ADOBE SIGN
Form Basics

Independent Practice

CSU Bakersfield

ACTIVITY STEPS

Send document for signature

You will use the Conference Form to add fields and send to your shoulder partner.

1. Request Signatures
    - Add 2 recipients as signers: your shoulder partner (recipient 1) and yourself (recipient 2)
2. Contact Information Section
    - Add Text Input Fields for all the fields and assign to recipient 1
    - Make First Name and Last Name required fields
3. Registration Information
    - All fields are assigned to recipient 1, except Meal Type which is assigned to Anyone
    - Track: Add radio buttons for Finance, Budget, and Excel
    - Session: Add check boxes for A, B, and C
    - Meal type: add a drop down with options for beef, chicken, and vegan and assign to Anyone
    - Justification: Make field multi-line
    - Add a signature block
4. Department Use Only
    - Approved: add a radial button for Yes and No
5. Options
    - Set Completion Deadline for tomorrow
    - Set Reminder for everyday
6. Add document to library
7. Send document

Approve document

1. Locate document from your shoulder partner
2. Click Review and approve/sign
3. Change Meal Type to Vegan
4. Sign document

Audit Report

1. Navigate to Manage page
2. Locate the document you sent for signature
3. What is the status of your document? _____

Activity Summary

In this independent practice, you will apply the functions, tools, and techniques you learned to fill and send a document for elctronic signature.

Objectives Covered

- 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
- Request signatures
- Fill and complete a document for signature
- Set completion deadline and set reminder
- Approve and deny documents
- Identify key elements of the document audit report

4. If approved, what time was the document approved/signed? _____

Check for Understanding

1. (T/F) Adobe Sign is a web-based electronic signature application?
2. (T/F) With Adobe Sign, you can preview your document before sending
3. Name a best practice for creating and sending documents for signature
4. To deny a document you would perform which steps
    - (A) Click Review and Sign
    - (B) Click Options
    - (C) Click I will not sign
    - (D) Enter a reason for declining
    - (E) All of the above
5. Which selection field allows the recipient to make one selection among many options (i.e. mutually exclusive)
    - (A) Radio Button
    - (B) Checkboxes
    - (C) Both