



# Mt. SAC Adobe® Sign User Guide (Basic)

**Information Technology**  
Mt. San Antonio College  
1100 North Grand Avenue  
Walnut, CA 91789  
Help Desk 909.274.4357

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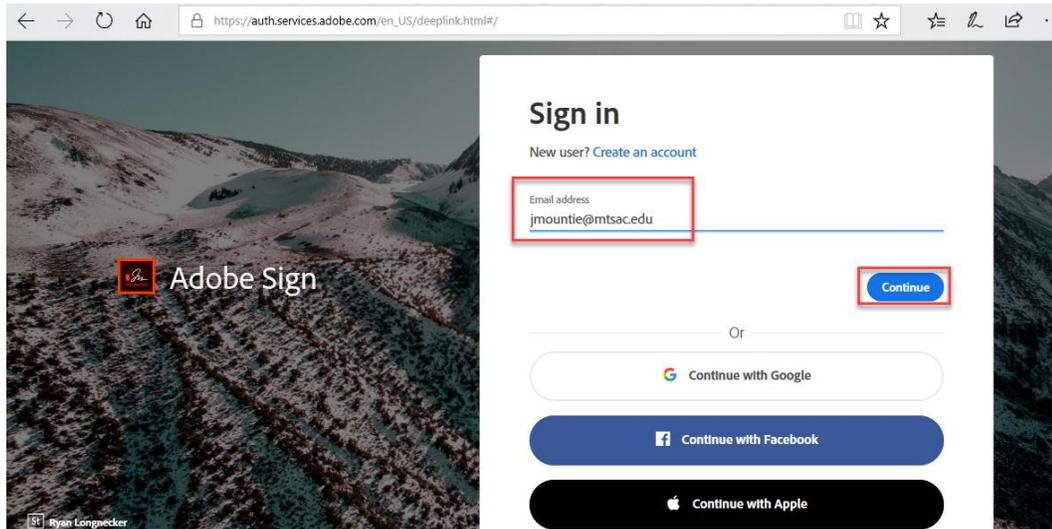
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## Accessing Adobe Sign

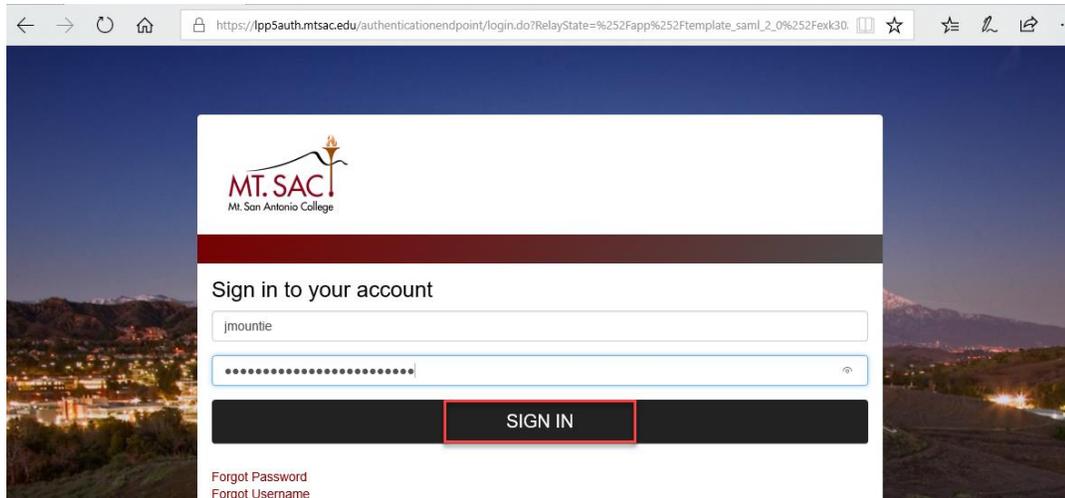
Once you are granted a license for Adobe® Sign, you will receive an email from Adobe to access your account. Use the link in that email to log in or visit [Adobe® Sign](#) home page to log in.

*Hint: bookmark either link on your preferred internet browser for easy access.*

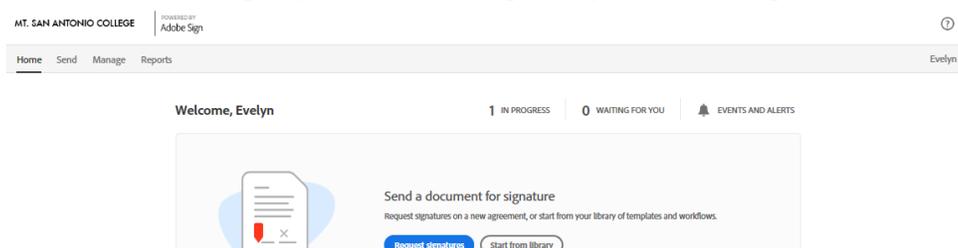
1. On the sign in screen, enter your Mt. SAC email address and press continue



2. On the single sign on screen, enter your portal username and password to log in



3. After successful login, you will be brought to your Adobe Sign account screen

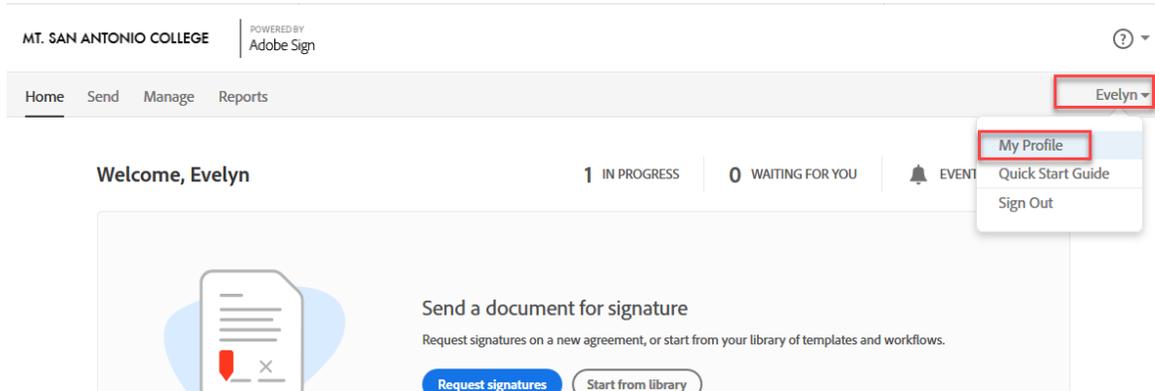


# Setting up Your User Profile

## Updating your Personal Information

It is important to make sure your information, notifications, and signatures are up to date.

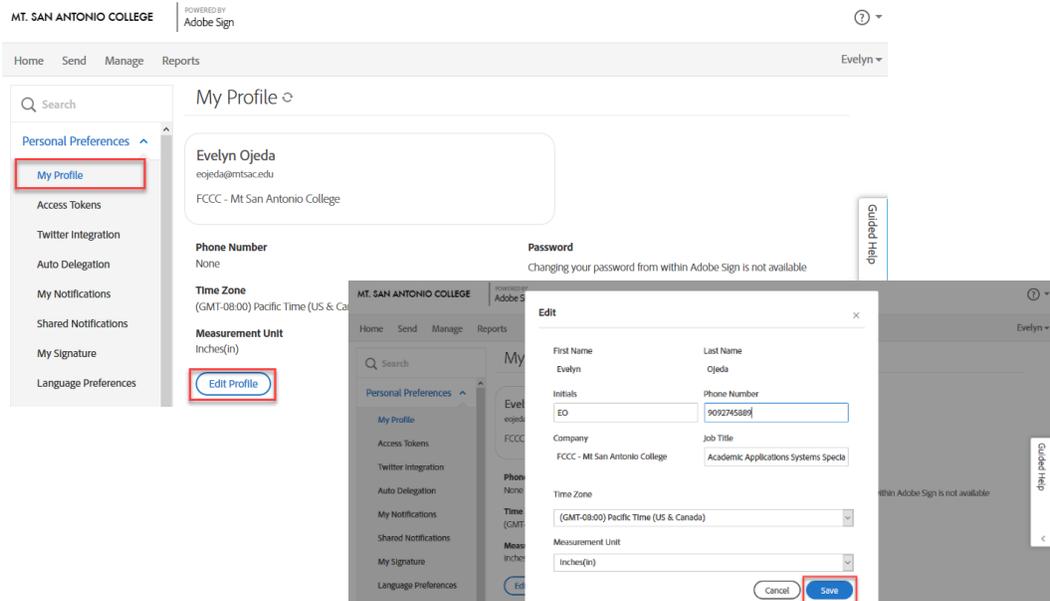
1. Once logged in, click on your name on the upper right corner of the screen and click 'My Profile'



2. On the personal preferences page, click the 'Edit Profile' button to make changes, and then click 'Save' to save changes.

Please review and modify these fields to display your correct information:

- Your full name – Used in email communications and for your default typeset signature
- Your job title – Automatically populates if you ever have a Title field to fill in
- Time Zone - Time/Date stamps will be cast in your time zone for better clarity when running reports.



## Setting up Notifications

Configure which types of events/alerts you want Adobe Sign to notify you about, and how you want to be notified. You can get real time email, or log the event and set up reporting on a daily or weekly cycle. Events are triggers when something happens. Alerts are triggered when a time interval passes and something doesn't happen.

1. On your profile page, click on My Notifications on the left menu
2. Review each option and select/unselect your notification preferences, click Save after each change.

*Recommendation: keep all events checked for complete tracking*

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Search

Personal Preferences

- My Profile
- Access Tokens
- Twitter Integration
- Auto Delegation
- My Notifications**
- Shared Notifications
- My Signature
- Language Preferences
- View Other Accounts
- Share My Account
- Adobe Sign API

### My Notifications

Select which changes in status should trigger an e-mail notification or create an event

Email	Event	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Agreement sent
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Agreement viewed
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Agreement signed or approved
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Agreement declined
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Agreement delegated
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Signed copy uploaded by sender
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Email sent to a signer bounced and was not delivered
<input checked="" type="checkbox"/>		Notify me when someone else in my recipient group has signed

Select which conditions should trigger an e-mail notification or create an alert

Email	Alert	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Agreement not viewed in 8 hours

Cancel Save

## Setting up Your Signature

Adobe Sign gives you several options on how to display your signature when you apply it to a document.

**Option 1 (Default)** – you can use the default Adobe Sign signature text font (no setup needed):

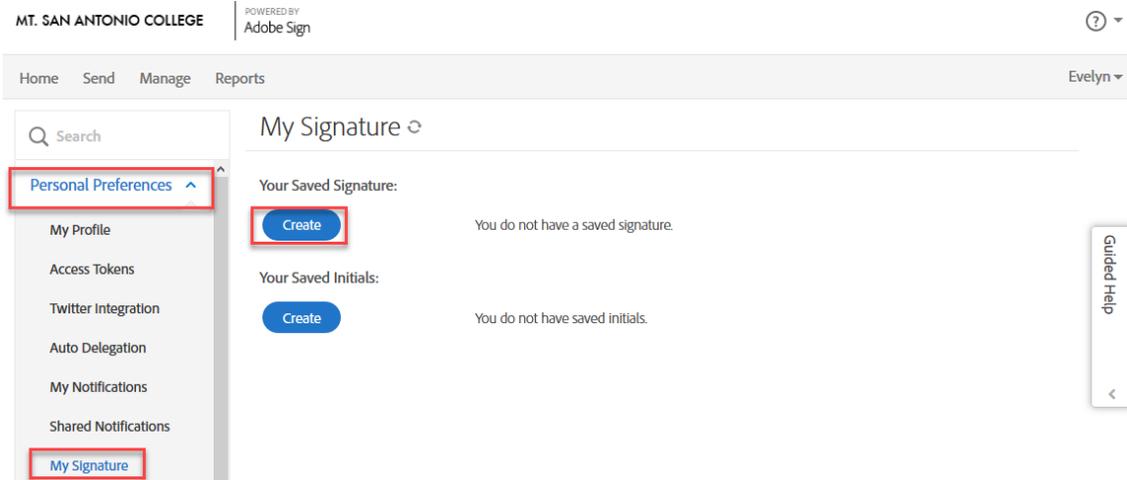
Joe Mountie

**Option 2 (Draw)** - you can draw your signature with your mouse (or finger on mobile device)

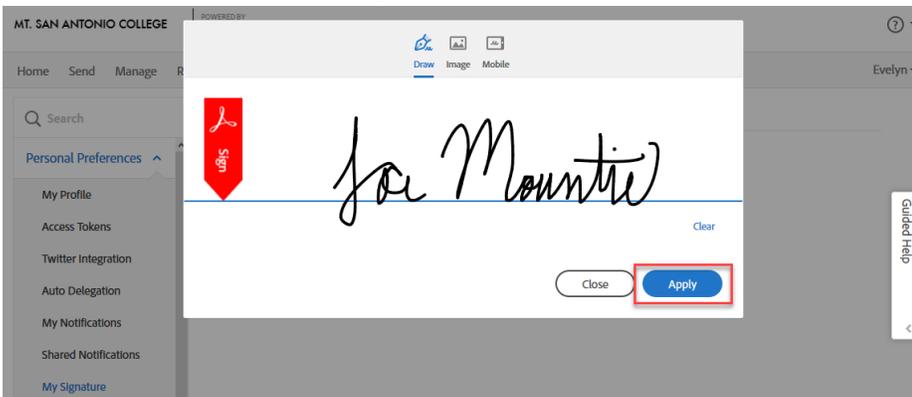
**Option 3 (Upload)** – you can upload an image of your signature using a .png, .gif, .bmp or, .jpg format

To set up your signature by drawing or uploading it, please follow the steps below.

1. On My Profile page, click on My Signature on the left menu
2. Click on the Create button



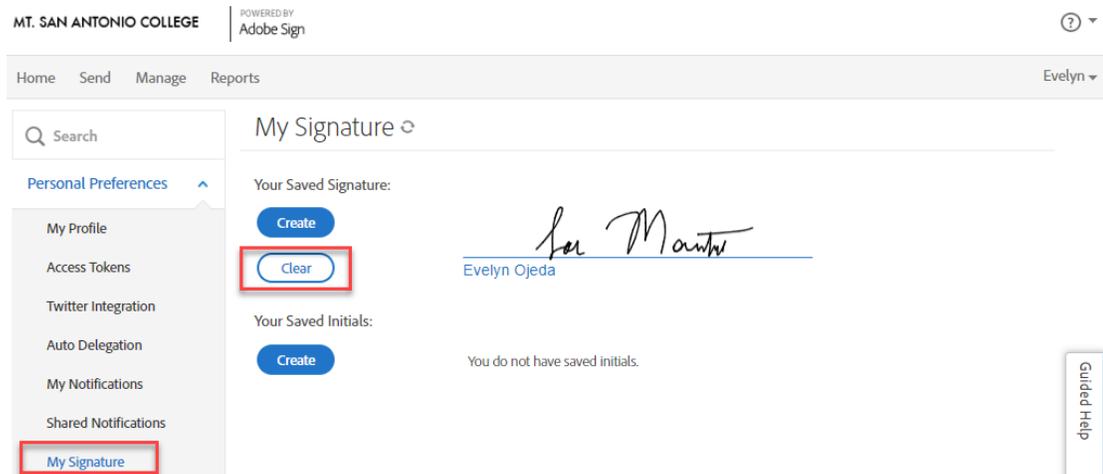
3. Once you see the signature panel, you can choose one of the methods to enter your signature. *Note: you can only save one signature.*
  - a. If you select **draw**, you can use your mouse, stylus, or finger.
    - i. If you are on a desktop with a non-touch screen, select the **Mobile option**. The Mobile option which will ask for a phone number to a touch enabled device. A link will be sent to that number, allowing you to draw your signature there, and import it to your user profile
  - b. If you select **upload**, you can then select an image from your computer. Image must only contain your signature and no other content. Minimal recommended size: 60 pixels tall and up to 600 pixels wide. Supported formats: PNG, JPG, GIF, BMP.
4. Once you are happy with a signature, click Apply.



5. Follow the same process for your initials.

## Changing Your Signature

1. In My Profile page, select My Signature on the left menu.
2. Click on the Clear button



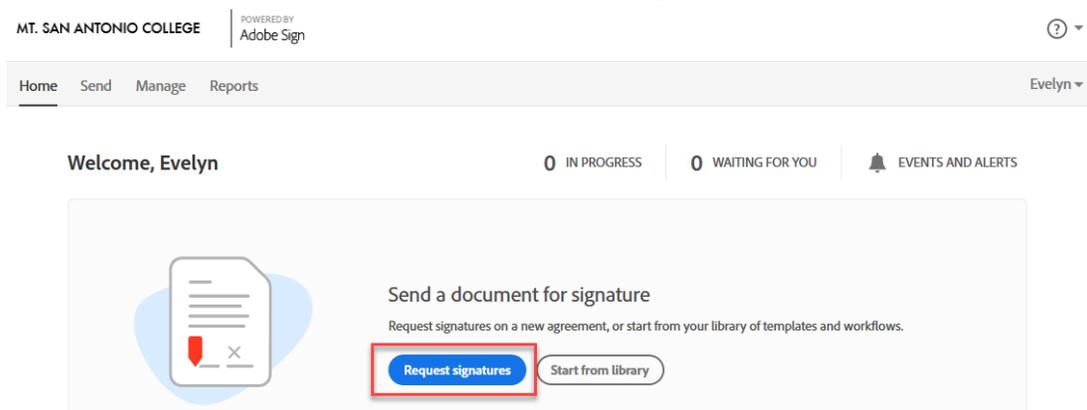
3. Create your new signature following the previous steps above in this guide.

## Sending Documents for Signatures

Adobe Sign allows for you to send documents for signatures from one recipient or multiple recipients.

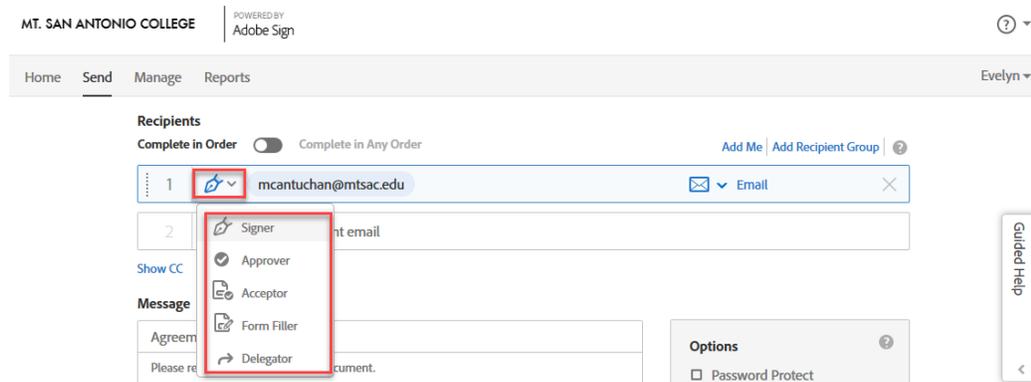
### Sending Documents to a Single Recipient

1. On the Home tab of your account, click Request Signatures

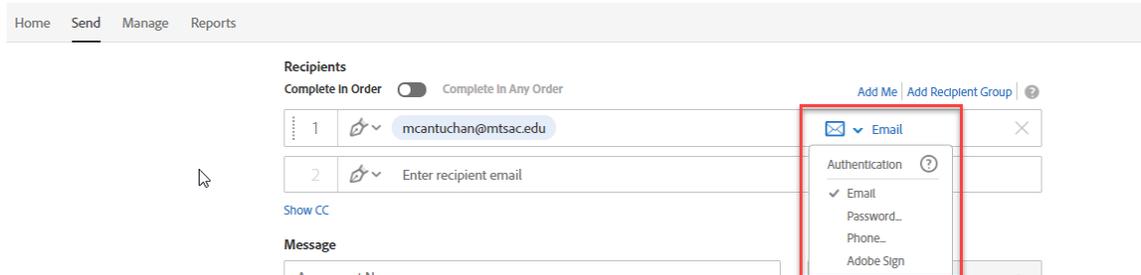


2. In the following screen, enter the recipient's email address
3. Click the pen icon, to the left of the email address field, to choose the role of the recipient.
  - a. **Signers** (default role) are required to apply at least one signature to an Agreement. Each signer on a transaction needs to have at least one required signature field assigned to them.
  - b. **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.

- c. **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 be available as you would expect.
- d. **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.
- e. **Form Filler** is designed specifically for customers that have a need to fill in form content during the signature process, but don't have the systems in place to programmatically build custom documents or push field content from a database to the form.
- f. The **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.

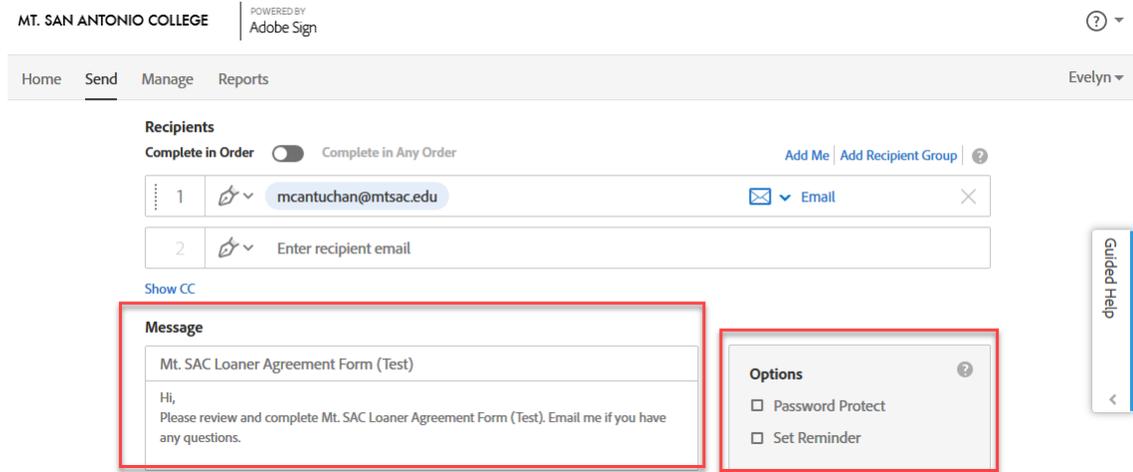


4. (Optional) Select the second-factor authentication method. The default is Email, but you can select Password (supplied by sender) OR Phone (SMS verification code) OR Adobe Sign. *Note: For internal sending, using Password or Adobe Sign is recommended.*

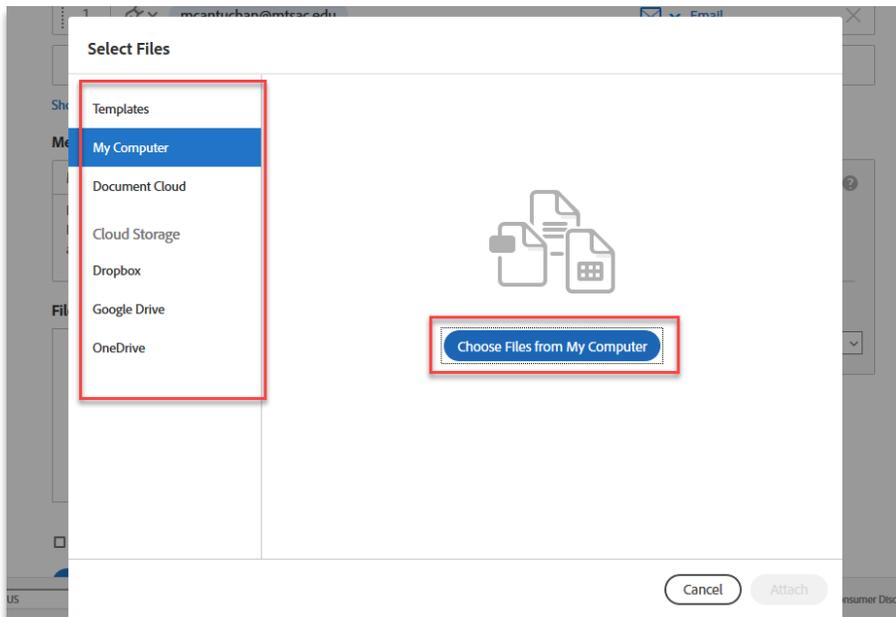
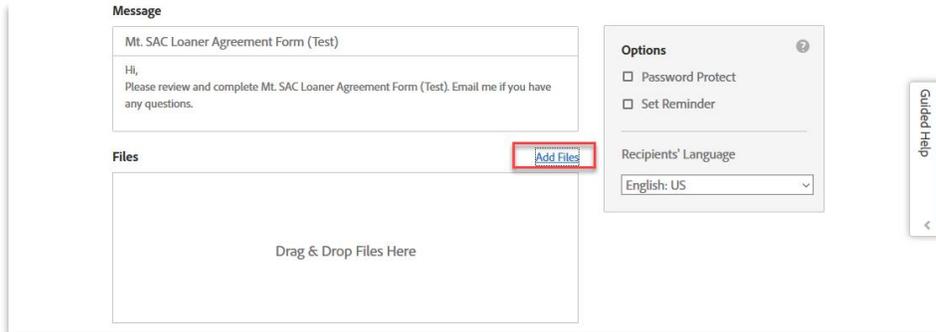


5. Enter an Agreement Name and Message in the appropriate fields
6. (Optional) You can set a password that will require recipients to enter a password to open and view the signed PDF file. Or set Reminders to be sent until the agreement is

completed.



7. Click on Add Files or drag and drop to attach. You can attach from My Computer or the other options listed. *Note: Multiple documents can be attached, and are delivered as one contiguous document for the recipient.*



8. Your file(s) should be listed under Files. Check the Preview and Add Signatures Field box, then click the Next button. Note: the box must be checked to avoid signature errors

Message

Mt. SAC Loaner Agreement Form (Test)

Hi,  
Please review and complete Mt. SAC Loaner Agreement Form (Test).

Files Add Files

Computer-loan-agreement.pdf

Drag More Files Here

Options

Password Protect

Set Reminder

Recipients' Language

English: US

Preview & Add Signature Fields

Next

Guided Help

9. Explore the fields on the right tabs. It is always good practice to make sure you have the correct recipient listed.

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Relative to Page Navigate to...

RECIPIENTS

mcantuchan@mtsac.edu (Signer)

Signature Fields

Signature

Initials

Signature Block

Stamp

Signer Info Fields

Data Fields

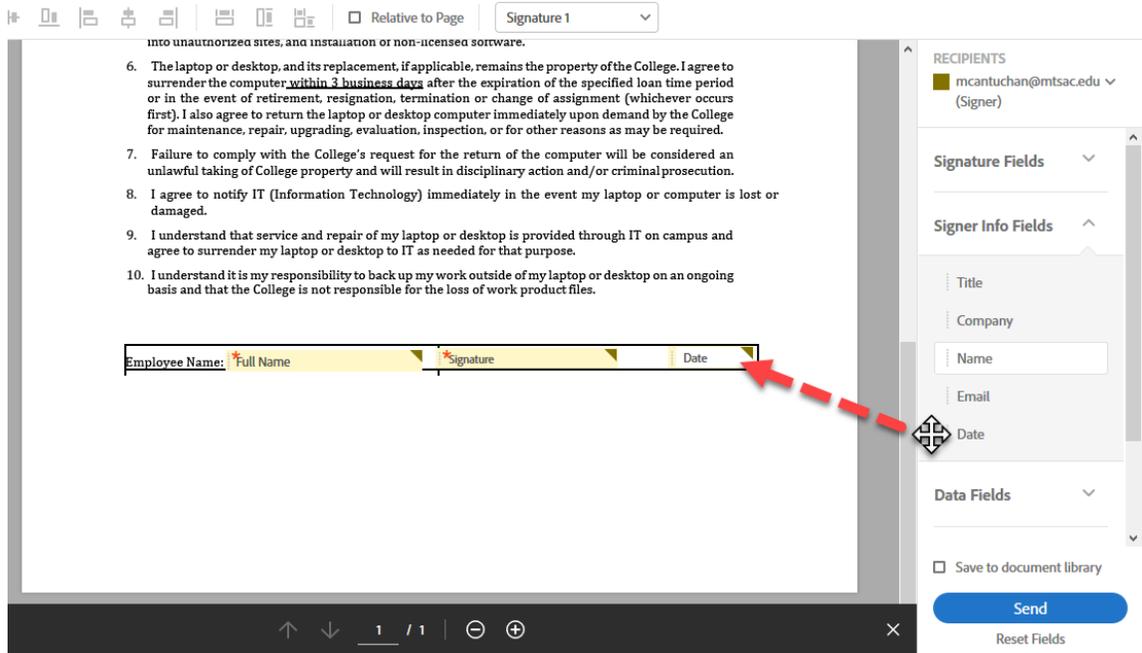
More Fields

Save to document library

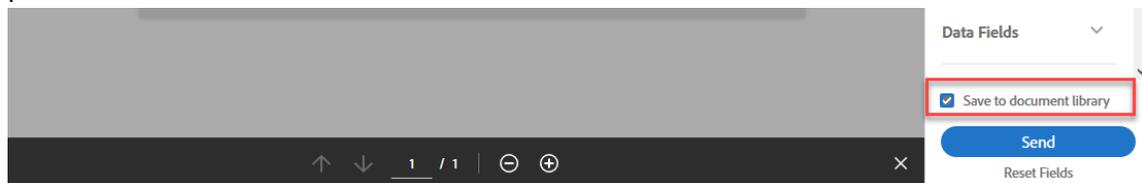
Send

Reset Fields

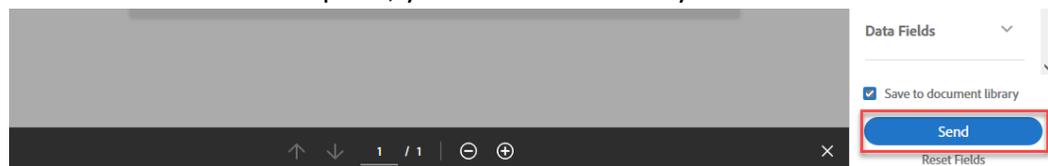
10. Click and drag the fields that you want to place on the document- one at a time. You can resize them as needed. **Note: Double-click on the fields placed on the document to view more options.**



11. (Optional) If you are building a common document for your use, you can check the Save to document library option, saving the document with the fields as placed. In future transactions, you can simply attach the document from your library, and skip the field placement.



12. When all desired fields are placed on the document, click the Send button
  - a. An email is sent to your recipient that includes a link to the document, enabling their action.
  - b. Once their action is complete, you will be notified by email.

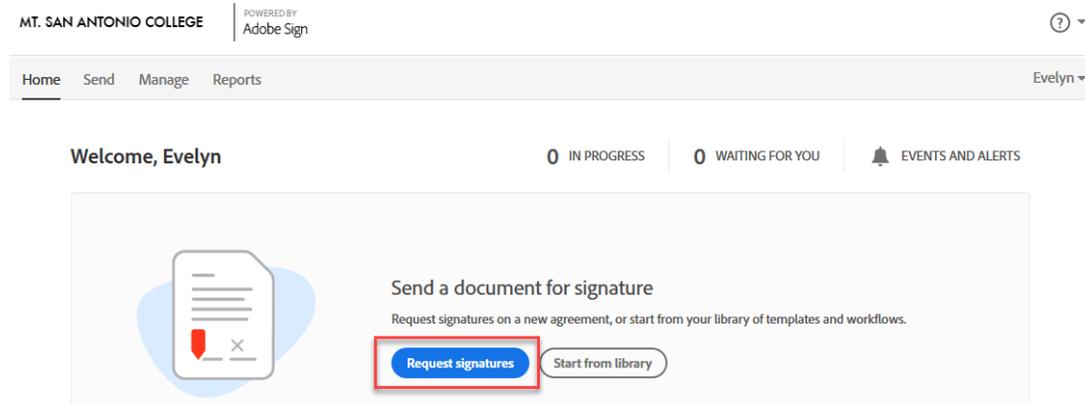


## Sending Documents to Multiple Recipients

Sending an agreement to multiple recipients is almost identical as sending to one recipient.

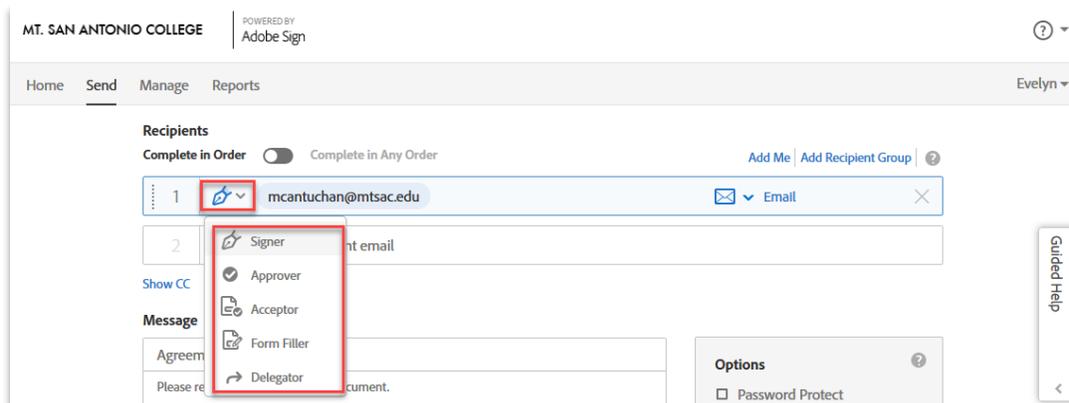
**The two differences** to keep in mind are: define each recipient in the order you want the document signed and instead of placing fields for one recipient, you will place necessary fields for each specific recipient.

1. On the Home tab of your account, click Request Signatures

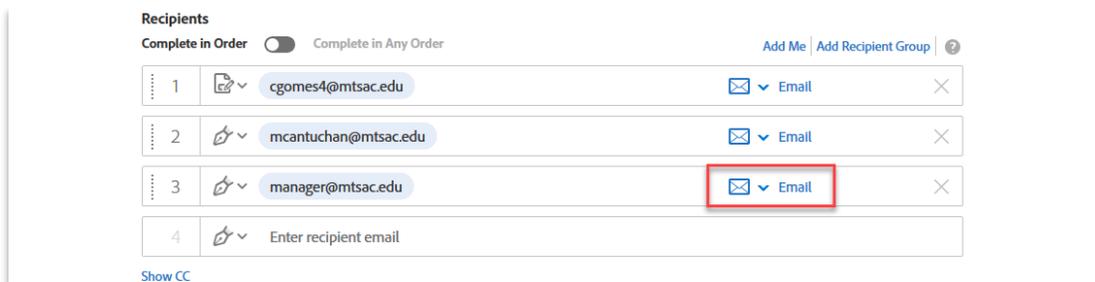


2. In the following screen, enter all of the recipient's email addresses. Enter recipient in order from top to bottom, if order matters.
3. Click the pen icon, to the left of the email address field, to choose the role of each recipient.
  - a. **Signers** (default role) are required to apply at least one signature to an Agreement. Each signer on a transaction needs to have at least one required signature field assigned to them.
  - b. **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.
  - c. **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 be available as you would expect.
  - d. **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.
  - e. **Form Filler** is designed specifically for customers that have a need to fill in form content during the signature process, but don't have the systems in place to programmatically build custom documents or push field content from a database to the form.
  - f. The **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

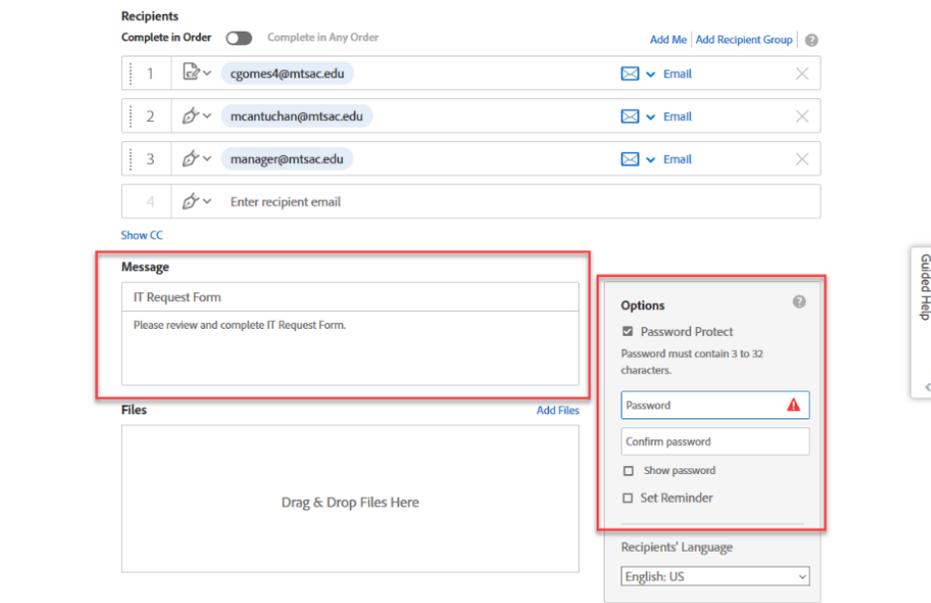
document.



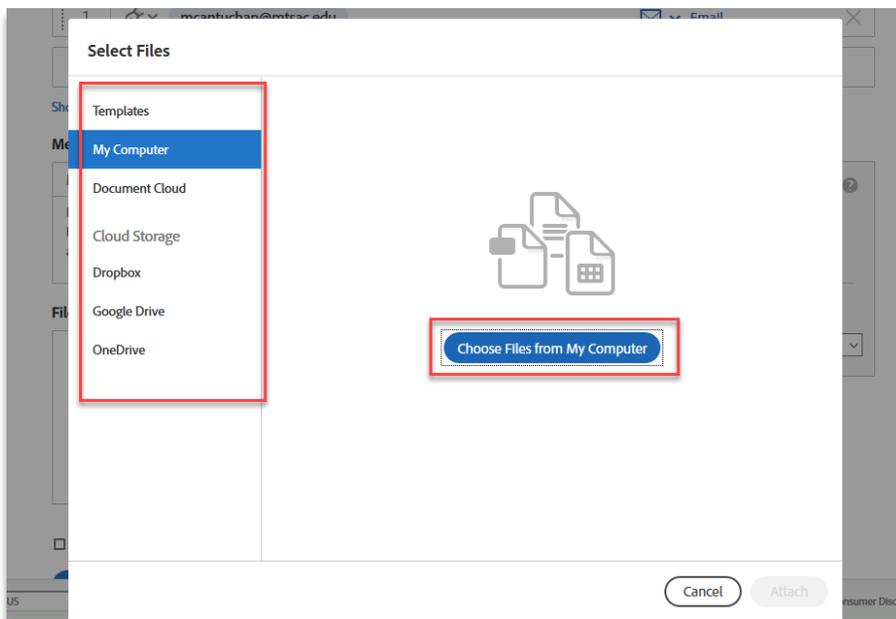
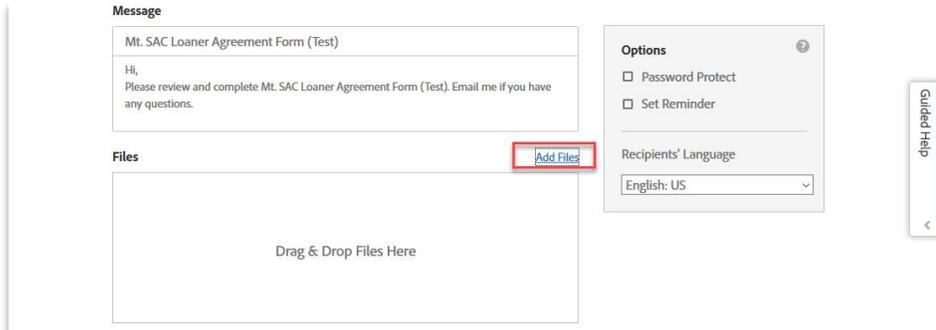
- (Optional) Select the second-factor authentication method. The default is Email, but you can select Password (supplied by sender) OR Phone (SMS verification code) OR Adobe Sign.



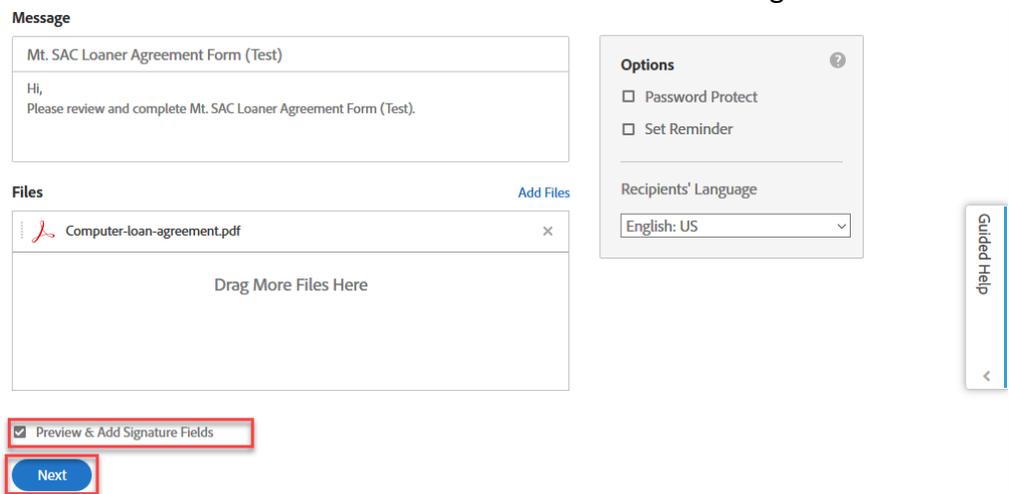
- Enter an Agreement Name and Message in the appropriate fields
- (Optional) You can set a password that will require recipients to enter a password to open and view the signed PDF file. Or set Reminders to be sent until the agreement is completed.



7. Click on Add Files or drag and drop to attach. You can attach from My Computer or the other options listed. *Note: Multiple documents can be attached, and are delivered as one contiguous document for the recipient.*



8. Your file(s) should be listed under Files. Check the Preview and Add Signatures Field box, then click the Next button. *Note: the box must be checked to avoid signature errors*



- Explore the fields on the right tabs. It is always good practice to make sure you have the correct recipients listed.

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**LOAN AGREEMENT (for Faculty/Staff)**  
 1100 North Grand Avenue, Walnut, CA 91789-1399 • 909.274.7500 • www.mtsac.edu

Mt. San Antonio College provides temporary replacement laptop or desktop computers to its eligible full-time faculty and staff for use in the course and scope of their employment. The goal in providing this resource is to promote educational excellence through the use of technology to foster innovation, creativity and efficiency. The faculty or staff member agrees to take reasonable measures to protect the College's property and agrees by affirmation to the following conditions:

- I accept personal liability for the computer plus its College-supplied software and its repair or replacement should the computer be lost or stolen or severely damaged. I agree to repay the college the full amount required to replace the lost, stolen, or damaged computer, or to pay for its repair if severely damaged but repairable. In the event of loss, theft or severe damage, the computer will be replaced or repaired at the sole discretion of the College.
- If the computer needs to be left unattended, I agree to take appropriate precautions against theft, loss, or damage, which may include locking it in a secure area.
- I agree to exercise care and caution when downloading files from the Internet or external media. Certain files may carry computer viruses that may damage the computer's software and operating system. Other files may contain content which is illegal or inappropriate for retention on College-owned equipment. Should such material be discovered on this College-owned computer at any time, the user may be subjected to disciplinary action.
- I understand that computers are provided to support the educational mission of the College. Incidental personal use of the computer must not interfere with this educational mission.

**RECIPIENTS**

- Caron Gomes (cgomes4@mtsac.edu) (Form Filler)
- Evelyn Ojeda (me) (Prefill)
- Caron Gomes (cgomes4@mtsac.edu) (Form Filler)
- mcantuchan@mtsac.edu (Signer)
- manager@mtsac.edu (Signer)
- Anyone

Data Fields ▾  
More Fields ▾

- Select your first recipient from the list, click and drag the appropriate fields that apply to that specific recipient. Repeat for each recipient listed. **Note: Double-click on the fields placed on the document to view more options.**

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into unauthorized sites, and installation or non-licensed software.

- The laptop or desktop, and its replacement, if applicable, remains the property of the College. I agree to surrender the computer, within 3 business days after the expiration of the specified loan time period or in the event of retirement, resignation, termination or change of assignment (whichever occurs first). I also agree to return the laptop or desktop computer immediately upon demand by the College for maintenance, repair, upgrading, evaluation, inspection, or for other reasons as may be required.
- Failure to comply with the College's request for the return of the computer will be considered an unlawful taking of College property and will result in disciplinary action and/or criminal prosecution.
- I agree to notify IT (Information Technology) immediately in the event my laptop or computer is lost or damaged.
- I understand that service and repair of my laptop or desktop is provided through IT on campus and agree to surrender my laptop or desktop to IT as needed for that purpose.
- I understand it is my responsibility to back up my work outside of my laptop or desktop on an ongoing basis and that the College is not responsible for the loss of work product files.

Full Name: \_\_\_\_\_  
 Email: \_\_\_\_\_  
 Title: \_\_\_\_\_  
 Supervisor: \_\_\_\_\_

Off Campus Contact Phone#: \_\_\_\_\_  
 Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**RECIPIENTS**

- Caron Gomes (cgomes4@mtsac.edu) (Form Filler)

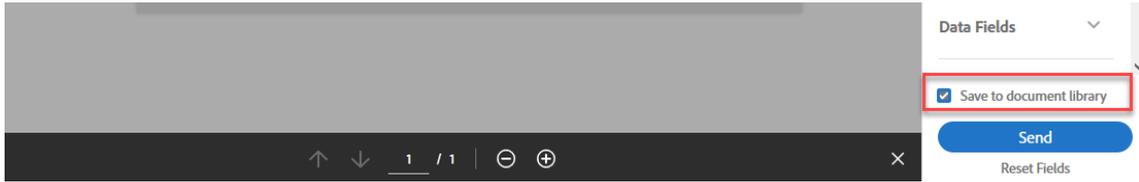
Signature Fields ▾  
 Signer Info Fields ▲

Title  
Company  
Name  
Email  
Date

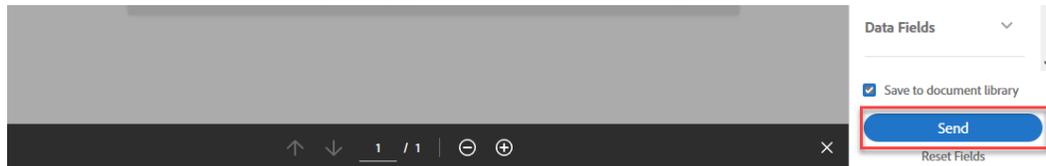
Data Fields ▾

- (Optional) If you are building a common document for your use, you can check the Save to document library option, saving the document with the fields as placed. In future

transactions, you can simply attach the document from your library, and skip the field placement.

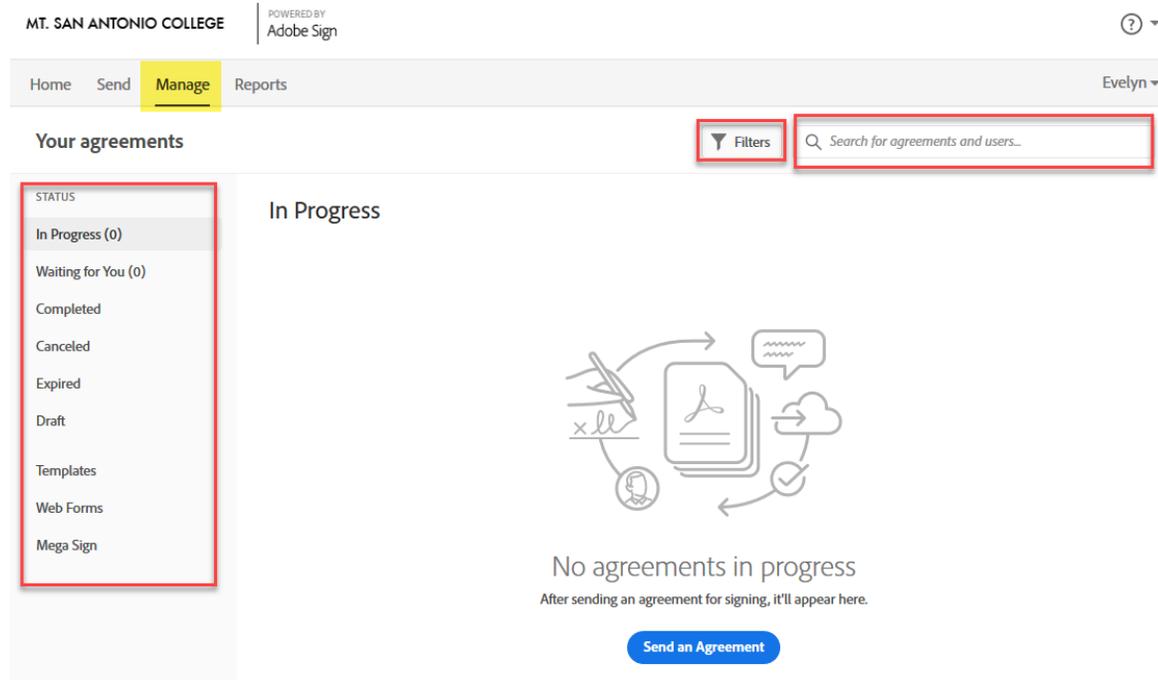


12. When all desired fields are placed on the document, click the Send button
  - a. An email is sent to your recipients that includes a link to the document, enabling their action- in the order that you listed them.
  - b. Once their action is complete, you will be notified by email.

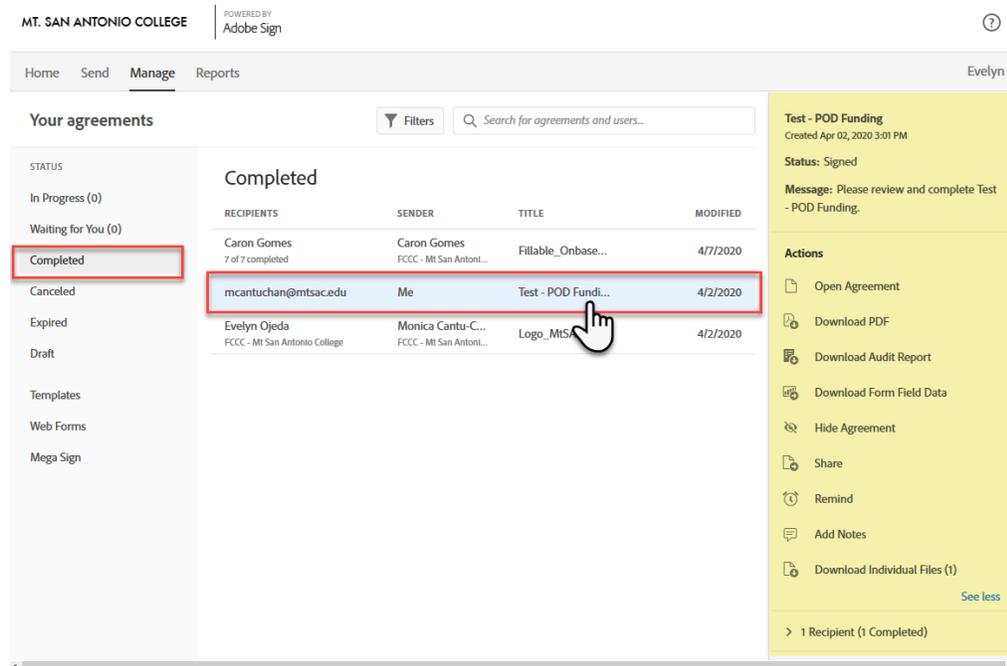


# Managing and Tracking Documents

Adobe Sign allows you to easily manage and track agreements through the Manage screen. Your agreements are categorized by status, to the left of the screen. You can also use the Search bar on the upper right of the screen or add a Date Filter to search for an agreement.



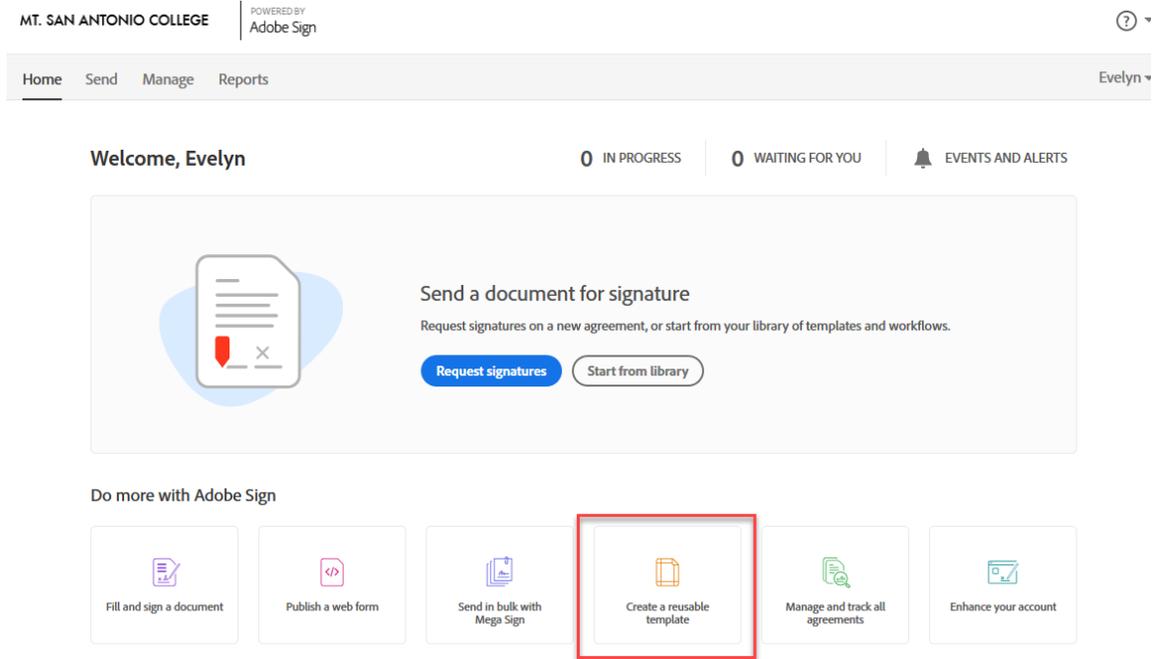
Once an agreement has been sent, you can view all agreement options by clicking a specific document under any category. You can view an agreement, download the audit report, view the event history, set reminders and much more.



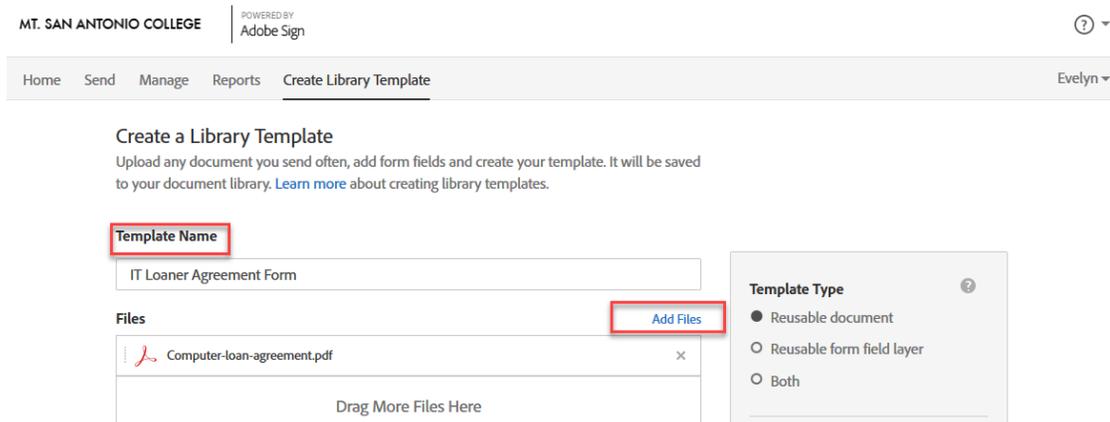
# Creating Custom Templates

Library templates allow users to create reusable, interactive documents. These documents can be as simple as one signature field, or highly complex forms.

1. On the Home screen, click on the Create a Reusable Template option



2. Enter the name of your template into the Template Name field
3. Click Add Files to browse your system or you can drag and drop file(s) into the designated area. *Note: Multiple files can be attached to build one larger template if desired.*



4. Under Template Type, select an option (can be changed at any time):
  - a. Reusable document - This option saves the full document, content and form fields

- b. Reusable form field layer - This options saves just the form field layer to be applied to a different document (different content with the same layout)
  - c. Both - Both types of templates will be available
5. Under Who Can Use My template, select an option:
- a. Only me - This option will only make the template available to the uploading user
  - b. Any user in my group - Setting the template at the group level will create a logical association between the template and the group the uploading user is currently part of. All members of the group will have access to the template
  - c. Any user in my organization - Every user in the account will have access to use the template.

The screenshot shows a form for creating a template. The 'Template Name' field contains 'IT Loaner Agreement Form'. The 'Files' section shows a file named 'Computer-loan-agreement.pdf' with a red icon and a close button. Below the files is a 'Drag More Files Here' area. At the bottom left is a blue button labeled 'Preview & Add Fields'. On the right side, a settings panel is highlighted with a red border. This panel contains two sections: 'Template Type' with three radio button options: 'Reusable document' (selected), 'Reusable form field layer', and 'Both'; and 'Who can use this template' with three radio button options: 'Only me' (selected), 'Any user in my group', and 'Any user in my organization'.

6. Click the Preview and Add Fields button

This screenshot is identical to the one above, showing the same form and settings panel. However, the blue button at the bottom left, labeled 'Preview & Add Fields', is now highlighted with a red border.

7. Drag and drop the desired fields using the tabs to the right of the screen. Once placed on the document, you can resize fields to fit your document.

*Note: All fields placed are assigned to the first recipient by default. You can change who the placed fields are assigned to by accessing the Recipients drop-down list and changing the selected recipient.*

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Relative to Page Custom Field 3

4. I understand that computers are provided to support the educational mission of the College. Incidental personal use of the computer must not interfere with this educational mission.

5. I understand that I will be personally liable for any of my own actions that violate copyright laws, illegal use of the computer or of copyrighted material or other illegal use, such as harassment, "hacking" into unauthorized sites, and installation of non-licensed software.

6. The laptop or desktop, and its replacement, if applicable, remains the property of the College. I agree to surrender the computer within 3 business days after the expiration of the specified loan time period or in the event of retirement, resignation, termination or change of assignment (whichever occurs first). I also agree to return the laptop or desktop computer immediately upon demand by the College for maintenance, repair, upgrading, evaluation, inspection, or for other reasons as may be required.

7. Failure to comply with the College's request for the return of the computer will be considered an unlawful taking of College property and will result in disciplinary action and/or criminal prosecution.

8. I agree to notify IT (Information Technology) immediately in the event my laptop or computer is lost or damaged.

9. I understand that service and repair of my laptop or desktop is provided through IT on campus and agree to surrender my laptop or desktop to IT as needed for that purpose.

10. I understand it is my responsibility to back up my work outside of my laptop or desktop on an ongoing basis and that the College is not responsible for the loss of work product files.

Computer Asset Tag#:	Serial#:
Employee Name: Full Name	Off Campus Contact Phone#:
Employee #: A	Signature: Date:
Supervisor:	Division:
Login Test Successful: N/A	Mobile Wifi (Mifi) included:
<input type="checkbox"/> Computer <input type="checkbox"/> Outlook <input type="checkbox"/> Adobe	Yes No

Template Properties

RECIPIENTS Participant 1

Signature Fields

Signer Info Fields

Data Fields

- Text Input
- Drop Down
- Check Box
- Radio Button
- Image

More Fields

Save Reset Fields

8. (Optional) Double-click on any field on the document to view more options for that field

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10. I understand it is my responsibility to back up my work outside of my laptop or desktop on an ongoing basis and that the College is not responsible for the loss of work product files.

Computer Asset Tag#:	Serial#:
Employee Name:	Off Campus Contact Phone#:
Employee #: A	Signature: Date:
Supervisor:	Division:
Login Test Successful:	Mobile Wifi (Mifi) included:
<input type="checkbox"/> Computer <input type="checkbox"/> Outlook <input type="checkbox"/> Adobe	Yes No

Custom Field 3

Assigned To Participant 1

Field Type Text Input

Value Type Entered Value

Required  Read Only

Mask field data  Multi-line data entry

Default Value

Tooltip

Validation None

Conditions

Appearance

Tools

Delete Field Cancel OK

Template Properties

RECIPIENTS Participant 1

Signature Fields

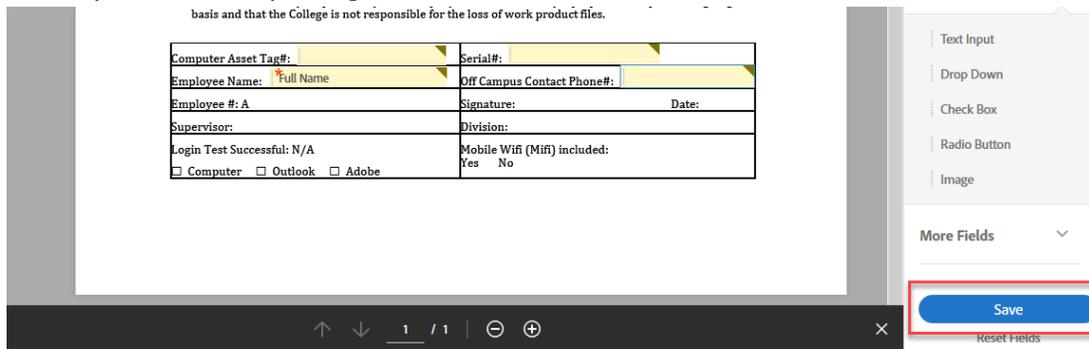
Signer Info Fields

Data Fields

- Text Input
- Drop Down
- Check Box
- Radio Button
- Image

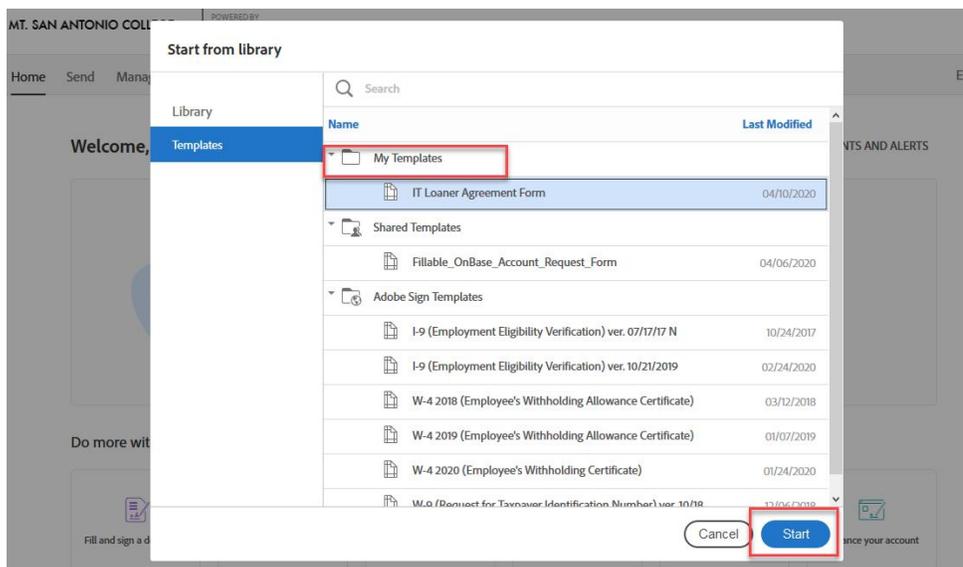
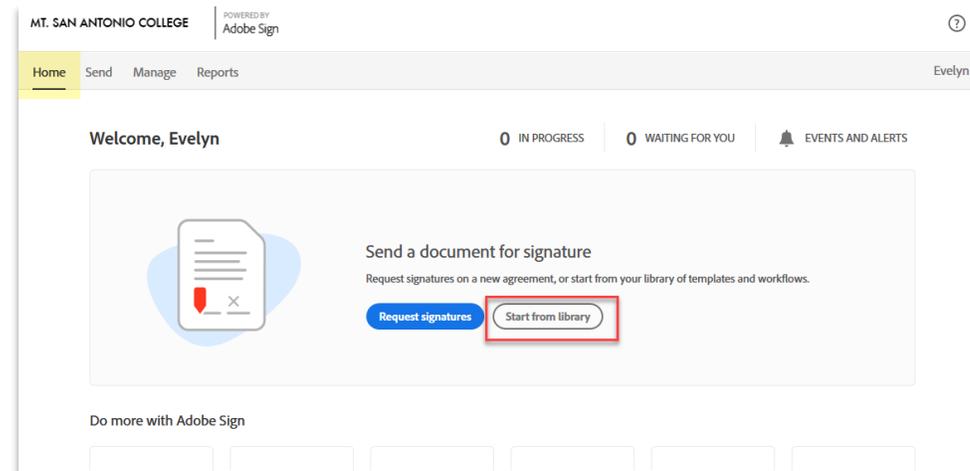
More Fields

9. When you are done placing all fields on the document, click the Save button.



10. When you are ready to use your template, simply click the Start from Library option on the Home page

11. Select your desired template under My Templates and click Start

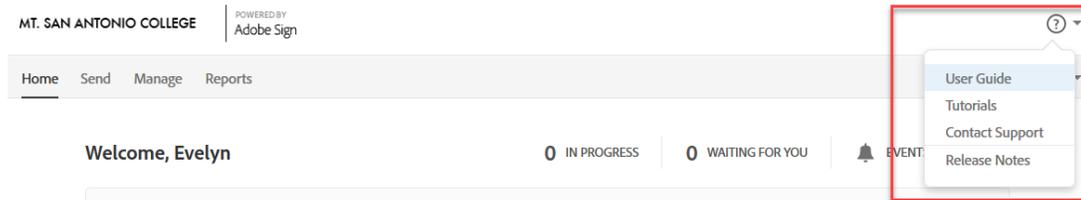


## Using/ Getting Help

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There are several kinds of help to assist you and guide you:

- **Help/Support.** This shortcut lets you access Adobe User Guides, Tutorials, etc. This shortcut is found on most pages throughout Adobe Sign.



- Email. [helpdesk@mtsac.edu](mailto:helpdesk@mtsac.edu)
- Call us. (909) 274- 4357
- Online Support Request. [helpdesk.mtsac.edu](https://helpdesk.mtsac.edu) self-service portal.