## 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 forALL 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:	Additional services for McClure Engineering to design a Mothers Room on the s
Net Commitment Amount: 🕜	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? Note: If the answer to #2 is yes, then an Amendment must be written to assign the Director 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).

🧧 Trir	<b>nble</b> Unity (	Construct			
30.15	- Change	Order/Am	endment Requ	est (COA	AR) - 9
Accept	Decline		Please select an action Y	Take Action	Check S
	Project: Process Document:	Ozark Field Stat COAR - 9	Please select an action Inside eBuilder		Project I Overall D
Cu	urrent Workflow Step:	Show History   Contract Admir Workflow Diagr	Outside Sign Revise		Step D
	Subject: Status:	S&T RC000451 ( Reinstallation of Pending	Reassign Sign.		

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

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	Selected Users
KERNER KERTULANAAR JOUNSON COLLARORATIVES	
Khanna, Kapii (LAMAR JOHNSON COLLABORATIVE)	

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.

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

e-Builder is unable to process the information requeste     Contact your e-Builder Administrator for support.	d. Some miscellaneous error has	occurred
Available Users		Selected Users
	>	
Inside eBuilder Cancel		

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.

Prepare document(s) for eSignature		
lick here to prepare documents(s) for eSignature		
lick here for instructions on preparing document(s) for eSignature		
Autolichie Henry	c.L.a.d	
Available Users	Selected	Users
Available Users Khanna, Kapil (LAMAR JOHNSON COLLABORATIVE)	Selected	Users
Available Users Khanna, Kapil (LAMAR JOHNSON COLLABORATIVE)	Selected	Users

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.	<b>•</b> •
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	

 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.

Add file		Agreement name *	
L 1	Ŵ	RC000708 SCA - 36	
		Message	
		Please review and complete this document.	
Drag and drop your files here			
Choose more files			

7. Under "Add recipients" **delete** the signors that don't apply to this document and delete the blank placeholders

d recipients ③			
Recipients must sign in o	rder		
	Email *	Name	
👉 Signer 🗸	bounces285315@e-builder.net	Chuck Bouse	1
Desisient entitient			
Multi-factor authentio	ল cation None Private message None Identity Check None		
de maria de	Email *	Name.	
Dr Signer	Dources205520@e-builderhet	Fred Stone	
Multi-factor authentio	cation None Private message None Identity Check None		
	Email *	Name	
<ul> <li>♂ Signer ∨</li> <li>Recipient settings</li> </ul>	Email * bounces421380@e-builder.net	Name Kapil Khanna	面
<ul> <li>♂ Signer ∨</li> <li>Recipient settings</li> <li>Multi-factor authentic</li> </ul>	Email * bounces421380@e-builder.net / / zation None Private message None Identity Check None	Name Kapil Khanna	面
<ul> <li>♂ Signer ∨</li> <li>Recipient settings</li> <li>Multi-factor authentic</li> </ul>	Email * bounces421380@e-builder.net / cation None Private message None Identity Check None Email *	Name Kapil Khanna	
<ul> <li>♂ Signer ∨</li> <li>Recipient settings</li> <li>Multi-factor authention</li> <li>⊘ Signer ∨</li> </ul>	Email * bounces421380@e-builder.net cation None Private message None Identity Check None Email * bounces513343@e-builder.net	Name Kapil Khanna Name Ryan Thomassen	١ ١ ١
Signer      S	Email * bounces421380@e-builder.net cation None Private message None Identity Check None Email * bounces513343@e-builder.net	Name Kapil Khanna. Name Ryan Thomassen	
Signer      S	Email * bounces421380@e-builder.net cation None Private message None Identity Check None Email * bounces513343@e-builder.net None Private message None Identity Check None	Name Kapil Khanna Name Ryan Thomassen	
Signer      Signer      Signer      Signer      Signer      Signer      Signer      Signer      Email	Email * bounces421380@e-builder.net cation None Private message None Identity Check None Email * bounces513343@e-builder.net None Private message None Identity Check None *	Name Kapil Khannā. Name Ryan Thomassen	
Signer Signer Signer Signer Signer Control Signer Control Con	Email * bounces421380@e-builder.net cation None Private message None Identity Check None Email * bounces513343@e-builder.net  None Private message None Identity Check None  * uncesPlaceholder1@e-builder.net	Name Name Name Name Name Name	
Signer Kecipient settings Multi-factor authentic Signer Kecipient settings ti-factor authentication Signer Signer Lifactor authentication	Email * bounces421380@e-builder.net cation None Private message None Identity Check None Email * bounces513343@e-builder.net  None Private message None Identity Check None  * uncesPlaceholder1@e-builder.net None Private message None Identity Check None	Name Kapil Khannā Name Ryan Thomassen Name	
Signer  Recipient settings Multi-factor authentic  Signer  Recipient settings  ti-factor authentication  Signer  Email  Signer  Email  Lipient settings  Email  Em	Email * bounces421380@e-builder.net cation None Private message None Identity Check None Email * bounces513343@e-builder.net None Private message None Identity Check None * IncesPlaceholder1@e-builder.net None Private message None Identity Check None *	Name Name Name Name Name Name Name	

\*\*\*NOTE\*\*\* <u>Go slowly when deleting users</u>. 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.

Email *			Name	
🗇 Signer 🛩 bour	nces285315@e-builder.net		Chuck Bouse	
	•			
Email *		Recipients	lame	
Email ★ & Signer ❤ bour	nces421380@e-builder.net	Recipients	Jame Kapil Khanna	
Email *	nces421380@e-builder.net	Recipients (2) Myself (2) Individual	lame Kapil Khanna	
Email # Signer V bour Recipient settings	nces421380@e-builder.net lone Private message None Identity Check None	Recipients (1) Myself (2) Individual (3) Group	łame Kapil Khanna	
Email *	inces421380@e-builder.net lone Private message None Identity Check None	Recipients ③ Myself 옾 Individual 용 Group	lame Kapil Khanna	

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

	Add
сс	
These recipients will receive a copy of the completed agreement.	
Separate email addresses with a comma, semicolon or space	
eckerte@theljc.com ×	
eview & 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.	

KOD FORM FIELDS FOR ()				
& • Chuck Bouse				
	AMENDMENT 1			
Ø ● Kapil Khanna	#RC000703 - Havener Interior Improvements Missouri University of Science and Technology			
DD HILLDS ()	February 11, 2025			
Field templates	The scope of work, for the above referenced project, is modified as follows:			
12 E-signature	Additional services for McClure Engineering to design a Mothers Room on the second floor Center with focus on plumbing and HVAC.			
er instats	The current agreement amount is \$247,200.00. Compensation for this additional work shall be in the amount of \$10,000.00, bringing the total maximum fee under the agreement to \$257,200.00.			
& Recipient name				
Recipient email	ACCEPTANCE: For LAMAR JOHNSON COLLABORATIVE	For THE CURATORS OF THE UNIVERSITY OF MISSOURI		
Date of signing	* Signature	Signature		
	Text	Text		
II Text	Title	Title		
Date .				
# Number	Date	Dute		
Checkbox				
Radio button				
Gee				

- 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.

	End session
$\odot$	
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

Vou have successfully prepared document(s) for eSignature		×
Prepare document(s) for eSignature		
Click 'Continue' to move the process to the next step Click here to edit documents(s) for eSignature Click here for instructions on preparing document(s) for eSignature		
Available   Isers	Selected	d Users
Autobe Osers		

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.

	e-Builder DocuSign UM FPD has copied you on eSignature Required.	ox ×	合	
£,	e-Builder DocuSign UM FPD via Adobe Acrobat Sign <adobesign@adobesign.co (4="" 3:59pm="" ago)="" me="" minutes="" td="" to="" 🛧="" 🛪<=""><td>٢</td><td>4</td><td>:</td></adobesign@adobesign.co>	٢	4	:
	Powered by Adobe Acrobat Sign			
	You are copied (Cc) on eSignature Required e-Builder DocuSign UM FPD has copied you on eSignature Required. You will be notified after all			
	participants complete the document. To: bounces307720@e-builder.net, bounces282764@e-builder.net, bounces476148@e-builder.net, bounces30aceholder Lige-builder.net, and 3 more From: e-Builder DocuSign UM FPD (University of Missouri System)			
	Please review and complete this document.			
	Click here to view this document online in your Adobe Acrobat Sign account.			
	Why use Adobe Acrobat Sign:			
	Exchange, Sign, and File Any Document. In Seconds!     Set-up Reminders. Instantly Share Copies with Others.     See All of Your Documents, Anytime, Anywhere.			
	To ensure that you continue receiving our amails, please add adobesign@adobesign.com to your address book or safe list.			