ADOBE SIGN SERIES
Faculty and Staff

Adobe Sign

SENDER ADVANCED

Quick Reference Guide

APRIL 2020
© 2020. All Rights Reserved.

CSU Bakersfield

REVISION CONTROL

Document Title:	Adobe Sign - Advanced Guide - QRG.docx
Author:	Campus Training, Dr. Tammara Sherman

Revision History

Revision Date	***Revised By***	***Summary of Revisions***	***Section(s) Revised***
4/30/2020	T. Sherman	Created document	All

Review / Approval History

REVIEW DATE	REVIEWED BY	ACTION (REVIEWED, RECOMMENDED OR APPROVED)

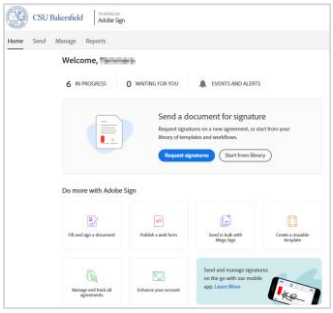
TABLE OF CONTENTS

1.0 INTRODUCTION 5
1.1 About This Guide 5
2.0 Recipient / Participant Roles 5
3.0 WEB FORMS 6
3.1 Create a web form 6
3.2 Disable A Web Form 7
3.3 Enable a Web Form 8
4.0 REUSABLE TEMPLATES 8
4.1 Creating Reusable Templates 8
4.2 Viewing your Templates 9
4.3 Editing Reusable Templates 9
4.4 Deleting Reusable Templates 10
5.0 REUSABLE FORM FIELD TEMPLATES 12
5.1 Creating Reusable Form Field Template 12
5.2 Applying a form field template 13
6.0 LIBRARY DOCUMENTS 15
7.0 TRACK DOCUMENTS 16
7.1 Viewing Documents 16
7.2 Viewing the Audit Report 16
7.3 REMINDERS 17
7.3.1 Sending reminders 17
7.3.2 Editing Reminders 17
7.3.3 Canceling Reminders 18
7.4 EXPIRATION DATES 18
7.4.1 Setting Expiration Dates 18
7.4.2 Editing Expiration Dates 18
7.4.3 Canceling Expiration Dates 19
7.5 Modify In-Transit Documents 19
7.6 Cancel In-Transit Documents 20
7.7 Download Form Data 21
8.0 MEGA SIGN 22
8.1 Mega Sign Manually 22

8.2 Mega Sign with Import 23
8.2.1 Preparing your CSV file for Import 23
8.2.2 Importing your CSV File into Mega Sign 24
9.0 GETTING HELP 26

1.0 INTRODUCTION

Adobe Sign is an electronic form and signature application. It allows you to send electronic documents to recipients for signature. Additionally, you can take existing documents, make them fillable, and prepare them for electronic signatures.



1.1 About This Guide

This guide focuses on advanced Adobe Sign functionality. It will walk you through the advanced topics, such as web forms, mega sign, reusable templates, tracking documents, and reports.

For information on basic Adobe Sign functionality for senders, see the Adobe Sign Sender Basics Quick Reference Guide.

2.0 RECIPIENT / PARTICIPANT ROLES

For each recipient email address you add, you can specify their role. The table below describes the different roles and best use.

Role	Symbol	Description	Best Use
Signers	Signer	• Default participant role. • Each signer must have at least one signature field assigned to him or her. • If the system does not find a signature field for the signer, it automatically generates a signature block at the end of the document.	• Signature is needed • Example: Student, Faculty, Employee, MPP/Director, AVP/Dean, or anyone needing to sign
Approvers	Approver	• Not required to sign or interact with any fields. • Enter their name before sending the document to the signers. • Fields can be assigned to approvers, and if those fields are required, they need to fill them out.	• Situations where someone needs to review a document for accuracy before it's sent to the next signer • Example: An MPP/Director or Administrative Assistant who reviews before an AVP/Dean signs
Acceptors	Acceptor	• Similar to Approvers in that they do not need to apply a signature, • If form fields are assigned to them, they can fill them out.	• When the recipient needs to acknowledge an acceptance of the document without formally approving the content. • Example: front counter in an office who receives documents

3.0 WEB FORMS

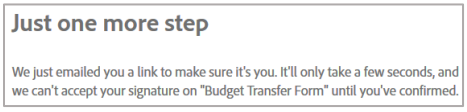
Web Forms allow you to create documents that are fillable and that contain your embedded workflow. Anyone with the URL to the web form can initiate the form filling and signing process. For example, you can host your web form on a website. After a person completes the form, Adobe Sign will send the form to the recipients you specified.

Use Web Forms when you have frequent forms or documents that individuals can initiate from outside of Adobe Sign and subsequent signers are always the same individual or individuals. As such, Web forms work well for most student forms and documents.

3.1 Create a web form

When creating Web Forms, the first signer can be anyone and the other signers (counter signers) must be the same person(s) every time. To create a web form,

1. From the Home tab, click **Publish a web form**
2. In the Web Form Name, enter a meaningful name for your web form
3. In the Web Form Recipient Role, select **Signer**
   - Signer - Signers must apply a signature in addition to any other fields that are required
   - Approver - Approvers can fill fields, but are not required to apply a signature
   - Acceptor - Acceptors, like Approvers, can fill field content, but are not obligated to provide a signature
   - Form Filler - Form Fillers can only fill fields and cannot sign the document.
4. Leave the Web Form Authentication set to None (Email verification will be used after the form is submitted). The signer will see a message similar to the one below.



5. (Optional) In the Counter-Signers, select roles as needed
   Counter-signers are individuals who always sign after the person who visited the web form has completed and signed the form.
6. To add a document, click **Add Files**

7. On the Select Files screen, click **Choose Files from my Computer**
8. Navigate to the desired document and click **Open**

   Your selected documents will appear in the Files section. You can click Add Files to add more documents.

To remove a document, click the X. To reorder the files, drag and drop them in the desired order.

9. Click **Next**

10. Add the fields to the document as necessary.

    For more information on adding fields manually or using the auto detection feature, please refer to the Adobe Sign Sender Basics QRG.

11. Click **Save**

12. The next screen will show your document and links for your web form. Click either the Copy Web Form URL (recommended) or Copy Web Form Embed Code links to copy the link.

    You can paste the links into a document until you are ready to add the link to your website. If you are using the WCMS or Cascade Server to host your website, then use the Copy Web Form URL option.

3.2 Disable A Web Form

You can disable a web form when you no longer want it accessible by signer. You will still have access to the form in Adobe Sign.

1. Click Manage Tab

2. In the left pane, click Web Forms

3. Click the desired web form

4. From the right pane, click Disable

5. On the Disable Web Form page, make your selection

   - Redirect signers to another web page:

     Redirects the signers to another web page, like a current version of the web form

   - Enter a custom message to signers:

     Enter a message that will be displayed in place of the web form. You can add hyperlinks to the message by enclosing them in brackets [ ]. You can add labels by using the | (pipe) symbol after the URL. For example, [https://www.sign.adobe.com/ | Adobe Sign] will display as Adobe Sign.

6. Click Disable

   - A success message is displayed
   - The status changes
   - The redirect method is inserted under the status
   - The ability to edit the web form is removed

3.3 Enable a Web Form

You can enable a disabled web form from Adobe Sign.

1. Click Manage Tab
2. In the left pane, click Web Forms
3. Click the desired web form
4. From the right pane, click Enable
5. Click Enable again

4.0 REUSABLE TEMPLATES

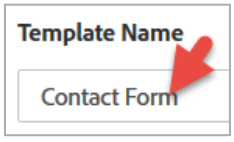
Reusable Templates are documents that you can create for reuse. You will only have to add your form fields once. Adobe Sign places your reusable templates in your document library. You can share your templates with others for their use. However, they will not be able to edit or delete the templates.

4.1 Creating Reusable Templates

To create a reusable template,

1. From the Home tab, click **Create a reusable template**

2. In the Template Name, enter a meaningful name

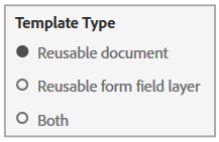


3. To add a document to base your template on, click Add Files

4. On the Select Files screen, click **Choose Files from my Computer**
5. Navigate to the desired document and click **Open**
6. Your selected documents will appear in the Files section.

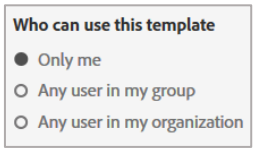
If necessary, you can add more documents by clicking the Add. To remove a document, click the X. To reorder the files, drag and drop them in the desired order.

7. Under Template Type (right pane), select **Reusable document**



8. For Who can use this template, select Only me, Any user in my group, or Any user in my organization.

   Please note:
   Sharing your template with others allows them to use it to send out for signatures. However, they will not be able to edit or delete the template.



9. Click **Preview & Add Fields**

10. Add the fields to the document as necessary.

    For more information on adding fields manually or using the auto detection feature, please refer to the Adobe Sign Sender Basics QRG.

11. Click **Save**

4.2 Viewing your Templates

To view your template,

1. From the Home page, click **Start from library**

2. In the left pane, click **Templates**

3. Locate the desired document

4. Double-click the desired template to open it.

4.3 Editing Reusable Templates

You can make changes to an existing template in your document library. You can find all your templates on the Manage page. You only can edit or delete templates that you created.

1. From the Home page, click **Manage**

2. In the left pane, click **Templates**

3. Locate the template you would like to edit
4. Click **Edit** to make changes
5. If necessary, add the fields to the template.

   For more information on adding fields manually or using the auto detection feature, please refer to the Adobe Sign Sender Basics QRG. For information on editing form fields, please refer to the Adobe Sign Form Fields QRG.

6. To edit the name of the template,

   - Expand the Template Properties
   - In the Template Name, enter the new name

7. To edit the sharing properties,

   - Expand the Template Properties
   - Under Who Can Use, make your selection

8. When finished, click **Save**

4.4 Deleting Reusable Templates

You can delete an existing template in your document library. You can find all your templates on the Manage page. You only can delete templates that you created.

Please note:

- *Deleting a template is a permanent action. As such, the template cannot be recovered.*
- *When deleting a template, be sure to remove the sharing access. Otherwise, the people, with whom you shared the template, will continue to have access to it and to use it.*

1. From the Home page, click **Manage**

2. In the left pane, click **Templates**

3. Locate and select the template you would like to delete

4. In the right pane, click **Delete**

5. Click **Delete** again to confirm.
   This deletes your template permanently from your library

5.0 REUSABLE FORM FIELD TEMPLATES

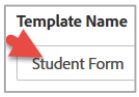
Form field templates allow you to create reusable field layers. You can apply these field layers to any document. These field layers work well for fields that are common among several documents, such as name, email address, CSUB ID, etc. Alternatively, you can use if the same document can be sent different ways.

5.1 Creating Reusable Form Field Template

To create a form field template,

1. From the Home tab, click **Create a reusable template**

2. In the Template Name, enter a meaningful name



3. To add a document to base your template on, click **Add Files**

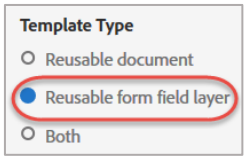
4. On the Select Files screen, click **Choose Files from my Computer**

5. Navigate to the desired document and click **Open**

6. Your selected documents will appear in the Files section.

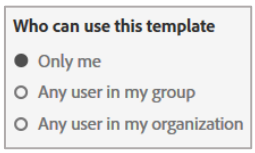
If necessary, you can add more documents by clicking the Add. To remove a document, click the X. To reorder the files, drag and drop them in the desired order.

7. Under Template Type (right pane), select **Reusable form field layer**



8. For Who can use this template, select Only me, Any user in my group, or Any user in my organization.

Please note:
Sharing your template with others allows them to use it to send out for signatures. However, they will not be able to edit or delete the template.



9. Click **Preview & Add Fields**

10. Add the fields to the document as necessary.

    For more information on adding fields manually or using the auto detection feature, please refer to the Adobe Sign Sender Basics QRG.

11. Click **Save**

5.2 Applying a form field template

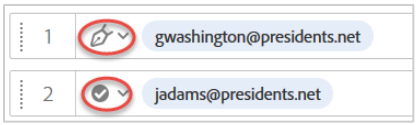
You can apply form field reusable layers to other documents. To apply a form field template,

1. Click the **Send** tab

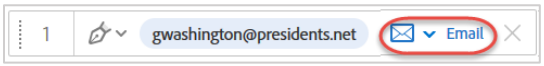
2. Enter the email addresses for the recipients. (Click the X to remove a recipient)

3. For each recipient, use the drop down menu to select the recipient's role.

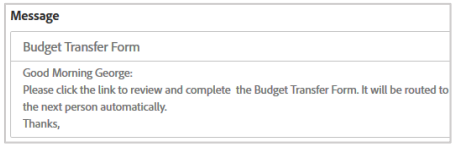
   For more information on the different roles, see the Recipient / Participant Roles section.



4. Leave the Identity Verification set to **Email**.
   The Identity Verification ensures that the recipient's identity is verified using one of the selected methods. The recommended selection is Email.



5. For the Message,
   - In the Agreement Name box, enter a subject for your email
   - Enter your message for the email



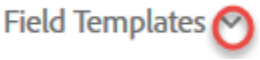
6. Click **Add Files** to add your documents. (You can also drag and drop the files)

7. On the Select Files screen, click **Choose Files from my Computer**
8. Navigate to the desired document and click **Open**
9. Your selected documents will appear in the Files section. You can click Add Files to add more documents. *To remove a document, click the X.*

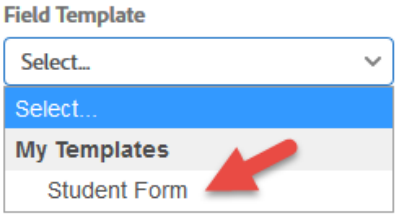
10. (Optional) Make selections from the Options section

    From the Options section, you can password protect your document, set a completion deadline date, and set a reminder. For more information about these options, see the next section.

11. When you are finished adding documents, click **Next** button
12. Adobe Sign will process your document.
13. Expand the Field Templates drop down (upper left)



14. For Field Template,
    - Select the desired field template from the drop down



    - Select the desired Start of Page
    - Click **Apply**

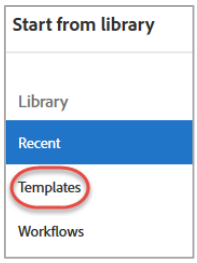
15. After the fields are added, Click **Send** (lower left hand corner).

6.0 LIBRARY DOCUMENTS

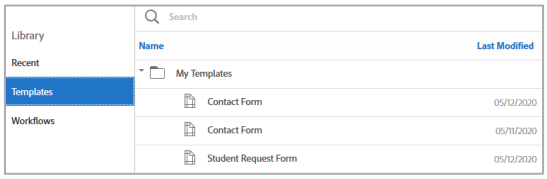
Templates and Workflows are added to the document library, as well as, documents that are shared with you. To send a document using the library,

1. From the Home tab, click **Start from Library**

2. Click **Templates**



3. Locate and select the desired document



4. Click **Start** (lower left)

5. Complete the document.

7.0 TRACK DOCUMENTS

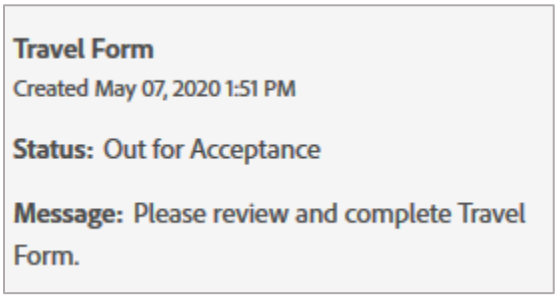
The Manage page allows you to track your documents. You can view the documents that are in progress, waiting for your signature or approval, completed, canceled, expired, drafts, and more. Additionally, you can search for documents and filter the documents by date and other keywords.

7.1 Viewing Documents

You can view documents that are in-transit from the Manage page.

1. From the main page, click **Manage**

2. In the center, click the desired document
3. The right pane will show you information about the document, such as the status, the sender, and the included message.



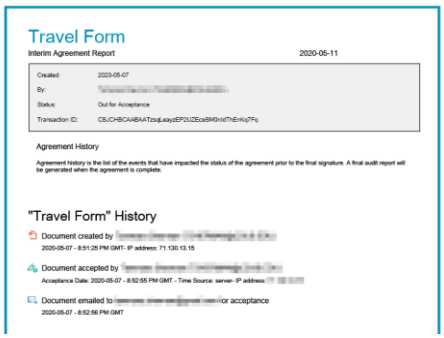
4. In the right pane, click **Open Agreement**

7.2 Viewing the Audit Report

The Audit report shows the history for the agreement. It will show timestamps for when the document was sent, when each recipient signs the document, and more. To view the audit report,

1. From the main page, click **Manage**

2. In the center, click the desired document
3. From the right pane, click **Download Audit Report**
4. Next,
   - Click the **Open with**
   - Click **OK**
5. The audit report opens.



7.3 REMINDERS

You can send reminders for documents that are out for signature.

7.3.1 Sending reminders

To send a reminder,

1. From the Home tab, click **Manage**

2. Locate and select the desired document
3. From the right pane, click **Reminder**
4. On the Add a reminder window,
5. Select a frequency
6. Select who you want to remind
7. (Optional) Enter a message with your reminder
8. Click Create

7.3.2 Editing Reminders

To edit a reminder,

1. From the Home tab, click **Manage**

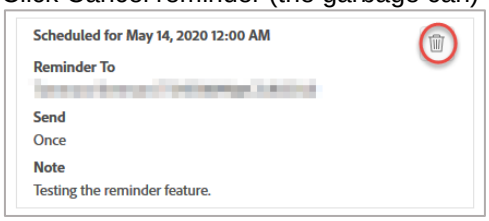
2. Locate and select the desired document
3. From the right pane, click **Reminder**
4. On the Add a reminder window,
    - Select a frequency

- Select who you want to remind
- (Optional) Enter a message with your reminder
- Click Create

7.3.3 Canceling Reminders

To cancel a reminder,

1. Select the reminder you want to cancel
2. Click Cancel reminder (the garbage can)



7.4 EXPIRATION DATES

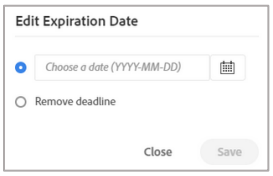
You can set expiration dates for documents.

7.4.1 Setting Expiration Dates

To set an expiration date,

1. From the Home tab, click Manage

2. Locate and select the desired document
3. From the right pane, click the pencil beside Expiration Date
4. On the Edit Expiration Date window, enter a date or use the calendar icon
5. Click Save

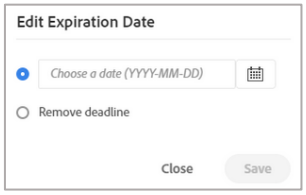


7.4.2 Editing Expiration Dates

To edit an expiration date,

1. From the Home tab, click **Manage**

2. Locate and select the desired document
3. From the right pane, click the pencil beside Expiration Date
4. On the Edit Expiration Date window, edit the date or use the calendar icon
5. Click Save

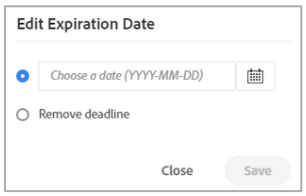


7.4.3 Canceling Expiration Dates

To cancel an expiration date,

1. From the Home tab, click **Manage**

2. Locate and select the desired document
3. From the right pane, click the pencil beside Expiration Date
4. On the Edit Expiration Date window, click **Remove deadline**
5. Click Save



7.5 Modify In-Transit Documents

You can modify a document that is out for signature under certain conditions. You cannot modify a document if any recipients has taken action. For example, you cannot modify documents where the:

- Signer has signed the document
- Approver has approved the document
- Delegator has delegated the document or
- Document was denied.

However, if the signer has delegated the sign and the document is not signed yet, then you may be able to modify it. Similarly, if the Approver has delegated the approving of the document and the document is not approved yet, then you may be able to modify it.

1. From the Home tab, click **Manage**

2. Locate and select the desired document
3. Click on **Modify Agreement**
4. The document will open. Areas that are not available to you will be grayed out. At this point, you can add another document, add fields to a document,
5. To add another document, click **Add Files**

6. On the Select Files screen, click **Choose Files from my Computer**
7. Navigate to the desired document and click **Open**
8. Your selected documents will appear in the Files section. You can click Add Files to add more documents.

   To remove a document, click the X. To reorder the files, drag and drop them in the desired order.

9. To add fields to the document, check **Preview & Add Signature Fields**
10. Click **Next**
11. Add the fields to the document as necessary.

    For more information on adding fields manually or using the auto detection feature, please refer to the Adobe Sign Sender Basics QRG.

12. Click **Update** to send the modified document for signature.

    When the Recipient receives the document email, the recipient will see a message indicating that the document was modified by sender.

7.6 Cancel In-Transit Documents

If the need arises, you can cancel a document that you sent for signature. Canceling a document will stop the signing process and the ability to complete the document. The canceled document will be moved to the Canceled category of the Manage page.

1. From the Home tab, click **Manage**

2. Locate and select the desired document

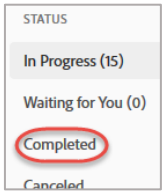
3. From the right pane, click **Cancel**
4. In the box, enter a reason for canceling the document
5. (Optional) check the Notify participants via email, if you want to notify the participants that the document was canceled,
6. Click Cancel Agreement

7.7 Download Form Data

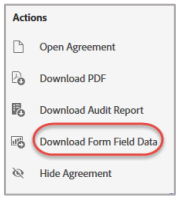
To download form field data,

1. From the Home tab, click **Manage**

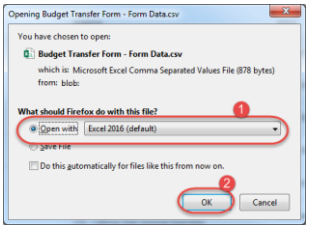
2. In the left pane, click **Completed**



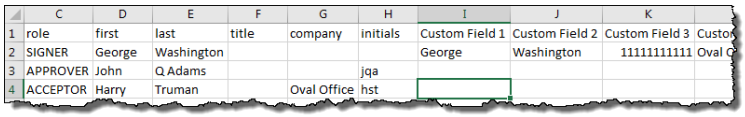
3. Locate and select desired document
4. Under Actions (right pane), click **Download Form Field Data**



5. On the dialog box,
   - Click **Open with Excel 2016**
   - Click **OK**



6. The form data opens in Excel 2016



	C	D	E	F	G	H	I	J	K	
1	role	first	last	title	company	initials	Custom Field 1	Custom Field 2	Custom Field 3	Custo
2	SIGNER	George	Washington				George	Washington	11111111111	Oval O
3	APPROVER	John	Q Adams			jqa				
4	ACCEPTOR	Harry	Truman		Oval Office	hst				

8.0 MEGA SIGN

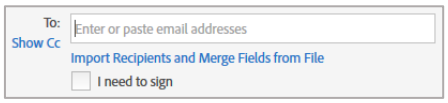
Mega Sign allows you to send an individual document to many people at once. It allows you to enter the recipient email addresses individually or to import their email addresses using a CSV file. You can either enter or paste the email addresses or import them. This section will cover both options.

8.1 Mega Sign Manually

To manually add recipients to Mega Sign,

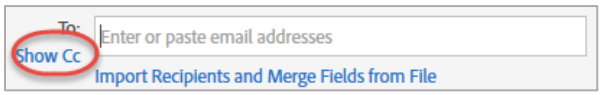
1. From the Home page, click **Send in bulk with Mega Sign**

2. In the To, enter or paste the email addresses



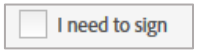
3. (Optional) If you need to carbon copy individual(s),

   - Click the **Show CC**



   - In the CC, enter or paste the email addresses

4. (Optional) If you need to sign the document, check **I need to sign**



5. In the Agreement Name, enter the name of the document

6. In the Message, enter your message, such as Please review and complete the form.

7. Click **Upload** to add your document
8. Navigate to the desired document and click **Open**
9. Click **Send**
10. (Optional) add the fields to your document.

    For more information on adding fields manually or using the auto detection feature, please refer to the Adobe Sign Sender Basics QRG.

11. (Optional) If you want the document added to your document library, check **Save to document library** (right pane)
12. Click **Send**
13. Each recipient will receive an email with an instance of the document. To track the documents, use the Manage feature from the Adobe Sign Home tab. For more information, refer to the Track Documents section of this document.

8.2 Mega Sign with Import

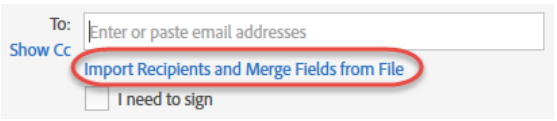
When importing our email addresses to Mega Sign, you will need to prepare your CSV ahead of time. This section will cover preparing your CSV file and importing it into Mega Sign.

8.2.1 Preparing your CSV file for Import

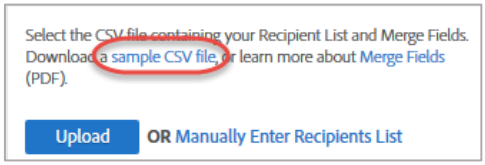
Before you begin, you will need to prepare your CSV file. Mega Sign can import up to 300 email addresses at a time. To prepare your import file,

1. From the Home page, click Send in bulk with Mega Sign

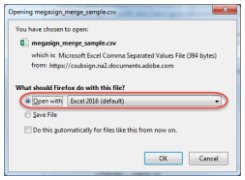
2. Below the To field, click the Import Recipients and Merge Fields from File link



3. When the box opens, click the **Sample CSV File**



4. Click **Open with Excel 2016**



5. Click **OK**

6. The file will open in Excel. The file will contain 7 columns with sample information. However, you will only need to use column A.

	A	B	C	D	E	F	G	H
1	_es_signe	_es_signe	_es_signe	_es_signe	_es_agree	Phone	zipcode_es_signer	
2	casey@so	Casey Jon	Casey's co	Casey's tit	Hi Casey,	555-555-5	98765	
3	jane@son	Jane Doe	Jane's con	Jane's titl	Hi Jane, fc	666-666-6	12345	
4								

7. Delete columns C-G.

	A	B	C
1	_es_signer_email	_es_signer_fullname	
2	casey@some.email.domain	Casey Jones	
3	jane@some.email.domain	Jane Doe	

8. In columns A and B, delete the information in rows 1-2.

	A	B
1	_es_signer_email	_es_signer_fullname
2		
3		

9. In column A - B, copy and paste your email addresses and full names beginning in row 2

	A	B
1	_es_signer_email	_es_signer_fullname
2	ofc365-47@o365training.csub	Abraham Lincoln
3	ofc365-50@o365training.csub	Andrew Jackson
4	ofc365-11@o365training.csub	Barack Obama
5	ofc365-23@o365training.csub	Benjamin Franklin
6		

Do not delete the column headers in A1 and 2. Remember, Mega Sign will only import 300 email addresses at a time.

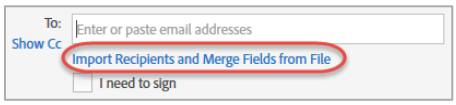
10. Save your Excel file to your desktop with a meaningful name. When asked about the format, click Yes.

11. Close your CSV file. If asked, click Don't Save.

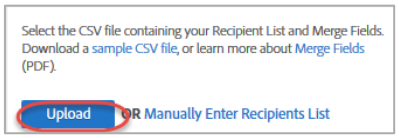
8.2.2 Importing your CSV File into Mega Sign

1. From the Home page, click Send in bulk with Mega Sign

2. Below the To field, click the **Import Recipients and Merge Fields from File** link

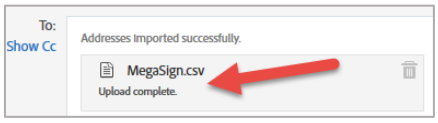


3. When the box opens, click **Upload**



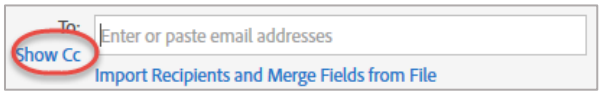
4. Navigate to the file you saved earlier and click **Open**

5. Your file will appear below the To box.



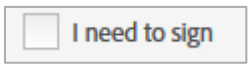
6. (Optional) If you need to carbon copy individual(s),

   - Click the **Show CC**



   - In the CC, enter or paste the email addresses

7. (Optional) If you need to sign the document, check **I need to sign**



8. In the Agreement Name, enter the name of the document

9. In the Message, enter your message, such as Please review and complete the form.

10. Click **Upload** to add your document

11. Navigate to the desired document and click **Open**

12. Click **Send**

13. (Optional) add the fields to your document.

    For more information on adding fields manually or using the auto detection feature, please refer to the Adobe Sign Sender Basics QRG.

14. (Optional) If you want the document added to your document library, check **Save to document library** (right pane)

15. Click **Send**

16. Each recipient will receive an email with an instance of the document. To track the documents, use the Manage feature from the Adobe Sign Home tab. For more information, refer to the Track Documents section of this document.

9.0 GETTING HELP

If you are unsure or need assistance, please consider the preferred sources and order in which to contact listed below:

- **Web Resources**
  Adobe Sign Resources

- **Service Center**
  661-654-4357
  servicecenter@csub.edu