

ADOBE SIGN Information Session

Handout

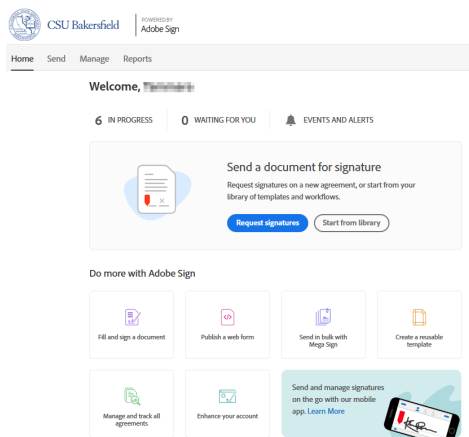


ADOBE SIGN

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.

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.



SENDING A DOCUMENT FOR SIGNATURE ONLY

You can send a document to a recipient for a signature. Optionally, you can add fields to make the document fillable.

1. Click the Send tab
2. Enter the email addresses for the recipients
3. Select the participant role (see Table on back page for descriptions)
4. In the Agreement name box, enter a subject for your email

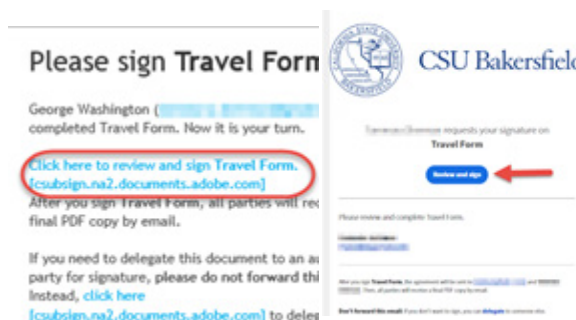
5. In the Message, enter your message to the recipient
6. Click Add Files
7. Navigate to the desired document and click Open
8. Click Next
9. Adobe Sign will process your document.
10. (Optional) Add form fields to document
11. Click Send

RESPONDING TO A REQUEST FOR SIGNATURE/APPROVAL

When you receive an email requesting your signature or approval, you have three options. You can sign / approve, decline, or delegate the request.

Signing / Approving a Request

1. From your email, click the link or button to review and approve.... depending on your email account



2. Your default browser will open.
3. If necessary, complete the form
4. Click the **Click to Approve** or **Click to Sign** button (bottom of the screen)

Declining a Request

1. From your email, click the link or button to review and approve.... depending on your email account
2. Your default browser will open.
3. Click the Options button or drop down
4. From the menu, click I will not e-sign or approve
5. In the box,
 - Enter your reason for declining
 - Click Decline
6. The requestor will receive an email stating that the request was denied and your reason for denying the request.

Delegating a Request

1. From the document email, click the link, click here to delegate
2. On the Delegate this Document screen,
 - In the Email, enter the email address of the authorized signer to whom you want to delegate the document
 - In the Message, enter a reason for delegating the document

- Click **Delegate**

3. After delegating the document, you will see the following message.

"Travel Form" Has Been Forwarded to hstruman@presidents.isp for Acceptance.

FILL AND SIGN A NON-FILLABLE DOCUMENT

You can complete and sign any document even if it is not a fillable form using Adobe Sign. To fill and sign a document from Adobe Sign,

1. From the Home tab, click the **Fill and sign a document** button
2. Click **Add Files** to add your documents. (You can also drag and drop the files)
3. On the Select Files screen, click **Choose Files from my Computer**
4. Navigate to the desired document and click **Open**
5. 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.*
6. When you are finished adding documents, click Next button
7. Use the menu bar to complete the document and sign.



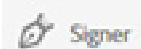
The table below provides a description of each item on the menu bar.

	Type Text	Allows you to enter text for a field
	Cross Mark	Allows you to check a field using an X (cross mark)
	Check Mark	Allows you to check a field using a check mark
	Filled Dot	Allows you to check a field using a dot
	Sign	Allows you to add your signature or initials

14. When you are finished, click **Done**

PARTICIPANT / RECIPIENT ROLES

Signers



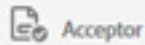
- Default participant role
- Each signer must have at least one signature field assigned to him or her.
- If the system does not find a signature field for the signer, it automatically generates a signature block at the end of the document.
- Best used when a signature is needed
- Example: Student, Faculty, Employee, MPP/Director, AVP/Dean, or anyone needing to sign

Approvers



- 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.
- Best use is in 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



- 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.
- Best use is 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

ADOBE SIGN RESOURCES

Web Resources

- Adobe Sign Tutorials (videos)
<https://helpx.adobe.com/sign/tutorials.html>
- Adobe Sign Resources
<https://www.csub.edu/training/pgms/adobesign/index.html>

Training Resources

- Training Schedule
<https://www.csub.edu/training/schedules/index.html>

Technical Assistance

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

Contact Information

Dr. Tammara Sherman
Campus Technology Trainer
Campus Training

661-654-6919
tsherman@csub.edu
www.csub.edu/training/index.html