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eSignature in Contracts+ for Contract Administrators

eSignature Overview

The eSignature feature provides the ability to sign contracts electronically. The University of Illinois will be using **Adobe Sign** for eSignatures.

Configuring eSignature Settings

1. **Enable eSignature on Contract Header** - The **Use eSignature for this contract?** metadata field flags a contract to use electronic signature. If set to **Yes**, eSignature is enabled for the contract and the eSignature option is displayed in the left menu once the Contract Administrator has saved their progress.

2. **Complete the eSignature Tab** - On the eSignature tab, Contract Administrators add the individuals who are to sign the contract electronically.

3. **Apply or Edit Signature Blocks** (if necessary) - Depending on where the contract template originated and the file type of the contract being used, the Contract Administrator may need to apply or edit the signature block on the contract.

4. **eSignature Setup Workflow Step** - eSignature contracts are submitted for approval and move through the regular approval workflow until they reach the **eSignature Setup** workflow step. At this point the Contract Administrator must add signature fields to the contract before sending it out for signature.

5. **Signers Review Contract** - Signers receive an email notification that allows them to open the document and sign it electronically. Contract Administrators can view the status for each signer on the eSignature page.

6. **Contract is Approved or Returned** - Signers have the option to sign the contract or decline to sign the contract. When all signers have signed the document, the contract returns to the regular workflow and is executed.

Enabling eSignature on Contract Header

If the Contract Administrator wishes for the contract to be signed via eSignature, during the contract creation process, they should set the response to the **Use eSignature for this contract?** metadata field to **Yes**. After filling out the rest of the metadata required for the contract, they should select the **Save Progress** button at the bottom right of the screen, which will allow the **eSignature** tab to appear on the left menu.

NOTE: If the response to the **Use eSignature for this contract?** metadata field is set to **No**, the contract will not be sent for eSignature and will need to be signed by all parties outside of the Contracts+ system. When not using eSignature, the fully executed version of the contract should be uploaded to Contracts+ by the Contract Administrator when the contract reaches the **Upload Signed Document** workflow step.

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Completing the eSignature Tab

Before submitting an eSignature contract into the approval workflow, the Contract Administrator should access the eSignature tab and add the individual(s) who will be signing the contract electronically.

1. Click the **eSignature** tab in the left menu.

2. Add signers by clicking **Add Signer**.

3. Complete fields in the **Add Signer** window:

   a. **Contract Party** - Select the contract party of the signer. The contract parties available for selection are those selected on the contract header.

   b. **Choose a Contact** – Choose a signer from the drop-down list. For second parties, if the name of the person who needs to sign the contract on behalf of the second party does not appear, choose **Manually Enter Signer** and enter, at minimum, the signer's name and email address.

      i. **NOTE:** For the University of Illinois Board of Trustees, Contract Administrators do not have the option to manually enter a signer name and must choose the appropriate Comptroller Signature Delegate for their office from the drop-down list.

   c. **Signing Order** - If you are adding more than one signer to a contract, select the sequence in which you want the person to sign the contract. This field is only displayed when more than one signer is added to a contract.

4. Click **Save Changes**.

5. Repeat the above steps to add any additional eSigners to the contract.

6. Once a signer has been added, you can click **Edit** > **Edit/Reorder Signer** next to a signer name to make changes.

NOTE: In a situation where one signer will be signing via eSignature and the other will not, the signature of the non-eSigning party will need to be captured outside of the system and the version of the contract with that signature will need to be uploaded into Contracts+ before the contract is released into the approval workflow. The Contract Administrator would only add the name of the party that will be signing via eSignature to the eSignature tab.

Apply or Edit Signature Blocks

A Contract Administrator's need to add or edit signature blocks on a contract will differ depending on where the contract template originated, the file type of the contract being used, and the order in which signatures are being applied to the contract.

For contracts created from Main Document Templates in the system or contracts being submitted into the approval workflow as Word documents, there are different clauses available to use based on University signing order and number of other party signers.

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Signature Blocks for Contracts Created from Main Document Templates in Contracts+:

Main Document Templates in Contracts+ at the University of Illinois have a signature block built into them. If a Contract Administrator is creating a contract from a Main Document Template within the Contracts+ system*, they should not need to take any action with the signature block.

Signature Blocks for Contracts Created Outside of Contracts+ in Word Format:

If a Contract Administrator is creating an eSignature contract using a contract created outside of the system that they have received in a Word format (.doc, .docx, etc.), they may find the eSignature process easier if they replace the signature block in their template with a signature block from the Clause Library in Contracts+.

Contract Administrators can replace the existing signature block in the contract by editing the contract in the Word App.

1. Download the document by clicking **Open Main Document** in the left menu, or clicking the **Main Document** link on the **Attachments** page.

2. Open the downloaded file in Microsoft Word. This will depend on your browser. You may need to click the document icon in the lower left corner, or click **OK** to open it from a pop-up window.

3. In the open Word file, you may need to click **Enable Editing**. Once the document opens, the Word app is displayed in a panel to the right.

4. Within the Word app your password and click **Sign In**. For systems that require a password, the sign-in page only appears if you have not used the Word app in the last 30 minutes. Otherwise, you will not need to enter a password to open the Word app if you are already logged into Contracts+.

5. If the contract was not already checked out to you, click **Check Out** to prevent other users from modifying the text while you are making changes.

6. Find the existing signature block on the contract, use your cursor to highlight it, and delete it from the document.

7. In the right panel, click the **Approved Clauses** tab.

8. In the open search field, enter **Signature Block** and click the **Search** icon (magnifying glass icon). A few different signature block options will appear.

9. In the Word document text on the left, place your cursor where deleted the previous signature block.

10. In the right panel, click **Insert** next to the signature block clause that best fits your signing situation (example: University signing first, University signing last, or Multiple Second Party Signers).

11. When you are ready to save your changes to Contracts+, click **Check In**.

    a. (optional) Click **Keep this contract checked out to me** if you want to save your changes, but keep the document checked out to you for further editing.

12. Click **OK**. Your changes are saved and pushed to Contracts+.

Signature Blocks for Contracts Uploaded to Contracts+ in PDF Format:

When an eSignature contract is uploaded into Contracts+ in a PDF file format, the Contract Administrator will need to work with the signature block that is already in place on the document. They will not need to take any action with this signature block prior to submitting the contract into the approval workflow.

eSignature Setup Workflow Step

After being submitted into the approval workflow, an eSignature contract will move through all of the required approval levels before it is ready to be signed. However, before it is sent to the signer(s) for review and execution, it will stop in the **eSignature Setup** step in the approval workflow. Once the contract reaches this step, the Contract Administrator will receive a notification email and will need to manually place signature fields on the contract in Adobe Sign before sending it out for final signature(s).

Signature fields are placeholders added to a contract that indicate what type of information is required to electronically sign it, such as Signature, Date, or Initials fields. These fields will be completed by signers when reviewing a contract to indicate approval. The signature fields that the Contract Administrator will need to place in the contract depends on what kind of signature block is being used on the contract.

Placement of Signature Fields for Contracts using a Signature Block in a Main Document Template or Added from the Clause Library:

For contracts using a signature block that was built into a Main Document Template in Contracts+ or added from the Clause Library, the Contract Administrator needs to add all necessary signature field placeholders for each party who will be signing via eSignature.

1. Once the contract has reached the **eSignature Setup** step in the approval workflow, go to the **Contract Actions** menu and select **Launch eSignature**. You are redirected to the document in Adobe Sign.

2. Adobe Sign opens to the first page of the contract. The first signer's email address will be displayed in the Recipients field at the top of the panel on the right, and the eSignature fields that can be dragged and dropped into the document for the selected signer are in groups underneath.

   a. Scroll to the signature block in the contract.

   b. Double-check the name of the signer listed in the Participants field and drag and drop each of the necessary signature fields for that signer into the appropriate location in the signature block.

      i. University Comptroller Delegates will need the "Signature" and "Date" fields. The signature block image the Comptroller Delegate will be uploading already contains their title, so the Title field is not necessary. For the "Signature" field, click and drag the corner of the tag to make it the correct size for the field.

      ii. Second party signers will need, at minimum, the "Signature," "Name," "Title," and "Date" fields.

   c. When the necessary signature fields are in place for all eSigners, click the **Send** button (near the bottom of the right panel).

   d. **NOTE:** For contracts that require signer(s) to apply their signature or initials in places outside of the formal signature block, the Contract Administrator should select

the appropriate signer name from the Participant field and then simply drag and drop the necessary additional signature field(s) on the document in whatever location they are needed. There is no limit to the number of times a signature field can be used in a single contract.

3. The contract will be sent via email to the first signer on the list. This may take a few minutes. The signer status on the eSignature tab in Contracts+ will display **Sent** when the contract has been sent to them, and the contract status will indicate **Out for Signature**.

Placement of Signature Fields for Contracts Uploaded to Contracts+ in PDF Format:

There are many reasons that a contract may be loaded into Contracts+ for approval workflow routing in PDF format. Two very common examples are:

- The Contract Administrator is using a contract provided to them by the second party, which they received in PDF format.
- One of the parties to the contract chose to sign the contract outside of the system, and a scanned-in version is being routed to collect University approvals and the other signature via eSignature.

A PDF version of a contract will not have the built-in signature field placeholders, the Contract Administrator will need to add all necessary signature field placeholders for each party who will be signing via eSignature.

1. Once the contract has reached the **eSignature Setup** step in the approval workflow, go to the **Contract Actions** menu and select **Launch eSignature**. You are redirected to the document in Adobe Sign.

2. Adobe Sign opens to the first page of the contract. The first signer's email address will be displayed in the Participants field at the top of the panel on the right, and the eSignature fields that can be dragged and dropped into the document for the selected signer are in groups underneath.

3. Adobe Sign opens to the first page of the contract. The first signer's email address will be displayed in the Participants field at the top of the panel on the right, and the eSignature fields that can be dragged and dropped into the document for the selected signer are in groups underneath.

   a. Scroll to the signature block in the contract.

   b. Double-check the name of the signer listed in the Participants field and drag and drop each of the necessary signature fields for that signer into the appropriate location in the signature block.

      i. University Comptroller Delegates will need the "Signature" and "Date" fields. The signature block image the Comptroller Delegate will be uploading already contains their title, so the Title field is not necessary.

      ii. Second party signers will need, at minimum, the "Signature," "Name," and "Date" fields. They may also need the "Title" field if their title is not already pre-printed on the contract.

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c. (optional) If there is another person signing via eSignature, select their name in the Participants field and drag and drop each of the necessary signature fields for that signer into the appropriate location in the signature block.

d. **NOTE:** For contracts that require signer(s) to apply their signature or initials in places outside of the formal signature block, the Contract Administrator should select the appropriate signer name from the Participant field and then simply drag and drop the necessary additional signature field(s) on the document in whatever location they are needed. There is no limit to the number of times a signature field can be used in a single contract.

e. When the necessary signature fields are in place for all eSigners, click the **Send** button (near the bottom of the right panel).

4. The contract will be sent via email to the first signer on the list. This may take a few minutes. The signer status on the eSignature tab in Contracts+ will display **Sent** when the contract has been sent to them, and the contract status will indicate **Out for Signature**.

Signing a Contract in Adobe Sign for University Comptroller Signature Delegates

Individuals who are approving an eSignature contract in Adobe Sign will receive an email from Adobe Sign letting them know that they have a contract that needs their review and signature. The Comptroller Signature Delegate will receive an email from Adobe Sign with the subject "**[user account] Has Sent You [name of contract] to Sign**".

1. In the email, click the link "**Click here to review and sign [contract name]**". The document opens in Adobe Sign in your browser window. Directions and signature field placeholders are highlighted in yellow.

2. Sign the contract or choose an option from the Alternative Actions menu in the top left corner of the screen:

   a. **To Sign the Contract**:

      i. Click **Start** on the left side of the page to take you to the first signature field.

      ii. Click the signature field, and a box will open on the screen.

         1. At the top of the box, select the **Image** tab.

         2. Click **Select Image** in the middle of the box, navigate to the location where your signature block image is saved, and click on the image file – your signature block image will now appear in the middle of the box.

         3. Type your name in the text box in the lower-left corner of the box that says **Enter your name**.

         4. Click **Apply**, and your signature block image will appear on the contract.

      iii. When all signature fields have been completed, select the **Click to Sign** button displayed on the bottom right corner of the document. The information is sent back to the contract in Contracts+. The contract will move out of workflow to a finished state, and the signer's status on the eSignature page will indicate **Completed** (signed).

      iv. You will receive an email indicating that the request is completed. The email also contains a link to the completed document.

   b. **Alternative Actions**:

      i. **I will not sign** - A window opens where approvers enter a message indicating why they will not sign and click **Decline**. The contract will display an error on the Out for Signature step and the contract manager can see in the History that the signer declined to sign.

      ii. **Clear document data** - This clears any signatures or data entered in eSignature placeholder fields. Clicking **Clear** will clear all values entered and return the document to the state when the approver first opened it.

Other eSignature Information

Change or Add eSigners:

Users can reset the eSignature process on a contract once it has been sent out to be signed. They can then change or add eSignature signers and restart the process. The contract must be in Out for Signature status.

This allows users to adjust eSignature signers without repeating the workflow approval process.

1. Click the **Contract Actions** dropdown and select **Reset Signature Process**. The contract status changes to Pending Approval and signature tracking is reset.

2. Click **Contract Actions** and select **Check out for eSignature Changes**.

3. A pop up opens to confirm you want to check out the contract for eSignature changes. Click **Yes**. The eSignature page becomes editable.

4. Make the required changes to signers on the eSignature page.

5. Click **Contract Actions** and select **Re-Start eSignature Process**. The eSignature process is restarted, with the signer changes in effect.

Once the eSignature process is reset on a contract, anyone who previously signed the contract will need to sign again, provided they are still included as signers.

Attachment Size Warning:

For contracts that are using eSignature, a warning message will appear if the total size of attachments printed with the contract and sent for signature exceed 50 MB or 500 pages. It does not prevent the contract from being sent for signature, but it may stop the process from executing correctly. The warning message will also be displayed if the total size is less than 50 MB when the contract enters workflow, but the compiled document then exceeds the limit. The warning will not display if the contract is in an Executed status, a signed contract has been uploaded, or once the contract has been sent to the eSignature service.

eSignature Contract Status:

The status of contracts that have been sent for eSignature is displayed in the eSignature page next to the signer. Click on the **Information** icon next to the status to view more information on the contract.

The contract action **Return to Draft** is available on all manual and eSignature workflow steps for contract managers and contract administrators. If a signer declines to sign a contract, an error will occur on the Out for Signature step. If you choose to return the contract to Draft status, and want to send it out for eSignature a second time, you will need to resubmit the contract for approval.

eSignature Error Troubleshooting:

Any eSignature warnings and errors will be displayed on the top of the eSignature page. You can click on an error or warning in the results to see details about missing or inactive contract parties. You can contact System Administrators if contract party information needs to be edited, allowing them to correct a blank or duplicate email.