

# IRISS - Adobe Sign Integration

updated June 25, 2026

## Information for Sponsors and External Partners

The University of Calgary uses an integrated IRISS Adobe Sign process to manage the execution of research agreements. This approach separates responsibilities between systems while ensuring a fully connected and traceable workflow. IRISS functions as the system of record, managing routing, status updates, and visibility across the agreement lifecycle. Adobe Sign is used exclusively for the collection of electronic signatures.

This integration replaces a largely manual process with a system-managed workflow. It enables consistent tracking of agreements, improves transparency for all parties, and reduces the administrative burden associated with signature management. As a result, both study teams and external partners benefit from a more reliable and predictable execution process. This means that all agreement status, progress, and final records are maintained in IRISS, even though signatures are completed in Adobe Sign.

## Visibility of recipients and signatures

All agreements sent for signature include a new AdobeSign tab within IRISS. This tab provides full visibility into the signature process and serves as a central location for tracking execution activity.

Through this tab, users can see all recipients associated with the agreement, including whether each individual has been designated as a *signer* or as a *carbon copy* recipient. The system also displays the exact email address used for each recipient, ensuring clarity around where the agreement has been sent. As signatures are completed, IRISS records the date and time of each signature, creating a complete and transparent audit trail. This allows study teams to clearly see who the agreement was sent to, who has signed, and who is still outstanding.

Once all required signers have completed their actions, the system automatically notifies all carbon copy recipients. This ensures that all relevant parties receive a complete and final version of the executed agreement without requiring additional follow-up.

## Managed signing process

When an agreement enters the signature phase, it is routed through the CSM Legal Adobe Sign workflow. At this point, Adobe Sign manages the signature collection process, while IRISS continues to monitor progress in the background.

IRISS automatically checks the status of the agreement at regular intervals and updates the agreement record accordingly. **This means that manual status updates and separate tracking are no longer required.** All activity is reflected directly in IRISS, ensuring that the agreement status remains accurate and up to date.

Once all required internal signatures have been completed, the signed document is automatically returned to IRISS. From there, the agreement is routed to its next stage based on how the execution pathway was defined at the outset. This automated transition reduces delays and ensures consistency in how agreements move forward.

### **Partially Executed agreements**

A *partially executed* agreement indicates that all required University of Calgary signatures have been completed within the CSM Legal Adobe Sign process, but additional signatures are still required from the counterparty. In practical terms, this means the agreement is only partially complete and requires action from the counterparty to proceed.

In this scenario, the agreement transitions to the External Signatures state in IRISS. This state is specifically designed to provide visibility into agreements that require action outside of the CSM Legal Adobe Sign workflow. The agreement also appears in the study team's inbox to ensure it is actively tracked and not overlooked.

At this stage, responsibility shifts to the study team to coordinate the completion of the remaining signatures. To support this process, automated notifications are sent to key contacts, including the Principal Investigator, designated proxies, administrative contacts, and the counterparty. Notifications are sent at defined intervals (Day 0, 7, 14, 30, and every 2 months thereafter) to provide consistent follow-up and reduce the likelihood of agreements becoming stalled.

Once all parties have signed, the fully executed agreement must be returned to CSM Legal. This is a required step to allow the agreement to proceed to completion. This is done by replying directly to the system-generated notification email and attaching the completed agreement. Upon receipt, CSM Legal reviews the document and advances the agreement to the next stage of the workflow.

**Timely return of the fully executed agreement is critical. Delays at this stage will directly impact the agreement's ability to progress toward activation.**

### **Fully Executed agreements**

A fully executed agreement indicates that all required signatures, including those from external parties, have been completed within the CSM Legal Adobe Sign process.

In this situation, all required signatures have been completed within the system. This means no further signature action is required from the sponsor. The agreement is automatically advanced to the Pending Completion state once all signatures have been captured.

CSM Legal then conducts a final administrative review of the agreement to ensure that all required documentation is in place and that execution has been completed correctly. This step ensures that the agreement record is complete and compliant prior to activation.

## Finalisation and activation

Once an agreement reaches the *Pending Completion* state, final administrative checks are performed. Agreements will remain in this state if additional conditions must be met before activation. This most commonly includes situations where required approvals, such as ethics or animal care certifications, are still pending. The agreement will not be activated until all required approvals have been completed or confirmed as not applicable.

Once all conditions have been met, the agreement is formally activated within IRISS.

## Role of sponsors

Sponsors play an important role in ensuring that agreements move through the execution process efficiently. Prompt review and signature of agreements when received from CSM Legal is essential to maintaining timelines.

In cases where additional signatures are required outside of the CSM Legal Adobe Sign process, the fully executed agreement must be returned once all signatures have been obtained. The most effective way to do this is by replying directly to the notification email generated by the system and attaching the completed agreement.

Providing accurate contact information and ensuring that the correct signing authority is identified at the outset of the process also helps prevent delays.

Delays in signing or returning agreements may result in corresponding delays in finalisation and activation.

## Summary

The IRISS Adobe Sign integration establishes a structured and transparent approach to agreement execution. By combining system-managed routing with automated signature tracking, the process reduces manual effort and improves consistency across all agreements.

This approach ensures that all parties have clear visibility into the status of an agreement, understand what actions are required, and are supported through automated notifications and system-driven workflows. The result is a more reliable, efficient, and clearly defined approach to agreement execution between the University of Calgary and its external partners.

**Example:** Adobe Sign history showing execution type (Fully Executed or Partially Executed) and agreement progression

| History  | AdobeSign                     | Correspondence | Documents | Reviewer Notes           | Ancillary Reviews | Related Projects   | Contacts      | Snapshots |
|--|-------------------------------|----------------|-----------|--------------------------|-------------------|--------------------|---------------|-----------|
| Filter by <span>Activity</span> <input type="text" value="Enter text to search"/> <span>+</span> Add Filter <span>✕</span> Clear All   |                               |                |           |                          |                   |                    |               |           |
| Activity   | Author                        |                |           |                          |                   |                    | Activity Date |           |
|  | Sent for AdobeSign Signatures |                |           | agreementsreviewer, Test |                   | 2026-06-03 8:14 AM |               |           |
| Partially Executed: The agreement is considered PARTIALLY EXECUTED once the CSM Legal Adobe Sign process is complete. The counterparty is copied on the agreement, but their signatures are still outstanding. |                               |                |           |                          |                   |                    |               |           |

**Example:** Adobe Sign tab showing recipient roles, email addresses, and signature status

| History          | AdobeSign                    | Correspondence | Documents  | Reviewer Notes |
|------------------|------------------------------|----------------|------------|----------------|
| Agreement Status | Authoring                    |                |            |                |
| <b>Date Sent</b> | 5-12-2026 8:46:19 AM         |                |            |                |
| Last Updated     | 5-12-2026 8:46:19 AM         |                |            |                |
| Documents        | AdobeSign Test.pdf           |                |            |                |
| Recipient Status | Legalnegotiations@company.ca | CARBON_COPY    |            |                |
|                  | assarkha@ucalgary.ca         | CARBON_COPY    | Not Signed |                |
|                  | kaleb.chisholm@ucalgary.ca   | SIGNER         | Not Signed |                |
|                  | becks@ucalgary.ca            | CARBON_COPY    | Not Signed |                |

## Frequently Asked Questions (FAQ)

### 1. Why am I receiving this agreement through Adobe Sign?

The University of Calgary uses Adobe Sign as part of an integrated IRISS–Adobe Sign process to manage agreement execution. Adobe Sign is used to collect signatures, while IRISS manages workflow, status updates, and the official record of the agreement.

### 2. Where can I see the status of the agreement?

Agreement status is tracked within IRISS. Study teams have full visibility of recipient details, signature progress, and completion status through the AdobeSign tab in IRISS.

### 3. What is the difference between “Partially Executed” and “Fully Executed”?

- A **Partially Executed** agreement means that University of Calgary signatures are complete, but additional signatures are still required from the counterparty.
- A **Fully Executed** agreement means that all required signatures, including those from the counterparty, have been completed when the CSM Legal Adobe Sign process is complete.

### 4. What action is required from me if the agreement is Partially Executed?

If the agreement is Partially Executed, additional signatures are required outside of CSM Legal Adobe Sign process. Once all required signatures have been obtained, the fully executed agreement must be returned to CSM Legal by replying to the notification email and attaching the signed document.

### 5. What happens after all signatures are completed?

Once all required signatures are complete, the agreement is returned to IRISS and moves to the **Pending Completion** state. CSM Legal will complete final administrative checks before the agreement is activated.

### 6. Will I receive a copy of the fully executed agreement?

Yes. Once the agreement is fully executed, a copy is distributed to the appropriate recipients, including the counterparty.

### 7. Why am I receiving notification emails?

Notifications are sent to support timely completion of agreements outside of the CSM Legal Adobe Sign process. For agreements requiring external signatures, reminders are sent at defined intervals until the agreement is completed.

### 8. What should I do with notification emails requesting a signed agreement?

You should reply directly to the notification email and attach the fully executed agreement. This ensures the agreement can be reviewed and progressed without delay.

**9. What happens if I do not return the fully executed agreement?**

The agreement cannot proceed to completion until the fully executed document is received. Delays in returning the agreement may result in delays in finalisation and activation.

**10. Who should I contact if I have questions about the agreement?**

If you have questions about the agreement or the signing process, you should contact the study team or the University of Calgary CSM Legal at [csmlegalsigning@ucalgary.ca](mailto:csmlegalsigning@ucalgary.ca).