

ADOBE SIGN SERIES
Faculty and Staff

Adobe Sign **SENDER BASICS**

Quick Reference Guide

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CSU Bakersfield

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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 your basic Adobe Sign functionality for senders. Senders are the individuals who initiate sending documents or create documents for sending to recipients. It will walk you through the most common tasks performed by senders.

For information on advanced Adobe Sign functionality for senders, see the [Adobe Sign Resources](#) page.

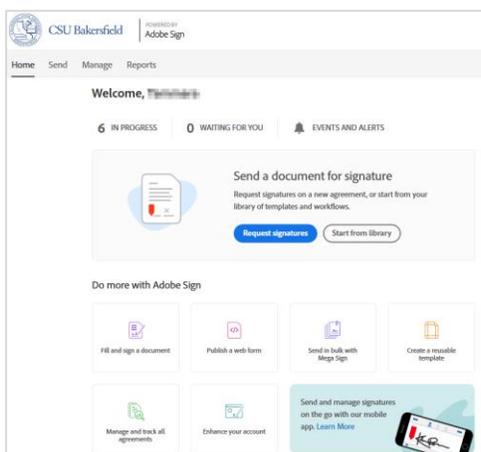
1.2 Accessing Adobe Sign

These instructions will guide you in accessing Adobe Sign.

1. Open a web browser.
2. In the address bar, type the following: <https://adobesign.csub.edu>
3. When the page opens,
 - Enter your email address
 - Click Continue
4. On the account selector page, click Company or School Account
5. On the CSU Bakersfield authentication page,
 - Enter your NetID
 - Enter your password
 - Click LOG IN
6. The Adobe Sign page opens.

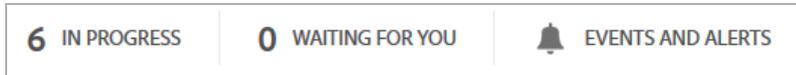
1.3 Adobe Sign Interface

The Adobe Sign Interface contains a menu bar, dashboard, descriptive text, and many buttons.



1.3.1 Dashboard

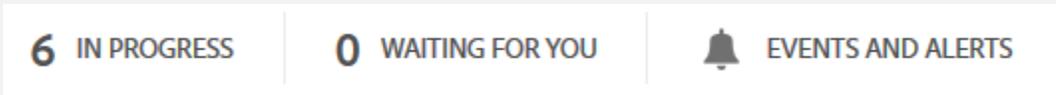
The dashboard shows how many documents you have in progress, the number documents that are waiting for your action, such approving, reviewing, etc, and any events and alerts.



1.3.2 Menu Bar

The Menu Bar contains four tabs: Home, Send, Manage, and Reports. The table below describes their basic functions. It is accessible from all tabs.



HOME	
	<ul style="list-style-type: none">• Shows a dashboard with the number of forms in progress, waiting for you, and your events and alerts• Shows buttons for requesting signatures, start from library, fill and sign a document, publish a web form, send in bulk with Mega Sign, create a reusable template, manage and track all agreements, and other buttons
SEND	<ul style="list-style-type: none">• Allows you to send an ad hoc forms for signature, to route for signatures, and make existing forms fillable
MANAGE	<ul style="list-style-type: none">• Allows you to manage the documents you have out for signature by status.
REPORTS	<ul style="list-style-type: none">• Allows you to run and view reports

2.0 SEND AD HOC DOCUMENTS

The Send function allows you to send documents to a recipient on the fly. You can specify the recipients including approvers, enter a message to the recipient, attach a form, convert the form to fillable form (if necessary), and send to recipients.

2.1 Sending an Ad Hoc Document

You can send a document to a recipient for a signature. Optionally, you can add fields to make the document fillable. These instructions will walk you through the basic steps for sending a document for signature.

1. Click the **Send** tab



2. (Optional) Select the Participation Order.

The Participation Order allows you to control whether the recipients must sign in the order you entered their email addresses or in any order. For more information on the Participation Order, see the Participation Order section below.

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



4. 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 below.



5. 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.



6. For the Message,

- In the **Agreement Name** box, enter a subject for your email
- Enter your message for the email



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



8. On the Select Files screen, click **Choose Files from my Computer**
9. Navigate to the desired document and click **Open**
10. 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.



11. (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 Options section below.
12. When you are finished adding documents, click **Next** button
13. Adobe Sign will process your document.
14. (Optional) You can convert your document to a fillable form, if necessary, by adding fields manually for each recipient or using the auto detection feature.
 - To add fields manually, skip to the Adding Fields Manually section.
 - To use the Auto Detection, skip to the Auto Detecting Fields section.
15. Click **Send** (lower left hand corner).

2.2 Participation Order

The Participation Order allows you to control whether the recipients must sign in the order you entered their email addresses or in any order.

1. If you want the recipients to fill and sign the form in any order, click the button to slide it to Complete in Any Order.



Otherwise, leave it set to Complete in Order



2.3 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	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • Signature is needed • Example: Student, Faculty, Employee, MPP/Director, AVP/Dean, or anyone needing to sign
Approvers	 Approver	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • 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

2.4 Options Section

The Options section assists you with controlling the document signing process. The table below describes the functions and best use for each option.

Option	Description	Best Use
Password protect	<ul style="list-style-type: none"> • Requires the recipient to enter a password to open and view the signed document. • Sender creates the password and sends it to the recipient separately. • Adobe Sign does not save the password. 	When working with sensitive information
Completion Deadline	<ul style="list-style-type: none"> • Sets the date the recipient(s) must complete and sign the document • The document expires after the date passes and cannot be completed 	When working time-sensitive information
Set Reminder	<ul style="list-style-type: none"> • Establishes a frequency in which recipients are reminded to complete the document 	When the sender wants to increase the probability of the document being completed timely

3.0 FILLABLE FORMS

You can convert any document to a fillable form that can be sent for signature(s). You have the option of adding fields manually or using the auto detection feature. The sections below will cover these two options. For more information, see the Working with Fields section.

3.1 Adding Fields Manually

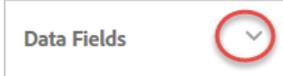
Before sending your document, you will need to add fields for each recipient. For more control over adding fields to your document, you can add these fields manually.

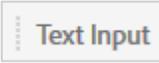
1. To add text fields,

- Select the recipient's name from the right pane



- In the right pane, expand the Data Fields

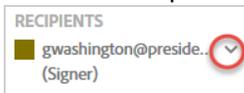


- Drag and drop the Text Input, , to the desired areas, i.e. First Name, Last Name, etc.

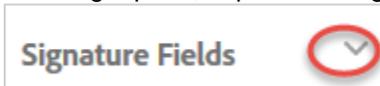


2. To add signature fields

- Select the recipient's name from the right pane



- In the right pane, expand the Signature Fields



- Drag and drop the Signature



3. To add a signature date field,

- Select the recipient's name from the right pane



- In the right pane, expand the Signer Info Fields



- Drag and drop the Date



4. To edit fields,

- Right-click on the desired field, select Edit, make your selections, and click OK.
- For more information on editing fields, refer to the section, Working with Fields. To resize a field, grab the edge and stretch or shrink it.

5. Your completed document will be color-coded based on the recipient. The example below illustrates this.

A screenshot of a "BUDGET TRANSFER FORM" with the subtitle "(For Illustration Purposes Only)". The form is divided into three sections: "Requestor Information", "Budget Information", and "Approval Information". Each section contains several input fields. The fields are color-coded: the "Requestor Information" fields (First Name, Last Name, Phone Number, Department) are light grey; the "Budget Information" fields (From, To, Signature, Date) are light blue; and the "Approval Information" fields (Reviewer Signature, Approver Signature, Date, Date) are light yellow. The "Signature" fields have a red asterisk next to them.

3.2 Auto Detecting Fields

To save time, you can use the auto detection to add fields to your document automatically. You may need to modify the fields once added.

1. To add auto-detected fields, click the Auto-detection icon, . *The number indicates the number of fields detected.*
2. Adobe Sign will add fields to the areas it detects. You can modify and remove these fields as needed.
3. To modify the fields, right-click on the desired field, select Edit, make your selections, and click OK. For more information on modifying fields, see the section, Working with Fields.

4.0 WORKING WITH FIELDS

When you convert a document to a fillable form, you have options for adding fields for text, dates, selections, images, and hyperlinks. Additionally, you can modify the field appearance by changing the font, changing the assign to information, and field type. This section will cover these options. For more information on editing form field, see the Adobe Sign Form Fields QRG.

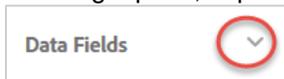
4.1 Text Input Fields

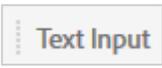
Text Input fields allow you to add areas where the recipients can input information, such as their name, address, etc. To add a Text Input field,

1. Select the recipient's name from the right pane



2. In the right pane, expand the Data Fields



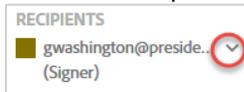
3. Drag and drop the Text Input,  to the desired areas, i.e. First Name, Last Name, etc.



4.2 Date Fields

Date fields allow you to add areas where the recipients can enter dates. The date fields will populate automatically with the date the recipients sign the document. To add a date field,

1. Select the recipient's name from the right pane



2. In the right pane, expand the Signer Info Fields



3. Drag and drop the Date



4.3 Signature Fields

You can add signature fields for each person who needs to sign the document. To add signature fields,

1. Select the recipient's name from the right pane



2. In the right pane, expand the Signature Fields



3. Drag and drop the Signature



4.4 Selection Fields

You can add Selection fields allow your recipients to choose among options that you specify. You have a choice of three selection fields: check box, radio buttons, and drop down. The table below describes their function and best use.

Selection Field	Description	Best Use
Check Box	Allows the recipient to select one or more options that apply	When the recipient can select multiple options
Radio buttons	Allows the recipient to select one option from two or more options	When the recipient can only choose one of the available options
Drop Down	Allows the recipient to select from a list of options	When the recipient has many options from which to choose

4.4.1 Adding Check Boxes

Check boxes allow the recipient to select one or more options that apply. To add a Check Box,

1. Select the recipient's name from the right pane



2. In the right pane, expand the Data Fields



3. Drag and drop the Check Box, , to the desired area



4. Repeat the above step for each check box option.

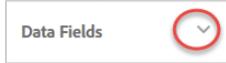
4.4.2 Adding Radio Buttons

Radio Buttons allow the recipient to select one option from two or more options. To add Radio Buttons,

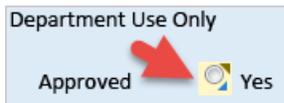
1. Select the recipient's name from the right pane



2. In the right pane, expand the Data Fields

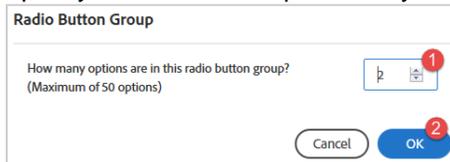


3. Drag and drop the Radio Button, , to the desired area



4. On the Radio Button Group screen,

- Specify the number of options for your radio button group



- Click **OK**

5. Adobe Sign will place the additional radio buttons on your document.



- Drag the radio buttons to the desired areas on the document



4.4.3 Adding Drop Downs

Drop down menus allow the recipient to select from a list of options. To add a Drop Down,

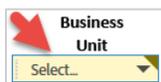
1. Select the recipient's name from the right pane



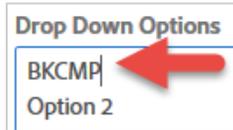
2. In the right pane, expand the Data Fields



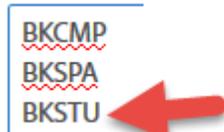
3. Drag and drop the Drop Down, , to the desired area



- To add the options for the Drop Down, double-click the drop down
- In the Drop Down Options of the pop-up menu,
 - Type over the entries with your options

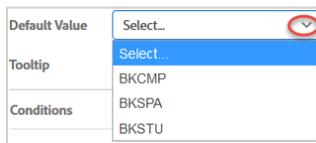


- To add more options, enter your options in the blank area



- (Optional) Add a default value for your drop down.

(A default value allows you to specify a value that stays populated on your document, until the recipient changes it value by making a different selection from the drop down.)



- Click **OK**

4.5 Hyperlinks, Images, and File Attachments

This section covers adding hyperlinks, images, and file attachments to your documents.

4.5.1 Hyperlinks

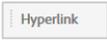
Hyperlink fields are a great way to link from your document to a website or other location. You can use it to link to instructions for completing the document, to policies associated with the document, etc. To add a Hyperlink field,

- Select the recipient's name from the right pane



- In the right pane, expand the More Fields

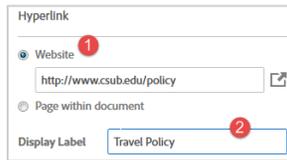


- Drag and drop the Hyperlink field, , to the desired area



- Double-click the Hyperlink field
- On the Hyperlink menu,

- In the Website, enter the URL for the desired website
- In the Display Label, enter a label for the website



- Click **OK**

4.5.2 Images

Image fields allows a recipient to attach an image, such as a student id, certificate of completion, etc. You can export the attached image for later use. To add an Image field,

1. Select the recipient's name from the right pane



2. In the right pane, expand the Data Fields



3. Drag and drop the Image field, , to the desired area



4. Resize the image field as necessary
5. Double-click the Image field
6. In the Display Label, enter a label for the Image field



7. Click **OK**

4.5.3 File Attachment fields

While Image fields allow you to attach an image to a document, File Attachment allows the recipient to attach a file, such as a certificate of completion, receipts, or other supporting documentation. To add a File Attachment field,

1. Select the recipient's name from the right pane



2. In the right pane, expand the More Fields



3. Drag and drop the File Attachment field, , to the desired area on your document



4. Double-click the File Attachment field
5. On the menu,
 - In the Display Label, enter a label for the file attachment field



- Click **OK**

5.0 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 Tutorials](#) (videos)
- [Adobe Sign Job Aids](#)

Technical Assistance

- Service Center
661-654-4357
servicecenter@csu.edu