Intro to Acrobat Sign Training Guide

Contents

Getting Started

Adobe Acrobat Sign is a cloud-based, enterprise e-signature service that lets you replace paper and ink signature processes with fully automated electronic signature workflows. With Acrobat Sign, you can work anywhere from any browser or mobile device to quickly request signatures from others, sign documents, track, and manage the process electronically.

Before you sign-in, make sure you read the information provided in this section of Getting Started to help you get on the right track.

Email Address

It is imperative to use the published email address when you sign-in or send documents for signature in Acrobat Sign. Faculty and staff should look up the published email address by using the online campus directory, at https://directory.csus.edu to ensure you are not using an alias email.

Enterprise Acrobat Sign Account

It is good practice to ensure you are login to the enterprise account. Once you sign-in, a quick way to check is to locate the Sacramento State Powered by Adobe Acrobat Sign Logo at the top left-hand corner of your screen. You will need to logout and log back in if you do not see the logo.
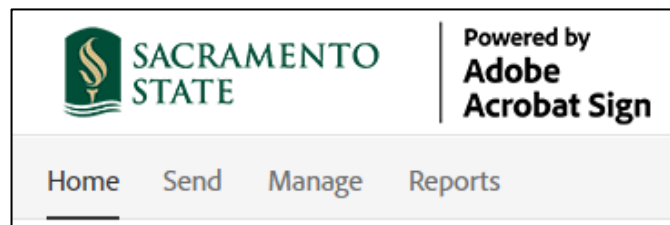
Acrobat Sign Login

Faculty, staff and students are recommended to sign-in to Acrobat Sign through the My Sac State portal. This section will walk you through the steps to sign-in.

Personal vs. Enterprise Acrobat Sign Account

Before Sacramento State adopt Acrobat Sign, some individuals may have established a personal Acrobat Sign account from a third-party agency to send or sign documents. If this is the case, when you sign-in, you will be given the option to select your *Personal Account* or *Company or School Account*. **Please always choose the *Company or School Account* option when conducting University business; this ensures you are signing into the Sac State enterprise account.**
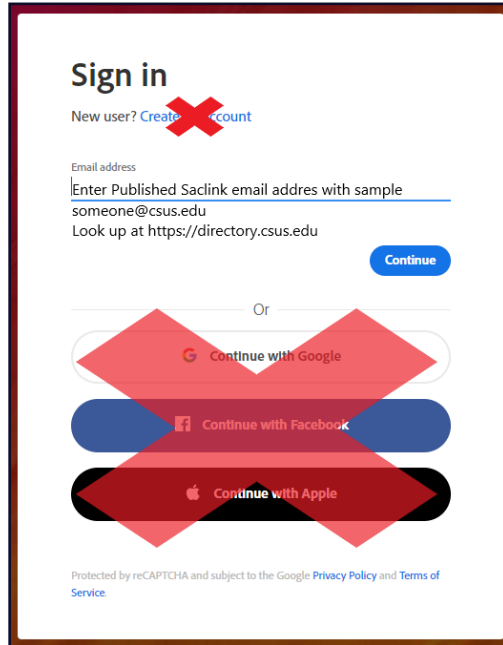
Sign-in

Log in to the My Sac State portal at https://my.csus.edu.
1. Under the *Faculty/Staff Related Links*, click on *Acrobat Sign.*
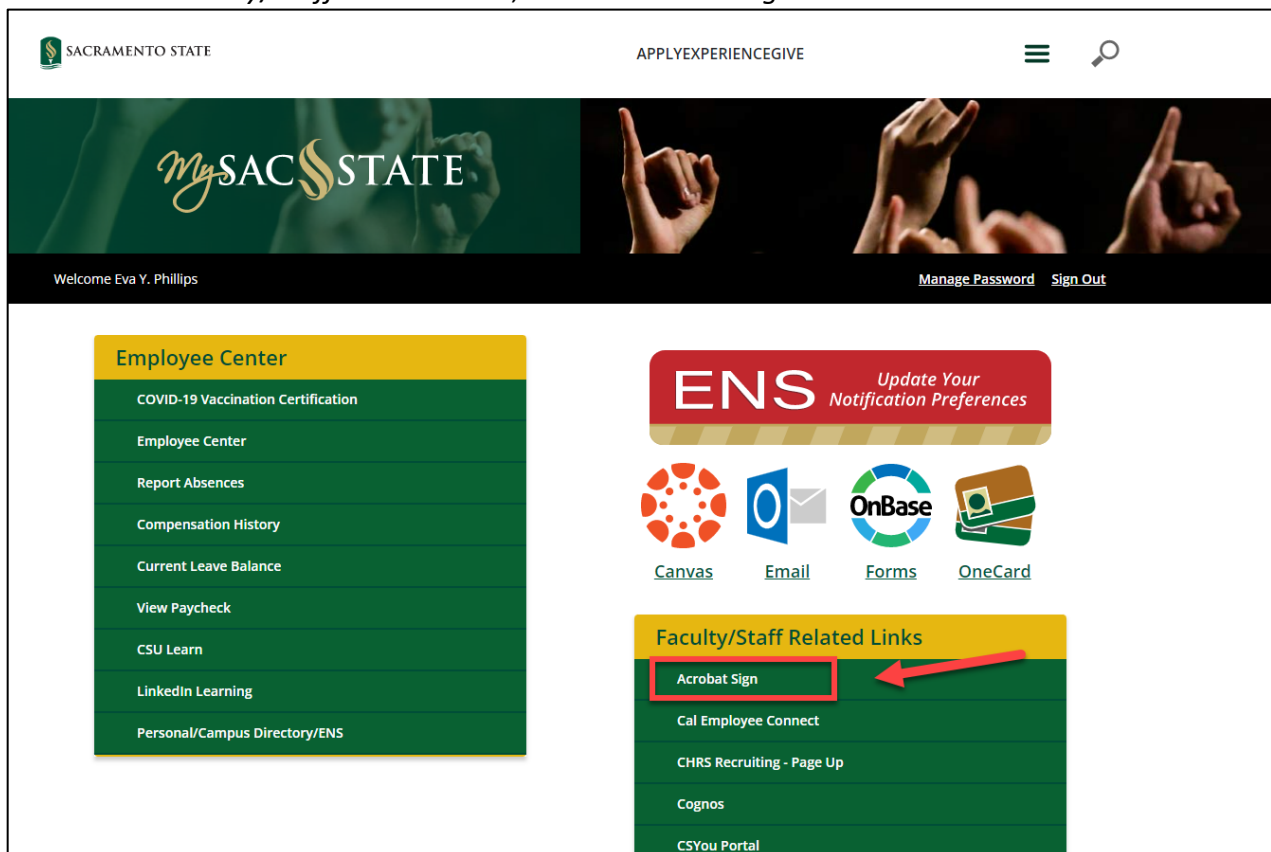
2. The *Acrobat Sign* login page will display
   a. In the *email address* line, type in your full saclink email address (ex. xxxxxx@csus.edu or xxxxx@skymail.csus.edu)
   b. Click **Continue**

3. You will see an Acrobat Sign splash screen as it routes you to the *Acrobat Sign* homepage (For staff with personal accounts, you may be prompt to select either a *Personal* or *Company Account*. Please select **company account**.)

Acrobat Sign Overview

The overview section provides information on the purpose and basic tools of each page in Acrobat Sign.

Home Page

The Home Page is the main page that you will see when you sign in. The page composes of sections that provide a quick view and access to the features in Acrobat Sign.
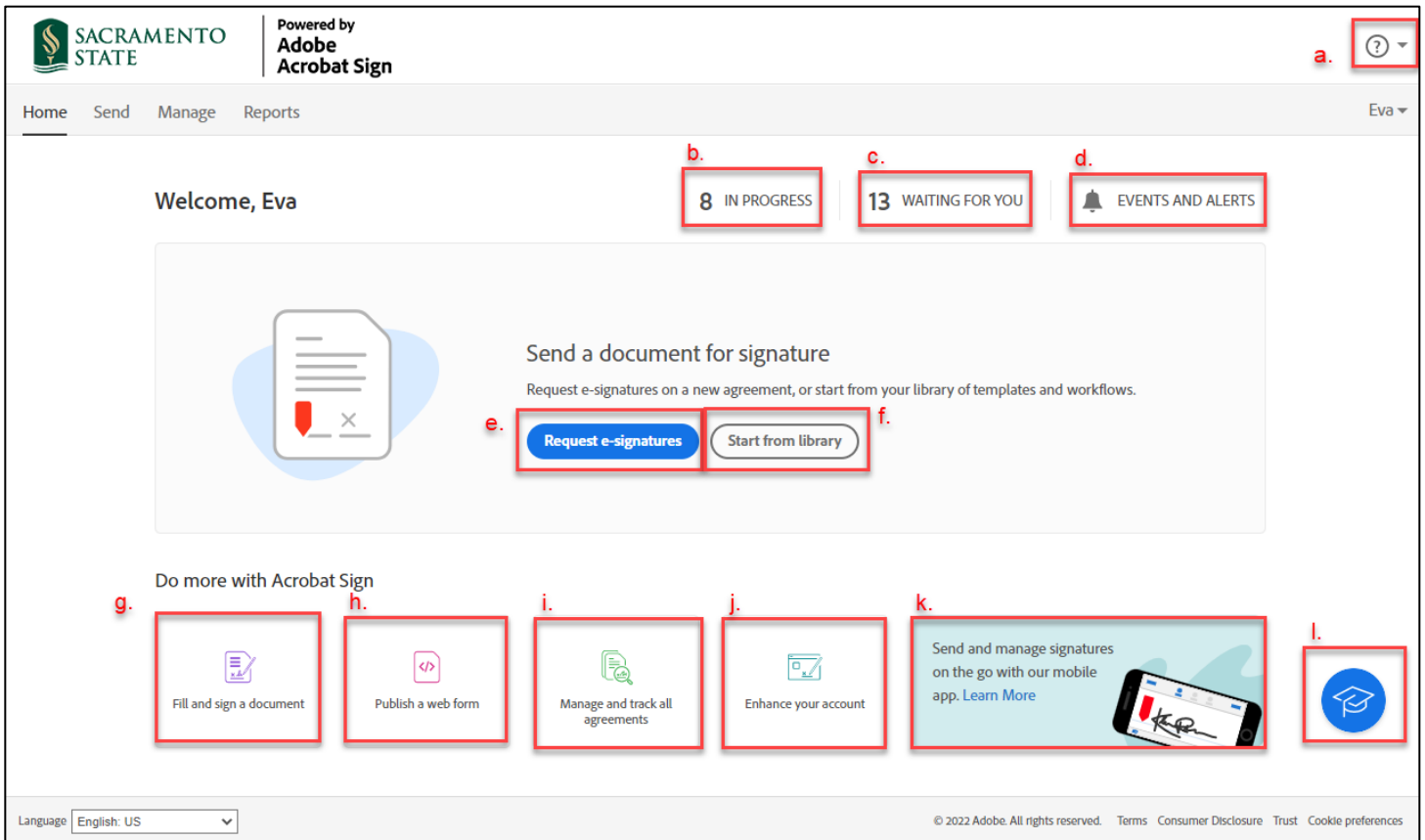
a. **Get help**

Access to the self-service help content provided by Acrobat Sign: User guide, tutorials, contact support, and release notes.

b. **In Progress**

Quick link to the *Manage* page and shows all the agreements you have created and in progress.

c. **Waiting for you**

Quick link to the *Manage* page and shows all agreements that are waiting for you to act.

d. **Events and Alerts**

Clicking on this opens the *Notification* page to the events tab.

e. **Request e-Signatures**

Quick link to the *Send* page to initiate the process for signature.

f. **Start from library**

The advance feature will not be used during the introduction. Contact IRT Service Desk for assistance.

g. **Fill and sign a document**

Used only when your information and e-signature is required on a document.

h. Publish a web form

This advanced feature should not be used with individual accounts.

i. Manage and track all agreements

Quick link to the *Manage* page.

j. Enhance your account

Based on your access rights, you will see different options. The quick link will either route you to the My Signature page to set-up a signature, account set up to upload a logo, or to configure company name, hostname, and logo.

k. Mobile device application information

  i. Apple Store (IOS)

  ii. Google Play (Android)

l. University Cap Icon

Acrobat Sign quick help resources.

Send Page

The Send Page is the interface where you will add pertinent information to send out your documents to be signed. This page consists of five sections; they are the Recipients, Message, Options, Files, and Preview and Add Signature Fields.
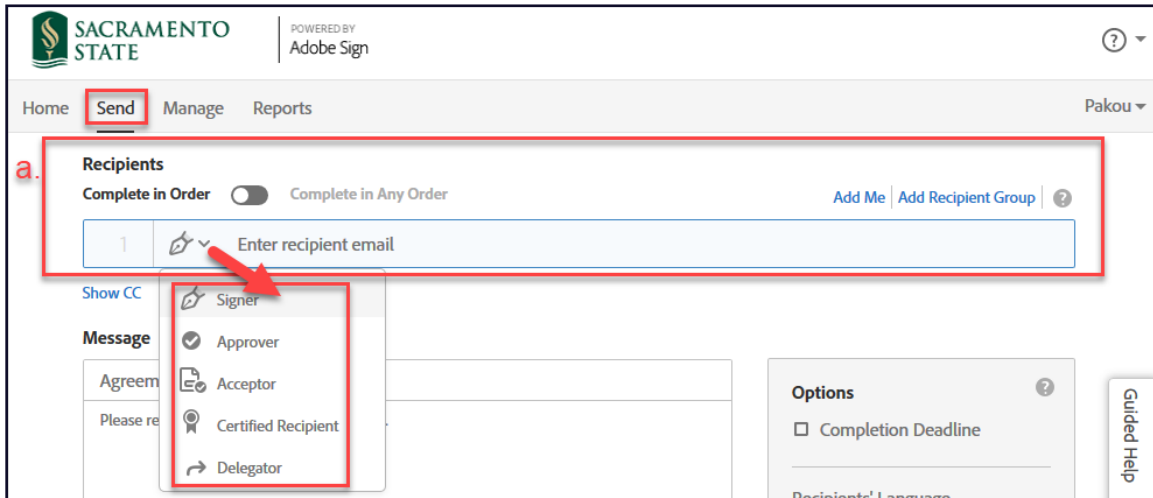
a. **Recipients**

Recipients are the people that you need to interact with your agreement. The roles available for the recipients are listed here.

- **Signers** are required to apply at least one signature to an Agreement. This role is the default recipient role.

- **Approvers** are not required to sign or interact with any fields. All approvers need to do is enter their name before sending the transaction to the signers.

- **Acceptors** are mechanically the same as Approvers in that they do not need to apply a signature, but if form fields are assigned to them, they will need to complete the fields.

- **Certified Recipients** can have no (zero) form fields assigned to them. During their "signature" process, they will be asked to either delegate, decline, or acknowledge the agreement.

- **Delegator role** is designed for workflows that require a person to make the final judgment on who the correct next person is that should sign or approve the document.
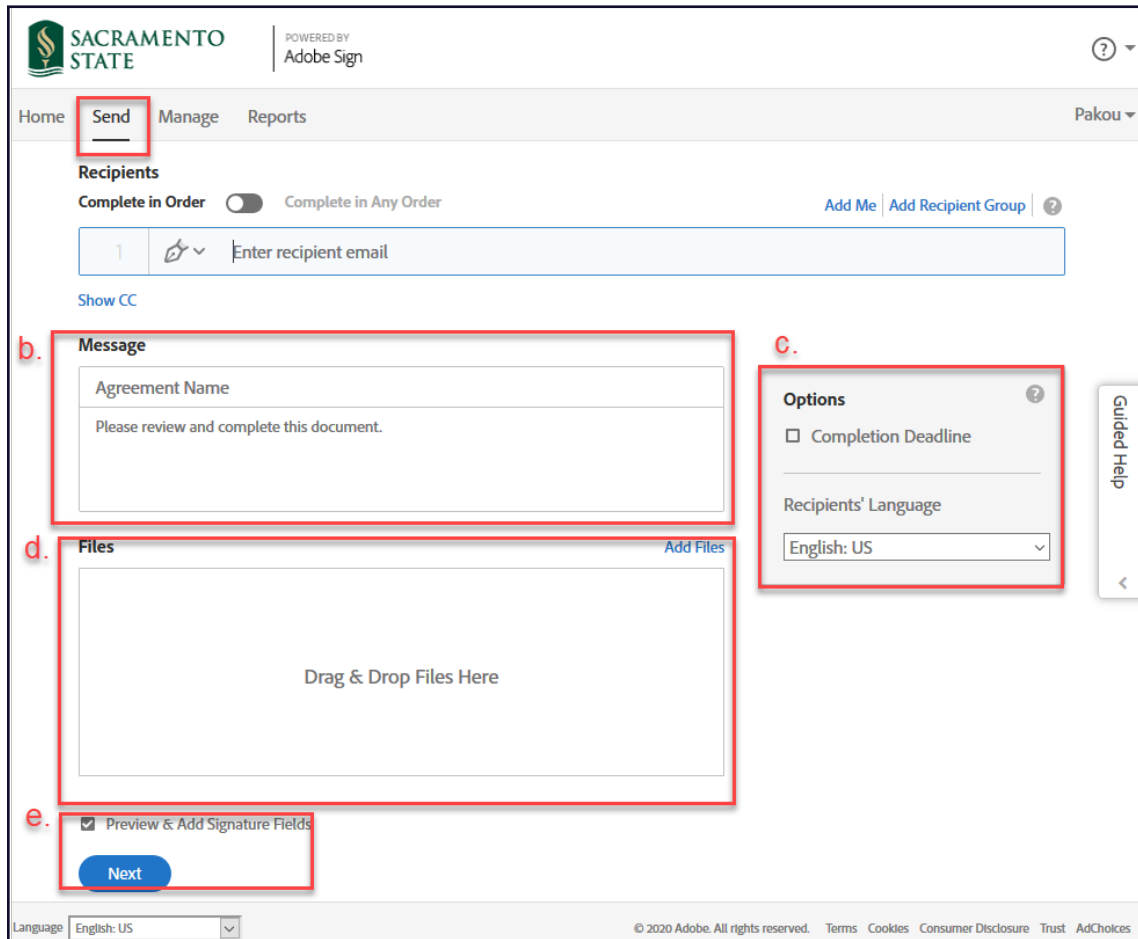
b. **Message**
   Message section is where you add in the name of the agreement and a message you want to deliver to the recipient(s).

c. **Options**
   Completion Deadline – When an agreement must be signed by a specific date, you can use this feature to cancel the agreement after a specified number of days.

d. **Files**
   Files section is where you select and attach the actual documents you are sending for signature.
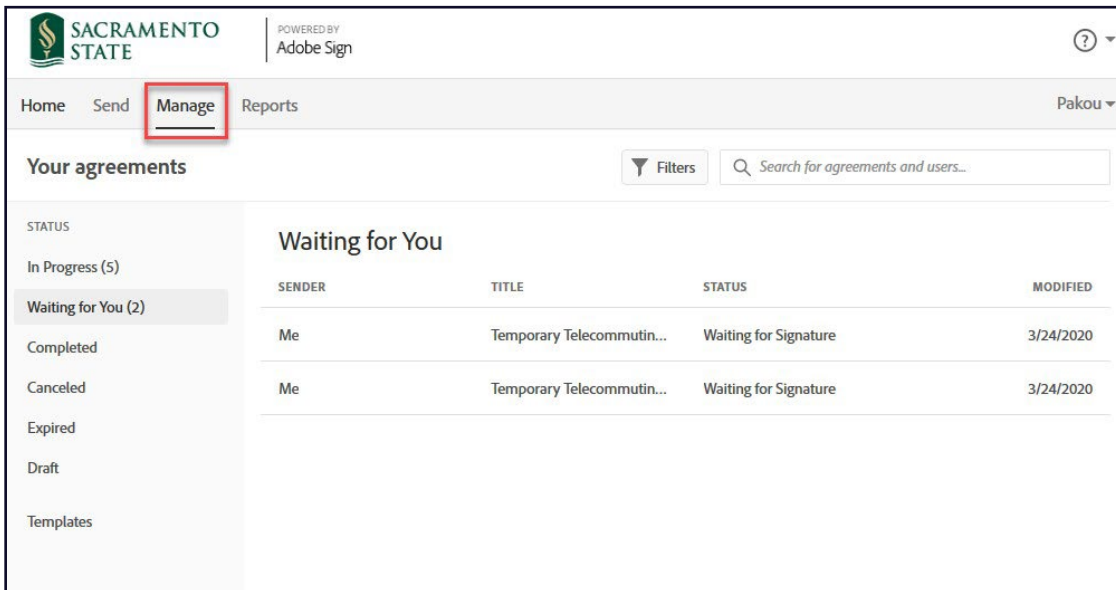
e. **Preview & Add Signature Fields**
   As a default, the box is checked. This will allow you to review and add form fields before emailing the document out.

Manage Page

As a sender, Recipient, or even as a CC'd party, if you were a participant with an Acrobat Sign agreement, the status will be available on your Manage Page. The Manage Page is a portal to all agreements tied to the user, the page is designed with two goals in mind: find the agreement you want to examine and perform management tasks for that agreement.

The main body of the page is the listing of your agreements, filtered by the status of the agreements in the left column (In Progress, Waiting for You, Complete, Canceled, Expired, and Draft). Template filters are also available just under the agreement filters (Templates, Web Forms, and Mega Signs).

Input text filters at the top right side of the page can help locate individual documents by searching for an email, name of the agreement, name of a recipient (if known to the system), date, notes, etc.)

Report Page

Regularly scheduled reports can help you quickly assess how your documents are progressing and where your attention is needed. Reports can be custom designed to trigger any day at any time to include the scope from all agreements to only documents with a specified name. Contact IRT Service Desk for assistance to create a new report.

Sending a Request for e-Signature

To send an agreement for signature, make sure you are on the Home page. At the center of the page, you will need to click on the blue **Request e-Signature** button. In doing this, it will bring you to the Send page, where you can start entering the required information to initiate the process.
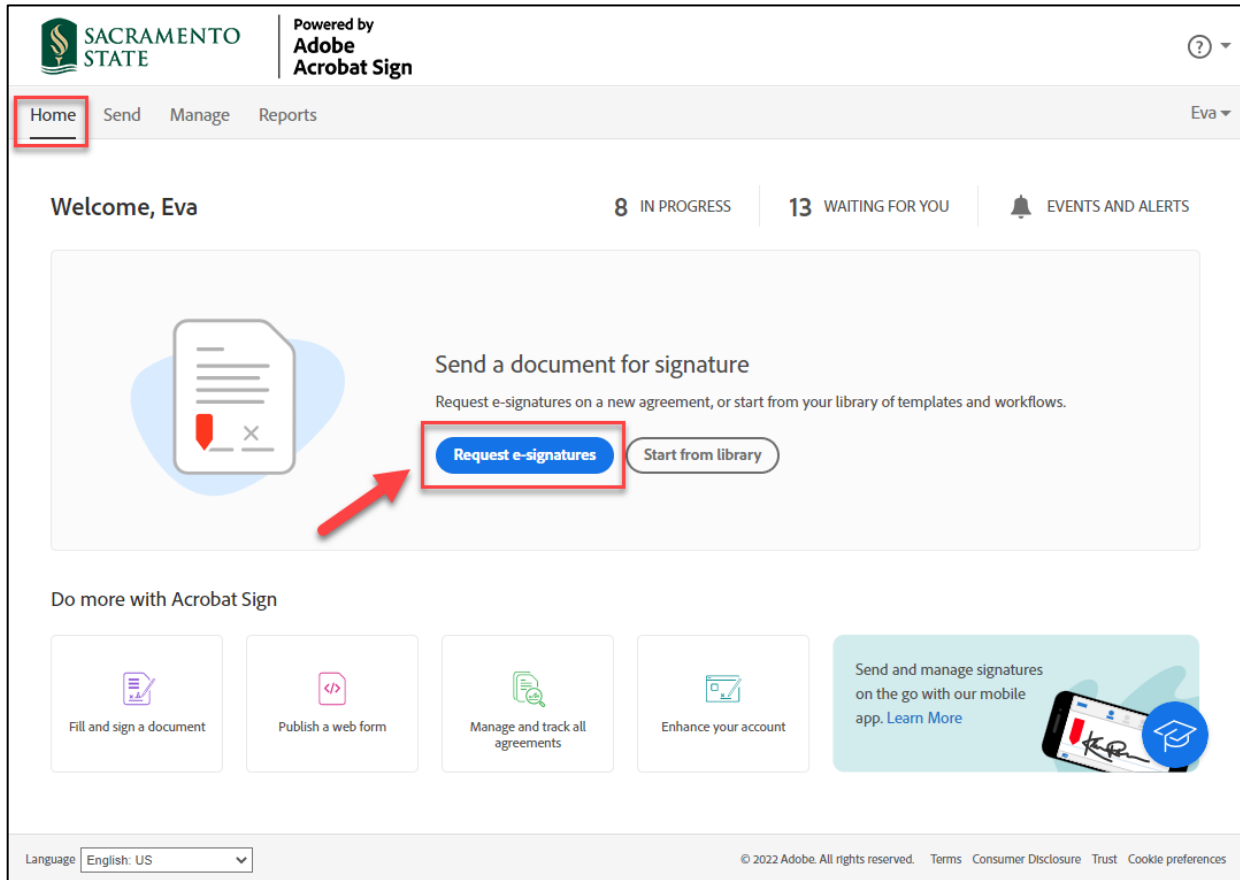
Recipient Section

The recipient section is where you enter the Recipient's email address and define its role. Please ensure that the email addresses being used are the *published email address*. You can verify the recipients' published email address at directory.csus.edu.

Tips to remember:

- To add yourself to the list of recipients, click the **Add Me** link in the upper right corner.
- Adding the same email address multiple times is permissible. Double check your recipient emails.
- If you need to delete a recipient row, click the X on the far right of the row
- *Complete in Order* is the default and sequentially routes to the recipients in the order they are listed.
- *Complete in Any Order* will send to everyone on the list at the same time.

Message Section

The message section allows you to add in your **Agreement Name** and send a personalized **Message** that will be included in the initial email to the Recipient.

Tip to remember:

If you **Add Files** (attach a file) first, your **Agreement Name** and **Message** will auto-populate to the name of your document.

Files Section

The files section is where you will be able to add the file to be signed. To **Add Files**, you can drag-and-drop, attach, or choose a library document.

Tip to remember:

Multiple documents can be attached, and are delivered as one contiguous document for the recipient

Optional Section

Completion Deadline - The deadline expires the transaction after the defined number of days. The configuration in the optional section is not required. Users may select a completion deadline, but again this is optional.

Field Assignment

Once you complete all the sections on the Send Page, clicking the blue *Next* button will route you to the Field Assignment screen. The Field Assignment determines which Recipient can interact with that field.

- To define a field for a specific recipient, you must set the *Assigned To* value of the field when you are authoring the document.
- An easy way to do this is to select the Recipient from the *RECIPIENTS* section along the right-hand side of the window before placing any fields.
- Any field subsequently placed will set the *Assigned To* value as that selected Recipient.
- There are two visual indicators to help understand the field "ownership":
    - When you select a recipient, all the fields assigned to that Recipient are highlighted with a brighter yellow shade, whereas fields not assigned to the chosen Recipient will be grayed out
- Each Recipient in the *RECIPIENTS* list has a different color block next to their name that corresponds to a

colored tag in the upper-right corner of each field

- Place all fields for one Recipient, and then select the next Recipient that needs to enter content or Sign, and place their fields. Do this for each Recipient on the agreement.

Form Fields

All the form fields are indicated in this section. Depending on which fields you plan to use, you will click and drag that field over to the document.

- Recipients
  - Participants that will be interacting with the document
- Signature Fields
  - Signature, Initials, Signature Block
- Signer Info Fields
  - Title, Company, Name, Email, Date
- Data Fields
  - Text Input, Drop Down, Checkbox, Radio Button & Image
- More Fields
  - File Attachment, Hyperlink
- Transaction Fields
  - Participation Stamp, Transaction Number

Modify the Assigned to Value

Once a field is on the document, you can modify the *Assigned To* value through the field properties menu.

- Double-click the field to open the properties menu (Right-clicking a selected field opens a small menu with *Edit* as an option).
- With the property's menu open, you can find the *Assigned To* field at the top, just under the field name.
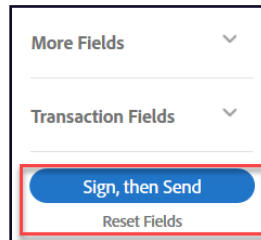- All recipients are listed in the drop-down menu.

Sign, Send and Reset Fields

- If you set yourself up as a signer, you will be prompt to fill-in and sign the document before sending it. You also have the option at this point to reset the fields before you sign. When you have placed all the fields on the document, click **Sign, then Send**.

- When you get to the signature field, it will prompt you through an e-signature signing process. You have four methods to define your signature: Typing in your name, drawing your name using the mouse, uploading an image of your signature, or sign using your mobile device. After you sign it, clicking **Apply** will take you to the next step. Clicking on the **Send** blue button will send off your document for signature.
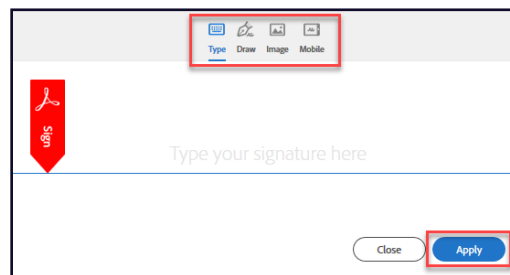
- The notification that pops up on the screen will show the email address you sent the document too, along with other information to provide you the status of the form. You can also double-check to see if there are any typo on the email address. Along with this notification screen, you will also receive an email from Acrobat Sign that informs you the document has been sent.
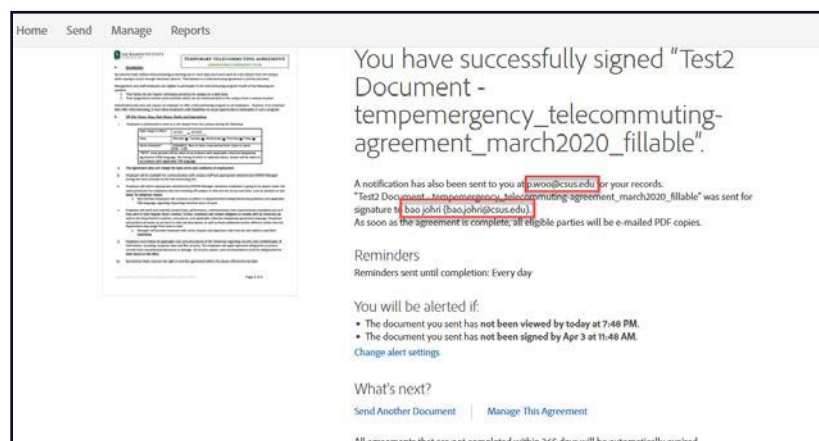
Sending a Fill and Sign Document

The *Fill and Sign Document* feature is used when you are the only one filling in the information and signing the document. In this feature, the text is entered through a direct "click and type" interface. To start this process from the **Home Page**, click on the **Fill and Sign a Document** feature located at the bottom left side of your screen.
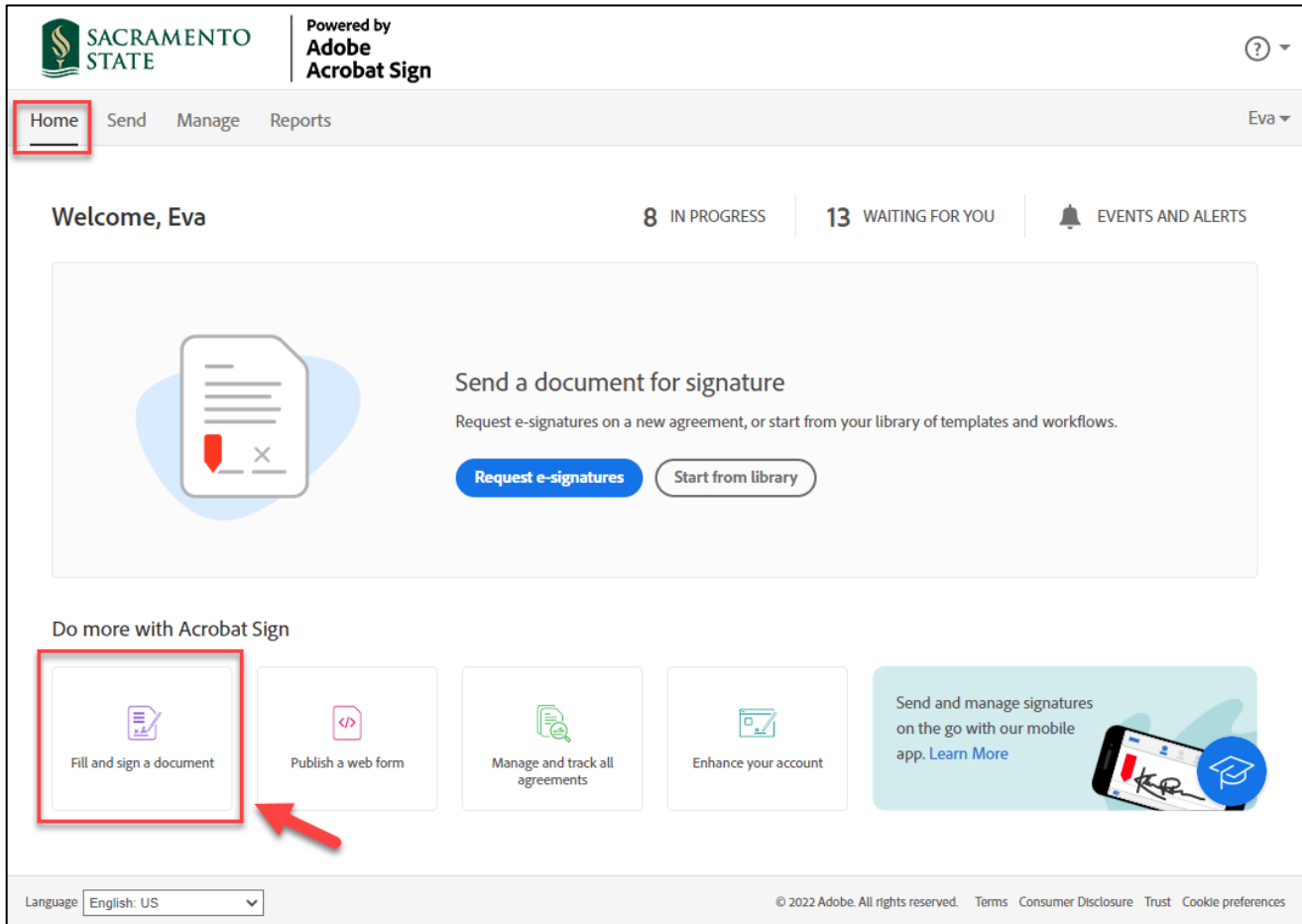
Fill & Sign Interface

- Add the files that need to be signed.
  Files can be added via drag and drop or from the Add Files link, just like attaching files on the *Send* page.
  Multiple files can be added and reordered via drag and drop.
- Provide an Agreement name
  By default, the *Agreement name* field adopts the name value of the first file dropped in the *Files* section. This value can be edited if desired.
- Once all the fields are completed, click the blue **Next** button to take you to the **Input Types** page.
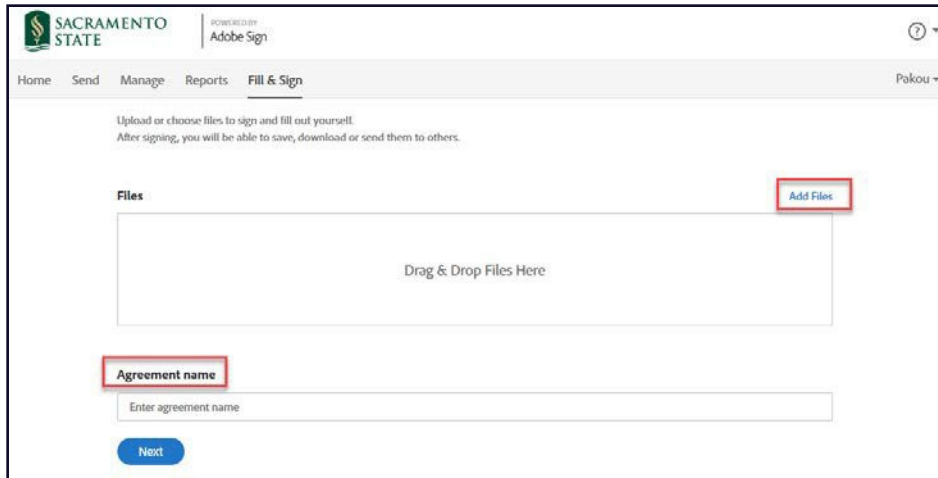
Input Types

Most of the time, the documents are set-up where there are designated areas to fill-in and sign. Make sure to select the correct **Input Types** to complete the document. To choose an Input Type, click on one of the options; the text input, checkmark, filled dot, signature, or initial and place the cursor where you need to enter, select, or sign the document.

> a. **Text Input** – With this option selected, click anywhere on the document to add text. To move to another section of the document, you must explicitly click in the new area and start typing. Text input respects carriage returns, so it is easy to type into multi-line note fields.
> b. **Crossmark Input** – This option places a Crossmark on the page. Can be used instead of checkmark.
> c. **Checkmark Input** – This option places a simple checkmark graphic. Ideal for Checkboxes.
> d. **Filled Dot Input** – *Filled Dots* are also simple graphics that are traditionally used with Radio Button sets, but can be applied in checkboxes as well.
> e. **Signature Field** – The *Signature Field* allows the user to place a signature or an initial. If you have a signature or an initial saved to your account, it will be used by default. Otherwise, you are presented with the normal e- signature signing process.

Once you complete filling out the document, clicking the **Done** button on the right will provide several actions you can take. You can **Send a Copy**, **Download a Copy**, **Manage This Agreement**, or **Sign Another Agreement**. In most instances, you will **Send a Copy** to another person. When you select this option, you will be routed to identify a recipient or recipients by using their published email address. After choosing the Recipient(s) and clicking the **Send** button, Acrobat Sign will route your document(s) to them.
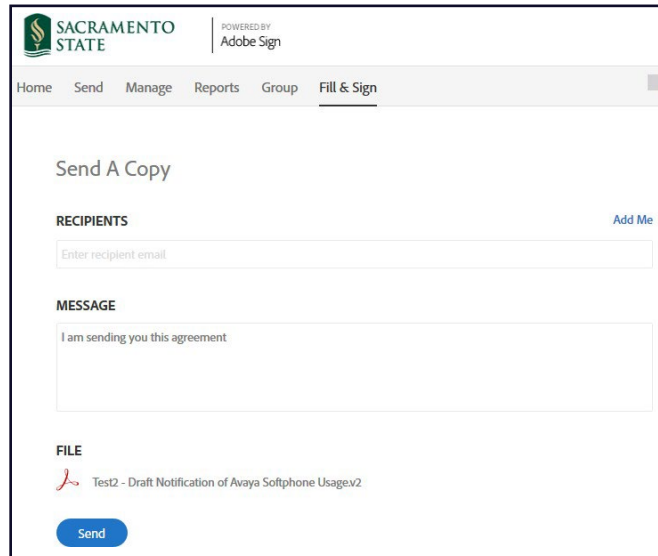
You can find the Fill and Sign agreements under the Manage tab under the Complete folder.

Signing a Document as a Recipient

- The *Recipient(s)* will receive an email to sign the document. They will need to click on the link to review and sign the document.
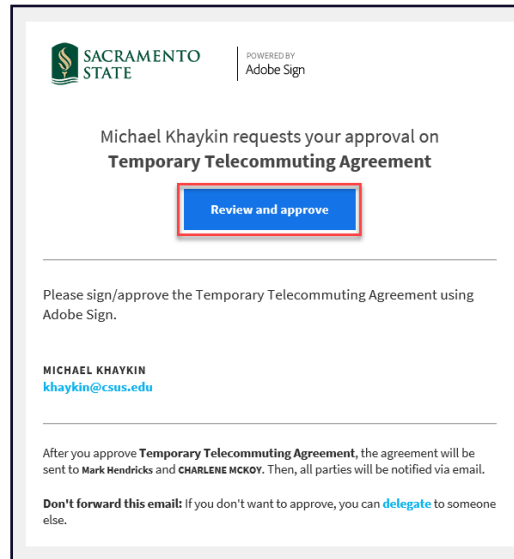
- Acrobat Sign uses a specific domain for their emails, and this cannot be changed. Senders and Recipients will receive emails from echosign@echosign.com.
- All Sac State faculty and staff will be prompt to log in to Acrobat Sign before they can e-sign any documents. **Please note:** If documents are sent to students to sign, we recommend that you send it to the student's SacLink email. Students are not provisioned with an Acrobat Sign account **but will be able to sign documents** sent to them.
- Once you log in, click the yellow **Start** tab to take you to the fields to fill in the information. Continue to click the yellow tab to fill-in all the fields.

- When you get to the **Signature Field**, it will prompt you through an e-signature signing process. You have four methods to define your signature: Typing in your name, drawing your name using the mouse, uploading an image of your signature, or sign using your mobile device. After you sign it, clicking **Apply** will take you to the next step.
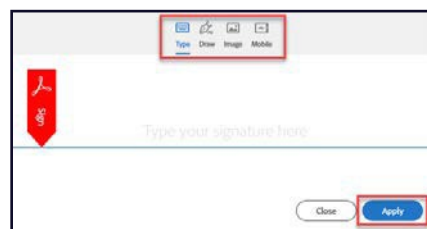

- Once your signature is applied, clicking the blue **Click to Sign** button at the bottom of your screen will send the signed document to the next Recipient.

Canceling a Request for Signature

Once you send the document, you can only cancel the document if the Recipient has not acted on this transaction.

- To cancel the request, navigate to the *Manage* page, and in the *In Progress* status, click on the request that you want to cancel. The row will then be highlighted blue. You will need to click **Cancel**. A cancel screen will display, giving you the option to notify the *Recipient* and provide a reason. If none is needed, click **Cancel Agreement** to complete the cancellation.
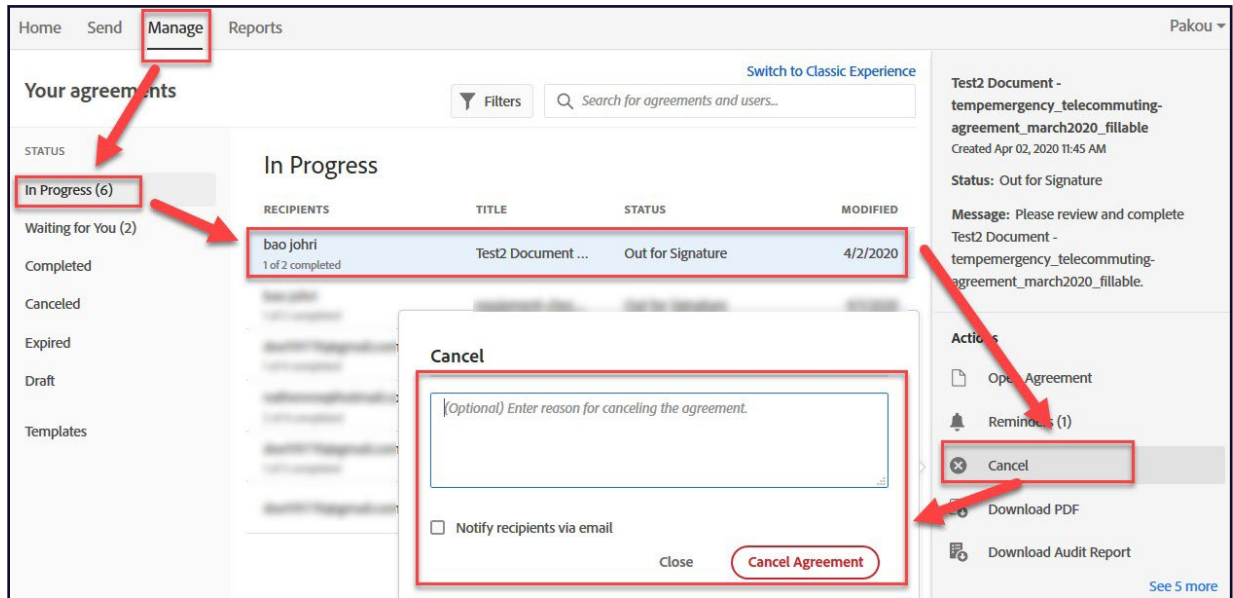
- If you want to cancel an agreement after it has been signed by the first recipient, you will not be able to cancel the agreement anymore. The only way to terminate the agreement is to contact the recipient that is next in the process and ask them to decline the agreement.

Acrobat Sign Resources

- IRT Acrobat Sign Webpage
  https://www.csus.edu/information-resources-technology/remote-work/acrobat-sign

- Acrobat Sign Webpage
  https://helpx.adobe.com/sign/using/get-started-guide.html