CHECK IN
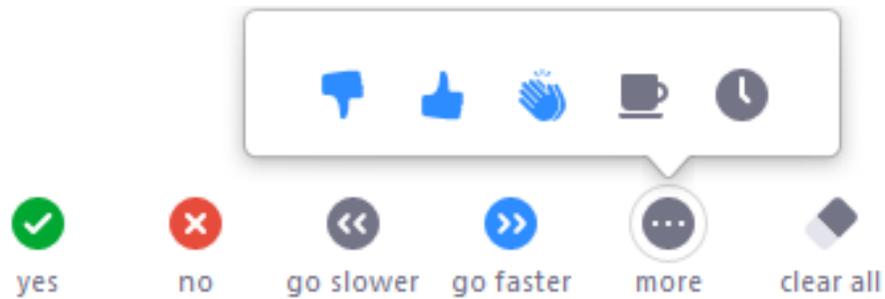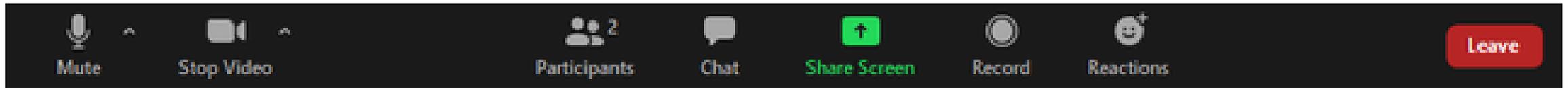
> Name & Department

> Prior experience working with fillable forms and electronic signatures

> What you would like to learn today

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ZOOM VIRTUAL ENVIRONMENT

BEST PRACTICES
- Mute your Microphone when joining
- Use the Space Bar to unmute yourself temporarily
- If you don't want your personal environment visible,
  - Stop Video Sharing or
  - Use a virtual background,
- Use the Chat window to ask questions or make comments (i.e. slow down, repeat that, etc.)

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Today's session will be recorded

START RECORDING

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SESSION GOAL

To teach you how to send and create fillable forms for signatures.

SESSION OBJECTIVES

> At the end of the session, the participants will be able to:

– Articulate function and purpose of Adobe Sign

– Distinguish between forms created with Adobe Acrobat Professional and Adobe Sign

– Identify the form design best practices

– Navigate the Adobe Sign environment

– Complete a non-fillable form

– Request signatures

– Use auto-detection to add form fields

– Fill and complete a document for signature

– Send documents for signature from library

– Set completion deadline and set reminder

– Approve and deny documents

– Send a shared document for signature

– Delegate documents to someone else

– Identify key elements of the document audit report

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WHAT IS ADOBE SIGN?

> Cloud based electronic document signing service that works on desktops, tablets, & phones

Sign through Email

Reduce Processing Time

Eliminate Paper and Wet signatures

Track Progress / Send Reminders

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HOW IT WORKS?

Form Fillers and Signers:

- Can complete and sign any form or document
- Can enable forms for use with Adobe Sign

Default Group

Form Initiators

- Anyone who begins the form signing process

Form owners:

- Should enable their forms for use with Adobe Sign
- Make their forms available for use

Publishers Group

Adobe Sign

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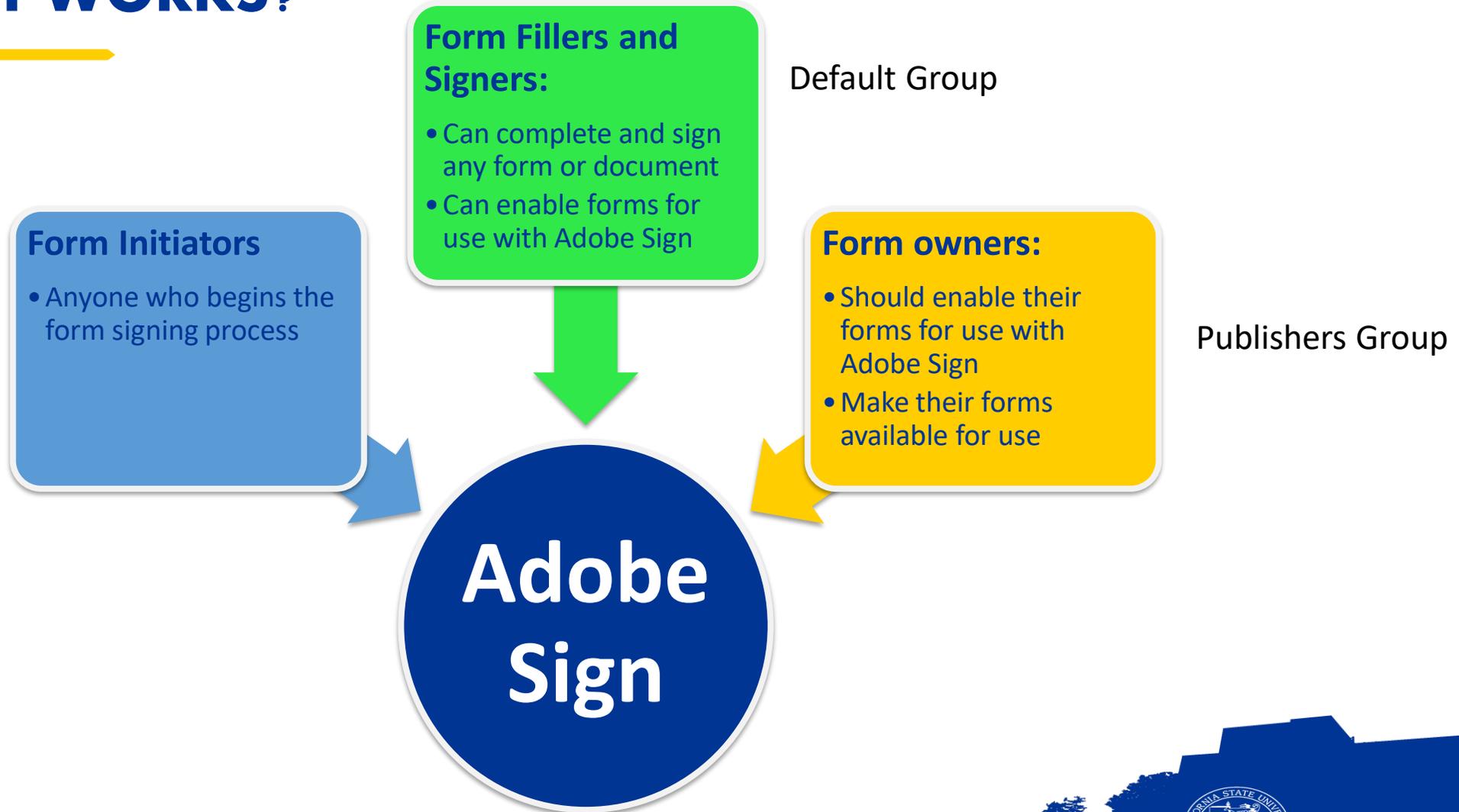
DO I NEED AN ADOBE SIGN ACCOUNT?

> All Faculty and Staff have Adobe Sign accounts

> Students do not have Adobe Sign accounts

> You do not need an Adobe Sign account to sign a document electronically

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ADOBE SIGN VS ADOBE ACROBAT FORMS

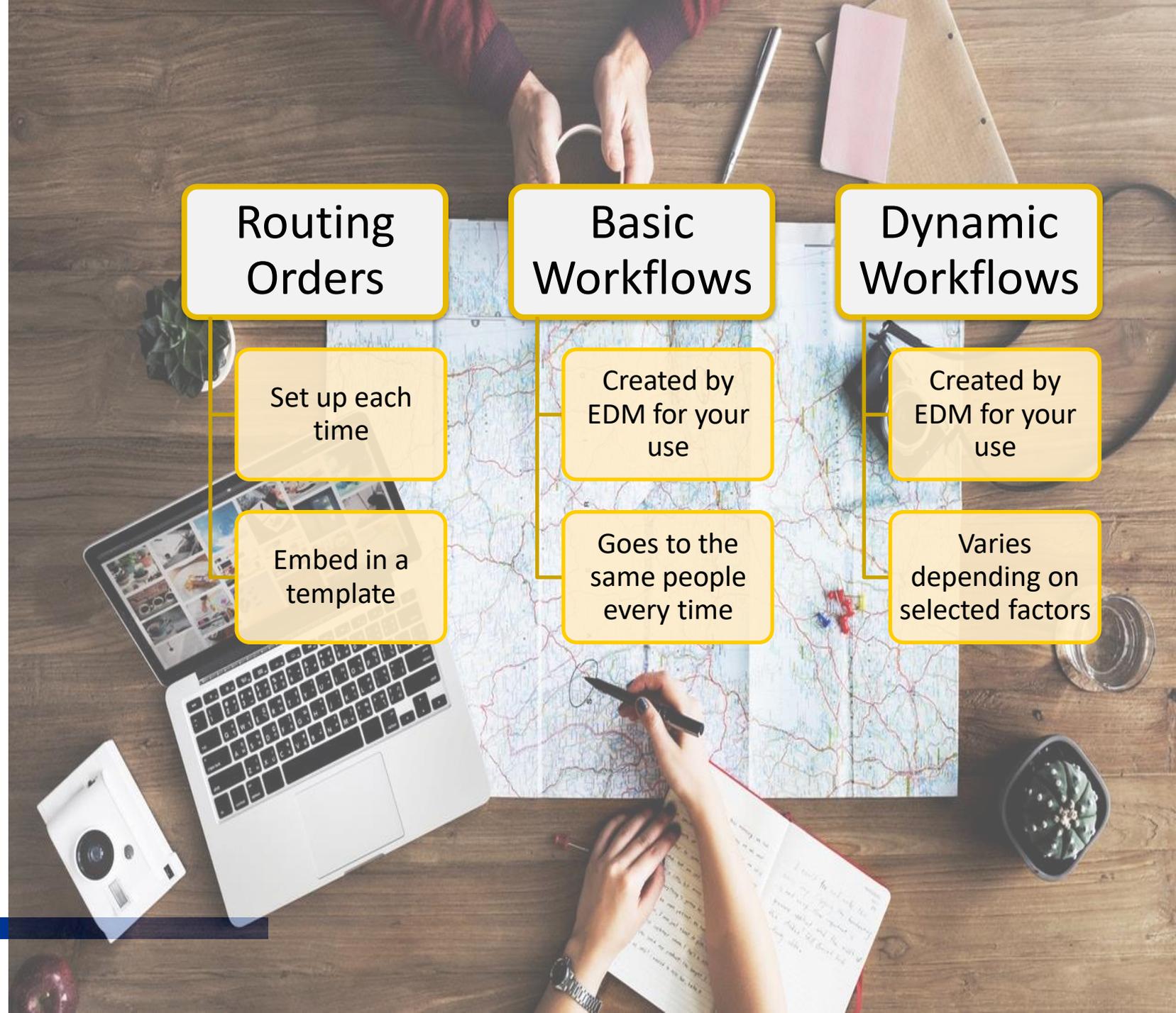|	ADOBE SIGN	ADOBE ACROBAT FORMS
Add / edit form fields	✓	✓
Use calculated fields	✓	✓
Auto detect form fields	✓	✓
Sign documents electronically	✓	✓
Use workflows	✓	
Create document library	✓	
Create templates and web forms	✓	
Edit form labels		✓
Organize form pages		✓
Combine files		✓
Preview form		✓

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ROUTING ORDERS, WORKFLOWS & FORM CONSIDERATIONS

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WHAT IS A WORKFLOW?

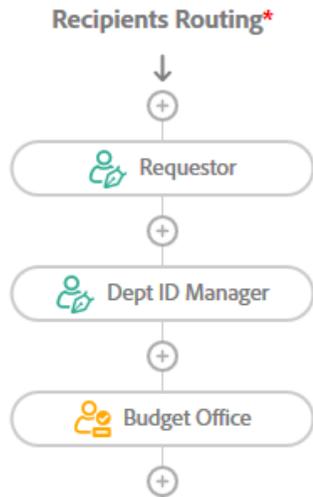The sequence of steps involved in moving your form from the initial person to the last person

Form Filler → Approver 1 → Approver 2 → Approver 3 → Processor

3 Types of Workflows

- Routing Orders
- Basic Workflow
- Dynamic Workflow

Routing Orders

- Set up each time
- Embed in a template

Basic Workflows

- Created by EDM for your use
- Goes to the same people every time

Dynamic Workflows

- Created by EDM for your use
- Varies depending on selected factors

STATIC WORKFLOW

Recipients Routing*

Requestor

Dept ID Manager

Budget Office

Using the static workflows
- Requires ITS to create
- Recipients can be hard-coded, optional, editable by sender
- Recipient roles are same as regular form workflows

Recipients

Requestor *

Enter recipient email   Email

Dept ID Manager *

Enter recipient email   Email

Budget Office *

[redacted]   Email

Document Name *

COVID-19 Extraordinary Expenditure Request for [Department]

Options
☐ Set Reminder

Message *

Please review and sign the COVID-19 Extraordinary Expenditure Request form for [Enter Department].

Files

test form *   BRP - COVID-19 Extraordinary Expenditure Request Form

Send

Using the form
- Requires Publishers group
- Accessed from shared templates

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Understand the workflow involved

Understanding the workflow will ensure that you include:

- Form and signature fields for all recipients / participants

Who needs to touch or interact with this form?

Form Workflow Example

How many people should be included in the workflow?

Contact List

First Name   _____   Last Name   _____

Address   _____   City / State   _____

Phone Number _____   Email Address   _____

Phone Number Type:

      Home   Cell Phone

Signature   _____   Date: _____

OFFICE USE ONLY

Processor Name: _____

Processor Signature:

      Processed   Not Processed

Reason for not processing:

Form Workflow Example

How many people should be included in the workflow?

Answer:

At least 2 people

- *Form filler*

- *Processor*

Contact List

1

First Name _____ Last Name _____

Address _____ City / State _____

Phone Number _____ Email Address _____

Phone Number Type:

Home   Cell Phone

Signature _____ Date: _____

OFFICE USE ONLY

2

Processor Name: _____

Processor Signature:

Processed   Not Processed

Reason for not processing:

Form Workflow Example

How many people should be included in the workflow?

CSUB STUDENT PHOTO ID APPLICATION

Card Request Type: ☐ New ☐ Replacement   Extended University Student: ☐ Yes ☐ No

_____   _____   (___)_____
CSUB ID Number   Last Name   First Name   Middle Name   Phone Number

Terms and Conditions

This CSUB ID card is the property of CSU Bakersfield, is non-transferable, and must be presented upon request to any University Official. Carry it with you at all times. This card is valid while you are enrolled at CSUB. Possession of this card does not guarantee current CSUB status. Cardholder is liable for unauthorized use of this card prior to notifying the RunnerID Card Office (661-654-2440) and/or Campus Police (661-654-2677) if lost or stolen. A fee is charged for replacement card. Cardholder agrees to all terms and conditions for the use of this card posted at https://its.csub.edu/services/service-areas/photo-id

_____   _____
Cardholder Signature   Date

_____|_____|_____|_____|_____|_____|_____|_____
Business Unit   Fund   Dept.   Account   Program   Project   Class   Dept. Contact & Ext.
Department PeopleSoft Chargeback Information **(Required if Department is paying for ID)**

_____
Department Authorization Signature **(Required if Department is paying for ID)**:

For RunnerID Card Office Use Only: Receipt # _____   Proxy # _____

Replacement Reason: _____   Ticket # _____

Form Workflow Example

How many people should be included in the workflow?

Answer:

Up to 4 people

- *Form filler*
- *Budget Analyst*
- *Budget Analyst or MPP*
- *Runner ID Card Office*

CSUB STUDENT PHOTO ID APPLICATION

(1) Card Request Type: ☐ New ☐ Replacement   Extended University Student: ☐ Yes ☐ No

_____   _____   (____) _____
CSUB ID Number   Last Name   First Name   Middle Name   Phone Number

Terms and Conditions

This CSUB ID card is the property of CSU Bakersfield, is non-transferable, and must be presented upon request to any University Official. Carry it with you at all times. This card is valid while you are enrolled at CSUB. Possession of this card does not guarantee current CSUB status. Cardholder is liable for unauthorized use of this card prior to notifying the RunnerID Card Office (661-654-2440) and/or Campus Police (661-654-2677) if lost or stolen. A fee is charged for replacement card. Cardholder agrees to all terms and conditions for the use of this card posted at https://its.csub.edu/services/service-areas/photo-id

_____   _____
Cardholder Signature   Date

(2) _____|_____|_____|_____|_____|_____|_____|_____
Business Unit   Fund   Dept.   Account   Program   Project   Class   Dept. Contact & Ext.
Department PeopleSoft Chargeback Information **(Required if Department is paying for ID)**

(3) _____
Department Authorization Signature **(Required if Department is paying for ID)**:

(4) *For RunnerID Card Office Use Only:*   Receipt # _____   Proxy # _____

Replacement Reason: _____   Ticket # _____

BEST PRACTICES AND RECOMMENDATIONS

> Always use electronic signatures, instead of digital signatures

> In case of pre-signer or delegate (i.e. administrative professional), consider adding required fields for that person in processing the form and add them to the signing workflow

> Add form fields for the office processing the form ("For Office Use Only")

> Consider ways to ensure accurate completion of forms
  – *There is NO option to send a form back for corrections.*
  – Use required fields
  – Use drop-down lists, radio buttons, or check boxes wherever possible
  – Assign fields to the correct participant to complete

> Use appropriate Adobe Sign participant roles (Signers must have signature field)

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BEST PRACTICES AND RECOMMENDATIONS

> Size input fields accordingly

> Left align text fields and right-align numeric fields

> Include a link to form instructions or other resources

> Test your form before implementing

> Use Tooltips for form fields

> Add Transaction IDs

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FORM CONVERSION OPTIONS

Excel → PDF → Adobe Sign
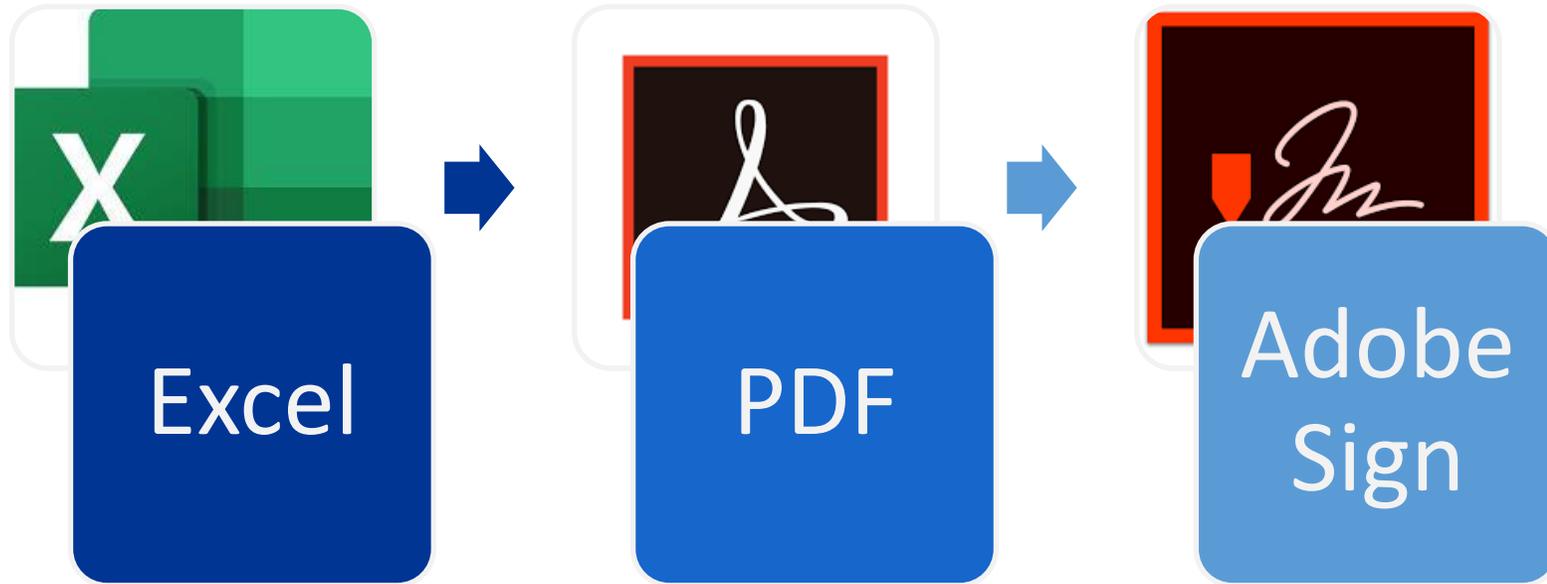
- Strips off any fields including calculations
- Add them back in Adobe Sign
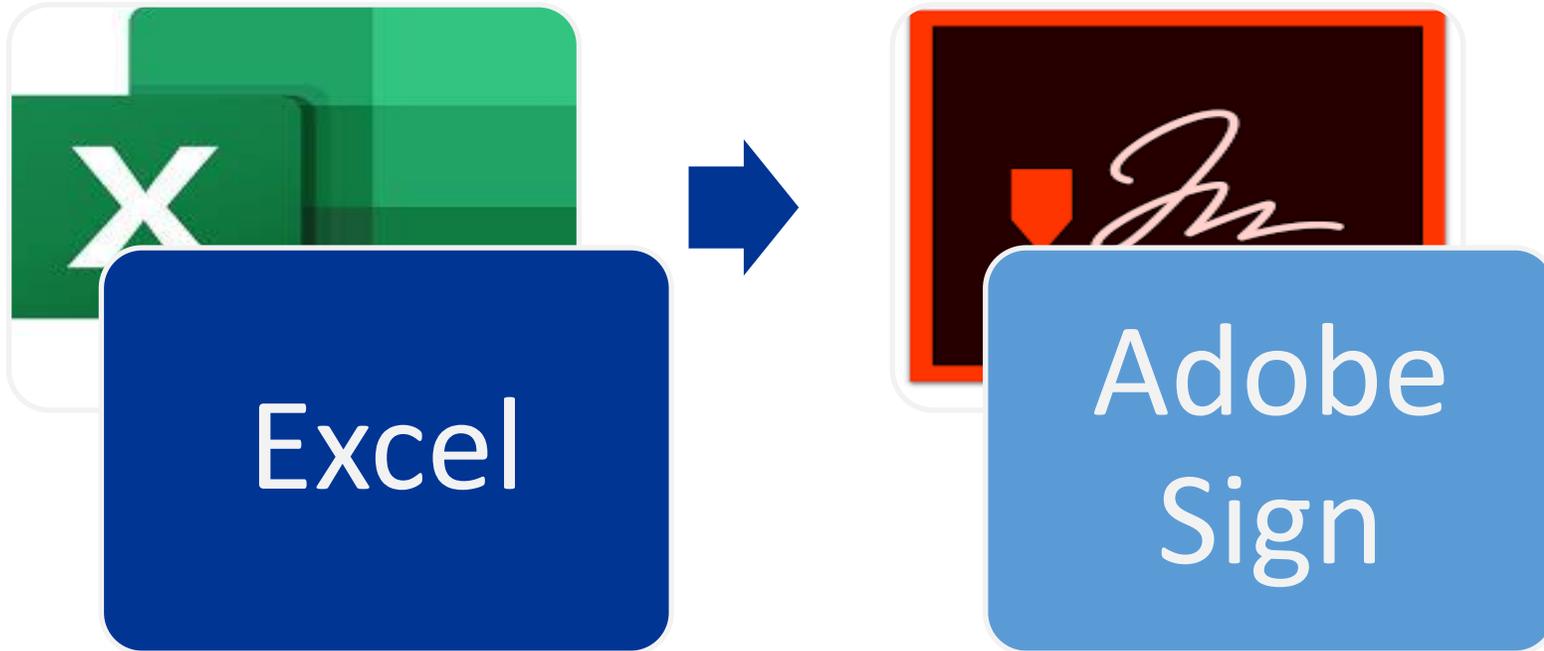- Work around
  - Use text tagging

OPTION 1

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FORM CONVERSION OPTIONS

Excel → **PDF with Text Tags** → **Adobe Sign**

- Preserves fields and calculations
- Requires text tagging for every field
- Helpful when the form changes frequently

Sig_es_:signer1:signature

OPTION 2

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FORM CONVERSION OPTIONS

Excel → Adobe Sign

- Strips off any fields including calculations
- Add them back in Adobe Sign
- **Preferred method**

OPTION 3: Recommended

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FORM CONVERSION CONSIDERATIONS

> Auto-generated numbers
  – Maybe possible with Dynamic Workflows
  – Alternative: Adobe Sign Transaction ID

> Use Templates or Webforms

> Consider using static or dynamic workflows

> Include all possible recipients including your department (can't modify after signed)

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BEFORE ....

Copy sample files and independent practice to your desktop

- Navigate to: [Adobe Sign Forms Basics](#)

- Copy the 3 files to your desktop

  – Conference Form.pdf

  – Contact form.pdf

  – Non-Fillable-Form.pdf

Session Documents

- Adobe Sign Signer Basics QRG (pdf)
- Adobe Sign Sender Basics QRG (pdf)
- Independent Practice (pdf)

Session Practice Files

- Conference form
- Contact form
- Non-Fillable Form - Example

Printer Friendly Version

GUIDED PRACTICE

RECIPIENT / PARTICIPANT ROLES

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

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OTHER ROLES

ANYONE	• Makes the field available to each recipient in turn, until someone enters content into the field.
	• Once a field has content, and the recipient completes their portion of the process, the field content **will be locked** against further editing for all subsequent recipients.
PREFILL	• Means the fields will be made available to the sender of the agreement **at the time the agreement is sent**.
	• These fields are only available during the prefill stage and can not be made available to recipients.

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ELECTRONIC SIGNATURES VS DIGITAL SIGNATURES

Electronic signatures

> AKA e-signatures

> Appropriate for 99% of CSU operational business (CSU CISO)

> Situations not appropriate

– Requires authorized purchasing agent

– Commits university to legal or financial agreements

– Contact Procurement, if you are unsure

Digital signatures

> Requires a special certificate issued by trusted and secure third-party company, along with public and private keys

> Guarantees the message contents were not altered in transit.

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ADOBE SIGN INTERFACE

- Menu Bar
- Dashboard
- Buttons

WHAT NEXT?

Adobe Sign ILT Training Sessions

Information Session	✓ Form Basics	Advanced Forms	Open Lab

• 1 hour session
• Adobe Sign Overview
• Sending an adhoc document for signature only
• Responding to a request for signature
  • Approving / Signing
  • Declining a request
  • Delegating the request to someone else
• Fill and sign a document
	• 2 hour session
	• Sending and creating fillable forms for signature using basic features
		• 2 hour session
		• Creating reusable templates, form fields, and web forms,
		• Tracking documents
		• Modifying and canceling in-transit documents
		• Working with form fields including calculated and masked fields
			• 1 hour session
			• Come and go as you please
			• Ask questions
			• Get answers

Training Schedule

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Adobe Sign Resources

- Quick Links
- Job Aids
- Quick Reference Guides
- Videos

Adobe Sign

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.

To learn how you can use Adobe Sign to convert documents to fillable forms, send documents for signatures, or both, use the curated list below of how-to job aids.

| Quick Links | Job Aids | Quick Reference Guides | Videos |

QUICK LINKS

Quick Link	Audience	Description
Adobe Sign (SSO Login)	Anyone	Adobe Sign login page via Single Sign-on
Adobe Sign Tutorials (videos)	Anyone	Tutorial videos curated by Adobe Sign
Adobe Sign Distribution Methods & Roles	Anyone	Describes the Adobe Sign functions and participant roles

Return to top

JOB AIDS

Job Aid	Audience	Description
Signing into Adobe Sign	Anyone	Covers signing into Adobe Sign
Sending an adhoc document for signature only	Anyone	Covers accessing Adobe Sign and sending a document for signature only
Approving and Denying Documents	Anyone	Covers signing, approving, and denying documents
Completing and Signing Fillable Forms	Anyone	Covers completing and signing a document with form fields
Complete and Sign a Non-fillable Form	Anyone	Covers completing and signing a document without form fields

SESSION OBJECTIVES

> At the end of the session, the participants will be able to:

– Articulate function and purpose of Adobe Sign

– Distinguish between forms created with Adobe Acrobat Professional and Adobe Sign

– Identify the form design best practices

– Navigate the Adobe Sign environment

– Complete a non-fillable form

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– Use auto-detection to add form fields

– Fill and complete a document for signature

– Send documents for signature from library

– Set completion deadline and set reminder

– Approve and deny documents

– Send a shared document for signature

– Delegate documents to someone else

– Identify key elements of the document audit report

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THANK YOU

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