



Secured Signing

Contract Eagle 2019

The screenshot displays the Contract Eagle 2019 dashboard. At the top, there is a navigation bar with icons for Dashboard, Contracts, Parties, Admin, and Help, along with a search box. The user's name, Simon Aspden, is visible in the top right corner.

The dashboard is divided into two main sections: My Dashboard and Team Dashboard. The Team Dashboard is currently active, showing the following components:

- Team Alerts:** A list of alerts including 7 approvals required, 6 unclaimed tasks, 3 overdue tasks, 1 task due within 30 days, 3 tasks due within 60 days, and 4 tasks due within 90 days.
- Team Contracts Due by 'Total Value of Contract':** A bar chart showing the total value of contracts due by month. The data is as follows:

Month	Total Value of Contract
Overdue	33.2K
Sep 2017	10.0K
Oct 2017	25.0K
Nov 2017	33.2K
Dec 2017	175.4K
Jan 2018	0
Feb 2018	0

A tooltip for Dec 2017 indicates: Dec 2017 4 contracts, Total Value of Contract=175.4K.
- Team Tasks:** A table listing tasks with columns for Task ID, Task Title, Task Owners, Status, and Due Date.

Task ID	Task Title	Task Owners	Status	Due Date
1003	Performance Review Reminder	Nigel Hughes	3 - Reassigned	15/09/2017
1005	Rent Review Date	Simon Aspden	1 - Unclaimed	12/10/2017
1004	Review Draft 1, please	Nigel Hughes	1 - Unclaimed	
1006	Contract Renewal Date	Simon Aspden	1 - Unclaimed	15/09/2017
1000	Contract End Date	Simon Aspden	1 - Unclaimed	12/10/2017
- Team Contracts:** A table listing contracts with columns for ID, Title, Contract End Date, Status, Next Event Due, and My Next Event.

ID	Title	Contract End Date	Status	Next Event Due	My Next Event
1136	Supply of Contract Management Software		Open	15/09/2017	15/09/2017
1038	Licence Agreement with Grunstein Music for Editing Software	1/10/2017	Open	16/09/2017	16/09/2017
1135	In-Licence Supply Agmt_Pacitaxel albumin Injectable		Open	30/09/2017	30/09/2017
1004	Employment contract		Open	1/10/2017	1/10/2017
1013	Preferred Supplier Agreement	1/10/2017	Open	1/10/2017	

Contents

Getting started with Secured Signing	2
Secured Signing Setup	2
Integration	2
Set Contract Status during and after Signing.....	5
Send Contract Documents for Signing	7
Signing Workflow.....	9

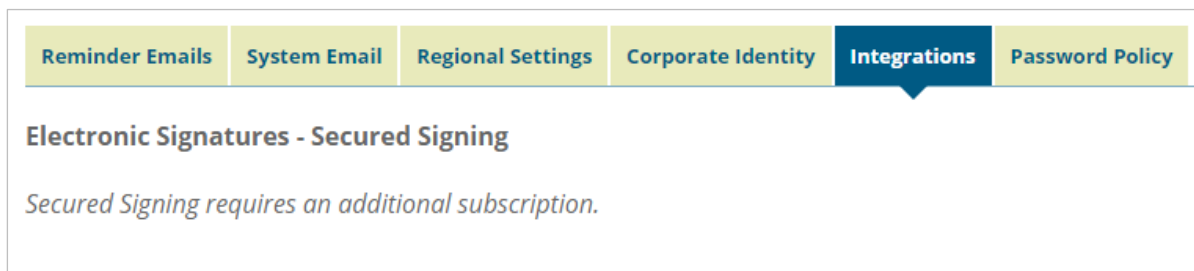
Getting started with Secured Signing

If your Contract Eagle subscription includes electronic signing, you can send documents directly from Contract Eagle to be signed electronically. Signed versions will be automatically ingested back into the same contract record in Contract Eagle.

To use electronic signing, your company will need:

1. a Contract Eagle subscription that allows electronic signing; and
2. your own subscription with one of our supported electronic signing providers, such as Secured Signing (www.securedsigning.com)

If your Contract Eagle subscription does not cover electronic signatures, the Integrations tab will appear as below:



[Get in touch](#) with us if you would like to set up electronic signatures within your existing Contract Eagle subscription.

Secured Signing Setup

Integration

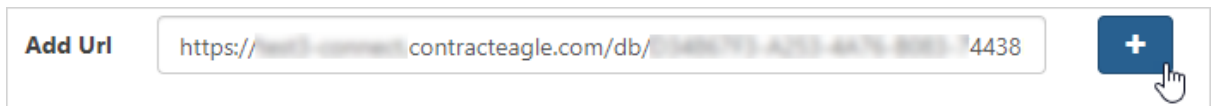
Your System Administrator can set up the integration between Contract Eagle and Secured Signing.

1. Log into Contract Eagle with an account that has System Administrator privileges.
2. Go to **Admin > System Preferences > Integrations** tab.
3. In a separate browser tab, log in to your company's Secured Signing account at <https://www.securedsigning.com> and go to **My Account > My Settings > API Settings > Developer Settings**.

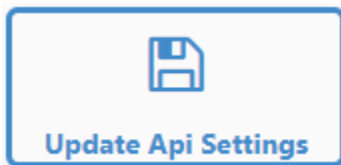
4. Click the **Add Api Key** button.



5. Give the new API key a name, eg "Contract Eagle".
6. Highlight and copy the API key.
7. Go into Contract Eagle and paste the API key into the "API Key" field.
8. Staying in Contract Eagle, highlight and copy the red text of the "Access URI": from "https://".
9. Go back into Secured Signing and paste the Access URI in the "Add Url" field as shown below, and click the plus button to add.



10. Staying in Secured Signing, highlight and copy the contents of the "Secret" field.
11. Click the **Update Api Settings** button.

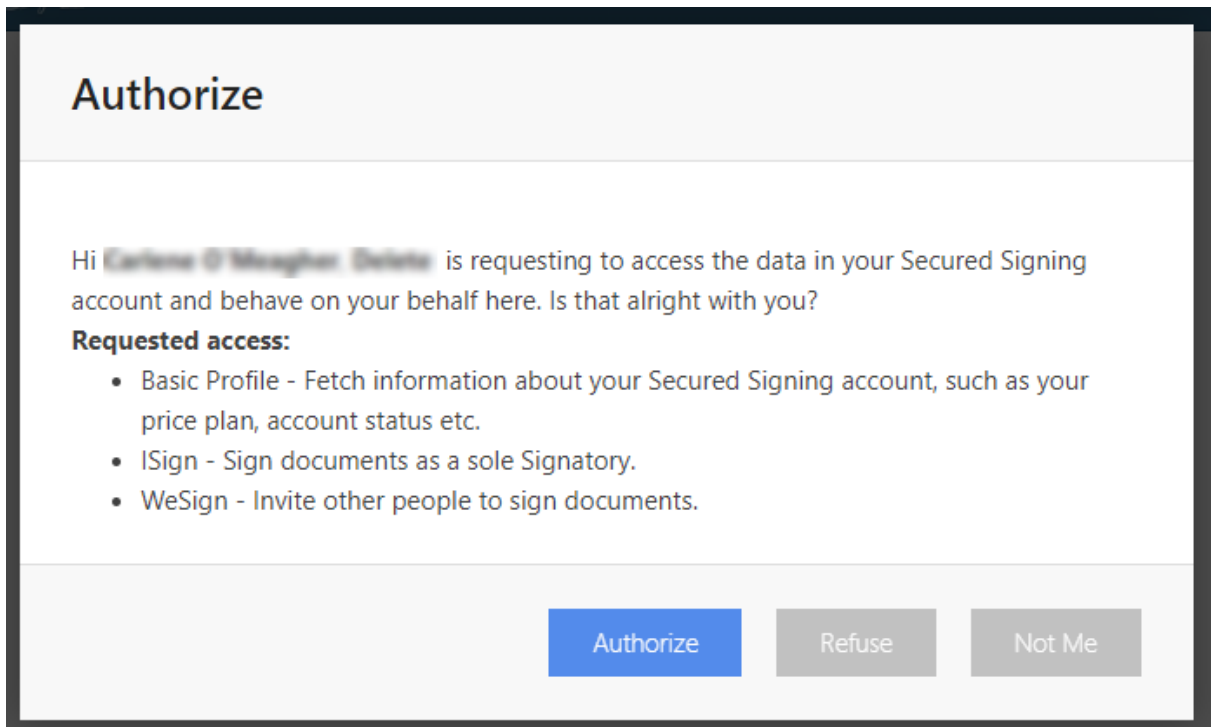


12. Go back into Contract Eagle and paste the text of the Secret into the "Secret" field. Tab or click somewhere outside the field to enable the **Authorize** button underneath.



13. Click **Authorize**.

14. A Secured Signing window will pop up (make sure your browser isn't blocking this), prompting you to log into your account.
15. After logging in, you will see a Secured Signing authorisation screen, as below. Click **Authorize**.



16. Secured Signing is now configured for use with Contract Eagle.

Set Contract Status during and after Signing

Contract Eagle can automatically set the status of your contract when you send documents for signing, eg from “Open” to “Signing in Progress”. When the signing process is complete, it can change the status again, eg to “Signed”. These statuses can be set globally in the System Preferences > Integrations screen, or on a per-contract type basis.

Set a Global Status during Signing Workflow

1. Log into Contract Eagle with an account that has System Administrator privileges.
2. Go to **Admin > System Preferences > Integrations** tab.
3. Scroll down to the **Signing Workflow** section.
4. From the drop-down under “Status during Signing”, select a contract status to reflect the fact that documents have been sent for signing.
5. From the drop-down under “Status after All Signed”, select a contract status to reflect the fact that the contract has been signed.

Signing Workflow

Status during Signing

Signing in Progress X

If this value is set, the contract will be given this status once you commence the signing process. You may override this setting for each contract type.

Status after All Signed

Signed X

If this value is set, the contract will be given this status once you complete the signing process. You may override this setting for each contract type.

6. Click **Save**.

NB: The drop-down lists will display the current available status types. To add new status types to reflect signing workflow, go to the **Contracts** menu > **Maintain Status Types** > **New**, and create new status types with an internal code of **Open**.

Set a Status during Signing Workflow per Contract Type

Even with a global status set, you may override this per contract type. This can be useful if you want to have a different status label on certain contract types when they are sent for signing, eg “Execution Pending”, “Fully Executed”, etc.

Prior to setting this up per contract type, make sure the status types have been set up under **Maintain Status Types**.

1. Go to the **Contracts** menu > **Maintain Contract Types**.
2. Select the contract type for which you wish to set up a different signing workflow status.
3. Go to the **Documents** tab.
4. Select the appropriate status under **Status during Signing** and again under **Status after All Signed**.
5. Click **Save** when you're done.

Documents

Show in Contract Entry Wizard

Show the documents step within the Contract Entry Wizard

Required

Either a document or a document request task must be attached to the contract.

Document Sorting

Newest document first ×

Status during Signing

Being Signed ×

Status after All Signed

Signed ×

Document Help

Send Contract Documents for Signing

Having configured Secured Signing in Contract Eagle, here are the steps to follow to send contract documents for signing:

Select Contract

1. Enter or search for your contract in Contract Eagle. You can send documents for signing from the following views:
 - a. In the Contract Maintenance screen, after adding a new contract or editing an existing one, using the **Save and Sign** button; or
 - b. From the Contract Preview or View screen, using the **Prepare for Signing** button.



Contract: 1029 - Ventitreesimo contratto

Title	Ventitreesimo contratto
Contract Type	Standard Contract
Business Unit	Default Business Unit
Start Date	21/06/2019
Status	Open
Document 75	MOL Fibre - Contract.pdf, 35 KB Loaded at 31/05/2019 08:40:59 by Carlene O'Meagher ▶ View Original Document
Document 74	MOL Fibre - Appendix 1.pdf, 32 KB Loaded at 31/05/2019 08:40:59 by Carlene O'Meagher ▶ View Original Document

View Edit **Prepare for Signing** Reports Exit

Select Documents for Signature

2. After clicking "Prepare for Signing" or "Save and Sign", Contract Eagle will display a list of files uploaded against your contract. Each file eligible for signature will have a check box, depending on your signing provider's file type and file size restrictions, and the document's current signing status.
3. Tick the box(es) of the documents you wish to send for signature.
4. Click the button to **Send to Secured Signing**.

Selected documents will be sent to Secured Signing for signing

Select to Sign	Available for signing?	Description	Date Loaded
<input checked="" type="checkbox"/>	Available for signing	Final - amended clause 4.2 [NDA Sample 1.pdf, 83 KB]	29/09/2015 22:39:00
<input type="checkbox"/>	Available for signing	Original [NDA Sample 1.docx, 11 KB]	29/09/2015 22:39:00

[Send to Secured Signing](#) [Exit](#)

Signing provider launches in browser

5. Having clicked the "Send to Secured Signing" button in Contract Eagle, a Secured Signing WeSign screen will launch in the browser and allow you to prepare your document for signing.
6. Once you've added invitees' details, signing boxes and any other fields, take the final **Send** action in Secured Signing and you will be returned to a Contract Preview screen of your contract.

Signing Workflow

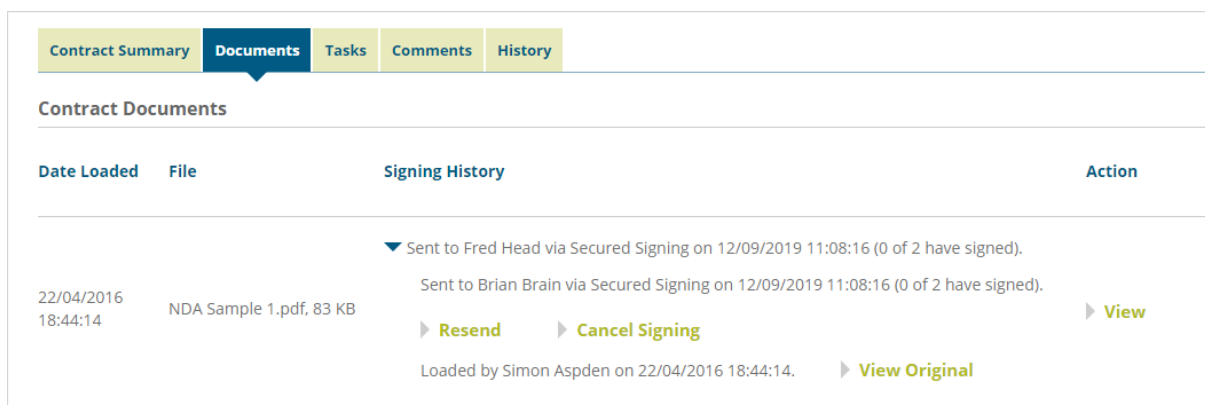
During Signing Process

Contract Eagle now regards your contract as having “Signing in progress”. This will be reflected in your contract’s status if you have configured this within Contract Eagle.

As recipients add signatures to your documents, these actions will be recorded in the Documents tab of your contract.

Signing History and Actions

When signing is in progress, you can view the Signing History in the Documents tab of your contract. You can expand the history section of each document to view each step in the signing process. You may also perform the following actions:



The screenshot shows the 'Documents' tab in the Contract Eagle interface. It displays a table of contract documents with columns for 'Date Loaded', 'File', 'Signing History', and 'Action'. The document 'NDA Sample 1.pdf, 83 KB' is shown with a signing history of two events: 'Sent to Fred Head via Secured Signing on 12/09/2019 11:08:16 (0 of 2 have signed)' and 'Sent to Brian Brain via Secured Signing on 12/09/2019 11:08:16 (0 of 2 have signed)'. The 'Action' column for this document includes 'Resend', 'Cancel Signing', and 'View'. A separate entry shows the document was 'Loaded by Simon Aspden on 22/04/2016 18:44:14' with a 'View Original' action.

Date Loaded	File	Signing History	Action
22/04/2016 18:44:14	NDA Sample 1.pdf, 83 KB	<ul style="list-style-type: none">▼ Sent to Fred Head via Secured Signing on 12/09/2019 11:08:16 (0 of 2 have signed).Sent to Brian Brain via Secured Signing on 12/09/2019 11:08:16 (0 of 2 have signed).	<ul style="list-style-type: none">▶ Resend▶ Cancel Signing▶ View
		Loaded by Simon Aspden on 22/04/2016 18:44:14.	▶ View Original

Resend – Simply resends the original email to your signatories; doesn’t launch the electronic signing prover.

Cancel signing – immediately cancels the signing process by removing all documents from the signing provider. The signing status of the documents is changed to “Aborted”. The documents can be selected for signing again if required.

View original – view the file sent for signing, before any signatures were added.

View signatures – available even while signing is still in progress, to view any signatures added thus far.

View – view the latest version of a document.

Delete – deletes any document but, where signing is in progress, this will have no impact on any signing recipients who have been emailed a link. They will still be able to view and sign the document via the email link. The signed document will not be imported back into Contract Eagle if its original version is deleted from the contract.

Signing Complete

Contract Eagle considers signing complete when all required signatories have added their signature to a document.

Completion of signing will be reflected in your contract's status if you have configured this within Contract Eagle.

Actions when Signing Complete

When signing is complete, you can view the Signing History in the Documents tab of your contract. You can expand the history section of each document to view each step in the signing process. You can also perform the following actions:

View Original – see the original document, as it was, before it was sent for signing.

View Signatures – see each signatory's signed version.

View Signed Document – see the final version of the document including all signatures.