Queen Mary University of London
Digital E-Signature User Guide

Version 1.4

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</tr>
</tbody>
</table>
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 –


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

Sign In To Your Account

Email:
Password:

Remember Me
Sign in
I forgot my password

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.

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:

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.
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.

OR

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

5.6 Agreement name and description
Add an Agreement Name and the corresponding description for the agreement
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.
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.
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.
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.
An email will be triggered to you (the requestor) and the recipient(s).

Sample of an email when you send the document.

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
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.

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

Signature requested on "Authorized Document" 

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

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

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

Drag More Files Here

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

Select Files

Choose files from My Computer
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.

7.3.5 Preview and add additional fields

Click on Preview and Add Fields
Create a Library Template

Upload any document you need often, add form fields and create your tax document library. Learn more about creating library templates.

Template Name

Test Template

Files

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

Drag More Files Here

Add Signature or Additional fields as required
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

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<tr>
<td>Adobe</td>
<td></td>
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<td>OneDrive</td>
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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.

**Note:** You can simply hover your mouse over any agreement and then open the agreement.
8.1.2 Send a Reminder to the recipients

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

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.
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.

8.1.4 Save a PDF copy of the document

You can save a PDF copy of the existing agreement.

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.
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.
Click on the option “Add Alternate Recipient”.

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

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.

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.

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.

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

You can simply hover and click on Open from the floating menu.
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.
Note: The same functionality exists when someone clicks on “Start from library” on the home screen.

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.
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.

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.

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<th>Enterprise VIP</th>
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<th>File size/Upload</th>
<th>Pages/Transaction</th>
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<tr>
<td>5000/Annual for all departments</td>
<td>10 MB</td>
<td>500</td>
<td>25</td>
<td></td>
</tr>
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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.
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.

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.

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.