Mt. SAC Adobe® Sign User Guide (Basic)

Information Technology
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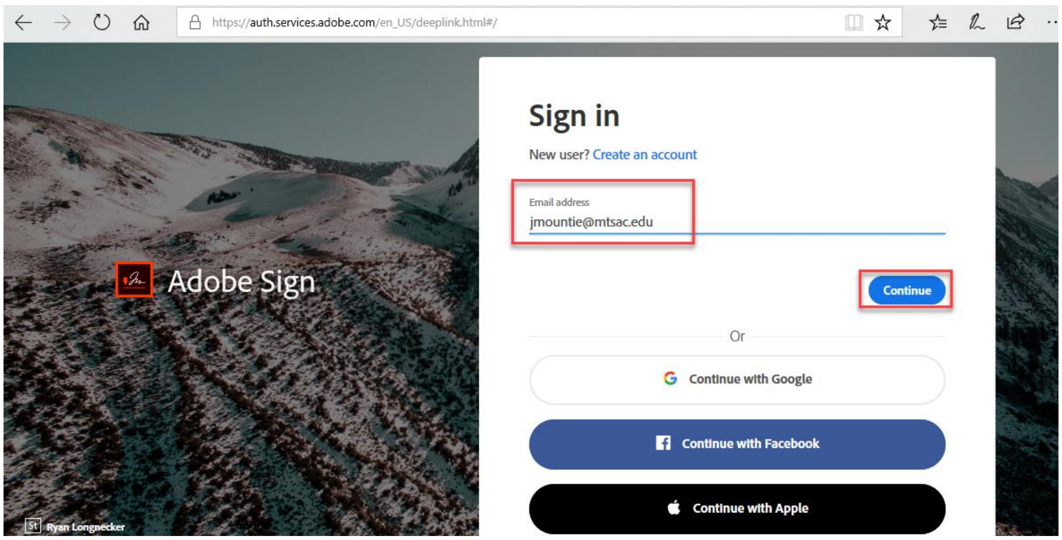
Contents

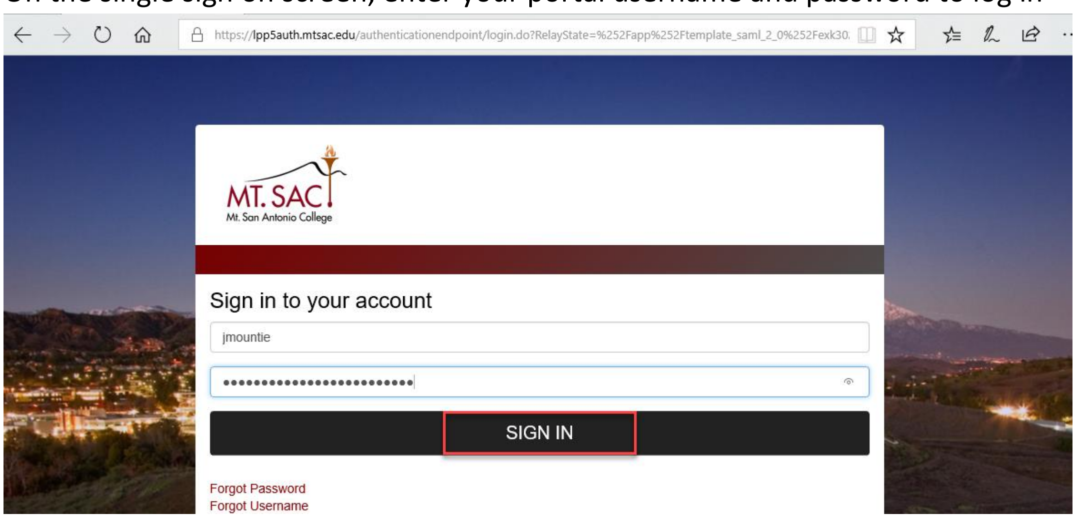
Accessing Adobe Sign

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.

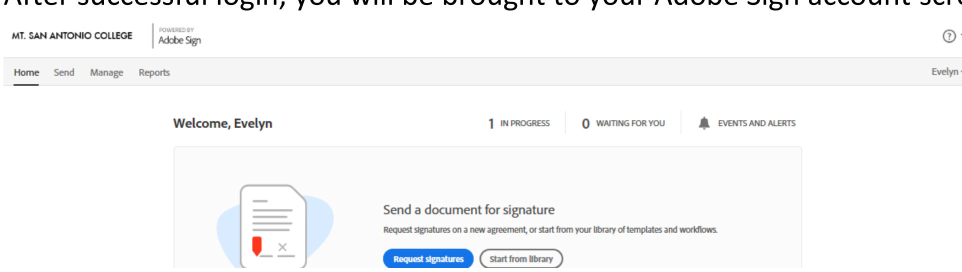
1. On the sign in screen, enter your Mt. SAC email address and press continue



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

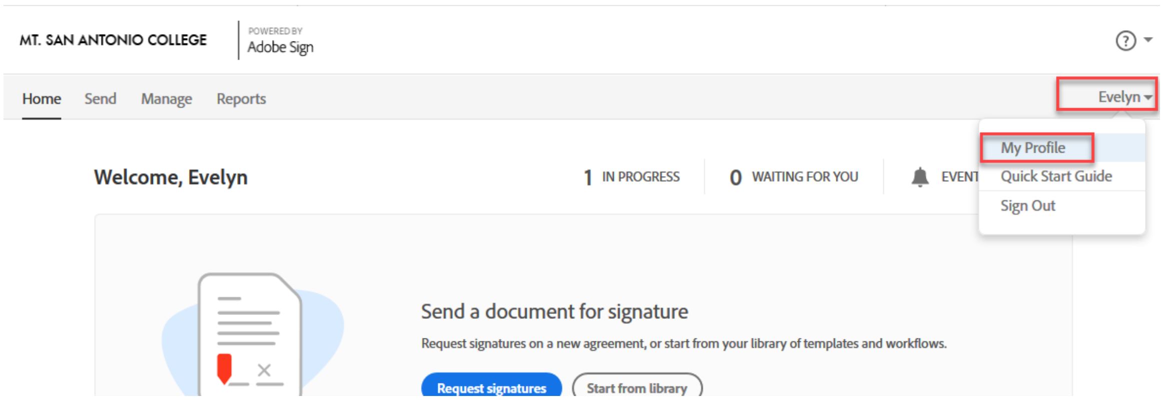


Setting up Your User Profile

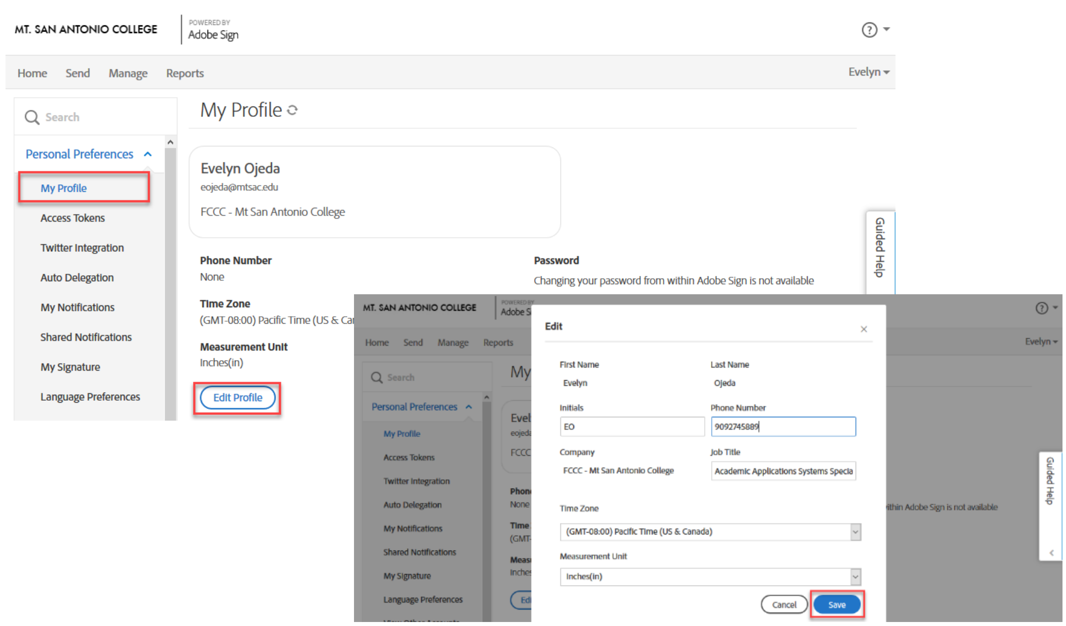
Updating your Personal Information

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’



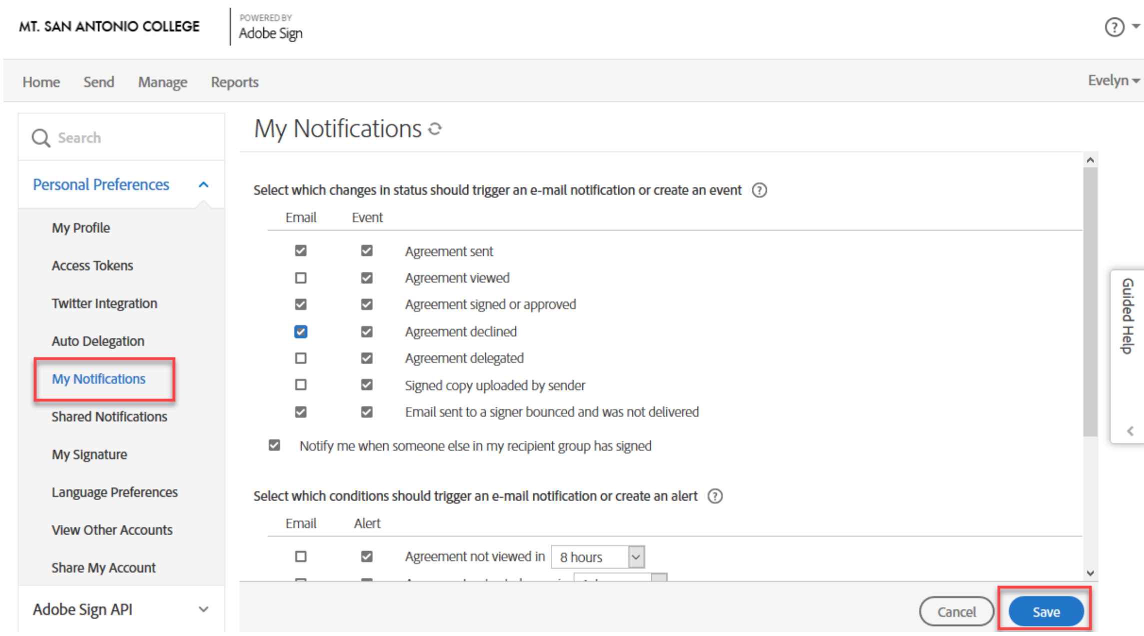
2. On the personal preferences page, click the ‘Edit Profile’ button to make changes, and then click ‘Save’ to save changes.
   Please review and modify these fields to display your correct information:
   - Your full name – Used in email communications and for your default typeset signature
   - Your 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



Setting up Your Signature

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

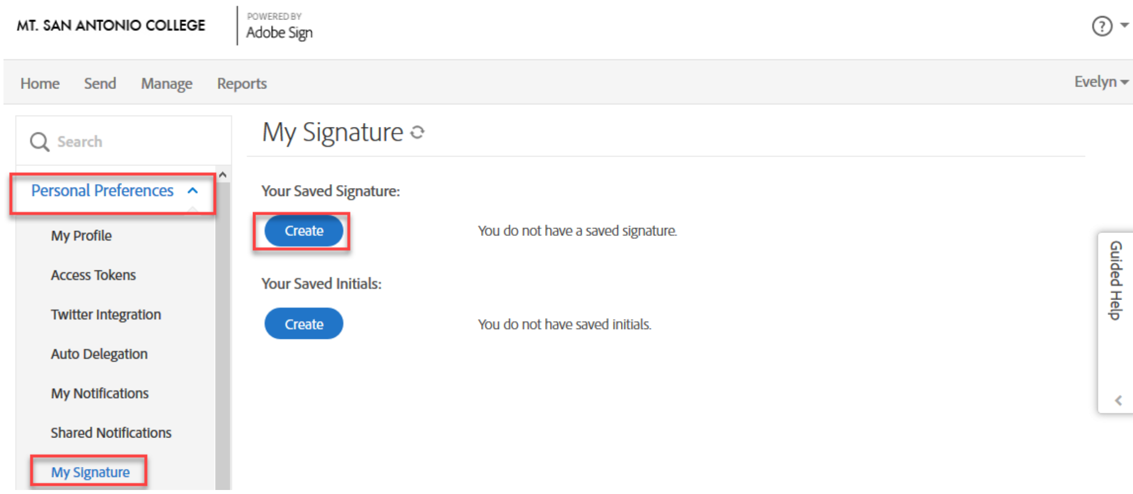
Option 1 (Default) – you can use the default Adobe Sign signature text font (no setup needed):

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

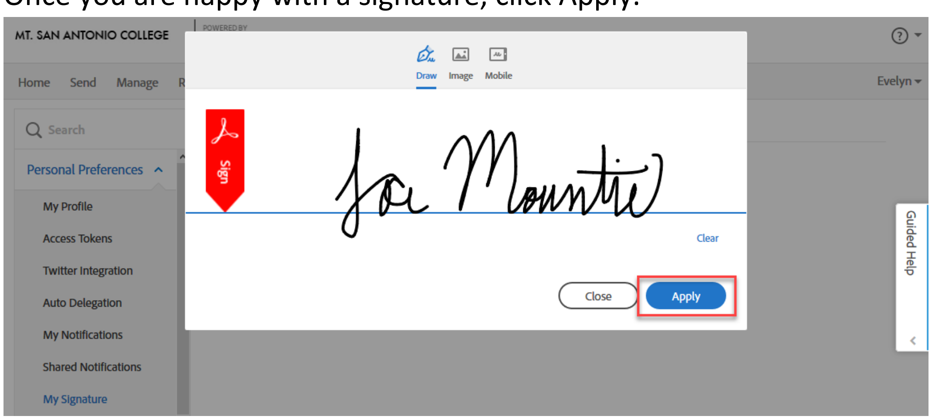
To set up your signature by drawing or uploading it, please follow the steps below.

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

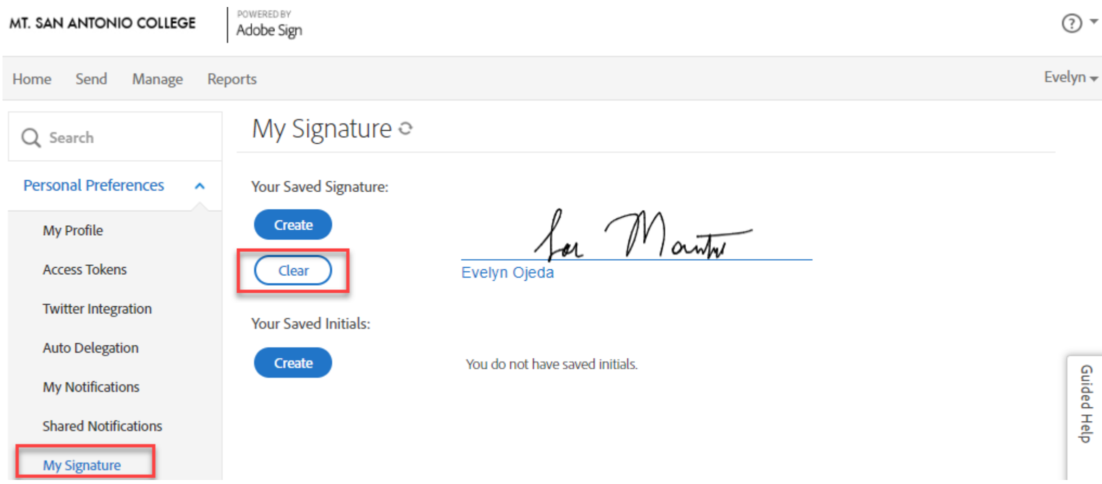
   b. If you select **upload,** you can then select an image from your computer. Image must only contain your signature and no other content. Minimal recommended size: 60 pixels tall and up to 600 pixels wide. Supported formats: PNG, JPG, GIF, BMP.
4. Once you are happy with a signature, click Apply.



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



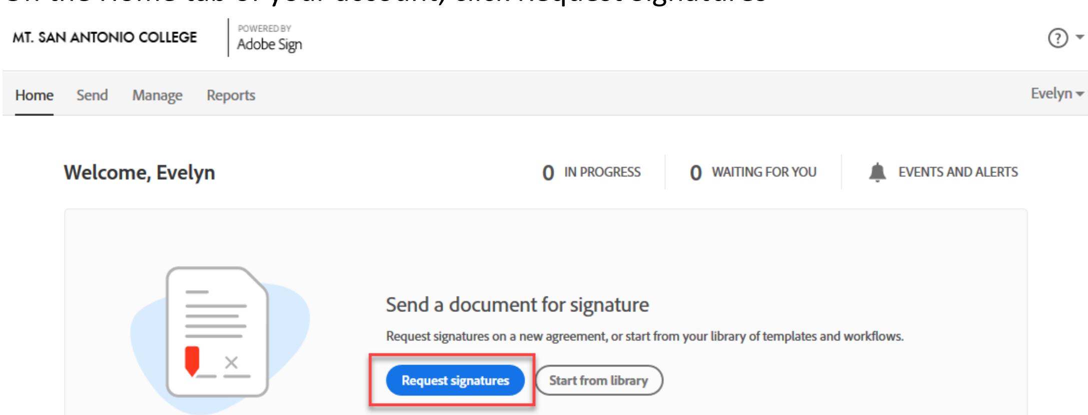
3. Create your new signature following the previous steps above in this guide.

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



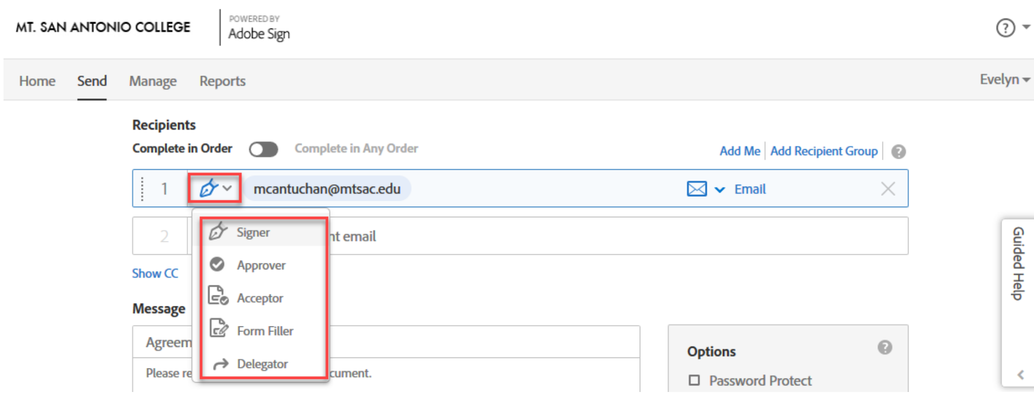
2. In the following screen, enter the recipient's email address
3. Click the pen icon, to the left of the email address field, to choose the role of the recipient.
    a. **Signers** (default role) are required to apply at least one signature to an Agreement. Each signer on a transaction needs to have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

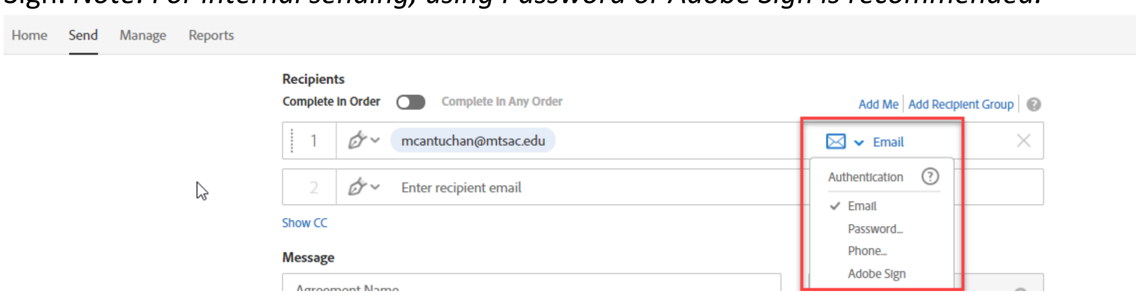
d. **Certified Recipients** can have no (zero) form fields assigned to them. During their "signature" process, they will be asked to either delegate, decline or acknowledge the agreement.

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.

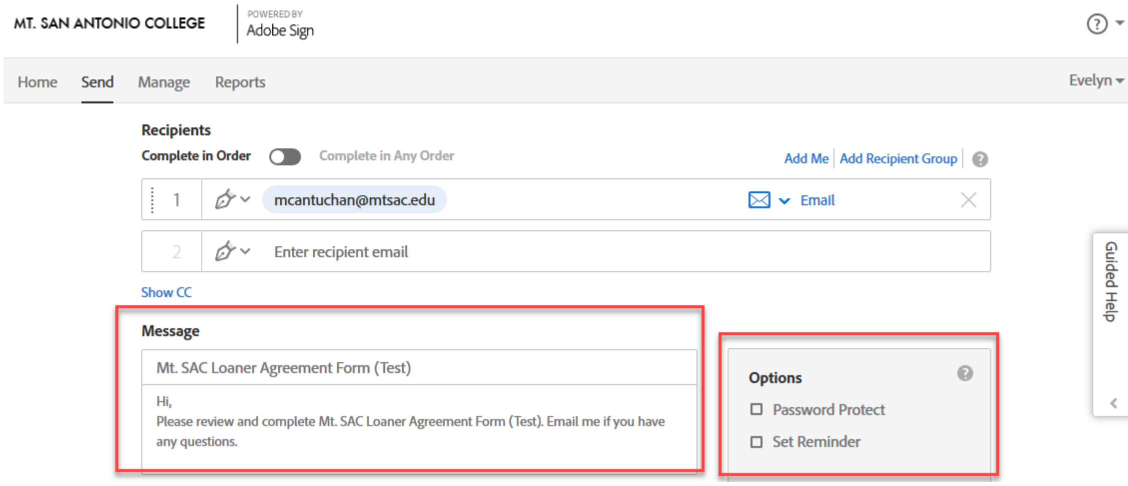


4. (Optional) Select the second-factor authentication method. The default is Email, but you can select Password (supplied by sender) OR Phone (SMS verification code) OR Adobe Sign. *Note: For internal sending, using Password or Adobe Sign is recommended.*

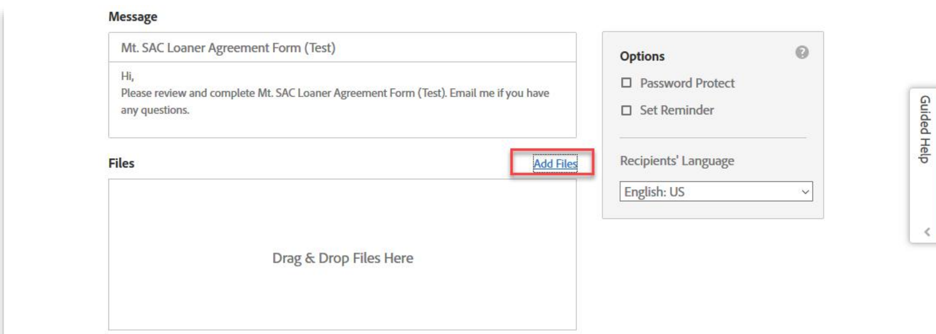


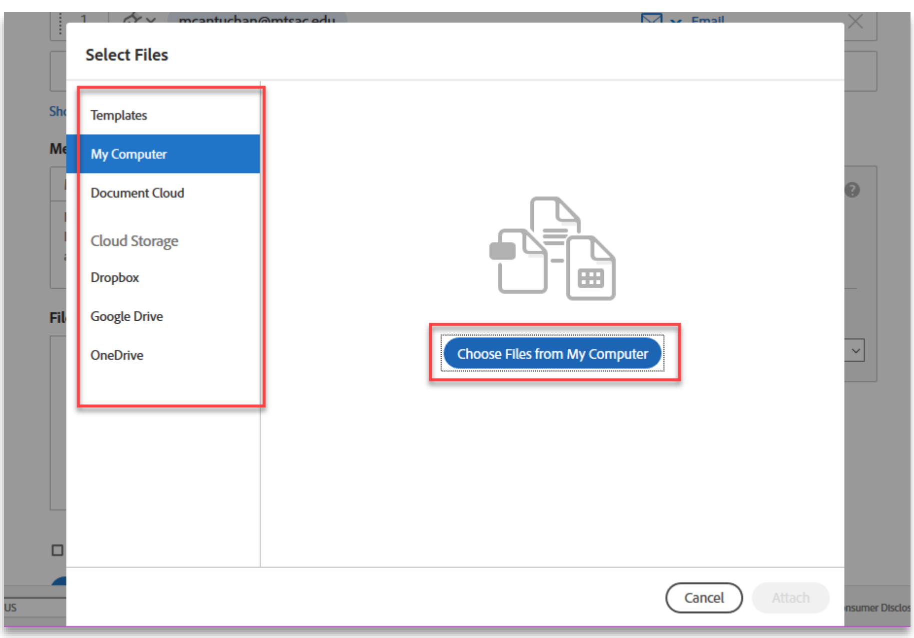
5. Enter an Agreement Name and Message in the appropriate fields
6. (Optional) You can set a password that will require recipients to enter a password to open and view the signed PDF file. Or set Reminders to be sent until the agreement is

completed.

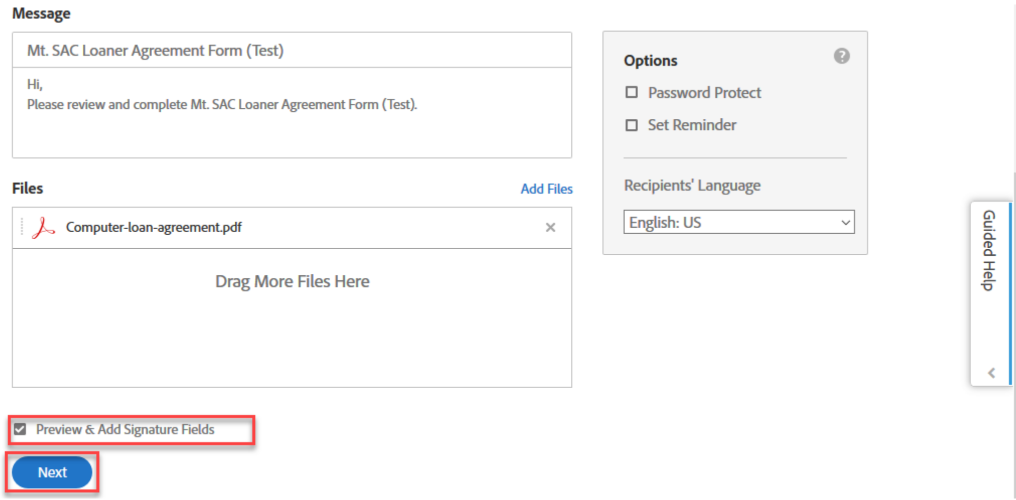


7. Click on Add Files or drag and drop to attach. You can attach from My Computer or the other options listed. *Note: Multiple documents can be attached, and are delivered as one contiguous document for the recipient.*

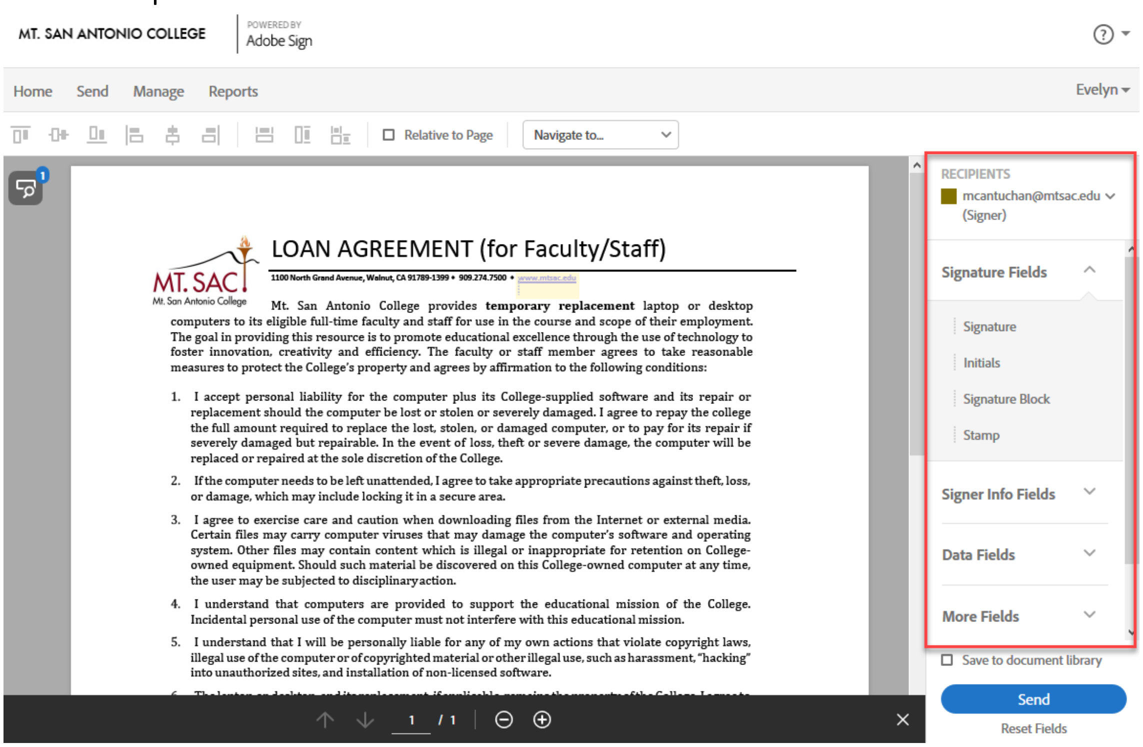




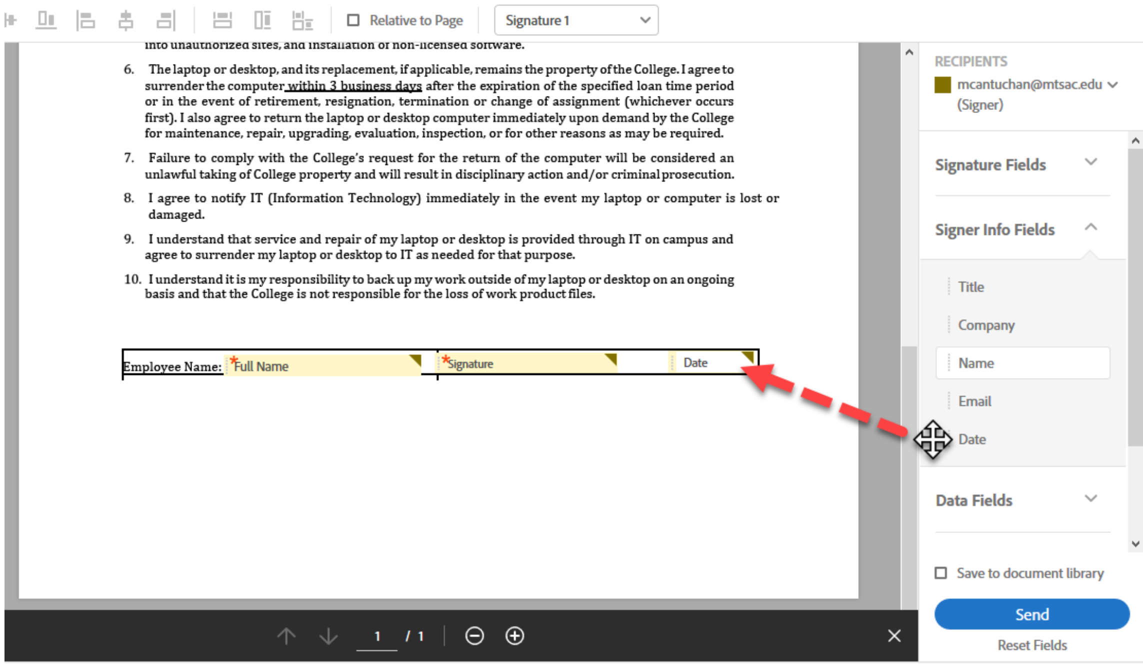
8. Your file(s) should be listed under Files. Check the Preview and Add Signatures Field box, then click the Next button. Note: the box must be checked to avoid signature errors



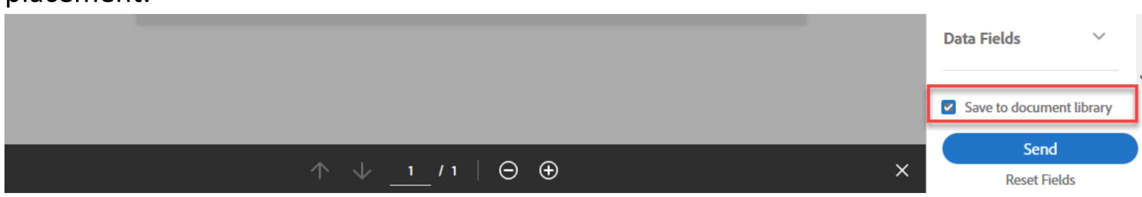
9. Explore the fields on the right tabs. It is always good practice to make sure you have the correct recipient listed.



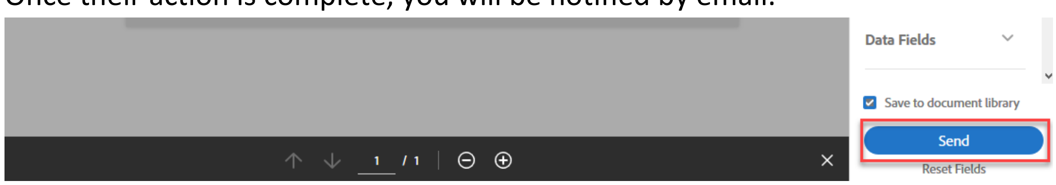
10. Click and drag the fields that you want to place on the document- one at a time. You can resize them as needed. **Note: Double-click on the fields placed on the document to view more options.**



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.



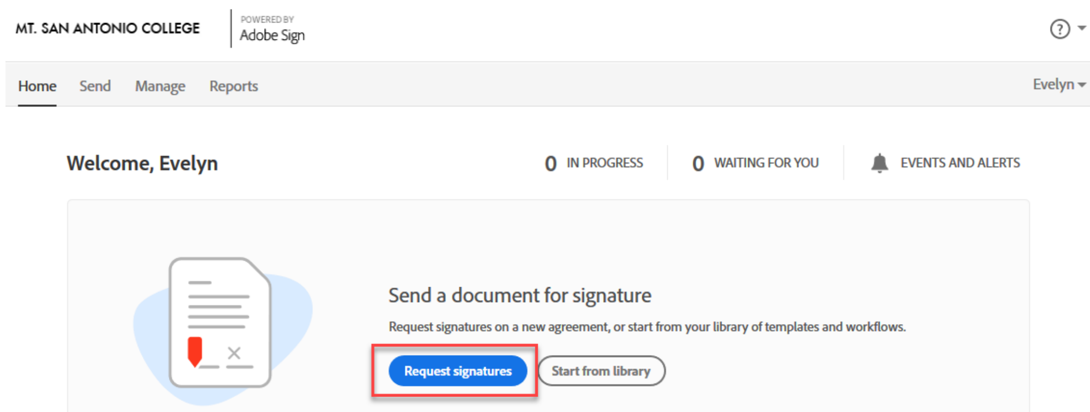
12. When all desired fields are placed on the document, click the Send button
    a. An email is sent to your recipient that includes a link to the document, enabling their action.
    b. Once their action is complete, you will be notified by email.



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

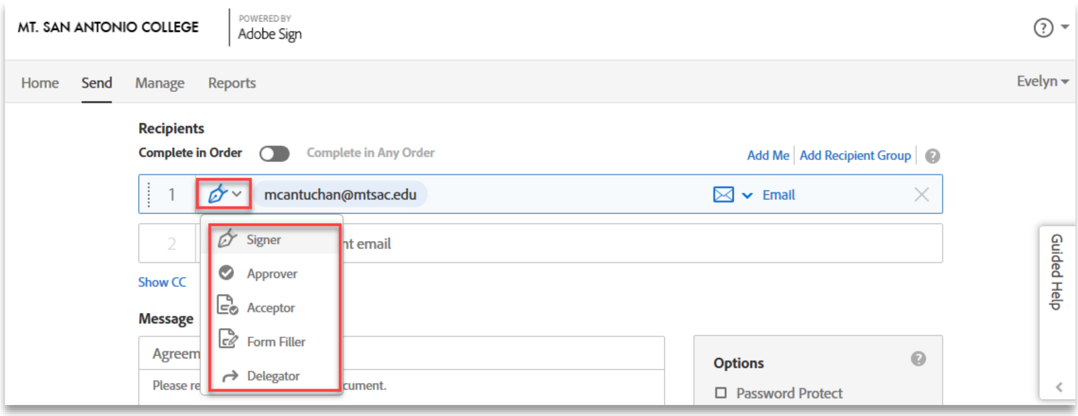


2. In the following screen, enter all of the recipient's email addresses. Enter recipient in order from top to bottom, if order matters.

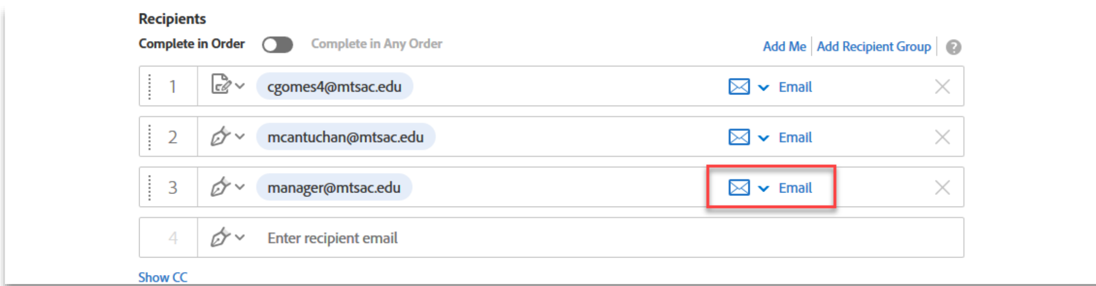
3. Click the pen icon, to the left of the email address field, to choose the role of each recipient.

    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

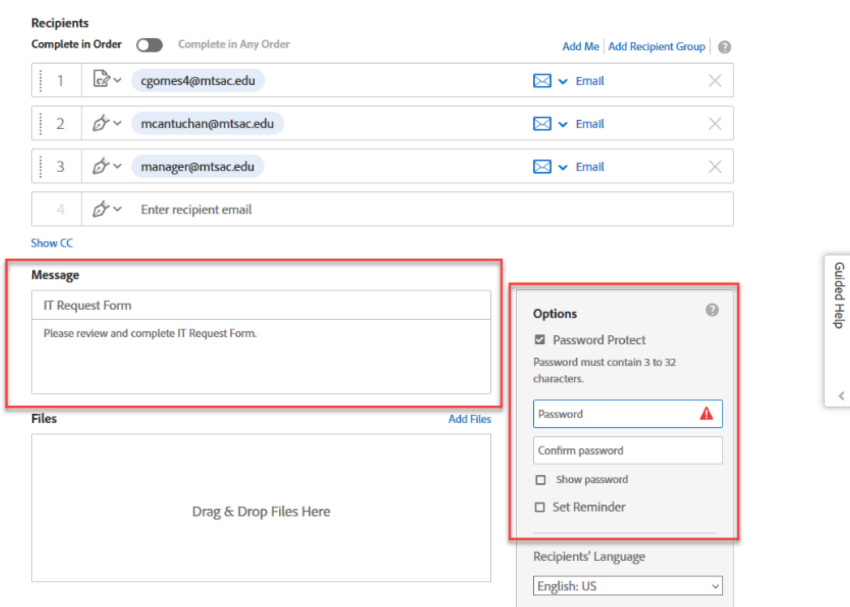
document.



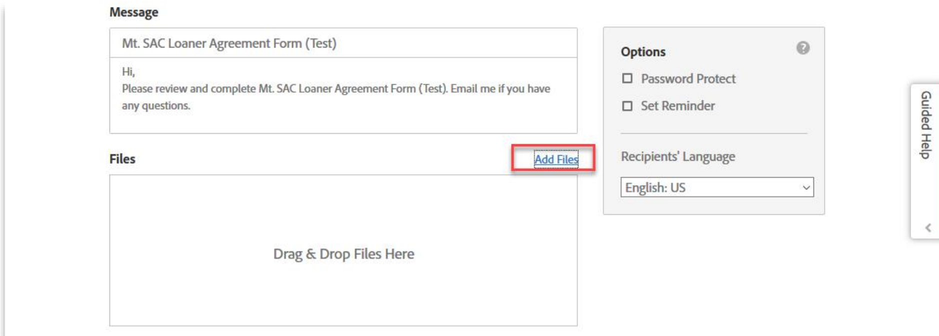
4. (Optional) Select the second-factor authentication method. The default is Email, but you can select Password (supplied by sender) OR Phone (SMS verification code) OR Adobe Sign.

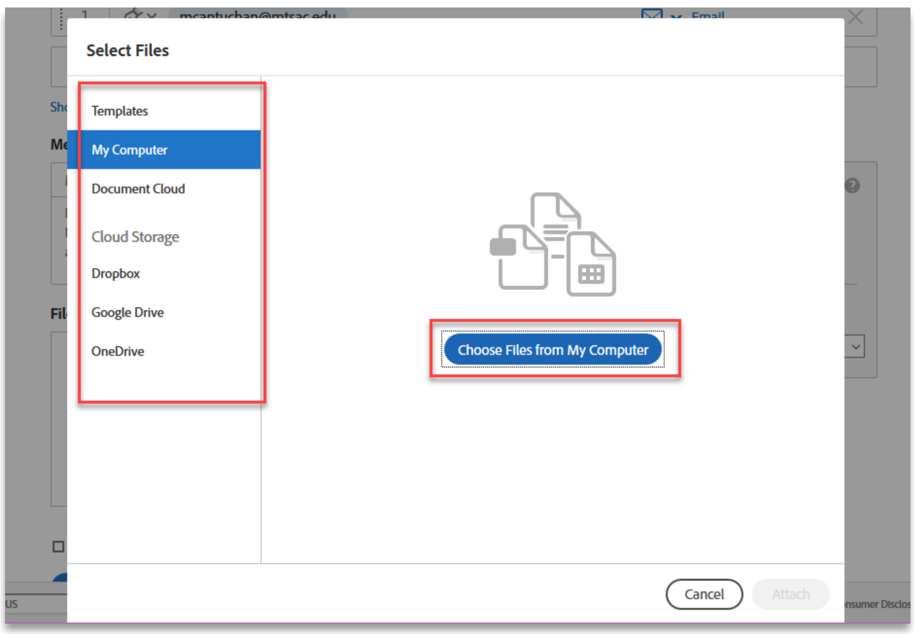


5. Enter an Agreement Name and Message in the appropriate fields
6. (Optional) You can set a password that will require recipients to enter a password to open and view the signed PDF file. Or set Reminders to be sent until the agreement is completed.

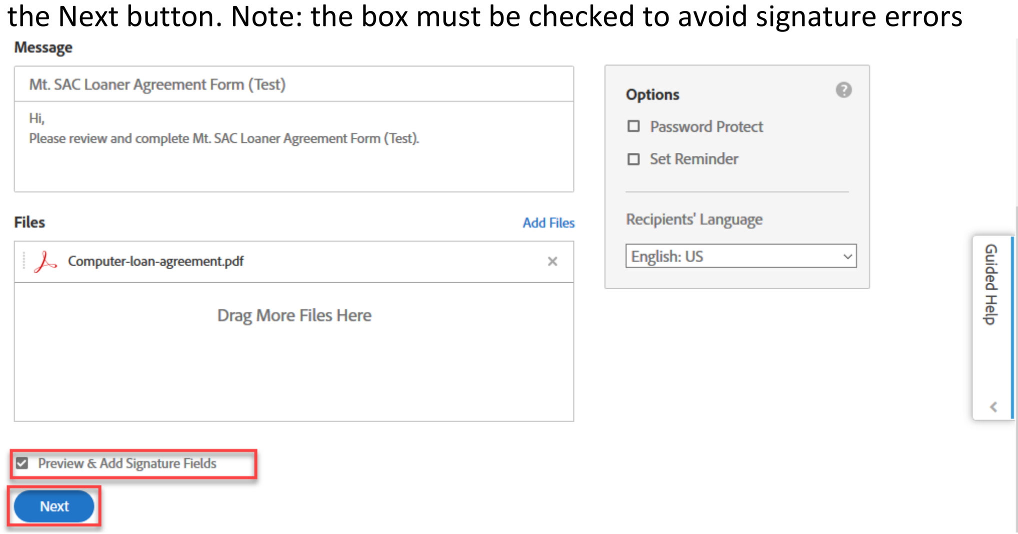


7. Click on Add Files or drag and drop to attach. You can attach from My Computer or the other options listed. *Note: Multiple documents can be attached, and are delivered as one contiguous document for the recipient.*

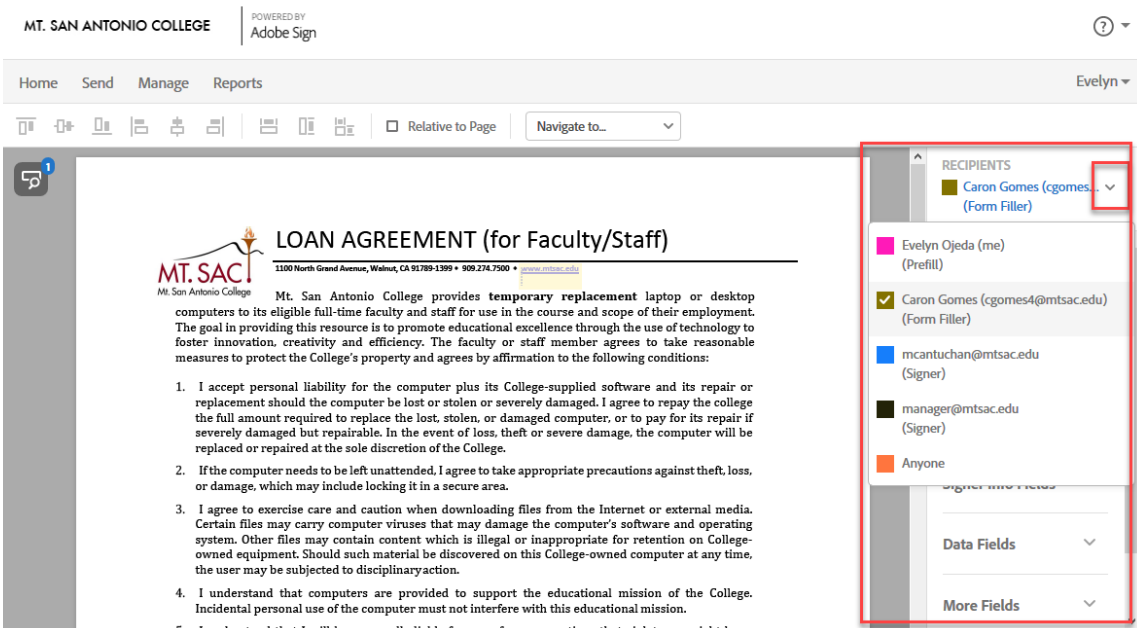




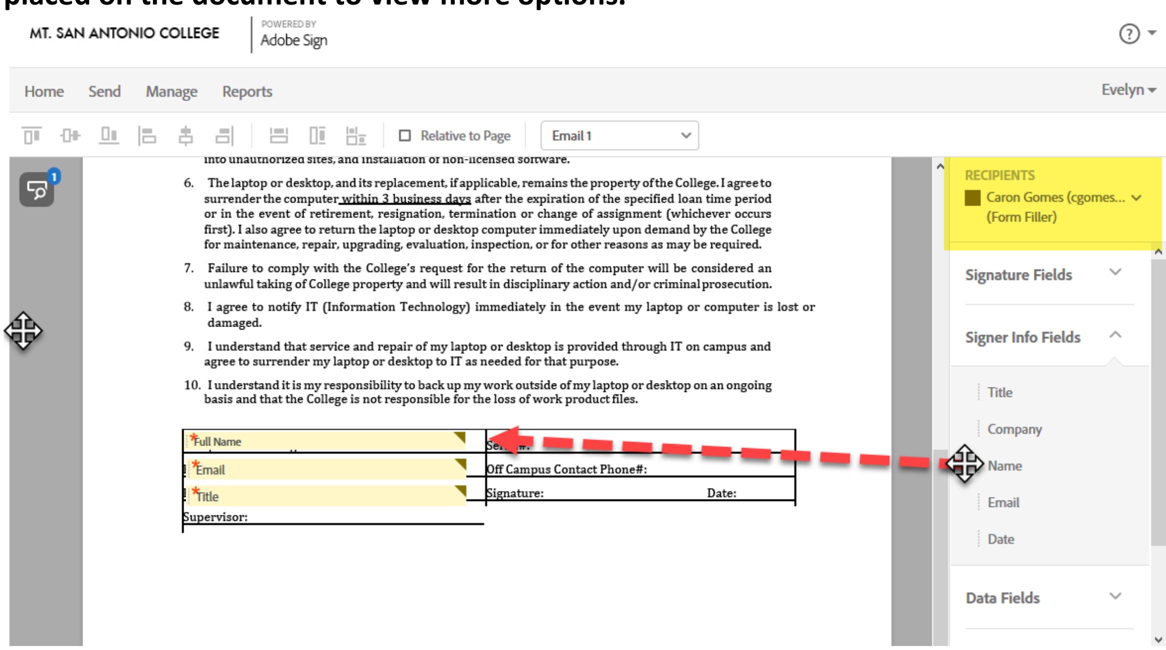
8. Your file(s) should be listed under Files. Check the Preview and Add Signatures Field box, then click the Next button. Note: the box must be checked to avoid signature errors



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

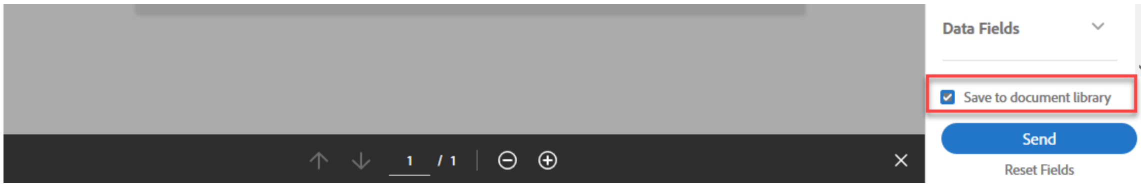


10. Select your first recipient from the list, click and drag the appropriate fields that apply to that specific recipient. Repeat for each recipient listed. **Note: Double-click on the fields placed on the document to view more options.**



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

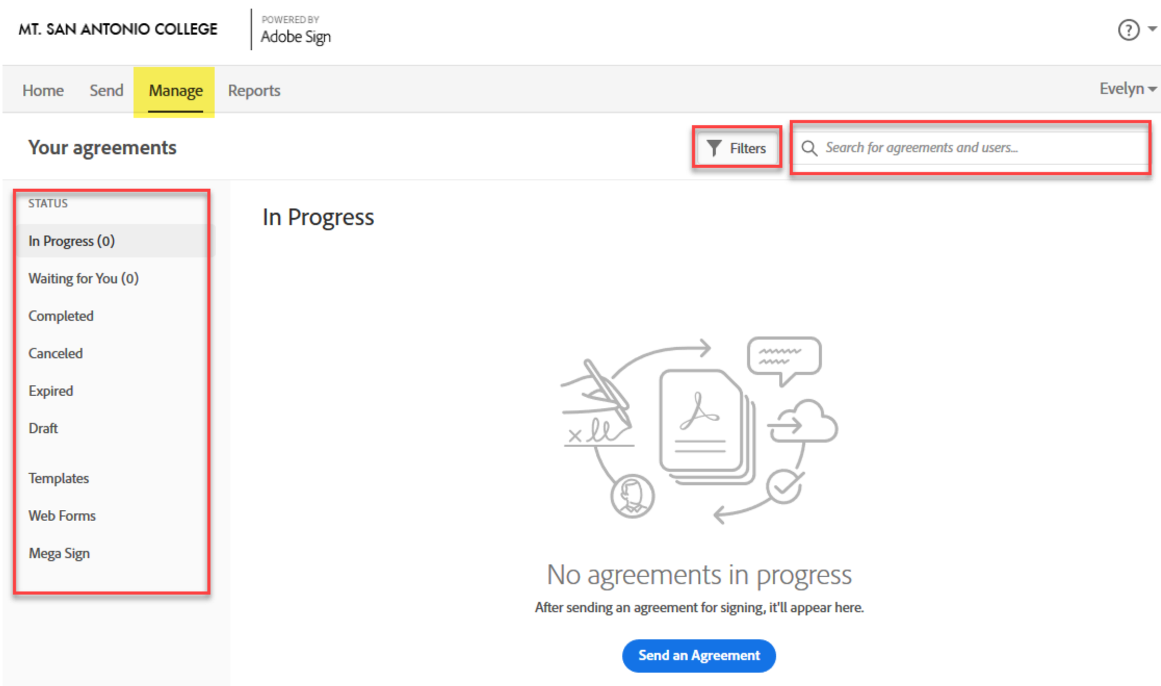
transactions, you can simply attach the document from your library, and skip the field placement.



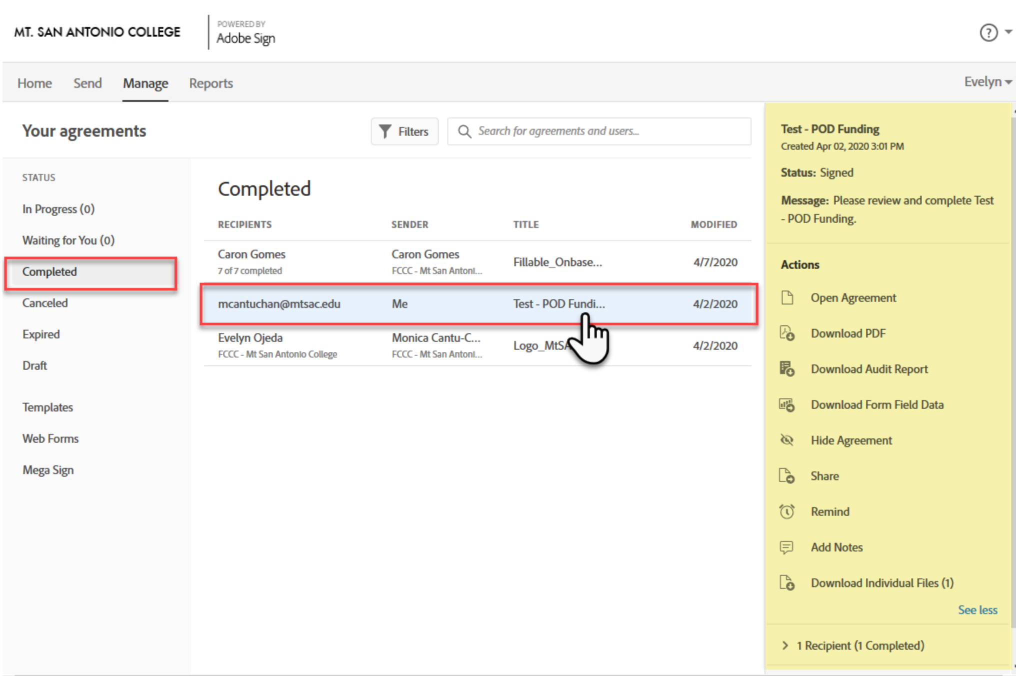
12. When all desired fields are placed on the document, click the Send button
    a. An email is sent to your recipients that includes a link to the document, enabling their action- in the order that you listed them.
    b. Once their action is complete, you will be notified by email.

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.



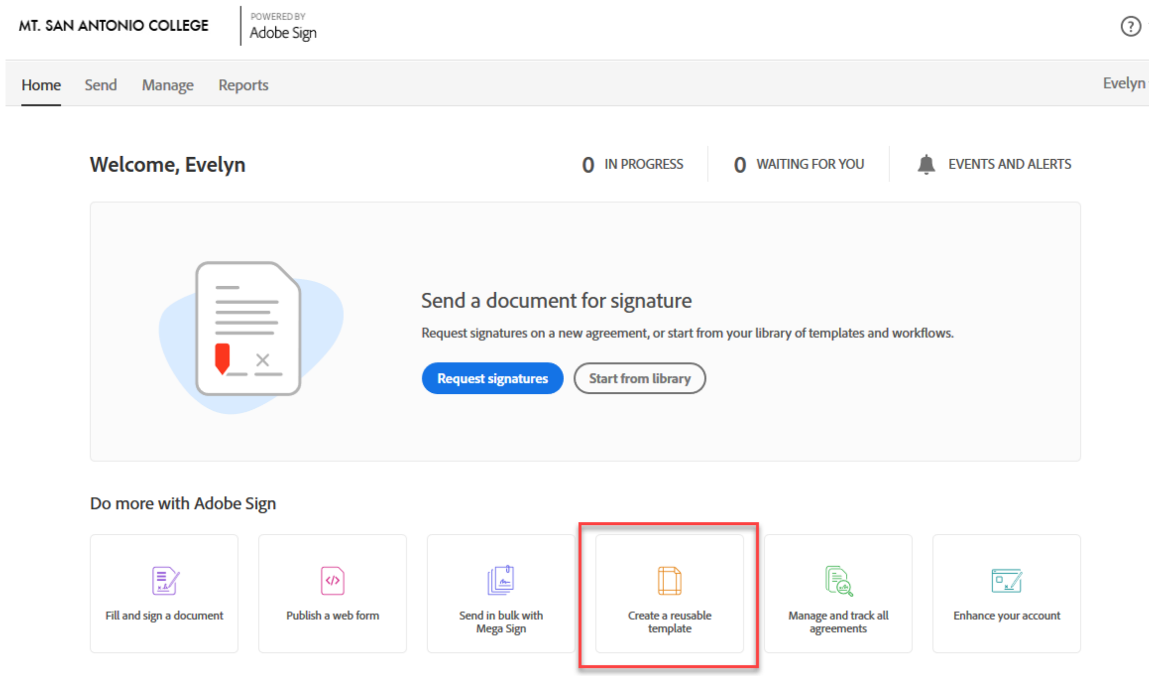
Once an agreement has been sent, you can view all agreement options by clicking a specific document under any category. You can view an agreement, download the audit report, view the event history, set reminders and much more.



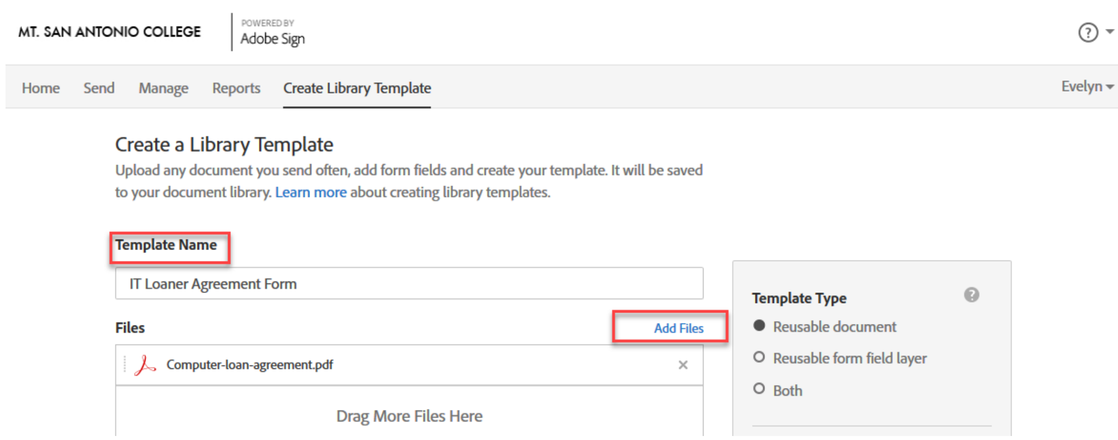
Creating Custom Templates

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



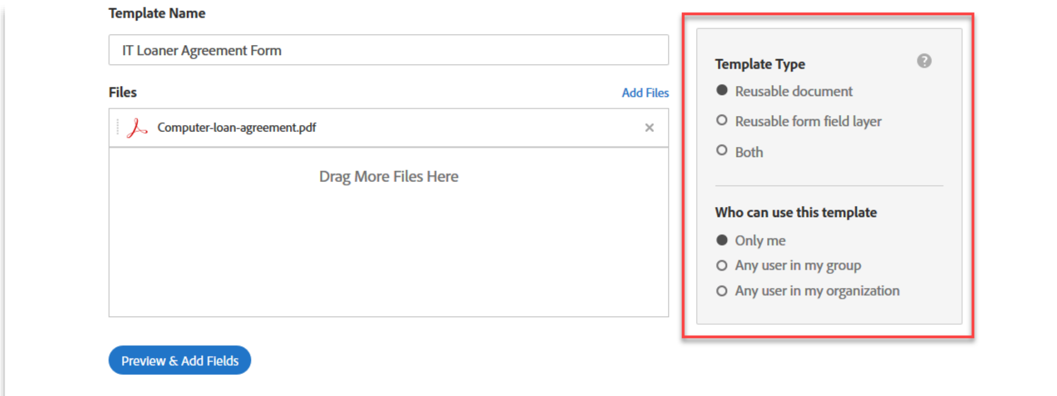
2. Enter the name of your template into the Template Name field
3. Click Add Files to browse your system or you can drag and drop file(s) into the designated area. *Note: Multiple files can be attached to build one larger template if desired.*



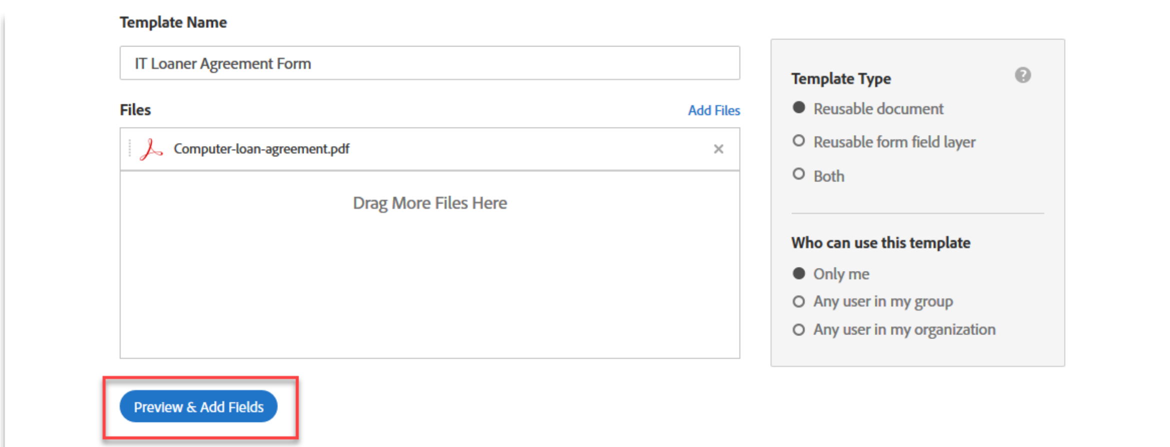
4. Under Template Type, select an option (can be changed at any time):
   a. Reusable document - This option saves the full document, content and form fields

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

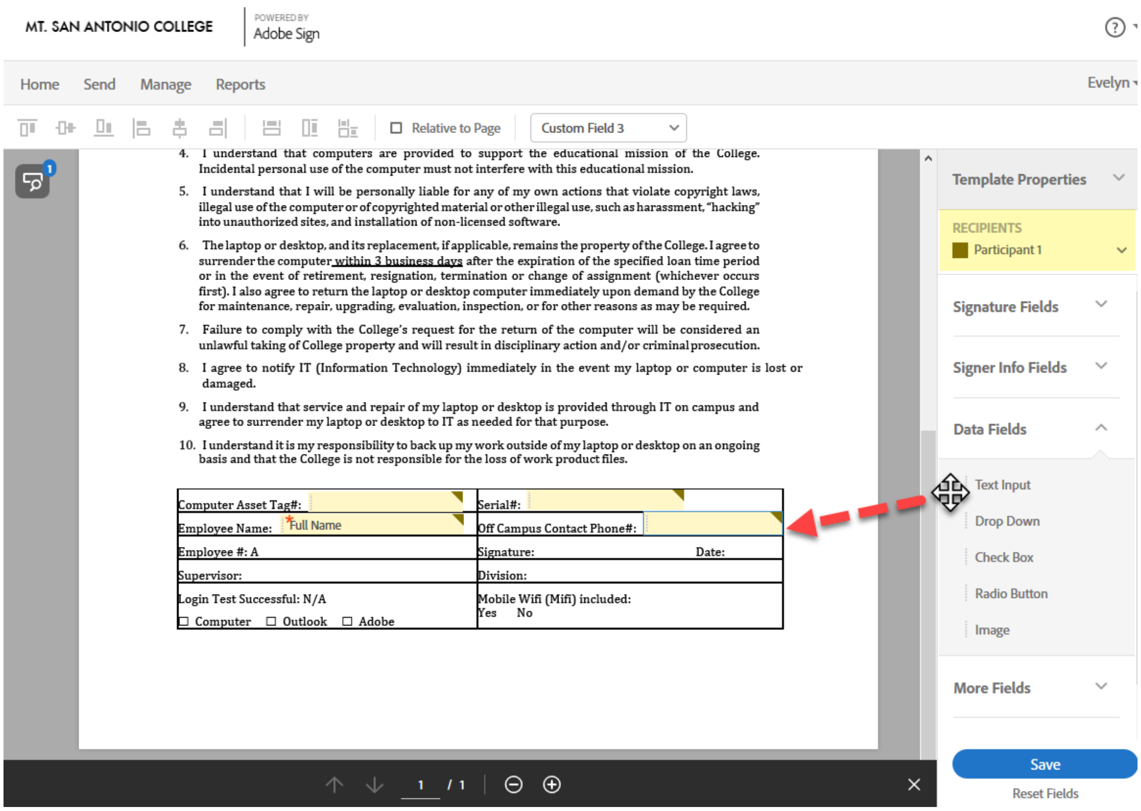
5. Under Who Can Use My template, select an option:
    a. Only me - This option will only make the template available to the uploading user
    b. Any user in my group - Setting the template at the group level will create a logical association between the template and the group the uploading user is 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.



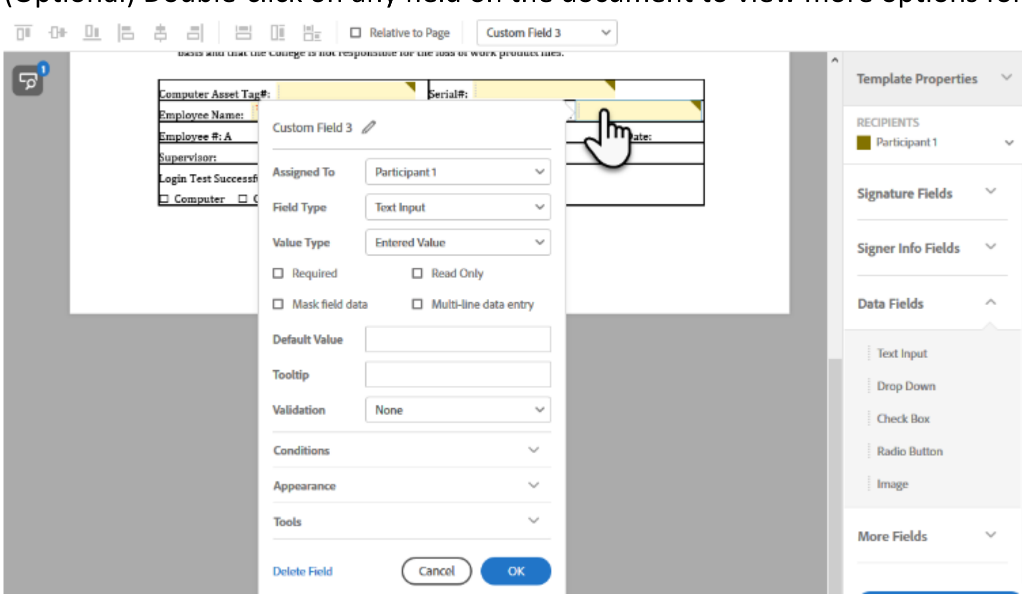
6. Click the Preview and Add Fields button



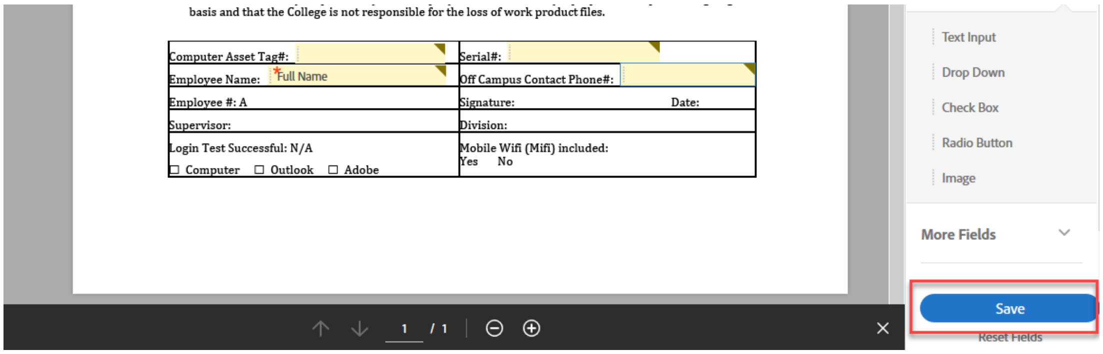
7. Drag and drop the desired fields using the tabs to the right of the screen. Once placed on the document, you can resize fields to fit your document.
Note: All fields placed are assigned to the first recipient by default. You can change who the placed fields are assigned to by accessing the Recipients drop-down list and changing the selected recipient.



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

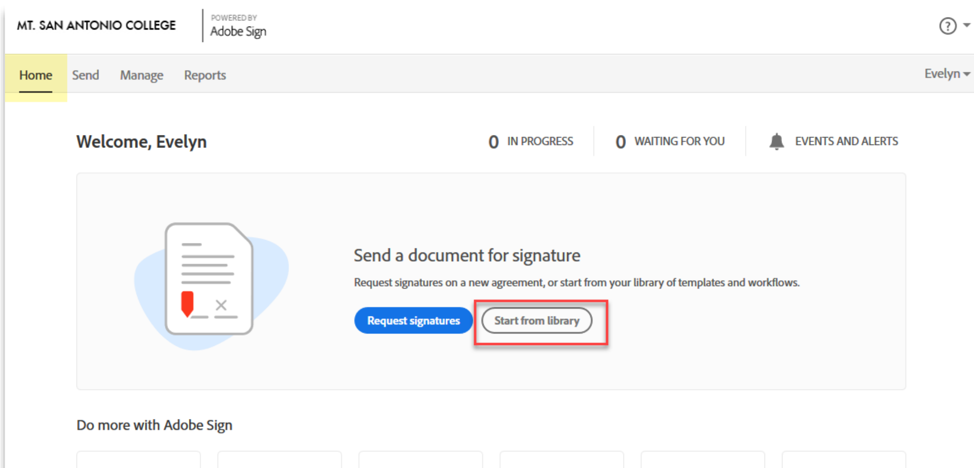


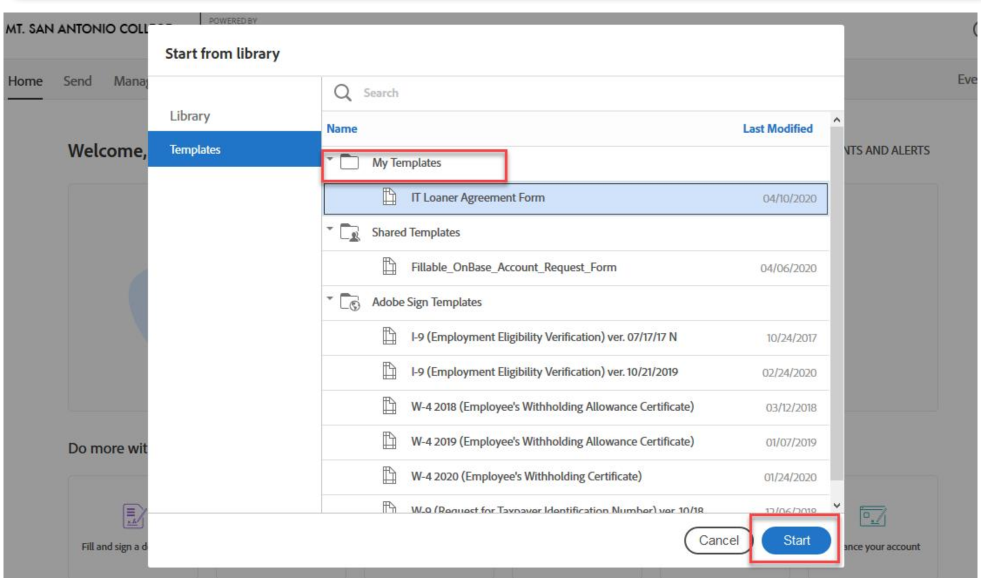
9. When you are done placing all fields on the document, click the Save button.



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

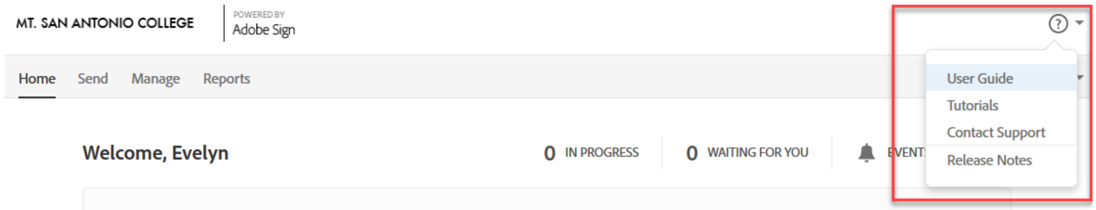




Using/ Getting Help

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
- Call us. (909) 274- 4357
- Online Support Request. helpdesk.mtsac.edu self-service portal.