Use a Collect Signatures workflow

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The Collect Signatures workflow routes a Microsoft Office document that is saved to a list or library to a group of people to collect their digital signatures. The Collect Signatures workflow works only with Microsoft Office Word 2007 or Microsoft Office Excel 2007 documents that contain one or more Microsoft Office Signature Lines. By default, the Collect Signatures workflow is associated with the Document content type and it is thus automatically available in document libraries for documents or workbooks that contain Microsoft Office Signature Lines.

In this article

How does the Collect Signatures workflow work?

The Collect Signatures workflow supports a business process that involves sending a document to a group of people to collect signatures. The Collect Signatures workflow makes the digital signature process more efficient by managing and tracking all of the human tasks involved with the signature process and by providing a record of the signature process after it is complete.

The Collect Signatures workflow differs from other predefined workflows in Microsoft Office SharePoint Server 2007 in that users must start this workflow from within the 2007 Microsoft Office system client program in which the signing task will be performed. Participants must also complete their signing tasks for the Collect Signatures workflow within the client program.

To use a Collect Signatures workflow, you must first save your document or workbook to a SharePoint library where the specific Collect Signatures workflow that you want to use is available. To start a Collect Signatures workflow, open the Office Word 2007 document or Office Excel 2007 workbook in which you want to collect one or more signatures. If the document or workbook does not already contain the Microsoft Office Signatures LInes that you need, you must insert them or the Collect Signatures workflow will not be available for use. To start the workflow from within the client program, click the **Microsoft Office Button**, click **Start Workflows**, and then select the Collect Signatures workflow that you want to use. Fill out a workflow initiation form in which you specify the names of the people who need to sign the document. The form automatically displays the names of the suggested signers who are specified within the document or workbook. You can choose to assign the signature tasks in the order in which the signatures appear or to all signers at once.

After the workflow starts, the server assigns signature tasks to all participants. If e-mail alerts are enabled for the server, the server also sends all participants e-mail alerts about their signature tasks. Participants can click the **Edit this Task** button in the e-mail task alert to open the document or workbook to be signed and complete their signature tasks.

While the Collect Signatures workflow is in progress, the workflow owner or the workflow participants can view the Workflow Status page to see which participants have completed their workflow tasks. When the workflow participants complete their workflow tasks, the workflow ends, and the workflow owner receives an e-mail message that the Collect Signatures workflow is complete. This e-mail message specifies the names of all of the people who have signed the document, along with the names of the people who were originally indicated as suggested signers.

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Add or change a Collect Signatures workflow for a library or content type

Before a Collect Signatures workflow can be used, it must be added to a library or content type to make it available for documents or items in a specific location. The Collect Signatures workflow is intended primarily for use in libraries and can be started only on documents that open in Office Word 2007 or Office Excel 2007. You must have the Manage Lists permission to add a workflow to a library or content type. In most cases, site administrators or individuals who manage specific lists or libraries perform this task.

The availability of the workflow within a site varies, depending on where it is added:

- If you add a workflow directly to a library, it is available only for documents in that library.
- If you add a workflow to a list content type (an instance of a site content type that was added to a specific library), it is available only for items of that content type in the specific library with which that content type is associated.
- If you add a workflow to a site content type, that workflow is available for any items of that content type in every list and library to which an instance of that site content type was added. If you want a workflow to be widely available across libraries in a site collection for items of a

specific content type, the most efficient way to achieve this result is by adding that workflow directly to a site content type.

Add or change a Collect Signatures workflow for a library or content type

If you want to add a Collect Signatures workflow to a library or content type, or if you want to change a Collect Signatures workflow that is already associated with a library or content type, you follow the same steps.

1. To go to the Add a Workflow page or the Change a Workflow page for the library or content type to which you want to add a workflow, do one of the following:
   - For a library:
     1. Open the library to which you want to add or change a workflow.
     2. On the **Settings** menu 

, click the settings for the type of library that you are opening.

        For example, in a document library, click **Document Library Settings**.
     3. Under **Permissions and Management**, click **Workflow settings**.
   - For a list content type:
     1. Open the library that contains the instance of the list content type for which you want to add or change a workflow.
     2. On the **Settings** menu 

, click the settings for the type of library that you are opening.

        For example, in a document library, click **Document Library Settings**.
     3. Under **Content Types**, click the name of the content type.

        Note If the library is not set up to allow multiple content types, the **Content Types** section does not appear on the Customize page for the library.
     4. Under **Settings**, click **Workflow settings**.
   - For a site content type:
     1. On the home page for the site collection, on the **Site Actions** menu 

, point to **Site Settings**, and then click **Modify All Site Settings**.
     2. Under **Galleries**, click **Site content types**.
     3. Click the name of the site content type for which you want to add or change a workflow, and then click **Workflow settings**.

Note If workflows have already been added to this library or content type, this step takes you directly to the Change Workflow Settings page, and you need to click **Add a workflow** to go to the Add a Workflow page. If no workflows have been added to this library or content type, this step takes you directly to the Add a Workflow page.

2. On the Change Workflow Settings page, click **Add a workflow** or click the name of the workflow for which you want to change the settings.
3. Do one of the following:
    - If you are adding a workflow, on the Add a Workflow page, in the **Workflow** section, click the **Collect Signatures** workflow template.
    - If you are changing the settings for a workflow, on the Change a Workflow page, change the settings that you want to change according to the following steps.
4. In the **Name** section, type a unique name for the workflow.
5. In the **Task List** section, specify a tasks list to use with this workflow.

    Notes

    - You can use the default **Tasks** list or you can create a new one. If you use the default **Tasks** list, workflow participants will be able to find and view their workflow tasks easily by using the **My Tasks** view of the **Tasks** list.
    - If the tasks for this workflow will reveal sensitive or confidential data that you want to keep separate from the general **Tasks** list, you should create a new tasks list.
    - If your organization will have numerous workflows or if workflows will involve numerous tasks, you should create a new tasks list. In this instance, you might want to create tasks lists for each workflow.

6. In the **History List** section, select a history list to use with this workflow. The history list displays all of the events that occur during each instance of the workflow.

    Note You can use the default **History** list or you can create a new one. If your organization will have numerous workflows, you might want to create a separate history list for each workflow.

7. In the **Start Options** section, specify how, when, or by whom a workflow can be started.

    Notes

    - Specific options may not be available if they are not supported by the workflow template that you selected.
    - The option **Start this workflow to approve publishing a major version of an item** is available only if support for major and minor versioning is enabled for the library and if the workflow template that you selected can be used for content approval.

8. If you are adding this workflow to a site content type, specify whether you want to add this workflow to all content types that inherit from this content type in the **Update List and Site Content Types** section.

   Note The **Update List and Site Content Types** section appears on the Add a Workflow page only for site content types.

9. Click **OK**.

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Start a Collect Signatures workflow on a document or workbook

Before you can start a Collect Signatures workflow, you must save the document or workbook for which you want to collect signatures to a SharePoint library for which the Collect Signatures workflow is available. You must have at least the Edit Items permission to start a workflow. Some workflows may require that you also have the Manage Lists permission in order to start a workflow on an document or item.

Note If you want to ensure that workflow participants receive e-mail notifications and reminders about their workflow tasks after you start a workflow, check with your server administrator to verify that e-mail notifications have been enabled for your site.

1. If the library is not already open, click its name on the Quick Launch.

   If the name of your library does not appear, click **View All Site Content**, and then click the name of your library.

2. Point to the document or workbook on which you want to start a Collect Signatures workflow, click the arrow that appears, and then click **Edit in *Program Name***.
3. If the document or workbook does not already contain signature lines to capture the digital signatures that you want to collect, insert them now.

   How?

4. If you add new signature lines, click the **Microsoft Office Button**, and then click **Save** to save your changes.
5. If the document is checked out, you must also check in the document before you start the workflow. To check in the document, click the **Microsoft Office Button**, point to **Server**, and then click **Check In**.

6. To start the workflow, click the **Microsoft Office Button**, and then click **Start Workflow**.
7. In the **Workflows** dialog box, locate the **Collect Signatures** workflow that you want to use, and then click **Start**.
8. In the ***Workflow Name*** dialog box, type the names of the people you want to sign the document on the appropriate signers lines, or click **Signer** to select people from the directory service.
9. If you want to assign the signature tasks in the order in which signature lines appear in the document, select the **Request signatures in the order above, rather than all at once** check box.

   Note This option is available only if the document contains more than one Microsoft Office Signature Line.

10. If you want other people to receive notifications (not task assignments) when the workflow is started, type their names on the **CC** line, or click **CC** to select people and groups from the directory service.
11. Click **Start**.

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Complete a Collect Signatures workflow task

To complete a Collect Signatures workflow task by adding a signature to a document, you must complete your task from within either Office Word 2007 or Office Excel 2007. However, you can edit a Collect Signatures workflow task on the server to delegate your task to another person or to specify that your signature is no longer required.

Sign a document to complete a Collect Signatures workflow task

1. In your e-mail task message, click the **Edit this Task** button, and then click **Open Document**.
2. In the Message Bar that appears at the top of your active document, click **Sign**.

   Notes

   - If the library where this document is saved requires documents to be checked out before they are edited, you might need to click **Check Out** in the Message Bar before you click **Sign**.
   - If your signature is requested in more than one location in the document, click **View Workflow Tasks** in the Message Bar. In the **Workflow Tasks** dialog box, select a task, and click **Open** to sign in a specific location. Repeat for each signature task that is listed.

3. To add your signature to the document, in the **Sign** dialog box, do one of the following:
   - To add a printed version of your signature, type your name in the box next to the **X**.

- To select an image of your written signature, click **Select Image**. In the **Select Signature Image** dialog box, find the location of your signature image file, select the file that you want, and then click **Select**.
- To add a handwritten signature (Tablet PC users only), sign your name in the box next to the **X** by using the inking feature.
- In the **Sign** dialog box, click **Sign**.

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Edit a Collect Signatures workflow task on the server

1. Go to the **Tasks** list for the site, and then select **My Tasks** on the **View** menu to locate your workflow task.

   Note If the workflow does not use the default **Tasks** list, then your workflow task may not appear in the **Tasks** list. To locate your workflow task, go to the library where the workflow item is saved. Point to the item that you want, click the arrow that appears, and then click **Workflows**. Under **Running Workflows**, click the name of the workflow in which you are a participant. On the Workflow Status page, under **Tasks**, locate your workflow task.

2. Point to the name of the task that you want to complete, click the arrow that appears, and then click **Edit Item**.
3. Do one of the following:
   - To assign your signature task to another person, type that person's name on the **Delegate** line or click **Delegate** to select a person from the directory service.
   - To indicate that the signature line is already signed or that your signature is no longer required, under **Update task**, select the **This signature line has already been signed, or a signature is no longer required** check box.
4. Click **OK**.

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