

## Trimble Unity Construct – Adobe Sign Instructions

Adobe Sign is used at the Contract Admin “Routing” step.

Prior to starting a commitment (Agreement, Contract, WA, MCAWA, NTP, COAR Amendments & Change Order) process, ensure the person who will be electronically signing (Adobe Sign) the commitment is a “project participant” on the project you are writing the commitment for, and in the correct project role (2-Agreement Execution or 2-Contract Execution) for execution.

\*\*\*NOTE\*\*\* When working in Adobe Sign prep step in eBuilder, be sure to use the **End Session** button to close the window. Do not close the window by clicking on the "X".

\*\*\*NOTE\*\*\* When routing documents for electronic signature you **MUST** send a copy (cc) to someone. The person receiving the copy of the executed document can be internal or external.

For example, the consultant’s accountant likes to receive a copy of all executed documents for billing purposes, or the contractor’s superintendent likes to receive a copy of executed change orders

Be prepared to have the email address of the person you will send a copy to.

### Step-by-Step Instructions

1. Open the process needing to be routed by clicking on the Instance in blue.

Havener Interior Improvements	COAR - 1	S&T RC000703 Amendment #1 - Lamar Johnson - Design Mothers Room	Contract Admin: Amendment Routing
Baseball Field Renovation	DBB - 1	S&T RC000729 DBB Contract Approval for ALL TYPE FENCE INCORPORATED	Contract Admin: Contract Routing

2. Scroll down in the process to find the YES/NO answer to the question “Does UM System need to Approve”

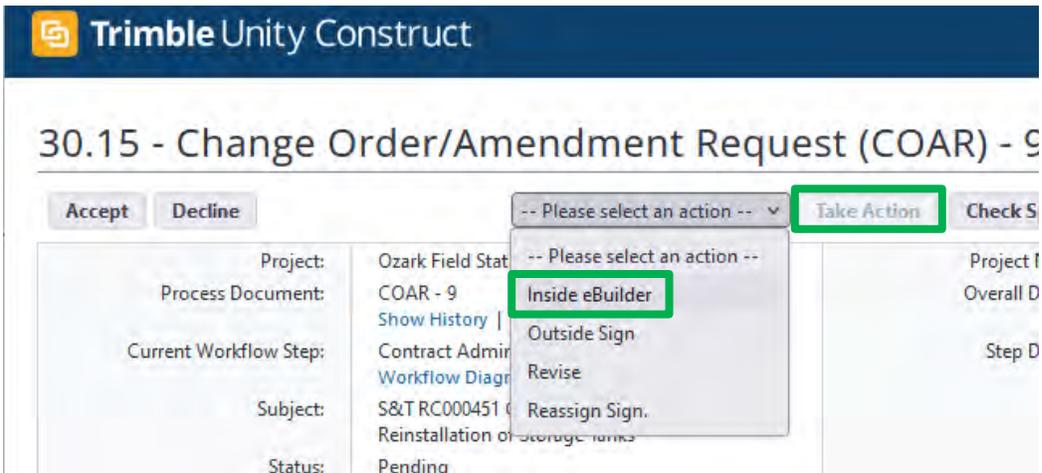
**If Yes**, you will route the document to UM System for execution (Chuck Bouse). **If No**, you will route to your campus Contracting Officer (Fred Stone).

Properties | Download (61.4KB) | Redline | Remove

#### Change Order/Amendment Request Details

Description of the Change: Net Commitment Amount: ?	Additional services for McClure Engineering to design a Mothers Room on the s This field is automatically calculated and filled by e-Builder. 257,200
Does Amendment Need UM System Approval?:	Please determine if the Amendment will need to have the Director of UM Faciliti 1. Was the Agreement (or any Amendments) signed by the Director of UM Facili 2. Does this Amendment raise the total fee above \$100,000? <i>Note: If the answer to #2 is yes, then an Amendment must be written to assign the Direct</i>
	<input checked="" type="radio"/> YES

3. Select **Inside eBuilder** in the drop-down menu and click Take Action. This will open a new window where you will prep the document (step 4).

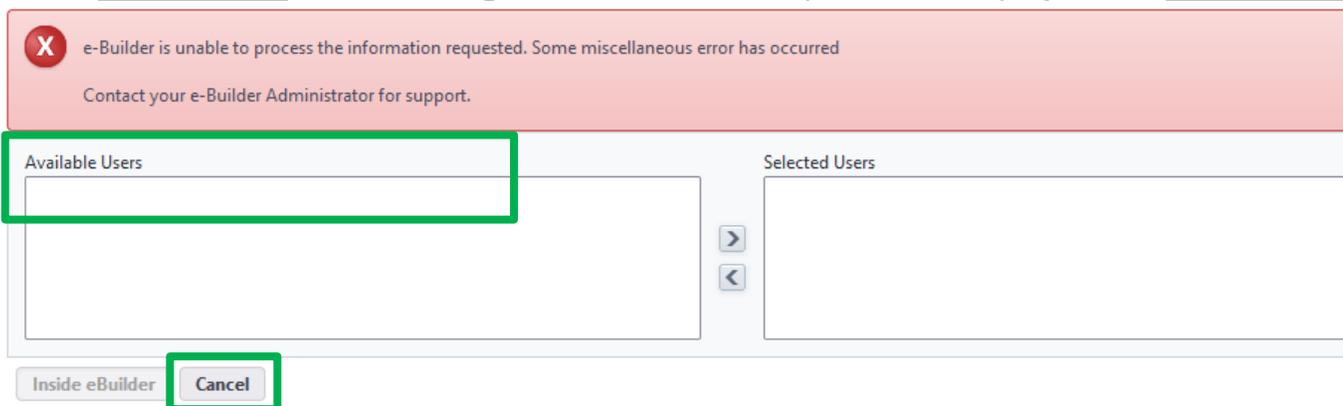


- You should see the external signature authority listed under the “Available Users” field.
- **Skip 3.a.** if your signature authority appears.



- 3.a. **\*\*\*NOTE\*\*\*** If you get an error message or do not see the external persons name listed in the Available Users field, it most likely means you haven't added the Signature person to the project in the 2-Agreement Execution role or 2-Contract Execution role.

**Click Cancel.** Go to Manager Users and add the person to the project and **repeat step 3.**



4. Prepare the document for Signature. Select “Click [here](#) to prepare document(s) for eSignature.

This will open the Adobe Sign application in another window.

**Note**  
This action requires the document(s) to be successfully prepared for eSignature before moving the process to the next step

**Prepare document(s) for eSignature**

Click [here](#) to prepare documents(s) for eSignature

Click [here](#) for instructions on preparing document(s) for eSignature

Available Users  
Khanna, Kapil (LAMAR JOHNSON COLLABORATIVE)

Selected Users

Inside eBuilder Cancel

5. The first time you use Adobe Sign in the prep step or if you have cleared your browser cache, you will be required to click **Yes** on the Confirmation Login Information page.

e-Builder

20.10 - Standard Consultant Agreement (SCA) - 36

End session

Confirm Login Information

You are logged in as umfpde-builderdoc1@umsystem.edu. Do you want to continue?

No Yes

6. In the Adobe Sign prep step, there is no need to add any documents. They pull in automatically. Please add the project ID and process instance to the **Agreement Name\*** field and delete any unnecessary signers and any blank placeholders.

Agreement details

Add file

1

Agreement name \*

RC00070# SCA - 36

Message

Please review and complete this document.

Choose more files

7. Under “Add recipients” **delete** the signors that don’t apply to this document and delete the blank placeholders

Add recipients 

Recipients must sign in order

	Email *	Name	
 Signer 	<input type="text" value="bounces285315@e-builder.net"/>	<input type="text" value="Chuck Bouse"/>	

Recipient settings 

Multi-factor authentication None Private message None Identity Check None

	Email *	Name	
 Signer 	<input type="text" value="bounces285320@e-builder.net"/>	<input type="text" value="Fred Stone"/>	

Recipient settings 

Multi-factor authentication None Private message None Identity Check None

	Email *	Name	
 Signer 	<input type="text" value="bounces421380@e-builder.net"/>	<input type="text" value="Kapil Khanna"/>	

Recipient settings 

Multi-factor authentication None Private message None Identity Check None

	Email *	Name	
 Signer 	<input type="text" value="bounces513343@e-builder.net"/>	<input type="text" value="Ryan Thomassen"/>	

Recipient settings 

Multi-factor authentication None Private message None Identity Check None

	Email *	Name	
 Signer 	<input type="text" value="bouncesPlaceholder1@e-builder.net"/>	<input type="text"/>	

Recipient settings 

Multi-factor authentication None Private message None Identity Check None

	Email *	Name	
 Signer 	<input type="text" value="bouncesPlaceholder2@e-builder.net"/>	<input type="text"/>	

\*\*\*NOTE\*\*\* **Go slowly when deleting users.** It’s easy to delete the signer you need.

If this happens, go to the top right corner of the window and select “End session”

Repeat step 4.

- 8. To add Cc recipients, click on "+ Add" at the bottom. Options to add will appear. Select CC with Paper Airplane.

Add recipients ⓘ

Recipients must sign in order

Signer	Email *	Name
▼	bounces285315@e-builder.net	Chuck Bouse

Recipient settings ✎

Multi-factor authentication None Private message None Identity Check None

Signer	Email *	Name
▼	bounces421380@e-builder.net	Kapil Khanna

Recipient settings ✎

Multi-factor authentication None Private message None Identity Check None

Recipients

- Myself
- Individual
- Group
- CC
- + Add

Preview & add fields

Send now

- Type the email address and hit tab. Add as many people as you'd like but you must add at least one.

+ Add

CC

These recipients will receive a copy of the completed agreement.

Separate email addresses with a comma, semicolon or space

eckerte@theljc.com X

Preview & add fields

Send now

- 9. Click "Preview & add fields"

10. Drag the E-Signature field of the external signor first to the corresponding signature line, and second the E-Signature field for university signer.

There is no need to insert the date field on the date line. The E-Signature field includes the date signed.

The screenshot shows a document signing interface. On the left is a sidebar titled "ADD FORM FIELDS FOR" with a list of field templates. The "E-signature" field is highlighted with a green box. Below it are other templates like "Initials", "Recipient name", "Recipient email", "Date of signing", "Text", "Date", "Number", "Checkbox", and "Radio button". A blue "Send" button is also highlighted with a green box. On the right is a document preview titled "AMENDMENT 1" for "#RC000703 - Havener Interior Improvements Missouri University of Science and Technology" dated February 11, 2025. The document text describes the scope of work and compensation. Below the text is an "ACCEPTANCE" section with two columns: "For LAMAR JOHNSON COLLABORATIVE" and "For THE CURATORS OF THE UNIVERSITY OF MISSOURI". Each column has fields for "Signature", "Text", "Title", and "Date". The "Signature" fields are highlighted with green and purple boxes respectively.

11. Select "Send" once all fields have been added. You should receive a message "eSignature Required was successfully sent for signature"

12. Select "End session" in the top right corner of the page.

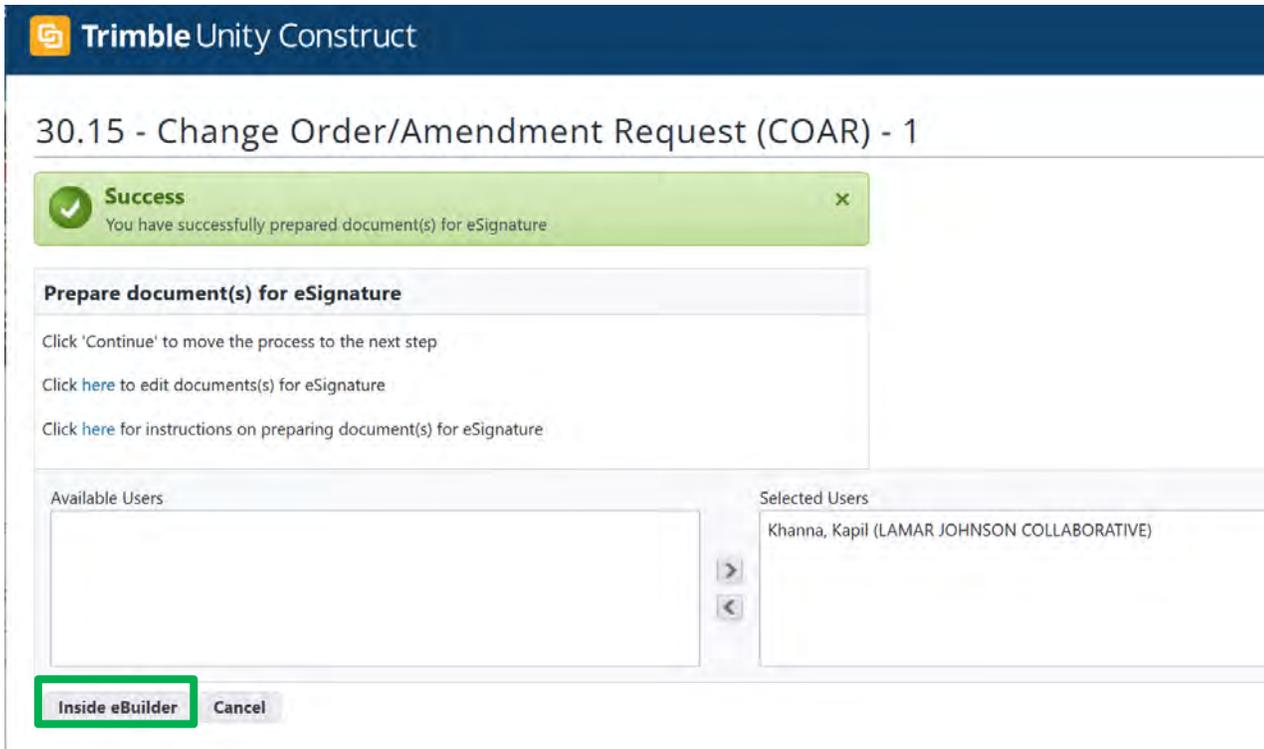


  
eSignature Required was successfully sent for signature  
A PDF copy will be sent to all parties once signing is complete.

13. Back in the process screen you should also see “Success”

Select the **external signer** in the “**Available Users**” field and move them to the “**Selected Users**” field.

**Click “Inside eBuilder”**



14. Cc recipients will receive an email as soon as they are added to an Adobe Sign envelop. The **Click here** link in the screen shot below will take them to the document in its current state. As the document progresses through the process for signatures, the document associated to the link will update.

