

Adobe Sign: Requesting Signatures

Introduction1
Requesting signatures1

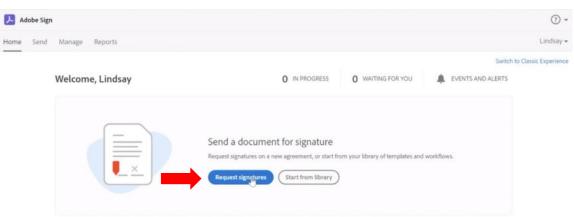
Introduction

Adobe Sign is a cloud-based e-signature service that allows the user to send, sign, track, and manage signature processes using a browser or mobile device. It is part of the Adobe Document Cloud suite of services. SCSU faculty and staff have access to Adobe Sign via the <u>MyApps</u> portal.

The following steps will walk you through how to send a document for signatures within Adobe Sign.

Requesting signatures

1. Select "Request signatures" from Adobe Sign's main landing page.



2. Select whether the signatures need to be completed in a specific order or any order with the sliding tab at the top of the page. Here we will show a document with a specific signing order.

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3. Enter the recipients email address(es). If using the "in order" option, be sure to enter them in the order to be signed. To add yourself as a signer, select "Add Me".

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	Recipients Complete in Order Complete in Any Order	Add Me
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	3 & Enter recipient email	Email Password Adobe Sign

5. To the right of the user, you will see the method in which they will authenticate the signing process. Users within SCSU may use Adobe Sign as the authentication method. Users outside of Southern may not have access to Adobe Sign, so in that case, we will want to use "Email" or "Password" as the authentication method.

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6. Add a private message to each user as well, if you wish, by selecting the speech bubble icon next to that user.

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7. To add an overall message to all users listed, enter text in the "Message" box.

Show CC Message	
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Please review and complete this document. Thank you.	Password Protect
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Adobe Sign Sample Document.docx	 to complete this agreement. Agreement expires after Dec 28, 2020.
Drag More Files Here	Set Reminder
	Signature Type
	Electronic O Written
	Recipients' Language
	English: US

8. Select "Add Files" to upload your document, or drag and drop the files into the box provided.

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Adobe Sign Sample Document.docx ×	to complete this agreement. Agreement expires after Dec 28, 2020.
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	Signature Type
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	English: US v

9. Additional features are available on the right-hand menu, such as adding a password, deadline, or scheduled reminders.

how CC Aessage	
Adobe Sign Sample Document Please review and complete this document. Thank you.	Options © Password Protect Completion Deadline
iles Add Files	10 ays to complete this agreement.
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10. Once finished, click "Next".

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Preview & Add Signature Fields			

11. On the next page, we will set the required fields for each user. Select the type of required field from the right-hand menu, then drag and drop that field from the menu to the area where the information is needed. We will look at signatures first. Since we have two users needing to sign this document, we will drag and drop two signature fields onto the document in the proper places.

Adobe Sign		⑦ -
Home Send Manage Reports		Lindsay -
Adobe Sign Sample Document Adobe Sign Sample Document Signature 1: Signature 2 (if applicable): Notes (if applicable): Notes (if applicable):	are 1 v 2 e1 v Assigned To Otus Owl (otusowl@souther v Field Type Signature v Required Conditions v Tools v Delete Field Cancel OK	RECIPIENTS Otus Owl (otusowl@so ~ (Signer) Signature Fields Digital Signature Initials Signature Block Reset Fields Back

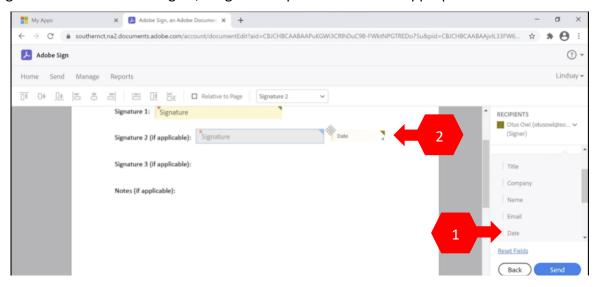
12. Double-click on each newly placed signature fields to set which user this field is intended for, and to set other options if needed. Select the "Assigned To" drop-down menu and choose who needs to sign in each box. Explore the other options available here, which will vary depending on what type of field this is.

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Home Send Manage Reports	Lindsay -
Image:	Signature 1 Signature 1 Assigned To Otus Owl (otusowi@souther Field Type Signature Conditions Tools Otus Owl (otusowi@souther Signature Fields Signature Digital Signature Signature Block
↑ ↓ 1 /1 Θ @	Delete Field Cancel OK Back Send

13. Once finished, select "OK".

Signature 1: Signature	Signature 1 🖉	(Signer)
Signature 2 (if applicable): [*] Signature	Assigned To Otus Owl (otusowl@souther 🗸	Signature Fields
Signature 3 (if applicable):	Field Type Signature ~	Signature Digital Signature
Notes (if applicable):	Conditions ~	Initials
	Tools	Back Send
↑ ↓ <u>1</u> /1 Θ 0	•	× Save Progress

14. Here we will also be adding "Date" fields next to each signature. This field type can be found under "Signer info Fields". Once again, drag and drop the fields in the appropriate location on the document.



15. Double-click these fields as well, to set whom is to complete each field and set preferences. Click "OK" once finished setting the options.

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16. Following this same process of dragging and dropping fields, we have also entered a "Notes" field. You may adjust the box size by dragging the box's corner. For general field such as this, you will notice the option of setting whom it is assigned to also includes an "Anyone" option.

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Signature 3 (if applicable): Notes (if applicable):	Data Fields
	Text Input Drop Down Check Box
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17. Once the document is complete, select "Send", or "Save Progress" to save as a draft.

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Adobe Sign Sample Document	RECIPIENTS Otus Owl (otusowl@so ∨ (Signer)
Signature 1: Signature Date	Data Fields
Signature 2 (if applicable): Signature Date	Text Input Drop Down
Signature 3 (if applicable):	Check Box
Notes (if applicable):	Back Send _{in}
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18. Once sent, Adobe Sign will provide you with a confirmation page showing details of this document.

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Iome Send Manage Reports		Lindsay
Mail by Sense Nources Nources Nources (Sense Nources) Rest of Nources Nources (Sense Nources)	"Adobe Sign Sample Document" has been successfully sent for signature A copy has also been sent to you at wargolf@southemct.edu for your records. "Adobe Sign Sample Document" was sent for signature to Otus Owl (otusow(@southemct.edu) and Linday Wargo (wargolf@southemct.edu). They will complete "Adobe Sign Sample Document" in order, one after the other. As soon as the agreement is complete, all eligible parties will be e-mailed PDF copies. Reminders There are no reminders set for this document. You will be alerted if: • The document you sent has not been viewed by today at 7:22 PM. • The document you sent has not been signed by Dec 19 at 11:22 AM. 	
	What's next?	
	Send Another Document Manage This Agreement	?
	All agreements that are not completed within 365 days will be automatically expired.	0