Publishing, Sending and Signing Documents

1. One Off Documents and Publisher, Recipient and Package Templates

1.1. A one off document is loaded, set up for signature (Below) and immediately sent to designated signatures without a future use template being created. It can also be sent and then saved as a template for future use.
1.2. A template is a document or contract that saves information and that can be used in the future and reused without all of the information having to be entered and without uploading a document each time.
1.3. A template may, but does not have to include variable information within or at the end of documents. Multiple templates with fact specific content could be used to address variable facts and needs.
1.4. The Template Manager blade (grey blades at left) lists all available templates.
1.5. Templates highlighted with an Asterisk will appear in the Dashboard for ease of use.
1.6. The Template Manager's third column indicates if it is a Publisher, Recipient or Package Template.
1.7. Most Templates are Publisher Templates where agreements are sent to and signed by known recipients.
1.8. A Publisher TP is not a webpage and is identified not with a URL, but with an ID number.

2. Recipient Templates

2.1. Recipient Templates are used when signers are not known. Signers could visit a site, link to and sign a contract and never know they left the visited site. No agreement is sent. Often this involves a link to and not the contract itself. One can enter that into the link so people go to the contract without having to log in.
2.2. A Recipient TP is a web page and a URL links to the document. They can have many signatures, but they are designed for one. Once saved, the system will email you a link to the agreement that you can send or post.
2.3. When in TP Manager use the proper buttons at the bottom of the screen.

3. Loading and Setup of One Off and Template Documents Prior to Delivery to Signatories

3.1. Document creation, loading and set up procedures are the same for one off and template documents.
3.2. The one off is sent now for signature and the template is saved for future use.
3.3. Publishers (Administrators) load a contract or document into Agreement Express and apply signature blocks and variable fields (where required) before sending the document to designated signatories for signature.
   (a) Send New Agreement (Arrow may give you option to use different interfaces).
   (b) Browse the desktop and attach the file to be uploaded (Open or Double Click).
   (c) We recommend PDF files, but MS Word files will work.
   (d) The document will appear in Document View of Agreement Express.
3.4. Documents can be saved as drafts (Save Drafts) so publishers and recipients can save progress made without having to finish their work. Drafts show in Agreement Manager as Drafts.

4. Adding Signature Blocks to One Off or Template Documents

4.1. Place signature blocks for intended signatories into the document or template.
4.2. Specific names are attached to placeholders prior to the document being sent for signature.
4.3. Upload the document or the template so it is on the screen.

4.4. From the Signature and Forms Tools blade at the right drag the signature to the desired document location.
4.5. You can only move it when the Set Up box is open.
4.6. This is used for all signatures. There are no longer different Portal and Placeholder signatures.
4.7. When you drag a placeholder onto the document it is asks for a name in the signature box.
4.8. You only designate a signer at this point with one-off (not a future use template) documents.
4.9. If you are not working with a one-off document you can fill in the designated signer box with a name for that signature block e.g. a position or person. Earlier versions only allowed for the label "placeholder" here.
4.10. For added signature blocks you no longer use "Add Placeholder". Just drag additional placeholders.
4.11. Edit, Save or Delete the signature block by clicking on it and using fields below the right Tools blade.
4.12. Save when you add, change or move a signature block.
4.13. With Signature Type you choose full signature, initials, review or date stamp. Initials have no date and can be used on a form requiring initials. The review option looks like a signature block, but no password is needed.
4.14. Use Signing Group to specify if a person is to sign first or second. The default is that there is no order. If no specific order is desired just ensure that all are designated in Group 1 (default).
4.15. See Sending One off or Creating Template below.

5. Create Variable Fields and Field Properties

5.1. Variable information fields are placed in the document via AE or any PDF software (pre loading).
5.2. Size fields at the corners.
5.3. The right side (Below Blade) content depends on where you are in the document, signature block or form field.
5.4. Below the right side Signatures and Form Tools blade you see icons for each type of field i.e. calendar, check box, radial button, amounts, text, names, date etc.
5.5. The Field Lock option allows you to lock the position of the field or signature.
5.6. Content is locked in with the Edit Right choice. The View Tab Order choice.
5.7. Use the Form Fields blade to drag a field on to the document.
5.8. Adjust the Field Attributes and Controls with boxes at the right side below the field icons.
5.9. Give the field a name in "Field Name". Several fields can have the same number. If two fields have the same name then when one is filled in the other fields with that name will be automatically populated with the same information entry. If you don't want that to happen just use a separate field name.
5.10. The Field ID is assigned by Agreement Express. Each field has a separate ID.
5.11. Fields and changes to them are automatically saved.
5.12. The default position is that the first signer has Edit Rights, but there are other options.
5.13. The "Secure" choice is used so that when data is entered into a field it will no longer be shown to anyone unless they have the ability to unlock it. This is common with credit card numbers and social security numbers. Stars/asterisks would appear instead of the numbers. If an agreement is signed people allowed to unlock it will be able to see what is contained there.
5.14. If the Required option is chosen they must use that field before they can sign and/or complete the agreement.
5.15. In the In Field Box the Name Field can be the Company so you can search and extract data better later.
5.16. If only one line is needed unclick multiline box (if option exists).
5.17. If necessary, control who can enter information into fields. See Forms blade options or Field Properties Box.
5.18. Do not use the Read Only box and the Edit Rights box.
5.19. Every field is searchable, extractable and can launch alerts and notices.
5.20. To delete a field click on the red X in the upper right corner. This will remove the field permanently.
5.21. Fields can be locked after the document is signed. A Read Only designation in PDF Creator will show in AE.
5.22. Selecting "Required" will only make the field you have selected required (Signature depends on field being filled in). It will not make all fields required unless all are selected. By entering a field name beside "Required" the field is only required if the field with that name is filled in or checked.
5.23. Signatures can be made subject to all or specified fields being completed (See Variable Fields).

6. Helpful Hints and Hovering Text

6.1. Add hints and text to documents. Help text can convey information in paragraph form.
6.2. To add a block of help text, drag the "add tool tip" icon from the form tool bar that appears when you are publishing a document to the place on the document where you would like to add help text. This adds a question mark. Click on the icon and add the text wanted. Format text. This help does not appear in print or PDF copies so do not include anything agreement terms in help text. To remove click on Remove.
6.3. To add brief text that hovers or appears when a person moves the mouse over a field choose from Options.
6.4. Click on the field you wish to add text too, click on the wrench icon on either the form tool bar or in the bottom left corner of the field to expose the field Options.
6.5. Check the Tool Tip box, and then type in the text you wish to appear.

6.6. Was Options and now see Tool Tip in the Field Form.
6.7. See also Prompt Text (Above).

7. Send One Off Document or Create Template

7.1. After the document has its required signature blocks and fields, send it as a one-off document or save it as a future template. Note: Save button saves documents to a hard drive so to send use Save and Send.
7.2. The Save and Send button at the top sends the document to designated signers.
7.3. Or use the Save As Template button at the top to Save and name the TP. If you Save TP again it creates a new TP with the same or a different name. Our Use Only: TP can be saved sequentially to multiple companies.

8. Designating Signatories and Sending One Off or Template Documents for Signature

8.1. On screen one-off documents and (recalled) templates are sent to the persons that will sign them.
   (a) Use the Email blade at the right. The same screen comes up via Save and Send.
   (b) In the "To" field insert the signor controlled email address of designated signers. The entered address comes up in a box below where you can edit or delete the email. It does not stay in the "To" field.
   (c) The email addresses then appear in the previously created and blank placeholders.
   (d) Personalize the email sent to designated signers with the Message and Subject lines.
   (e) Include a key signer name in the subject line to assist with tracking later.
   (f) Choose "Save" in Edit Email panel. This saves this email information. Sent documents are saved.
   (g) Send via Save and Send button
8.2. After the document is "Sent" a message confirms this.
8.3. A confirmation email is also sent when all parties sign. Options: Continue to Sign or Exit.
8.4. Documents can be resent again if a party delays signing (See Manage Agreements).
8.5. The sent document will be saved when it is sent and it will appear in the list of documents in Agreement Manager which will indicate if the signing process is completed or still in process (Manage Agreements).
8.6. If you are not sending the document now use Save As Template to the right of Save and Send. You can't do both at the same time, but you can Save and Send and then Create the template.

9. Private Signatures, Signature Labels and Signature Groups

9.1. Private Signatures is a document wide setting that prevents recipients from seeing the email addresses of the other individuals who have also been asked to sign the document.
9.2. If a Signature Label has been setup the label will appear in place of the email address of the other recipients, otherwise the label Private will appear. Signature Labels help identify a signature using a different label other than the default email address label that is displayed. They are also used in agreements marked as 'Private'.
9.3. A Signature Group can control the order by which recipients receive documents for signature. The individuals within a group will receive requests for their signature at the same time, and only after their entire group has completed signing will the next group receive notification that it is their turn to sign.

10. Additional Signing Procedure Security

10.1. In the Email blade at the right and when sending a document for signature you can address situations where you want to ensure that the person signing is the intended signatory (e.g. first time users, high security).
10.2. Restrict access to the document and signing process by clicking the Access Protected box and filling in the access code. When they receive the email and click on its document link it will be blurred (block is not just at signature stage) and only unlocked and loaded when the password and access code are entered.
10.3. Level One Security involves the password.
10.4. Level Two Security involves the additional access code. Even if a person gets someone's password they would have no access code (not emailed as with password unless deliberately done).
10.5. The access code can be given separately or tied to the person providing information only they could know.

11. Signers Exited to Desired Location

11.1. In the Email Blade (right side) of Document View, the Exit URL function allows for each party to be returned to a specific site after execution of the specific document.
11.2. This is useful if signing is part of a multi-page process e.g. on a website. Signing can appear seamless.
11.3. Before this they could only be returned to a site return set for each template or company.

12. Resend Documents

12.1. If signing is delayed Administrators can resend a contract to all or selected parties.
12.2. Use the box at the left of the agreement in the Agreement Manager list.
12.3. Click Resend from the menu bar at the bottom.
12.4. Select the persons you want to resend the agreement to. Resend.
12.5. You can use launch codes in this Resend function in situations where persons sign in person (Below).

13. Sending One Document to Many Persons (Not yet possible in 2011 interface)

14. Create Template Package

14.1. Template Packages involve multiple files and are a collection of templates and files. Each part is accessed with tabs at the left and can be signed separately. With TP packages, setup signatures cascade through all signature blocks in the package. You do not re-enter addresses. Each is signed individually. Package changes do not affect each TP.
14.2. In Template Manager, the list of available templates appears.
14.3. Click the Create Template Package icon at the bottom of the screen.
14.4. On the new tab, select what type of template you would like (Publisher or Recipient).
14.5. From the left box and list of templates available move (click and drag or just right click or double click) the templates to the right box and list (the templates package).
14.6. You can change the order of templates in the package by clicking and dragging them to the right spot.
14.7. Name the package and click Save or Create Package. No notice tells us the package was created.
14.8. Can also create a document package with "Add Document" (Below).
14.9. Use the Signer (Select Signatory) Box. Placeholders carry over from the first part of the package. You can toggle between documents by clicking left side tabs. You need not Print or Save (to hard drive) now.
14.10. If existing names appear don't delete them or you may have to add them later i.e. just add new names. You can copy email addresses between documents. If you delete placeholders and copy in email addresses the placeholders are removed. Leave no unwanted addresses in the "To" field and delete original Placeholders.
14.11. All signers, email addresses and variable information must be completed before you can sign.

15. Add Documents to Existing Documents and Require Documents

15.1. You can add documents to existing documents. This is generally done at the left of the document screen.
15.2. You can use the Blade at the right of the document screen to Request Additional Documents.
15.3. This is not the same as adding a document (left of screen) to an existing document. This blade involves adding or removing a document request. You can scan a document and make it required.
15.4. The requirement to sign would arise at Finish and Send. You can reference the requirement in the document.
15.5. Add another document from the desktop. Place placeholders in each document added, but information from others cascades through. Drag the signature down, but don't use Options to create placeholders.
15.6. Multiple document packages are also possible in the new 2011 interface. Load the template. See Add at left. Click on template. Both are at the left. Templates listed must be choses as a favorite (click column beside TP in TP list manager. A star should appear in that column.
15.7. To load a new template unsigned - Use loading or document required signature and drag signature on before sending. Arrows should draw attention to where the signature is required.

16. Recall and Send Existing Set Up Templates

16.1. From Template Manager (grey blades at left) choose the template or template package wanted.
16.2. The blank placeholders and variable fields placed in the template when it was created will be there.
16.3. Fill in variable information needed in the variable fields provided (if applicable).
16.4. Designate the persons receiving the email (See Instruction Below) and Send (Separate Instruction).
16.5. Distinguish Saving Documents and Saving Drafts (Separate Instruction).

17. Add Document to Dashboard

17.1. Specific templates can be added to the dashboard which is the first view the users see when they log in.
17.2. Add asterisk by clicking beside the template in the * column and that template will be added to the dashboard.
17.3. Yellow star column allows individual users to select which templates they want displayed on the dashboard.
17.4. Orange asterisks are for company defined documents (not overridden unless user is a company administrator).

18. Saving Drafts, Documents and Templates, Print Documents

18.1. A partially set up document can be saved as a draft and completed later before it is sent for signatures. They show in Agreement Manager as Drafts.
18.2. Distinguish documents saved as Drafts from documents Saved to one's desktop.
18.3. Recipients can close a saved agreement and complete it later using the link they received via email.
18.4. Documents are best saved (to one's desktop), printed and archived after execution by all parties and after they receive the confirmation email that all persons have signed.
18.5. A sent document is saved when it is sent and will appear in the list in Manage Agreements. Agreement Manager will indicate if the signing process is complete or in process.
18.6. The Save button in the create signature box only refers to saving the signature placeholder. Save each time you add, change or move a signature block. This will save all work done in Set Up.
18.7. The parties can save or print documents. With multiple documents each part must be saved or printed separately and separate files can be merged. It is best to save and print after all parties have signed.
18.8. They will be able to save as draft only if it is a publisher agreement. Recipient templates cannot be saved as drafts because the agreement isn't linked with the signer's account until they have signed.
18.9. In the March 2011 interface you can choose to Save Agreement (Reference Draft) rather than Save and Send.

19. Receipt of Email With Link to Document and Document Signatures

19.1. Designated signers receive a document link by email. Read the email for included instructions.
19.2. When they click on the link the document opens in Document (Execution) View.
19.3. If it is blurred it likely means that an additional access code must be entered.
19.4. Navigate with the mouse roller or page numbers at the top. Follow instructions in the document.
19.5. Signatories click on their signature block and follow instructions e.g. they provide a password to sign.
19.6. If the person has signed an agreement before then this process is abbreviated.
19.7. They Click "I agree/accept, create my signature" box and the block changes to indicate the signature is fixed.
19.8. The color of the block changes. Instead of saying "Click here to sign" it will say "Signed by X on this date".
19.9. Signature blocks feature the signer's name; execution date; signature ID number.
19.10. A "Signing Complete" message also comes up alongside the signed signature block. Click Finish and Send.
19.11. With multiple document agreements the signatories sign in one place and that action cascades through to the signature blocks in all parts of the agreement. Signatories must review each part before signing.
19.12. After all parties sign and click Finish and Send a confirmation email with a link to the executed document will be sent to all designated signatories. No order of signature is generally required (it can be required).

20. Signing In Person Without Email Receipt

20.1. Agreement recipients can launch and sign agreements in many ways.
20.2. As above, while at home or work, they can click the email link received and sign the document that appears.
20.3. Option 1: While they are in your office you can send the signer to their webmail where they can sign.
20.4. Option 2: use the Resend Launch Code for in person signatures or if there are email problems. The agreement can be signed without an email or the person present. Recipient agreements have URLs that can be used for website or email links to documents (resending not required because not sent in first place). Publisher agreements have no such URL, but for Resend functions they have unique URLs or Launch Links for each signer. Select the agreement from the Agreement Manager list. Resend the document (must have been sent in the first place). The box with the launch code also gives a URL for the document. Have the signer go to the URL and have them enter the launch code (random number expires after one hour).
20.5. Option 3: Open to Sign. Use this option when the person is present in the office. Follow the steps above, but instead of actually resending the document click "Open to Sign". It will open where the signer is present and they can use your keyboard to sign. The same security elements apply.

21. Document Links to External Documents

21.1. You can create a link in an AE document to an external site and document.
21.2. Load document or access an existing Template.
21.3. See Signature and Form Field Blade.
21.4. Choose the field option titled ABC and drag into the document.
21.5. Below the blade at the right insert the desired URL in the URL box (last on list of field options).