Trimble Unity Construct - eSignature Setup Guide

September 2024

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About Electronic Signatures

The ability to sign files electronically will reduce the time and cost associated with routing hard copy documents for wet signatures. Project participants are provided with instant access to signed documents and improved visibility of process statuses. The most common need for eSignatures are in contract approval processes and the like.

Electronic signatures allow users to integrate DocuSign or Adobe Acrobat Sign Enterprise accounts with their Trimble Unity Construct account in order to prepare documents and have recipients electronically sign PDF files either in a Trimble Unity Construct workflow or via direct email from those providers. This feature is supported through the Processes module.
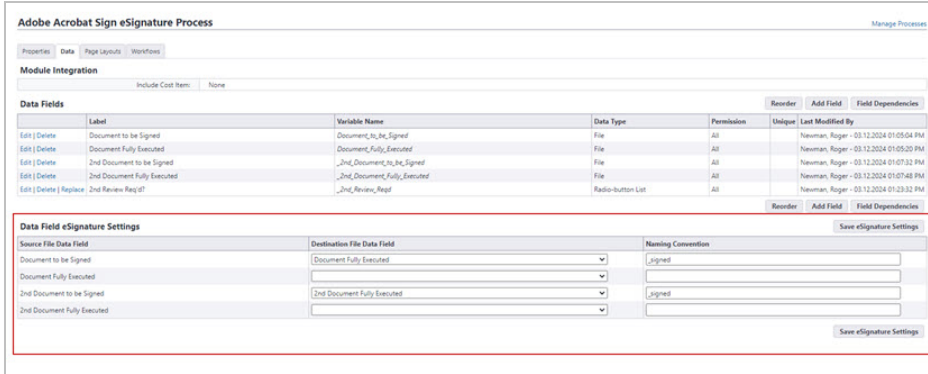
How Trimble Unity Construct uses e-Signature

- e-Signature sessions are embedded within our powerful Process/ Workflow module ensuring that users do not have to exit Trimble Unity Construct to prepare or sign documents.
- The Trimble Unity Construct Admin determines which workflow step makes the most sense to have staff prepare documents by tagging specific e-Signature locations on those documents.
- e-Signature recipients that are not Trimble Unity Construct users will receive a direct email requesting their signature, which is then uploaded to the Process/ Workflow.
- Trimble Unity Construct users on workflow steps requiring e-Signature, receive the documents in proper sequence and e-Sign each document exactly where required.

Note: A DocuSign license or an Adobe Acrobat Sign enterprise account is required in order to use the eSignature feature in Trimble Unity Construct.

Steps in the eSignature Process

1. **Authentication of the DocuSign or Adobe Acrobat Sign Enterprise account**: The DocuSign account or Adobe Acrobat Sign enterprise account must first be authenticated in Trimble Unity Construct before they can be used in eSignature process instances.
   For DocuSign clients, following successful authentication, Trimble Unity Construct Admins must notify Trimble Support and Support will then activate OAuth 2.0 authentication on future DocuSign process instances. Adobe Acrobat Sign clients can begin using Acrobat Sign immediately after authentication.
2. **Configure the eSignature Workflow**: For each file data field that will contain a document to be signed, ensure that the Destination File Data Field settings are configured correctly on the Data Field eSignature Settings section of the Data tab. (*Setup> Administration Tools> Processes> Manage Processes> {Click on a process name to view it} > Data Tab*)

Data Field eSignature Settings

Account administrators can include prepare document and e-Signing actions on Trimble Unity Construct workflow steps. These actions may be added to new or existing workflow steps. Admins can also create roles for signees. Any user that is an actor on the signing step can be a signatory.

3. **Document Preparation**: User(s) in document preparation roles can open Adobe Acrobat Sign or DocuSign, add form fields and tag documents for eSignature by internal and external recipients. Acrobat Sign does not allow removal of recipients once the agreement is no longer in Draft status, therefore it is imperative that any recipients who will not be necessary for a given process instance be removed initially.

4. **Completing the eSignature Process**: Recipients can electronically sign the document and then complete the eSignature step to send the process to the next workflow step.

Documents that are signed by Trimble Unity Construct step actors are saved in the Documents module as soon as the signing action is taken for quick and convenient retrieval. Documents that are signed by recipients who are not step actors as well as any step actors are automatically uploaded to Trimble Unity Construct's Documents module when the workflow completes the eSignature Download automation step. Each signed document is added as an electronic "envelope" in the client's DocuSign account, or as an electronic "agreement" in the client's Adobe Acrobat Sign account. Envelopes and agreements are encrypted with GUIDs, which certifies them as unique, electronically signed files.

e-Signature Integration

Adobe Acrobat Sign or DocuSign accounts must be authenticated in Trimble Unity Construct before they can be used in the e-Signature process.

Adobe Acrobat Sign Authentication

A "Group Administrator" on your organization's Adobe account must authorize and authenticate your Trimble Unity Construct account to your Adobe Acrobat Sign enterprise account at the group level.

Note: Your Adobe Account Admin must first set up a group that will be dedicated to storing Trimble Unity Construct generated agreements.

Group Administrators can make updates to the Group Setup, Group Settings, and Group Send Settings in their organization's Adobe account to maximize the user experience with Trimble Unity Construct e-Signatures. This eliminates the previous requirement for Adobe Account Admins to make changes to their Global Settings to maximize the integration.

Any agreements created through Trimble Unity Construct's e-Signature sessions will be stored within the group and can be managed at the group-level.
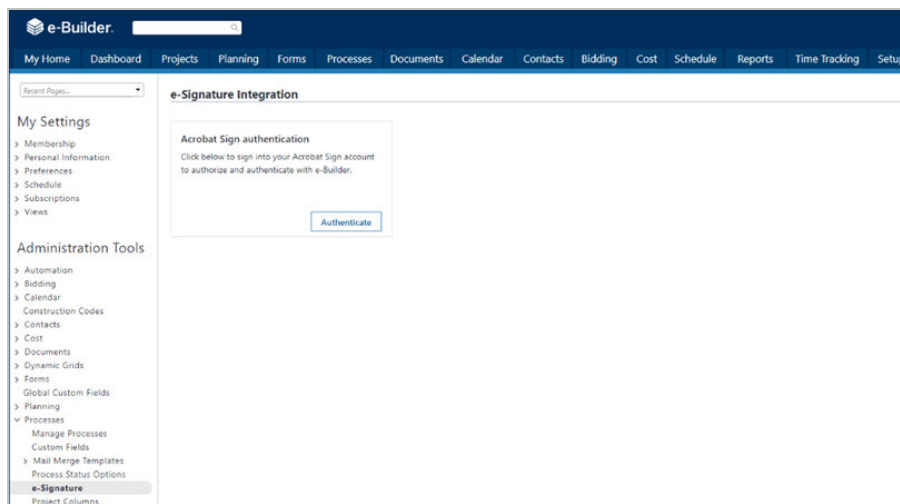
To authenticate the Adobe Acrobat Sign integration

1. Click **Setup**.

   If the Setup tab is not visible, click ▄▄▄, and then select the **Setup** check box.
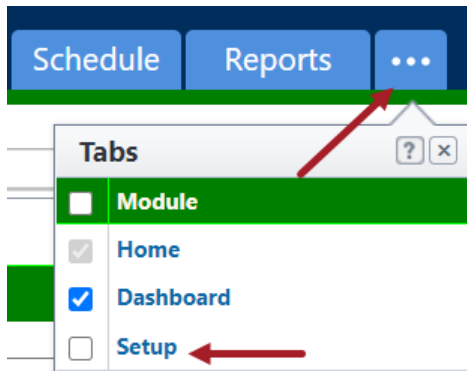
2. In the **Administration Tools** menu, expand **Processes**.
3. Click **e-Signature**. The e-Signature Integration page will be displayed.

4. Click **Authenticate** to sign into your Acrobat Sign account. The Adobe Acrobat Sign Log In page will be displayed.
5. In the **Email** field, enter your email address.
6. In the **Password** field, enter your password and click **Sign In**.

7. You will be asked to confirm whether you wish to allow access to Adobe Acrobat Sign from Trimble Unity Construct.

> **Tip:** If you are not ready to authenticate, click **Cancel**. If you click **Cancel**, a warning message will be displayed mentioning that consent has not been granted.

8. Click **Allow Access** to confirm. An Authorization Successful message will be displayed.

To remove the Adobe Acrobat Sign integration authentication

1. Click **Setup**.

   If the Setup tab is not visible, click ▪▪▪, and then select the **Setup** check box.
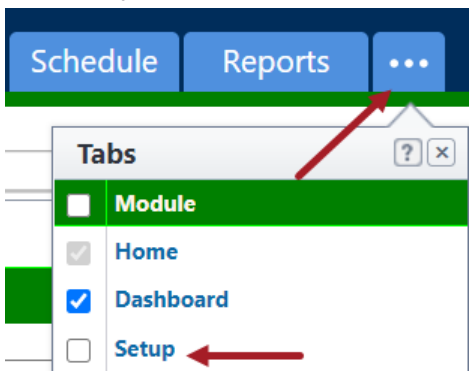
2. In the **Administration Tools** menu, expand **Processes**.
3. Click **e-Signature**. The e-Signature Integration page will be displayed.
4. Click **Remove**. You will be asked to confirm whether you want to remove the integration with Adobe Acrobat Sign.
5. Click **Yes, Remove** to confirm. The integration will be removed.

DocuSign Authentication

DocuSign accounts must be authenticated in Trimble Unity Construct before they can be used in the e-Signature process.

**Clients with Single Sign On (SSO) portals**:

If access to DocuSign account requires login to your SSO portal, first have your DocuSign system user login to SSO, then DocuSIgn before authenticating.

> **Important:** Following successful authorization, Trimble Unity Construct Admins must notify Trimble Support and Support will then activate OAuth 2.0 authentication on future DocuSign process instances.
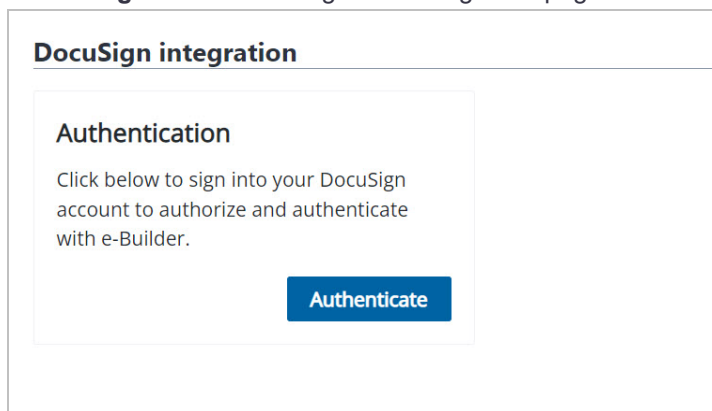
To authenticate the DocuSign integration

1. Click **Setup**.

   If the Setup tab is not visible, click ▪▪▪, and then select the **Setup** check box.
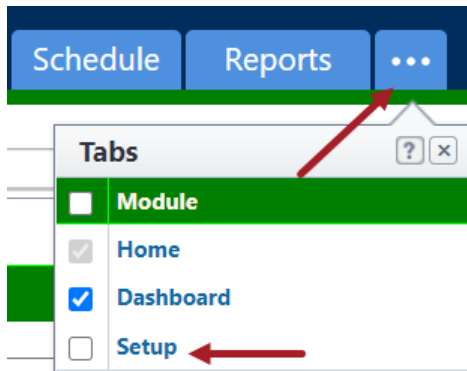
2. In the **Administration Tools** menu, expand **Processes**.

3. Click **e-Signature**. The e-Signature Integration page will be displayed.

4. Click **Authenticate**. The DocuSign Log In page will be displayed.

5. In the Email field, enter your email address and click **Next**.

6. In the Password field, enter your password and click **Log In**.

7. You will be asked to confirm whether you wish to allow access to DocuSign from Trimble Unity Construct.

   Tip: If you are not ready to authenticate, click **Cancel**. If you click **Cancel**, a warning message will be displayed mentioning that consent has not been granted.

8. Click **Allow Access** to confirm. An Authorization Successful message will be displayed.

   Note: While authenticating the DocuSign integration with Trimble Unity Construct, users with multiple DocuSign accounts will be asked to select the account that they would like to integrate with Trimble Unity Construct. After selecting the DocuSign account, click **Confirm** to save the changes.

To remove the DocuSign integration authentication

1. Click **Setup**.

   If the Setup tab is not visible, click ▄▄, and then select the **Setup** check box.
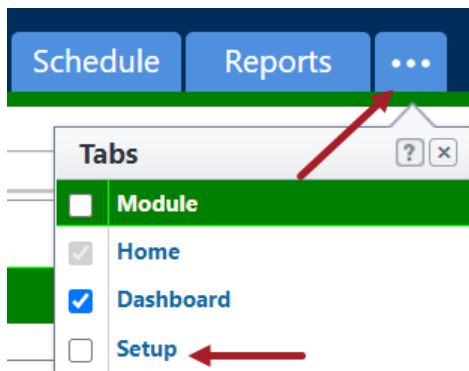
2. In the **Administration Tools** menu, expand **Processes**.
3. Click **e-Signature**. The e-Signature Integration page will be displayed.
4. Click **Remove**. You will be asked to confirm whether you want to remove the integration with DocuSign.
5. Click **Yes, Remove** to confirm. The integration will be removed.

Configure the eSignature Process

The following additional process and system configurations may be required to support the electronic signature feature in Trimble Unity Construct.

Step 1: Create Roles for Signees

Since the actions that can be taken on each step are role based, a valid role must exist for the signee or potential signees of the eSignature step.

Creating a role with specific users is a two-step process. You must first create the role, and then add users to the role.

> **Note:** As you select a role for the signing step, ensure that it includes only those persons that are allowed to sign the document. Otherwise, all actors in the selected role will have the ability to sign.

To create a role for each signee or sets of signees

1. Click **Setup** to access Administration Tools.
2. Click **Users** > **Manage Roles**.

   The Manage Roles page is displayed.
3. Click **Add Role**.
4. Enter a name for this role in the Name field.

   Example: A naming convention might be <Process Name>, <Step Name>.
5. *Optional:* Enter a description in the Description field.
6. Select **Yes** if this is an administration role.
7. Click **Save**.

To add users to the role

1. Click the name of the account role.
2. Click **Add User To Role**.
3. Filter for users and then select the check box next to the user's name.
4. Click **Add User**.

Step 2: Create File Data Fields for File Upload

File data fields make it possible for actors to upload documents. The same or different file data fields can be used to point to the destination folder of your choice.

Note: If you already have file data fields created that can be incorporated into your eSignature process, then this task is not required. Complete this task only if you do not already have the appropriate file data fields available.

Tip: Create a file data field for the upload of the final document as well. This way, you can store the final signed document in the appropriate location, perhaps in a limited-access folder.

To create a file data field

1. Go to the Data Tab for the process.
2. Click **Add Field**.
   The Add Data Field page is displayed.
3. Select the **File** radio button, and then click **Next**.
4. Complete all necessary fields.
5. Select the destination folder of the file in the **Destination Folder Path** field. If you do not choose a folder, users will have to choose one at the time of upload.
6. Click **Next**.
   A preview of the field just created is displayed on the field summary page.
7. Click **Save** or **Save & Add** to create another data field.

Step 3: Create String Data Field for Final Document

Create a string data field that will be used in the script added to the automation step of your eSignature process.

Note: It is recommended that you do not use an existing field or reuse it for other purposes within a single process.

To create a string data field

1. Go to the Data tab of the process.
2. Click **Add Field**.
3. Select the **String** radio button, and then click **Next**.
4. Complete all necessary fields.

> **Note:** The field can be given any name, but "DownloadSuccess" is recommended so that our Support team can easily locate it when finalizing this process for you, or if troubleshooting becomes necessary.

5. Click **Next**. The field summary page displays a preview of the field just created.

6. Click **Save** or **Save & Add** to create another data field.

Step 4: Configure eSignature Data Field Settings

eSignature data field settings allow administrators to specify the destination file data field, and a naming convention for the final version of the signed document.

To configure eSignature data field settings

1. Go to the Data tab for the process.

2. For each file data field that will contain a document to be signed, click the adjacent **Destination File Data Field** drop-down menu to select the file data field that will be used as the destination folder for the signed document. When more than one Destination File Data field is mapped, only one of those files is required to prepare the document for eSignature. Users will no longer have to upload "placeholder" files in DocuSign process instances when more than one file field is mapped by Admin.

> **Note:** This drop-down menu includes all existing file data fields. Files will go to the destination folder associated with the selected data field. To add or change the destination folder, edit the data field. If a folder is not specified, the user will be asked to make a selection when the file is uploaded.

3. In the **Naming Convention** field, enter a name to be appended to the end of the final document after all documents in the document set have been signed.

Example

> If you use the suffix_signed and the name of the document is Trimble Unity Construct User Guide, the final version that includes all signatures will be called, Trimble Unity Construct User Guide_signed.

4. Click **Save eSignature Settings**.

Step 5: Create a Read-Only Layout (Optional)

Create a read-only layout to prevent modification of the documents that need signatures.

As a business rule, you may not want to give signatories the ability to modify the files they need to sign; however, in a revision step, you might. Create the read-only layout based on the business rules that govern the process.

To create a read-only layout

1. Go to the Page Layouts tab of the process.
2. Click **Add Layout**.
3. Enter the name of the layout in the **Layout Name** field.
4. Click **Save**.
5. Select the data field on the right side of the page and drag into the Data section.
6. Select the field so that it is highlighted.
7. Right-click the highlighted field and select **Edit Field Properties**.
8. Select the **Read-Only** check box, and then click **Save**.

    The dialog box closes and you are now on the Layout Properties page.
9. Click **Save**.

Step 6: Enable eSignatures

The eSignature feature is enabled on the action of a process step. There are two parts to this particular step of the configuration. You must create a signing action and a non-signing action in order to give the signee an alternate action in case they choose not to sign the document during a particular process instance.

Optionally, you can also allow user(s) in document preparation roles to open a Sending session to tag documents for eSignature by internal and external recipients. Document preparers can precisely tag locations on documents for eSignature by each recipient, eliminating any missed signatures or initials. Project stakeholders who only interact with the construction program on rare occasions can be tagged as external recipients so that no Trimble Unity Construct license or user training is necessary in order to perform eSignatures.

Tip: In some cases, the process initiator is the actor that uploads documents to the eSignature Source fields and then takes action to prepare documents for eSignature. To make the workflow more efficient, documents can be prepared for eSignature from the Submit action on the Start step of the workflow. This will eliminate the requirement for Administrators to configure a subsequent Data Entry step that supports the Prepare Document for eSignature option.

Note: On the Submit action for the Start step of the workflow, only the **Prepare Document(s) for eSignature** check box will be available for selection. The **Require eSignature(s)** check box option will not be available for the Submit action from the Start step.

Add a Signing Action

To add a signing action

1. Go to the Workflows tab of the process.
2. Click the title of the workflow you want to access.
3. Click **Design Workflow**.
4. Go to the Workflow Designer.
5. To create a new step, drag and drop the Data Entry step to the Workflow Designer.

   The Edit Step page is displayed.

   —Or—

   To modify an existing step, right-click the step, and then click **Properties**. The Edit Step page is displayed.
6. Complete all necessary fields.
7. To make the file read-only, select a read-only layout from the **Actor Layout** drop-down menu.
8. Click **Add Action**.

   The Add Action page is displayed.
9. Complete all necessary fields.
10. Select the **Require Signature(s)?** check box.

    Note: Only one signature option, either the **Prepare Document(s) for eSignature** check box or the **Require eSignature(s)** check box can be enabled on a step action at a time. Once either check box has been selected, the other one will be greyed out and cannot be enabled.
11. Select the signee's user role(s).

    Note: All users within the selected role will have the ability to sign the document. To limit these users to the required signatories only, create a user role that includes only the qualified signees.
12. Click **Save**.

Add an Alternate, Non-Signing Action

A non-signing action is required in order to give the actor an alternate action. A probable secondary action might be Decline or Revise and Resubmit, which could potentially kick start the process all over again.

Warning: If the same file or a new file is uploaded, the current envelope ID becomes void and a new envelope will have to be created. In this case, all previous signees will have to sign each file again. A single envelope can contain a number of documents.

To add a non-signing action

1. Go to the Workflows tab of the process.
2. Click the title of the workflow you want to access.
3. Go to the Workflow Designer.
4. To create a new step, drag and drop the Data Entry step to the Workflow Designer.

The Edit Step page is displayed.

—Or—

To modify an existing step right-click the step, and then click **Properties**. The Edit Step page is displayed.

5. Complete all necessary fields.
6. To make the file read-only, select a read-only layout from the Actor Layout drop-down menu.
7. Click **Add Action**.

   The Add Action page is displayed.

8. Complete all necessary fields, EXCEPT the Require Signature(s)? check box. Leave this check box clear.
9. Select the signee's user role(s).

   Note: All users within the selected role will have the ability to sign the document. To limit these users to the required signatories only, create a user role that includes qualified signees only.

10. Click **Save**.

Add a Document Preparation Action (This is required for Adobe Acrobat Sign to function

To add a document preparation action

1. Go to the Workflows tab of the process.
2. Click the title of the workflow you want to access.
3. Click **Design Workflow**.
4. Go to the Workflow Designer.
5. To create a new step, drag and drop the Data Entry step to the Workflow Designer.

   The Edit Step page is displayed.

   —Or—

   To modify an existing step, right-click the step, and then click **Properties**. The Edit Step page is displayed.

6. Complete all necessary fields.
7. To make the file read-only, select a read-only layout from the **Actor Layout** drop-down menu.
8. Click **Add Action**.

   The Add Action page is displayed.

9. Complete all necessary fields.
10. Select the **Prepare document(s) for Signature(s)?** check box.

    Note: Select this option to allow a document preparer to set up the document for eSignature before sending it to the recipients. The Require eSignature(s) check box will still be available

on the Edit Action page. However, only the **Prepare Document(s) for eSignature** check box or the **Require eSignature(s)** check box can be enabled on a step action at a time. Once either check box has been selected, the other one will be greyed out and cannot be enabled.

11. Select the signee's user role(s).

> **Note:** All users within the selected role will have the ability to sign the document. To limit these users to the required signatories only, create a user role that includes only the qualified sign-ees.

12. Click **Save**.

Step 7: Add an Automation Step

An automation step must be placed at a point in the process after all documents have been signed. This step compiles the final document which includes all eSignatures and an encrypted certificate that solidifies it as a unique and final version of the document.

The end of your eSignature process should look similar to the highlighted portion of the diagram below:
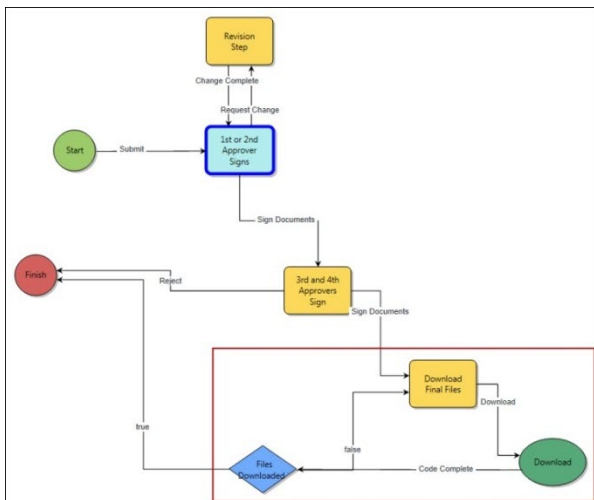

To add an automation step to an eSignature process

1. Go to the Workflow Designer.
2. Drag and drop the automation step to the Workflow Designer.
    The Edit Automation Step page is displayed.
3. Complete all necessary fields and specifically:
    ○ Click the **e-Signature File Download** radio button.
4. Click **Save**.

Step 8: Add a Conditional Step (Optional)

Adding a conditional step that branches off of the automation step will help offset any unexpected errors. This optional step safeguards the process by ensuring that the final document is created by creating a loop that gives the process an alternate action if there are any unexpected errors.

The conditional step will be similar to the highlighted portion of the diagram below:
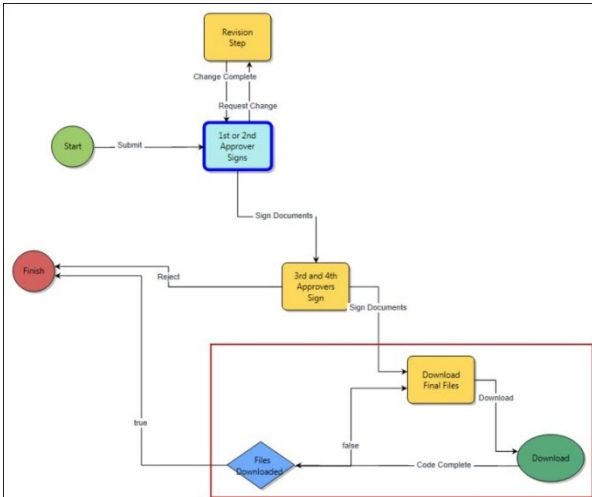
To add a conditional step

1. Go to the Workflow Designer.
2. Drag and drop the conditional step to the Workflow Designer.
3. Complete all necessary fields.
4. Click **Save**.

eSignature Workflow Troubleshooting Actions - for Adobe Acrobat Sign

While designing workflows with the eSignature process, it is important that you check that your workflow is valid and free from errors.

To validate your workflow

1. Go to the Workflow Designer.
2. Click the **Error Check** button.
   Any validation errors found in your workflow will be displayed.
3. Perform the following steps to resolve validation errors in your workflow:

Error Message	Troubleshooting Actions
{Step Name} can be	○ When using the **Prepare document(s) for eSignature** option, ensure that there is a workflow step configured for this. To do this, edit the workflow step

Error Message	Troubleshooting Actions
reached without required actions: 'Prepare document for eSignature (s)' or 'Require eSignature(s)'	action for the actor responsible for tagging documents to ensure that the **Prepare document(s) for eSignature** check box is selected (mandatory).
'Prepare document for eSignature(s)' action on {step name} requires eSignature 'Destination file data field' configuration and Automated File Download Step	○ If the **Prepare document for eSignature(s)** check box has been selected for the Submit action on the data entry step, an automated file download step must be added to the workflow.
eSignature 'Destination file data field' requires configuration	For each file data field that will contain a document to be signed, ensure that you configure the Destination File Data Field settings correctly on the Data Field eSignature Settings section of the **Data** tab (*Setup> Administration Tools> Processes> Manage Processes>Click on a process name to view it*).

eSignature Workflow Troubleshooting Actions - for DocuSign

While designing workflows with the eSignature process, it is important that you check that your workflow is valid and free from errors.

To validate your workflow

1. Go to the Workflow Designer.
2. Click the **Error Check** button.
   Any validation errors found in your workflow will be displayed.

3. Perform the following steps to resolve validation errors in your workflow:

Error Message	Troubleshooting Actions
{Step Name} can be reached without required actions: 'Prepare document for eSignature(s)' or 'Require eSignature (s)'	○ Ensure that all the users who need to sign and approve the document are required to perform eSignatures. To do this, edit the workflow step action for each signing user and ensure that the **Require eSignature(s)** check box is selected (mandatory). AND If using the new **Prepare document(s) for eSignature** option, ensure that there is a workflow step configured for this. To do this, edit the workflow step action for the actor responsible for tagging documents to ensure that the **Prepare document(s) for eSignature** check box is selected (mandatory). ○ On any possible path leading up to the document download step, at least one step actor must be required to e-Sign for the workflow to be valid.
'Prepare document for eSignature(s)' action on {step name} requires eSignature 'Destination file data field' configuration and Automated File Download Step	○ For each file data field that will contain a document to be signed, ensure that you configure the Destination File Data Field settings correctly on the **Data Field eSignature Settings** section of the **Data** tab (*Setup> Administration Tools> Processes> Manage Processes>Click on a process name to view it*). ○ If the **Prepare document for eSignature(s)** check box has been selected for the Submit action on the data entry step, an automated file download step must be added to the workflow. ○ A validation error will be displayed if either of the above requirements are not met.
eSignature 'Destination file data field' requires configuration	For each file data field that will contain a document to be signed, ensure that you configure the Destination File Data Field settings correctly on the Data Field eSignature Settings section of the **Data** tab (*Setup> Administration Tools> Processes> Manage Processes>Click on a process name to view it*).
'Prepare document for eSignature(s)' or 'Require eSignature (s)' workflow requires these account pref-	○ An eSignature enabled workflow cannot be published without a DocuSign account. ○ If the 'Prepare document for eSignature(s)' or the 'Require eSignature(s)' action has been added to the workflow, you need to setup your DocuSign credentials in Trimble Unity Construct as well.

Error Message	Troubleshooting Actions
erence to be defined: DocuSignBrandID, DocuSign TraceOn, DocuSignPassword, DocuSignUsername	Contact Trimble Support to configure your DocuSign account settings to work with your account in Trimble Unity Construct.

Create Envelopes in DocuSign

With the DocuSign eSignature feature, you can send documents for signing by putting them in an electronic container called an envelope.

Note: The actions that you may be able to perform in DocuSign are determined by the permissions profile set up for you in DocuSign. DS Sender or DS Admin profiles are required. Ensure that the eSignature workflow has been properly configured so that you can prepare electronic envelopes to and send documents for eSignatures.

Follow these steps to prepare and send a document for eSignature:

Step 1: Upload the file

Upload the document that requires electronic signature(s) to the process instance.

To upload and prepare a document for eSignature using DocuSign

1. Click the **Processes** tab located at the top of the page.
2. Choose a project from the **All Projects** menu.

   The Project Processes page is displayed.
3. Filter for the process whose details you want to view.
4. Click the process number or subject of the process you want to access.

   The Process instance page is displayed.
5. On the Details tab, click **Browse Computer** or **Browse e-Builder** to search for the document.
6. Click **Attach** to upload it.
7. Click **Take Action**.
8. On the Prepare document(s) for eSignature page, click the **Click here to prepare document(s) for eSignature** link.

   The DocuSign window is displayed with the document that was just uploaded.

   Note: This must be done before moving the process to the next step.
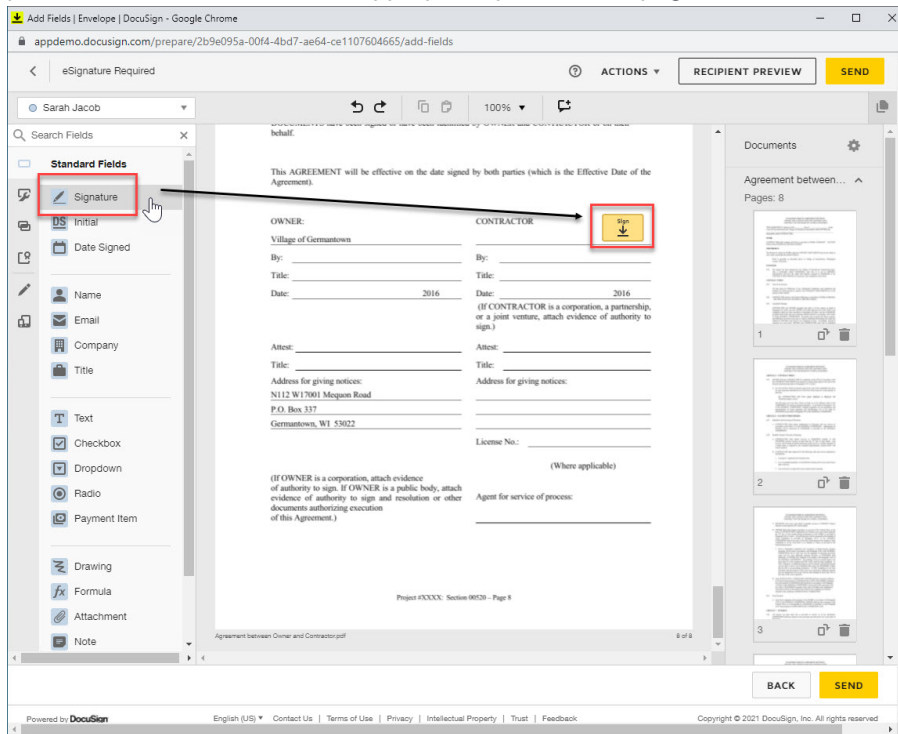
Step 2: Add standard fields

Add standard fields to the document such as signature, initials, date signed and name. You can add them for each user that must sign the document.

To add standard fields in DocuSign

1. Open the document in the DocuSign window.

2. From the recipients drop-down list, select the name of a user who needs to sign the document electronically.

   Note: The recipients drop-down list will contain every user that can take action in the next step. This list will be defined based on the user role set for the user. When configured, eSignature workflows allow you to select a specific project member from the Selected Roles list to be the actor on the next step. These project members are added to the DocuSign Recipients list in eSignature steps.

3. To insert a signature field for the selected user, drag and drop the **Signature** control from the left pane onto the document at the appropriate place on the page.

4. Repeat this step by dragging and dropping other necessary standard field options like **Initials** or **Date Signed** onto the page.

   Note: Some of the other document fields you can add to the file are listed on the left pane such as the Name, Email, Company and so on.

   Tip: DocuSign will retain the formatting such as the font size once you have set it for a certain field. This is useful when you need to add many fields of the same type such as multiple signature fields.

5. To switch recipients, select a different user from the recipients drop-down list. Repeat the previous steps to add signature and other document fields for each user.

> **Tip:** Click the **Recipient Preview** button to view a preview of the document as a particular recipient. In the DocuSign preview window that is displayed, you can select a user name from the **Viewing as** drop-down list to load their view of the document. Select the display format icons to see a desktop, tablet or phone preview of the document.

Step 3: Add external recipients (optional)

You can also add additional signees or document recipients who are external to e-Builder in this step.

> **Note:** Depending upon your DocuSign permissions profile, you may or may not have access to this feature.

Using the Edit Recipients option from the recipients drop-down list, external recipients can be added by entering their names and email addresses. The document recipients from e-Builder are locked and the signing order is set to 1 by default. This is to prevent inadvertent changes to the signing order as per the workflow. Any external recipients added using the **Edit Recipients** window will be set to a default signing order of 2.

> **Note:** It is important that you change the order to 1 for these recipients as well so that they receive the documents at the same time as the e-Builder users. If the order is unchanged and remains as 2, the document will be sent to these external recipients only after the document has been signed by the last e-Builder user in a given workflow instance.

To add external recipients

1. On the DocuSign window, click **Edit Recipients** from the recipients drop-down list.
2. On the Edit Recipients window, click **Add Recipient** to add a new row.
3. Enter the external user's details in the **Name** and **Email Address** fields.
4. Click **Done** to add the user to the recipient drop-down list.

Step 4 : Upload external files for eSignature (optional)

You can also add additional documents that are external to e-Builder in this step.

> **Note:** Depending upon your DocuSign permissions profile, you may or may not have access to this feature. Contact your DocuSign Administrator for further details.

To upload external files

1. On the Documents pane of the DocuSign window, click the document settings icon ⚙ and select **Edit Documents**.

   > **Tip:** The Documents pane on the right displays the current document being prepared for eSignature. You can also upload external files here.

2. On the **Upload a Document** window that is displayed, browse for and select the required file from your computer and click **Done**.

   > **Tip:** You can also choose to use a template or get the file from the cloud depending on your DocuSign account.

> **Note:** The uploaded file will be displayed in the Documents pane. You can add the signature and other document fields to it in the same way. This file will also be available on the **Attached Documents** tab of the process instance.

Step 5: Send the envelope

After you have finished preparing the document, you can send the envelope to the recipients.

To send the envelope

1. In the DocuSign window, click **Send** to send the envelope and move the process instance on to the next step.

   > **Tip:** If there are any missing fields for the recipients, you will be prompted to add them at this point. However, you are not required to add fields for every individual in situations where you have multiple recipients listed but only require specific individuals to apply their signature. You can also choose to skip this step and send the envelope without adding the missing fields. The users with missing fields will then be able to insert their signature anywhere in the document.

2. Once the envelope has been created and sent, click **Continue** to move the process on to the next step.

   > **Tip:** To save the envelope as a draft that you can revisit later, click the **Actions** drop-down list and then click the **Save and Close** button. After preparing the document completely, you can send it out. To discard the envelope that you have created, click the **Actions** drop-down list and then click the **Discard** button. You can then create a new envelope as required.

Create Agreements in Adobe Acrobat Sign

With the Adobe Acrobat Sign eSignature feature, you can send documents for signing by putting them in an electronic container called an agreement.

Follow these steps to prepare and send a document for eSignature:

Step 1: Upload the file

Upload the document that requires electronic signature(s) to the process instance.

To upload and prepare a document for eSignature

1. Click the **Processes** tab located at the top of the page.
2. Choose a project from the **All Projects** menu.

   The Project Processes page is displayed.
3. Filter for the process whose details you want to view.
4. Click the process number or subject of the process you want to access.

   The Process instance page is displayed.
5. On the Details tab, click **Browse Computer** or **Browse e-Builder** to search for the document.
6. Click **Attach** to upload it.
7. Click **Take Action**.

8. On the Prepare document(s) for eSignature page, click the **Click here to prepare document(s) for eSignature** link.

   The Adobe Acrobat Sign window is displayed with the document that was just uploaded.

   > **Note:** This must be done before moving the process to the next step.

Step 2: Manage Recipients

> **Important:** Acrobat Sign does not allow the removal of recipients once the agreement is no longer in Draft status, therefore it is imperative that any recipients who will not be necessary for a given process instance be removed initially. We also provide 1 placeholder recipient for each Require eSignature work-flow step, for the possibility that the intended recipient is not a Current Actor when the workflow reaches their step. If keeping placeholders, a Name is required for each.
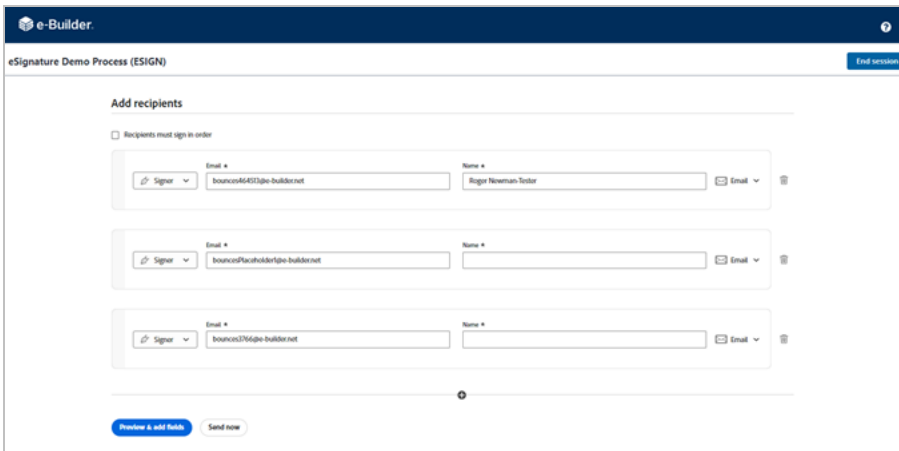
Remove Unnecessary Recipients or Add Names for Placeholder Recipients

- Click the delete button beside a recipient name to remove any unnecessary recipients.
- Enter a name in the **Name** field of each recipient row.

Guidelines to Tagging Documents with Placeholder Recipient fields

While preparing documents for eSignature using Adobe Acrobat Sign, you can now add placeholders recip-ients when the exact signer is unknown.


Adobe Acrobat Sign - Recipient placeholders

The guidelines to tagging Documents with Placeholder Recipient fields for eSignature are as follows:

- Review all "Recipient" names to determine which recipients are needed for the specific Process instance.
- The pre-loaded Recipients reflect every e-Builder user that is on a process step that requires e-Signature. Ensure that you <u>do not edit or delete</u> their "bounces" email addresses.
- If there's an eSignature step where the specific recipient is unknown, use the appropriate Placeholder email for their step: "bouncesPlaceholder1", "bouncesPlaceholder2", and so on.
  - Consult with your Admin for guidance on exactly which placeholder number (1,2,3, etc.) correlates to a particular eSignature step.
  - Locate the e-Builder users on that same step and delete them, leaving only the specific "bouncesPlaceholderN" emails for steps with unknown recipients.
- <u>Do not edit</u> the remaining "bouncesPlaceholder" emails.
- e-Builder highly recommends that you add a name for each of the remaining Placeholder recipients to make it easier when tagging their signature location on documents.
- Click **Preview & add fields** when done.

Step 3: Add external recipients (optional)

You can also add additional signees or document recipients who are external to e-Builder in this step.
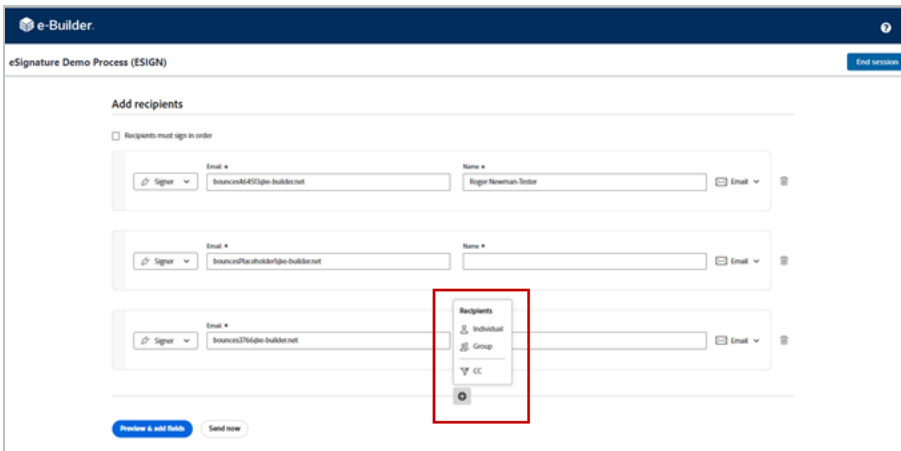
Add External Recipients

To add external recipients

1. At the bottom of the Add recipients section, click the Plus **+** symbol and select **Individual** from the **Recipients** drop-down list.
   A new signer row is added.
2. Enter the external user's details in the required **Email** and **Name** fields.
3. Repeat the steps as needed for each additional external recipient.
4. Click **Preview & add fields** to add the user to the recipient drop-down list.

Step 4: Add Form fields

Add Form fields to the document such as signature, initials, date signed and name. You can add them for each user that must sign the document.
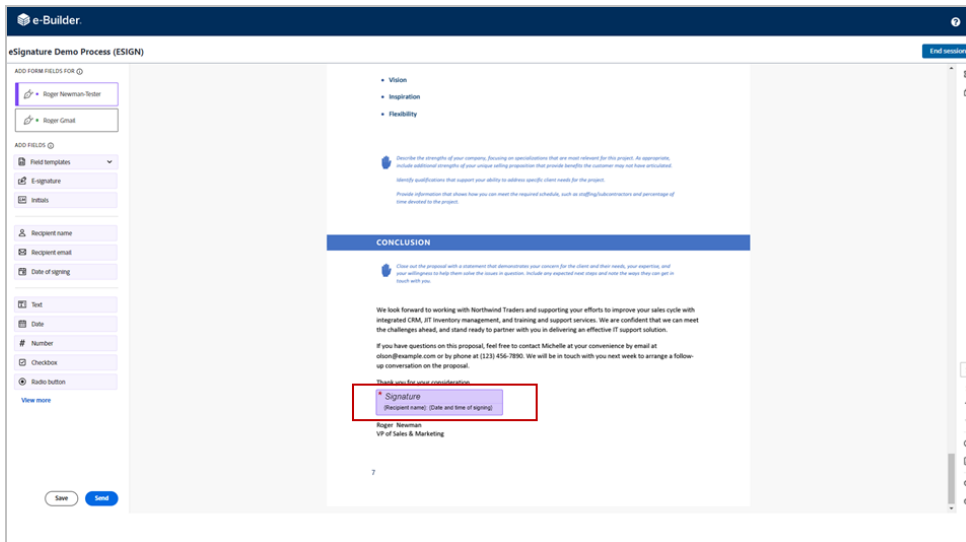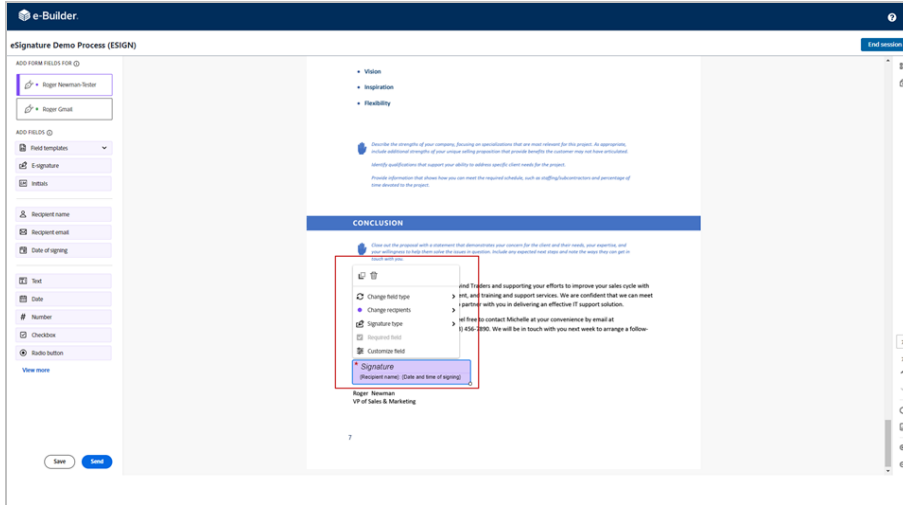

Add Form Fields

To add recipient Form fields to an agreement

1. Click **Preview & add fields**.
2. From the recipients drop-down list, select the name of a user who needs to sign the document electronically.

   > **Note:** The recipients drop-down list will contain every user that can take action in the next step. This list will be defined based on the user role set for the user. When configured, eSignature workflows allow you to select a specific project member from the Selected Roles list to be the actor on the next step. These project members are also added to the Recipients list. Additionally, there is one placeholder recipient for each step that has a **Require eSignature** action configured.

3. Add the **e-Signature** or **Initials** Form Fields to the required locations in the document. Additional options to change the field type and customize the field are available by right-clicking on the field.

Additional Options for Form Fields

Step 5: Send the agreement

After you have finished preparing the document, you can send the agreement to the recipients.

To send the agreement

1. In the Acrobat Sign window, click **Send** to send the agreement.

   Tip: If there are any missing fields for the recipients, you will be prompted to go back and add them at this point. However, you are not required to add fields for every individual.

2. Once the agreement has been created and sent, click **End session** to return to the action.

3. Click **Continue** to move the process on to the next workflow step.

Electronically Signing (e-Sign) Documents

Once a process step is configured with a signing action, this action will be listed in the Action drop-down menu for you to select.

Note: Only PDF files can be electronically signed.

To electronically sign a document in Adobe Acrobat Sign

1. Open the Process Instance page.

2. Complete all necessary fields.

3. Click the Action drop-down arrow and select the signing action.

   Note: Step names are configurable; therefore, the name of this step will be different for every user.

4. Click **Take Action**.

   A message prompting you for an electronic signature is displayed.

> **Note:** You are not required to click the **Take Action** button if the process has been configured to allow the action to take place by simply making a selection from this drop-down menu. For more information on this setting, see Workflow Properties Page Overview in the Online Help.

5. Click the link, **Click here to review and sign your document(s)**.

6. Click **Continue** to agree to Adobe's terms of use.

   This opens an agreement signing session in Adobe Acrobat Sign.
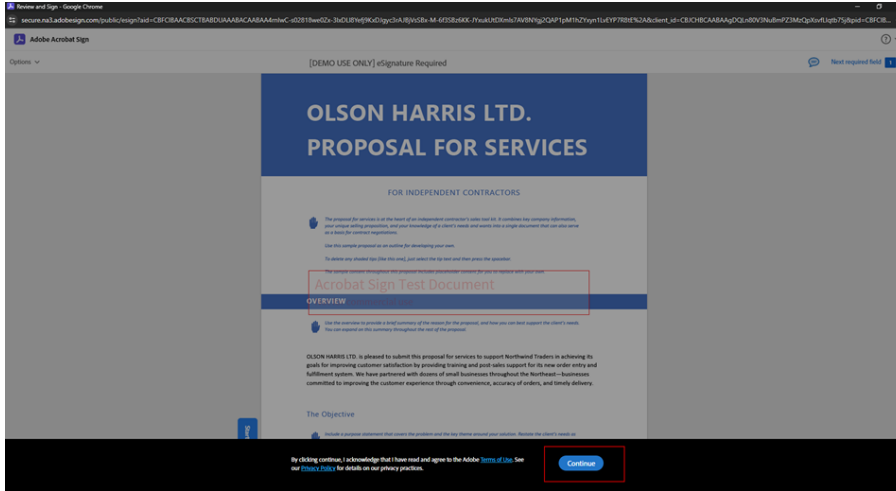
7. Click **Start** to navigate to the location where your signature is necessary.

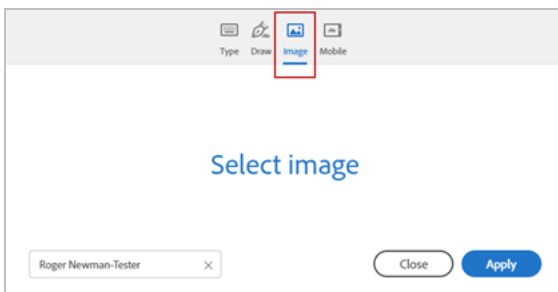8. Click to sign at each e-Signature location in the agreement.
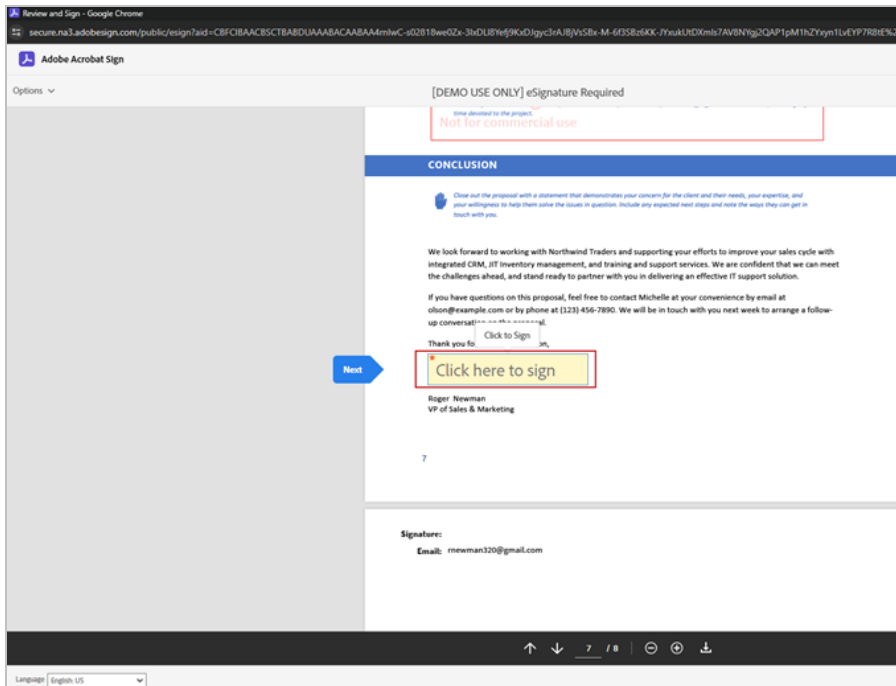
9. Select **Apply** once you determine your preferred method to e-Sign. You can type your name, draw your signature or select a signature image from your computer or use your mobile device to easily draw or capture your signature.
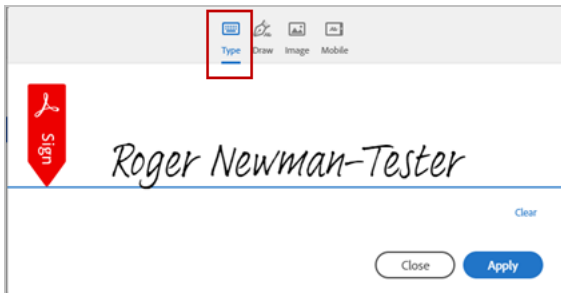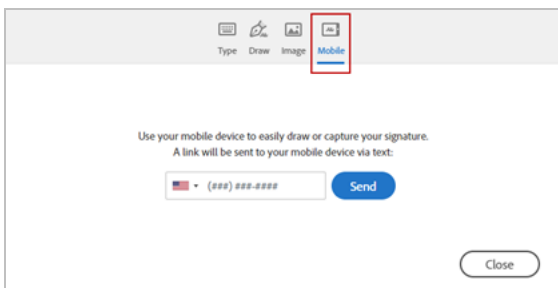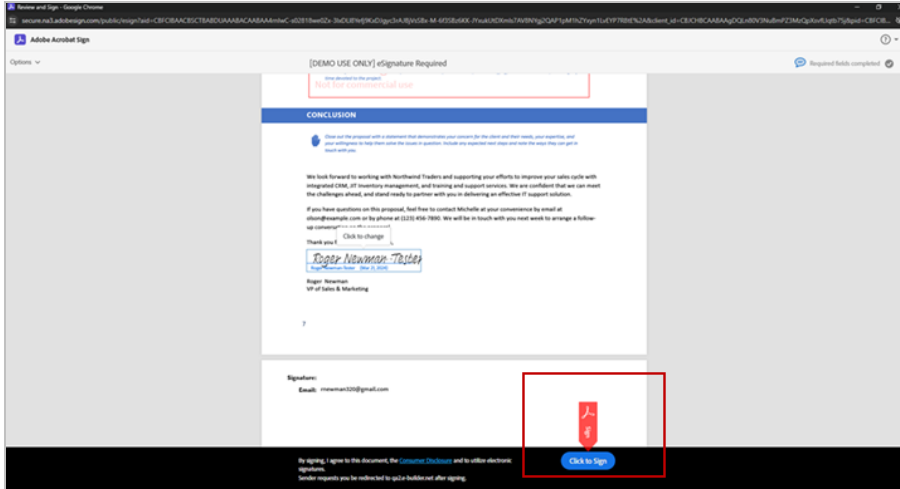

Type Name Option
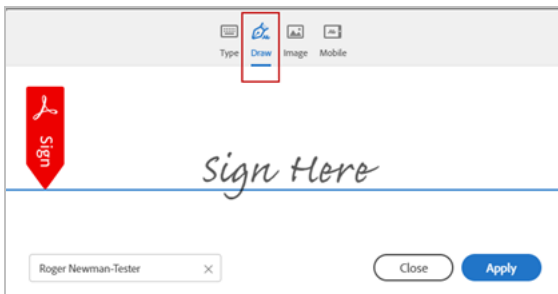
Draw Signature Option

Select Signature Image Option

Use Mobile Device Option

10. Click the **Click to Sign** button to end the signing session.

Ending the Signing Session

A success message will be displayed on the e-Builder page.

11. Click **Continue** to complete this step and send the process to the next workflow step.

To electronically sign a document in DocuSign

1. Open the Process Instance page.

2. Complete all necessary fields.

3. Click the Action drop-down arrow and select the signing action.

   Note: Step names are configurable; therefore, the name of this step will be different for every user.

4. Click **Take Action**.

   A message prompting you for an electronic signature is displayed.

   Note: You are not required to click the **Take Action** button if the process has been configured to allow the action to take place by simply making a selection from this drop-down menu. For more information on this setting, see Workflow Properties Page Overview in the Online Help.

5. Click the link, **Click here to review and sign your document(s)**.

6. Click **Review Document**.

   The file opens in DocuSign.

7. Review and locate where your signature is necessary.

8. Drag and drop your signature from the **Signature Context** menu.

   Note: This context menu displays by default, but should you need to reopen it, click the pencil icon ![pencil icon].

9. Click **Finish**.

   You are prompted for confirmation.

10. Click **Yes**.

A success message displays on the e-Builder Process Instance page.

11. Click **Continue** to complete this step.