Managing Completed Documents via Outlook vs Adobe Sign

Some departments and users manage completed Adobe Sign documents through Outlook rather than within the Adobe Sign platform. This occurs when users rely on workflow completion emails (which include attached copies of completed documents) to locate and manage electronic paperwork instead of using Adobe Sign's built-in agreement queues. These email notifications are meant as general confirmations - not as a primary tool for document management. While this approach can work, it's *not a best practice*, as it is much more limited when compared to the dedicated searching, tracking, and document management features available within Adobe Sign.

-Key Points-

Best Practice for Departments Using Shared Inboxes: Departments that manage or participate in workflows through a shared Outlook inbox should ensure that all directly involved staff are added as individual Adobe Sign participants - using their own Southern email addresses - by the workflow initiators. This applies whether they are added as a signer, approver, reviewer, or CC'd recipient, etc. Doing so allows each participant to view, search, and manage agreements directly within Adobe Sign, while the shared inbox still receives copies for general documentation or record keeping.

Best Practice for Individual Users: Individual workflow participants who receive Adobe Sign email notifications should use the Adobe Sign platform to review, search, and manage agreements rather than relying solely on their Outlook inbox. Email notifications are meant as convenient confirmations with links (that will eventually expire) and attached backup copies of workflow documents. Adobe Sign provides the dedicated queues and tracking tools needed for effective document management.

Alternatives (not recommended): Departments who utilize shared inboxes, and individual users who prefer to search for and manage completed documents through their own Outlook inbox, can continue doing so. However, searches and document management will be limited to Outlook's capabilities. For individual users who rely on accessing Adobe Sign documents through links included in corresponding email notifications, please keep in mind that the links will ultimately expire - which is yet another reason document management can be handled more reliably from within the Adobe Sign platform.

Summary & Best Practices

Managing completed Adobe Sign documents through Outlook works, but it can significantly limit efficiency and visibility. For improved tracking and search capabilities, staff who need access to workflow document should be included as individual Adobe Sign participants - even when a shared departmental inbox is also CC'd for general documentation purposes.