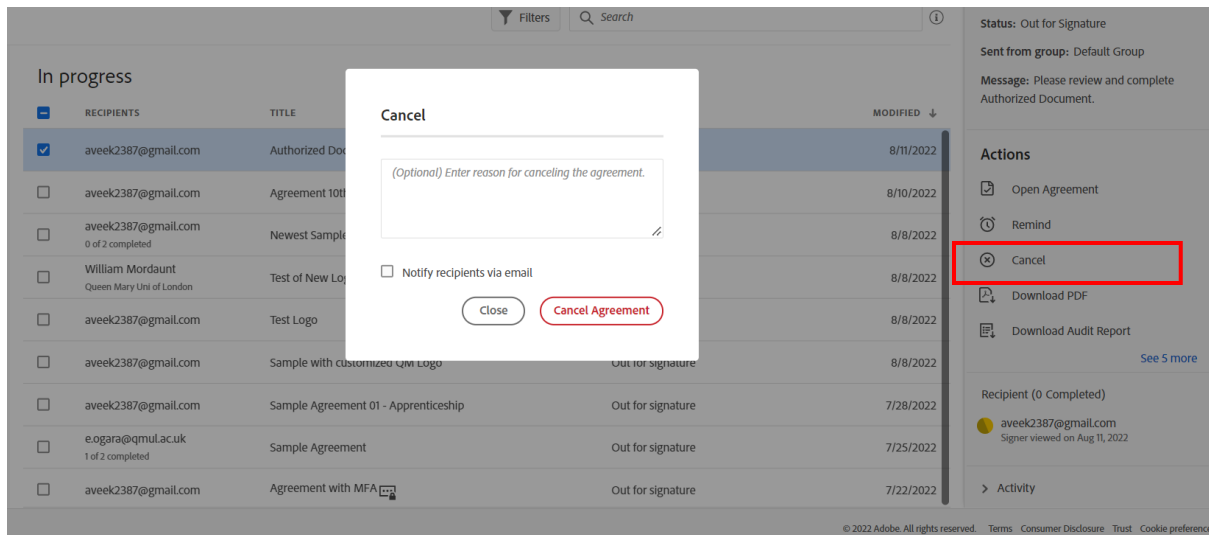
Include a message with your reminder?

Please sign the document

8.1.3 Cancel the document

There might be a scenario when you no longer require the document to be signed by the recipient(s). In this case you can cancel the agreement. (Cancellation doesn't mean you will not be charged the transaction fee)

To cancel, click on the required agreement and from the right panel click on Cancel.



The screenshot shows the Adobe Sign interface. A 'Cancel' dialog box is open in the center, asking for an optional reason for canceling the agreement and providing 'Close' and 'Cancel Agreement' buttons. In the background, a table lists documents with columns for recipients, titles, and modified dates. On the right, the 'Actions' panel is visible, with the 'Cancel' option highlighted by a red box.

RECIPIENTS	TITLE	MODIFIED
<input checked="" type="checkbox"/> aveek2387@gmail.com	Authorized Document	8/11/2022
<input type="checkbox"/> aveek2387@gmail.com	Agreement 10th Aug	8/10/2022
<input type="checkbox"/> aveek2387@gmail.com 0 of 2 completed	Newest Sample	8/8/2022
<input type="checkbox"/> William Mordaunt Queen Mary Uni of London	Test of New Logo	8/8/2022
<input type="checkbox"/> aveek2387@gmail.com	Test Logo	8/8/2022
<input type="checkbox"/> aveek2387@gmail.com	Sample with customized QM Logo	8/8/2022
<input type="checkbox"/> aveek2387@gmail.com	Sample Agreement 01 - Apprenticeship	7/28/2022
<input type="checkbox"/> e.ogara@qmul.ac.uk 1 of 2 completed	Sample Agreement	7/25/2022
<input type="checkbox"/> aveek2387@gmail.com	Agreement with MFA	7/22/2022

8.1.4 Save a PDF copy of the document

You can save a PDF copy of the existing agreement.



The screenshot shows the Adobe Sign interface with a list of documents. The 'Download PDF' option in the right-hand 'Actions' panel is highlighted by a red box.

RECIPIENTS	TITLE	STATUS	MODIFIED
<input checked="" type="checkbox"/> aveek2387@gmail.com	Authorized Document	Out for signature	8/11/2022
<input type="checkbox"/> aveek2387@gmail.com	Agreement 10th Aug	Out for signature	8/10/2022
<input type="checkbox"/> aveek2387@gmail.com 0 of 2 completed	Newest Sample	Out for signature	8/8/2022
<input type="checkbox"/> William Mordaunt Queen Mary Uni of London	Test of New Logo	Out for signature	8/8/2022
<input type="checkbox"/> aveek2387@gmail.com	Test Logo	Out for signature	8/8/2022
<input type="checkbox"/> aveek2387@gmail.com	Sample with customized QM Logo	Out for signature	8/8/2022

8.1.5 Share the status of an agreement with other users*

You can share the status of any In-Progress agreement with any other QM user from your team. This would help you to create a shared visibility of a critical transaction that needs a higher attention.

***Note:**

- **Please be careful to use this feature with ONLY QM internal users and NOT use any external email IDs.**
- **You can use a group email id if that is needed for the visibility.**

In progress

RECIPIENTS	TITLE	STATUS	MODIFIED
<input checked="" type="checkbox"/> aveek2387@gmail.com	Authorized Document	Out for signature	8/11/2022
<input type="checkbox"/> aveek2387@gmail.com	Agreement 10th Aug	Out for signature	8/10/2022
<input type="checkbox"/> aveek2387@gmail.com 0 of 2 completed	Newest Sample	Out for signature	8/8/2022
<input type="checkbox"/> William Mordaunt Queen Mary Uni of London	Test of New Logo	Out for signature	8/8/2022
<input type="checkbox"/> aveek2387@gmail.com	Test Logo	Out for signature	8/8/2022
<input type="checkbox"/> aveek2387@gmail.com	Sample with customized QM Logo	Out for signature	8/8/2022

- Cancel
- Download PDF
- Download Audit Report
- Hide Agreement
- Share**
- Add Notes
- Download Individual Files (1)
- Upload Signed Document

[See less](#)

Share Agreement

Let others view and access this agreement along with its status from their account.

Separate multiple email addresses with a comma, semicolon or spaces.

w.mordaunt@qmul.ac.uk × changedelivery@qmul.ac.uk × a.das@qmul.ac.uk ×

Optional message to sharees

Close Share

8.1.6 Add an alternative email for the recipient

If the recipient has lost access to the email ID, you can add an alternative email ID for the recipient. Remember, you are **ONLY** adding an alternative email ID and **NOT** adding new recipients. This feature shouldn't be interpreted as adding a new recipient.

Click on the agreement and scroll down on the right panel. Hover the mouse arrow over the recipient email ID.

In progress

RECIPIENTS	TITLE	STATUS	MODIFIED ↓
<input checked="" type="checkbox"/> aveek2387@gmail.com	Agreement 10th Aug	Out for signature	8/10/2022
<input type="checkbox"/> aveek2387@gmail.com 0 of 2 completed	Newest Sample	Out for signature	8/8/2022
<input type="checkbox"/> William Mordaunt Queen Mary Uni of London	Test of New Logo	Out for signature	8/8/2022
<input type="checkbox"/> aveek2387@gmail.com	Test Logo	Out for signature	8/8/2022
<input type="checkbox"/> aveek2387@gmail.com	Sample with customized QM Logo	Out for signature	8/8/2022
<input type="checkbox"/> aveek2387@gmail.com	Sample Agreement 01 - Apprenticeship	Out for signature	7/28/2022
<input type="checkbox"/> e.ogara@qmul.ac.uk 1 of 2 completed	Sample Agreement		
<input type="checkbox"/> aveek2387@gmail.com	Agreement with MFA		

aveek2387@gmail.com

[Add Alternate Recipient](#)

Role: Signer

Authentication: [Email](#) [Edit](#)

Status: Out for Signature

Sent from group: Default Group

Message: Please review and complete Agreement 10th Aug.

Actions

- Open Agreement
- Remind
- Cancel
- Download PDF
- Download Audit Report

[See 5 more](#)

Recipient (0 Completed)

- aveek2387@gmail.com
Signer viewed on Aug 10, 2022

Click on the option “Add Alternate Recipient”.

Out for signature	8/10/2022
Out for signature	8/8/2022
Out for signature	8/8/2022

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.

(Optional) Message to new recipient

Actions

- Open Agreement
- Remind
- Cancel
- Download PDF
- Download Audit Report

[See 5 more](#)

Recipient (0 Completed)

- aveek2387@gmail.com
Signer viewed on Aug 10, 2022

Enter the email ID and then click on add. The new recipient email ID will receive a notification.

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.

✓

(Optional) Message to new recipient

Open Agreement

-
-
-
-

[See 5 more](#)

Recipient (0 Completed)

- aveek2387@gmail.com
 Signer viewed on Aug 10, 2022

8.2 Waiting for you

The documents/agreements which require your sign will be in this section. You can simply hover your mouse to click on the sign option or click on the required document and click on View & Sign to sign on the document.

The same options will be available to you as we have seen for a standard signer screen.

Your agreements Filters Search

STATUS	SENDER	TITLE	Sign	STATUS	MODIFIED
Waiting for you (2)	William Mordaunt Queen Mary Uni of London	NRW-Afan-Blue-Scar	Open	Waiting for signature	8/17/2022
Completed	William Mordaunt Queen Mary Uni of London	Example document for signing		Waiting for signature	8/11/2022

NRW-Afan-Blue-Scar
Created Aug 17, 2022 4:38 PM

From: William Mordaunt (wmordaunt@qmul.ac.uk)

Status: Waiting For Me to Sign

Message: Please review and complete NRW-Afan-Blue-Scar.

Actions

Options ▾ NRW-Afan-Blue-Scar

- Read agreement
- Delegate signing to another
- Decline to sign
- Clear document data
- View history
- Download PDF
- Legal Notices

Llwyr Blue Scar

Gradd..... glas/cymedrol Peltter..... 7km
Amser..... 1 - 1½ awr Dringo..... 177m

Dosbarth y Llwybr Glas/ Cymedrol

Yn addas i Beicwyr canolradd/beicwyr mynydd gyda sgliau beicio oddi ar y ffordd sylfaenol. Beiciau mynydd neu feiciau hybrid.

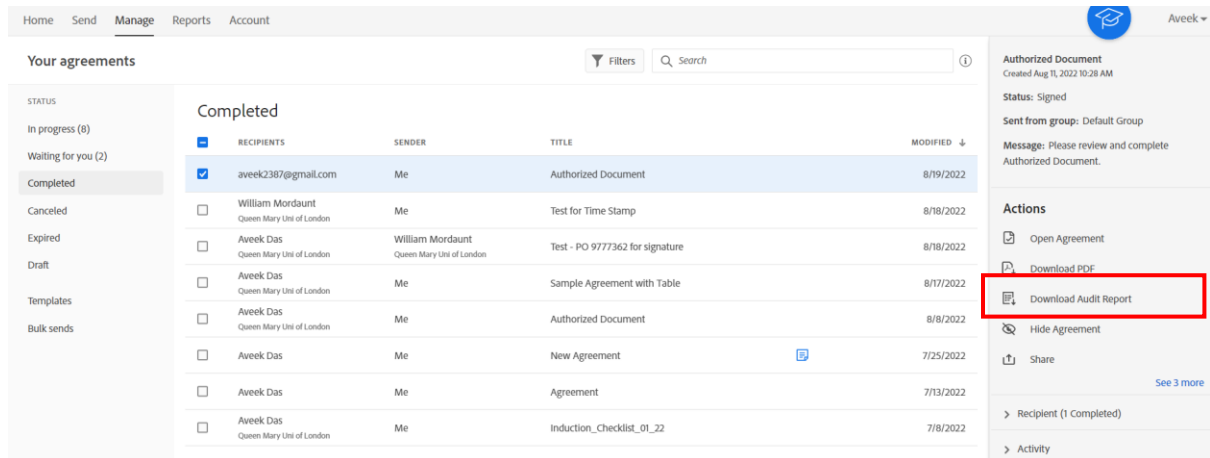
Mathau o lwybrau ac arwyneb Fel y "Gwyrdd" gyda thrac sengl wedi ei adeiladu'n arbennig. Gall arwyneb gynnwys rhwystrau bychan fel gwreiddiau a chraig.

Nodweddion graddiant a thechnegol y llwybr Mae'r rhan fwyaf o raddiannau'n gymedrol ond gall fod yna adrannau serth byr. Cynnwys nodweddion llwybr technegol a graddiannau bach.

Lefel ffitrwydd awgrymiedig Gall safon dda o ffitrwydd fod o gymorth.

8.3 Completed

All completed agreements will be displayed in this section. You can download or view the document from this section. Also, there will be an option for downloading the Audit report for compliance purpose from this section.



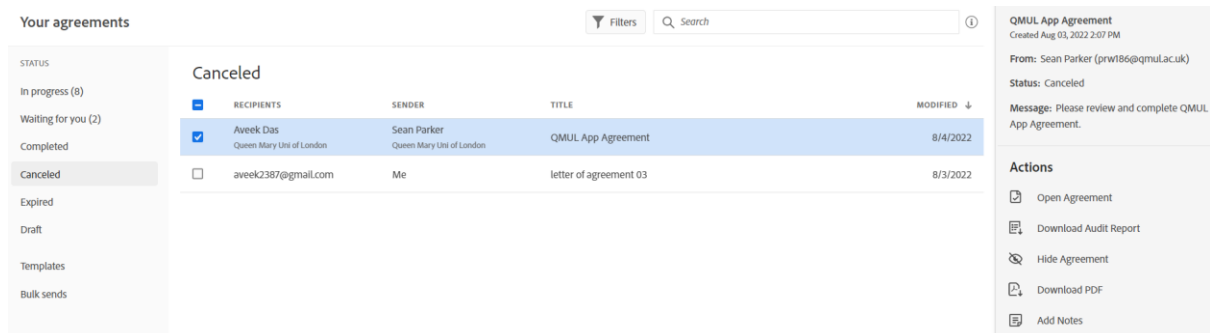
The screenshot shows the 'Your agreements' interface with the 'Completed' section selected. The table below lists the completed agreements:

RECIPIENTS	SENDER	TITLE	MODIFIED
<input checked="" type="checkbox"/> aveek2387@gmail.com	Me	Authorized Document	8/19/2022
<input type="checkbox"/> William Mordaunt Queen Mary Uni of London	Me	Test for Time Stamp	8/18/2022
<input type="checkbox"/> Aveek Das Queen Mary Uni of London	William Mordaunt Queen Mary Uni of London	Test - PO 9777362 for signature	8/18/2022
<input type="checkbox"/> Aveek Das Queen Mary Uni of London	Me	Sample Agreement with Table	8/17/2022
<input type="checkbox"/> Aveek Das Queen Mary Uni of London	Me	Authorized Document	8/8/2022
<input type="checkbox"/> Aveek Das	Me	New Agreement	7/25/2022
<input type="checkbox"/> Aveek Das	Me	Agreement	7/13/2022
<input type="checkbox"/> Aveek Das Queen Mary Uni of London	Me	Induction_Checklist_01_22	7/8/2022

The 'Actions' menu on the right includes the following options: Open Agreement, Download PDF, **Download Audit Report** (highlighted with a red box), Hide Agreement, and Share.

8.4 Cancelled

Any agreement that you have cancelled will be displayed in this section. As with the previous section, this section too has the similar features to view, download a PDF and fetch an Audit report for the list of documents present.



The screenshot shows the 'Your agreements' interface with the 'Canceled' section selected. The table below lists the cancelled agreements:

RECIPIENTS	SENDER	TITLE	MODIFIED
<input checked="" type="checkbox"/> Aveek Das Queen Mary Uni of London	Sean Parker Queen Mary Uni of London	QMUL App Agreement	8/4/2022
<input type="checkbox"/> aveek2387@gmail.com	Me	letter of agreement 03	8/3/2022

The 'Actions' menu on the right includes the following options: Open Agreement, Download Audit Report, Hide Agreement, Download PDF, and Add Notes.

8.5 Expired

Any document which has expired will be displayed in this section. The options in this section remain the same as previous.

Note: *No screen grabs available for this one.*

8.6 Draft

Any agreement which you haven't sent to a recipient but have saved from an earlier session will be displayed here. The following options are available to you in this section.

8.6.1 Open Agreement

You can open and view the agreement.

8.6.2 Edit Agreement

You can start editing the existing agreement. Please note that you cannot add additional recipients, add an expiry date or change the authentication method in the edit mode.

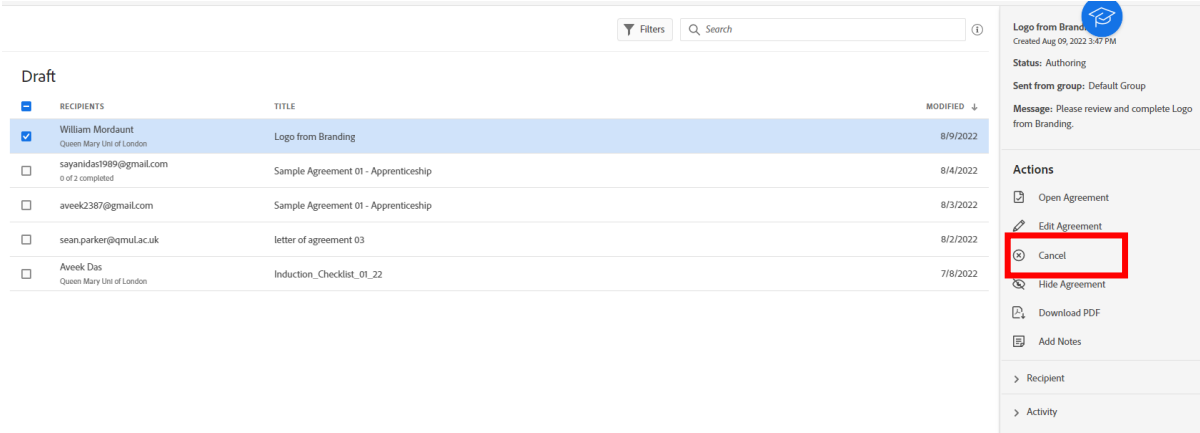
You can still add new files and add data fields in the agreement.

You can simply hover your mouse and click on Edit too.

The greyed-out areas are un-editable. Click on Next to continue the sender’s flow.

8.6.3 Cancel

You can cancel a draft agreement. This is essentially a delete function, and **it will NOT be updated in the Cancel Section** unlike the case for agreements which are in “In Progress” status.



RECIPIENTS	TITLE	MODIFIED
<input checked="" type="checkbox"/> William Mordaunt Queen Mary Uni of London	Logo from Branding	8/9/2022
<input type="checkbox"/> sayanidas1989@gmail.com 0 of 2 completed	Sample Agreement 01 - Apprenticeship	8/4/2022
<input type="checkbox"/> aveek2387@gmail.com	Sample Agreement 01 - Apprenticeship	8/3/2022
<input type="checkbox"/> sean.parker@qmul.ac.uk	letter of agreement 03	8/2/2022
<input type="checkbox"/> Aveek Das Queen Mary Uni of London	Induction_Checklist_01_22	7/8/2022

Logo from Branding
Created Aug 09, 2022 3:47 PM
Status: Authoring
Sent from group: Default Group
Message: Please review and complete Logo from Branding.

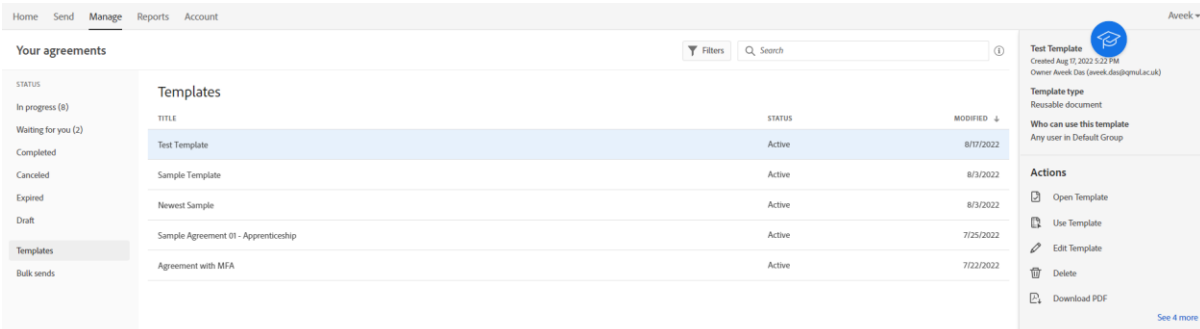
Actions

- Open Agreement
- Edit Agreement
- Cancel**
- Hide Agreement
- Download PDF
- Add Notes

> Recipient
> Activity

8.6.4 Templates

This section will contain all the re-usable templates that you created. You can open or edit the templates from this section. Click on any template to view additional options.



Home Send Manage Reports Account

Your agreements

STATUS

- In progress (8)
- Waiting for you (2)
- Completed
- Cancelled
- Expired
- Draft
- Templates**
- Bulk sends

Templates

TITLE	STATUS	MODIFIED
Test Template	Active	8/17/2022
Sample Template	Active	8/3/2022
Newest Sample	Active	8/3/2022
Sample Agreement 01 - Apprenticeship	Active	7/25/2022
Agreement with MFA	Active	7/22/2022

Test Template
Created Aug 17, 2022 5:22 PM
Owner Aveek Das (aveek.das@qmul.ac.uk)

Template type
Reusable document

Who can use this template
Any user in Default Group

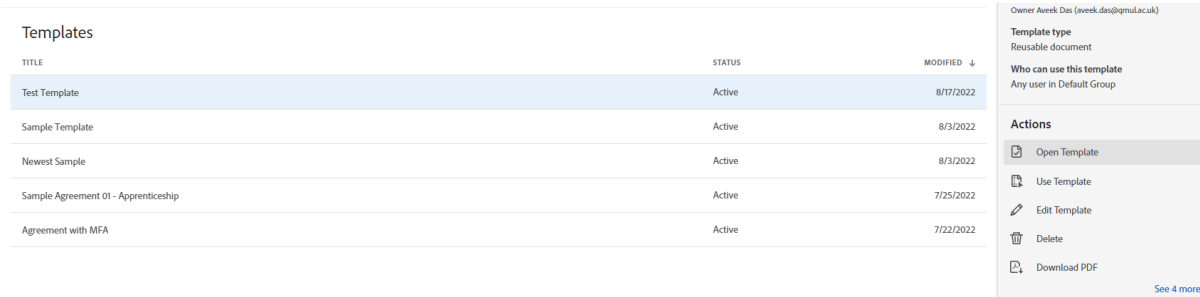
Actions

- Open Template
- Use Template
- Edit Template
- Delete
- Download PDF

See 4 more

8.6.4.1 Open a Template

Select an existing template and click on Open Template. This will open the document for further processing.



Templates

TITLE	STATUS	MODIFIED
Test Template	Active	8/17/2022
Sample Template	Active	8/3/2022
Newest Sample	Active	8/3/2022
Sample Agreement 01 - Apprenticeship	Active	7/25/2022
Agreement with MFA	Active	7/22/2022

Owner Aveek Das (aveek.das@qmul.ac.uk)

Template type
Reusable document

Who can use this template
Any user in Default Group

Actions

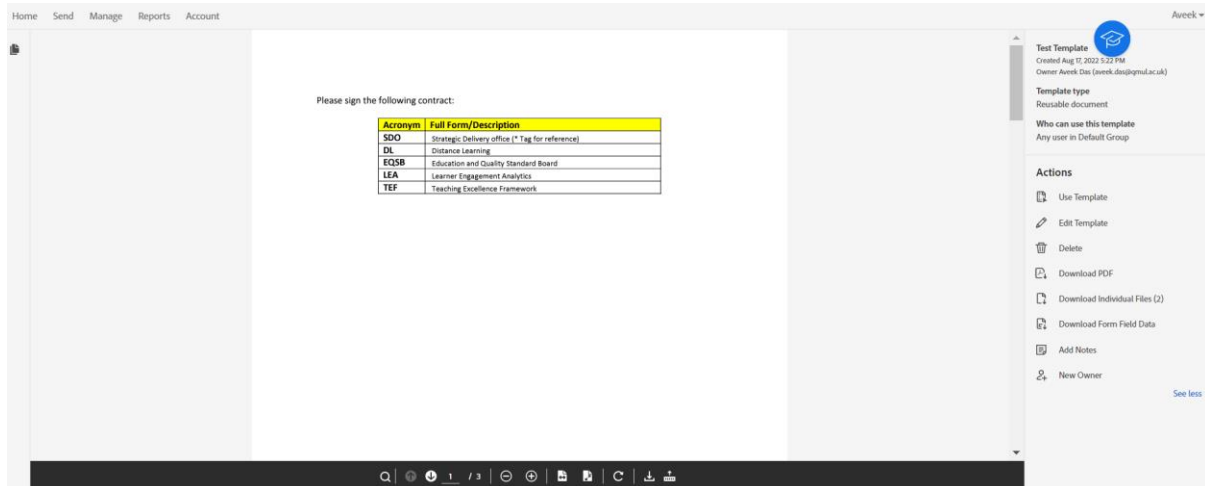
- Open Template**
- Use Template
- Edit Template
- Delete
- Download PDF

See 4 more

You can simply hover and click on Open from the floating menu.

Templates

TITLE	STATUS	MODIFIED ↓
Test Template	Active	8/17/2022
Sample Template	Active	8/3/2022
Newest Sample	Active	8/3/2022
Sample Agreement 01 - Apprenticeship	Active	7/25/2022
Agreement with MFA	Active	7/22/2022

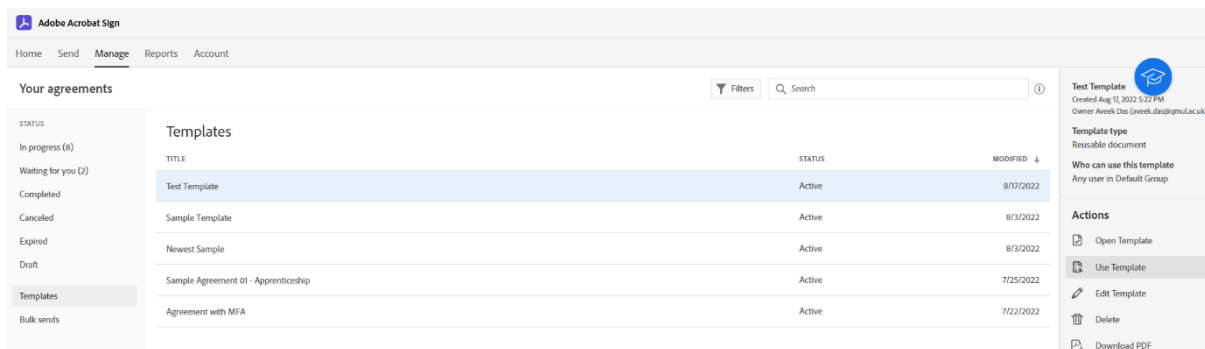


Please sign the following contract:

Acronym	Full Form/Description
SDO	Strategic Delivery office (* Tag for reference)
DL	Distance Learning
EQSB	Education and Quality Standard Board
LEA	Learner Engagement Analytics
TEF	Teaching Excellence Framework

8.6.4.2 Use a Template

If you want to use any specific Template as a Document within the agreement, please click on this option.



The template gets added to the Sender’s flow as you can see below.

Get documents signed

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

Send from: Default Group (Primary Group)

Recipients*

Complete in Order Complete in Any Order

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

1

[Show CC](#)

Message*

Test Template

Please review and complete Test Template.

Options

Password Protect

Completion Deadline

Set Reminder

Recipients' Language

English: US

Files* [Add Files](#)

Test Template ×

Drag More Files Here

Preview & Add Signature Fields

Note: The same functionality exists when someone clicks on “Start from library” on the home screen.

Welcome, Aveek

8 IN PROGRESS

2 WAITING FOR YOU

EVENTS AND ALERTS

Send a document for signature

Request e-signatures on a new agreement, or start from your library of templates and workflows.

Request e-signatures
Start from library

8.6.4.3 Edit Template

If you want to edit the existing template, please click on this option. You can perform operations like adding or editing data, signature or transaction fields.

Templates		
TITLE	STATUS	MODIFIED ↓
Test Template	Active	8/17/2022
Sample Template	Active	8/3/2022
Newest Sample	Active	8/3/2022
Sample Agreement 01 - Apprenticeship	Active	7/25/2022
Agreement with MFA	Active	7/22/2022

Owner Aveek Das (aveek.das@qmul.ac.uk)

Template Type
Reusable document

Who can use this template
Any user in Default Group

Actions

- Open Template
- Use Template
- Edit Template
- Delete
- Download PDF

[See 4 more](#)

8.6.4.4 Transfer Ownership

If you want to transfer a template to a new owner, please click on “New Owner” and enter the email id of the new owner.

TITLE	STATUS	MODIFIED ↓
Test Template	Active	8/17/2022
Sample Template	Active	8/3/2022
Newest Sample	Active	8/3/2022
Sample Agreement 01 - Apprenticeship	Active	7/25/2022
Agreement with MFA	Active	7/22/2022

Owner Aveek Das (aveek.das@qmul.ac.uk)

Template type
Reusable document

Who can use this template
Any user in Default Group

Actions

- Open Template
- Use Template
- Edit Template
- Delete
- Download PDF
- Download Individual Files (2)
- Download Form Field Data
- Add Notes
- New Owner**

[See less](#)

9.0 Transaction Limits

The tool has specific transaction limits. You need to know these limits when you are creating an agreement in the tool.

	Transactions/ User License/ Year	File size/ Upload	Pages/ Transaction	Signers/ Transaction
Enterprise VIP	5000/ Annual for all departments	10 MB	500	25

9.1 Archival of Documents

If you want to archive a specific signed document, there two ways of doing the same.

9.1.1 Saving the file from the Adobe sign portal

You can login to your adobe sign account and under the **Manage** section, click on the **Completed** Agreement. You can then click on any of the agreements and click on **download PDF** to save it in your local device.

Home Send **Manage** Reports Account

Your agreements Filters Search

STATUS

In progress (8)

Waiting for you (2)

Completed

Canceled

Expired

Draft

Templates

Bulk sends

Completed

RECIPIENTS	SENDER	TITLE	MODIFIED ↓
<input checked="" type="checkbox"/> aveek2387@gmail.com	Me	Authorized Document	8/19/2022
<input type="checkbox"/> William Mordaunt Queen Mary Uni of London	Me	Test for Time Stamp	8/18/2022
<input type="checkbox"/> Aveek Das Queen Mary Uni of London	William Mordaunt Queen Mary Uni of Lo...	Test - PO 9777362 for signature	8/18/2022
<input type="checkbox"/> Aveek Das Queen Mary Uni of London	Me	Sample Agreement with Table	8/17/2022
<input type="checkbox"/> Aveek Das Queen Mary Uni of London	Me	Authorized Document	8/8/2022

Aveek

Sent from group: Default Gr

Message: Please review and Authorized Document.

Actions

- Open Agreement
- Download PDF**
- Download Audit Repo
- Hide Agreement
- Share

> Recipient (1 Completed)

9.1.2 Saving a copy from the auto-generated email

Adobe Sign would send an email to all signatories once everyone signs a document. You can save a copy from the email as well.

[EXTERNAL] Authorized Document between Queen Mary Uni of London and aveek2387@gmail.com is Signed and Filed!

Adobe Sign <adobesign@adobesign.com>
To: aveek2387@gmail.com; Aveek Das

Reply Reply All Forward
Fri 19/08/2022

If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Authorized Document - signed.pdf
249 KB

CAUTION: This email originated from outside of QMUL. Do not click links or open attachments unless you recognise the sender and know the content is safe.



Authorized Document between Queen Mary Uni of London and aveek2387@gmail.com is Signed and Filed!

To: aveek2387@gmail.com and Aveek Das

Attached is a final copy of **Authorized Document**.

Copies have been automatically sent to all parties to the agreement.

You can view [the document](#) in your Adobe Acrobat Sign account.

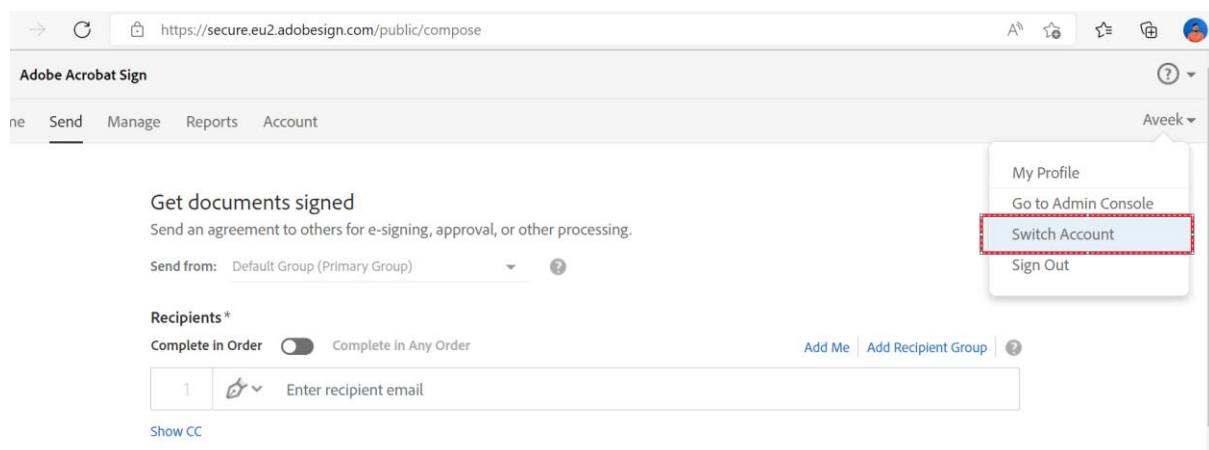
Why use Adobe Acrobat Sign:

Note: Please continue to store the agreement documents in the preferred repository as per the policy of the team/department. This could be a shared drive/MS SharePoint or a shared mailbox.

10.0 Advanced Sharing

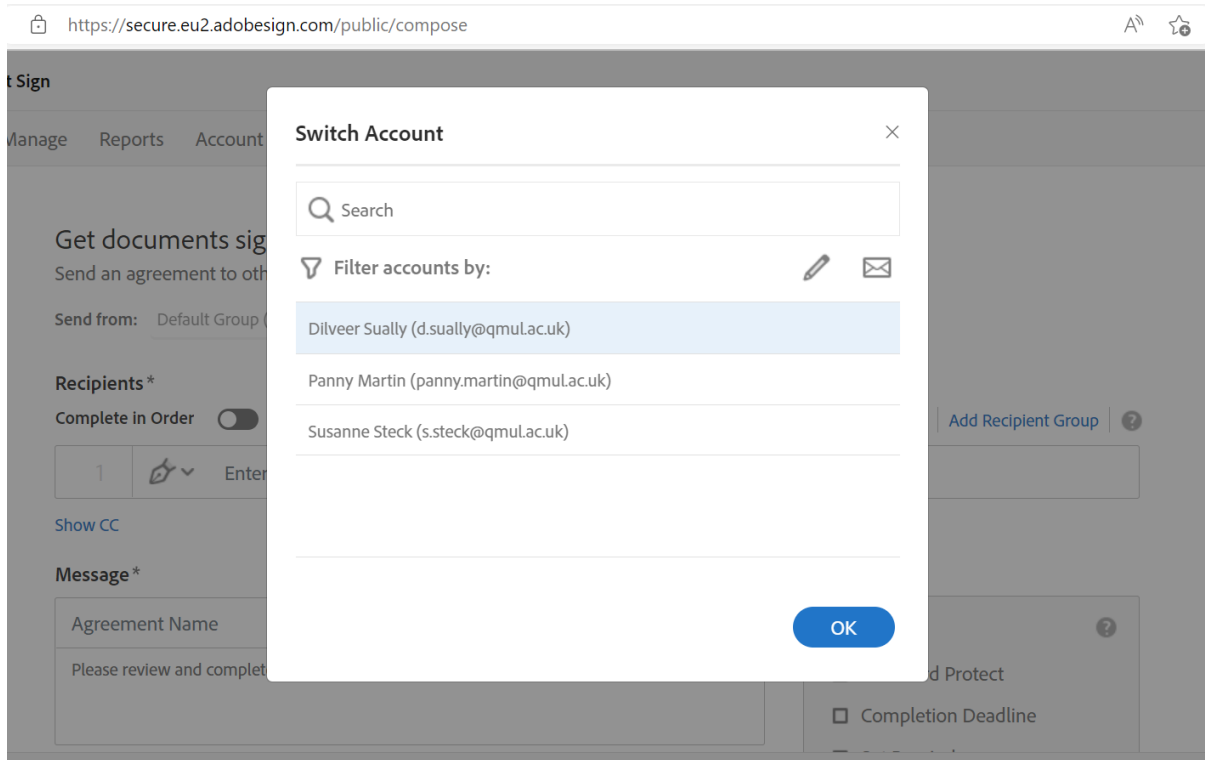
If your admin/group admin has turned on Advanced Sharing for your department/team/school, then you might be able to switch your account and work on your team member's account. You can either view or edit/send documents on behalf of your team member if this feature is turned on.

To switch accounts please click on your name drop down as displayed below and then click on the account you want to switch to.

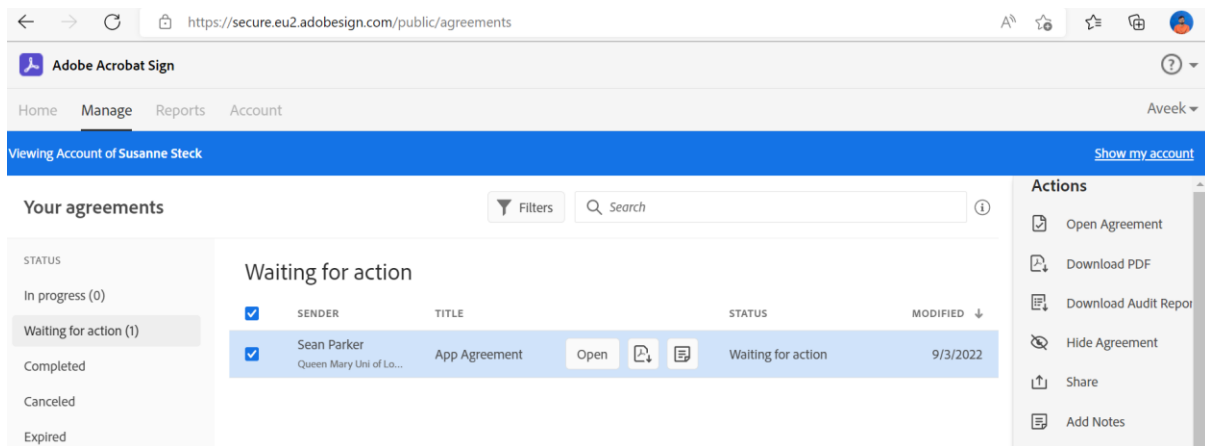


The screenshot shows the Adobe Acrobat Sign web interface. The browser address bar displays <https://secure.eu2.adobesign.com/public/compose>. The page title is "Adobe Acrobat Sign". The navigation menu includes "Send", "Manage", "Reports", and "Account". The user's name "Aveek" is displayed in the top right corner with a dropdown arrow. The dropdown menu is open, showing options: "My Profile", "Go to Admin Console", "Switch Account" (highlighted with a red dashed box), and "Sign Out". The main content area shows the "Get documents signed" section with a "Send from" dropdown set to "Default Group (Primary Group)". Below this is the "Recipients*" section with a "Complete in Order" toggle and "Add Me" and "Add Recipient Group" buttons. A recipient input field contains "1" and "Enter recipient email".

Select the account you want to switch as displayed and click on OK.



This is the view the user would be able to see.



Note: This feature depends on the security configuration of the Adobe Sign group/team. Some teams might not request for this feature and hence the user cannot see this option.

