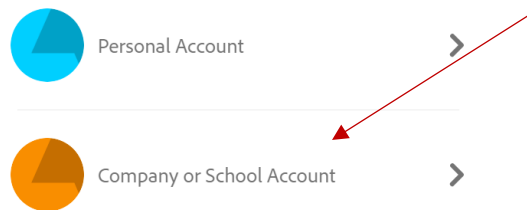# WKU

Information Technology Services

Adobe Sign

Mary Nunn
System Security Specialist
WKU ITS
mary.nunn@wku.edu
270-745-4196

Jennifer Robbins
System Security Specialist
WKU ITS
jennifer.robbins@wku.edu
270-745-8812

1. To Begin: You will select the Company or School Account option


2. You will login with your NetID and password. **If you are logged in through myWKU, this will automatically log you in**

3. Once logged in, you will have the option to select Home, Send, Manage, and Reports at the top left corner. You will see you In Progress, Waiting For You, and Events & Alerts in the middle.
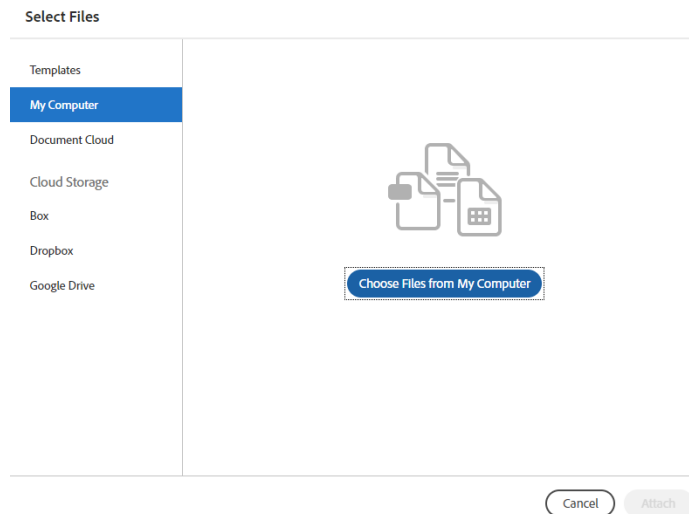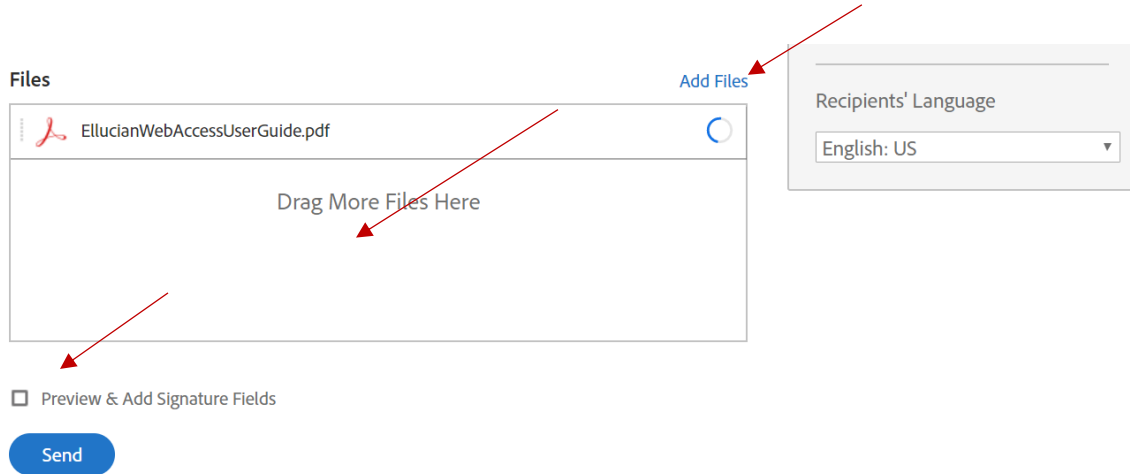   a. Start by clicking on the Request signatures in the middle to create a document.
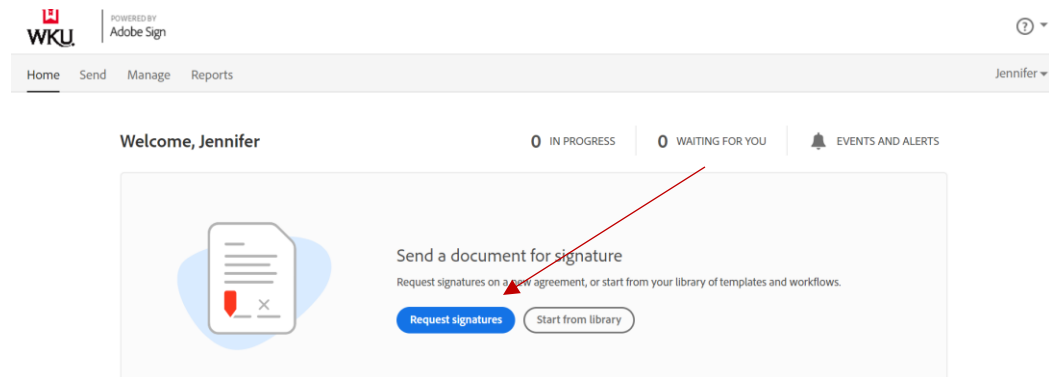
4. After starting a request, you will follow the prompts on the screen.
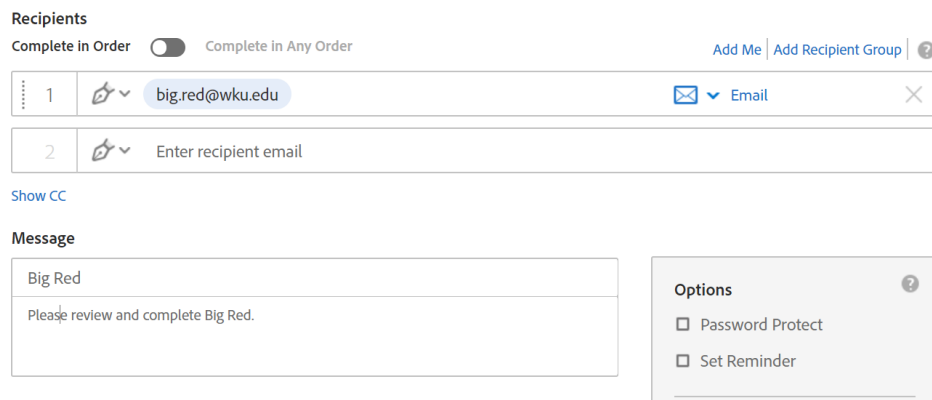
   a. You can require the Recipients to Complete in Order: first recipient will have to complete before it goes to the next.
   b. Add recipients by their email address.
   c. Add Me will add you to the recipients .
   d. Add Recipient Group allows you to name the group and add multiple emails to that group.
   e. Once you have added one email, it will add the second line for another email if needed, and so on.
   f. The Message box allows you to name the Agreement for signing and include a short message.

5. To add the file for signatures, you can merely drag the document from your desktop to the Files box or click the Add Files at the top right of that Files box

Files   Add Files

Recipients' Language

ᴸ EllucianWebAccessUserGuide.pdf   ○

English: US   ▼

Drag More Files Here

☐ Preview & Add Signature Fields

Send

Select Files

Templates
My Computer
Document Cloud
Cloud Storage
Box
Dropbox
Google Drive

Choose Files from My Computer

Cancel   Attach

a. The Preview & Add Signature Fields allows you to add signature, initial, etc boxes onto the document itself if there are multiple places signatures/initials are needed.

☑ Preview & Add Signature Fields
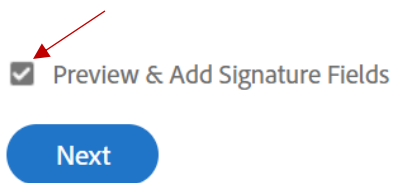
Next

b. When checked, it will allow you to click Next and add the signatures/initials as needed.

6. You have the option of adding a password and setting a reminder.

   a. Click the check box under Options for Password Protect. You can click the option to Show password.
   b. Click the Set Reminder to remind the recipients to sign. This can be set to Every day, Every week, Every business day, Every other day, Every third day or Every fifth day until the document is returned signed.
   c. You can change the language as needed for the recipients language from the drop down selection.
7. If you have clicked the Preview & Add Signatures option, you will be directed to a screen that shows you your file as well as the Reipients what you need them to complete.


   a. You will change recipients to add each option.
   b. You can add Signature Fields, Signer Info Fields, Date Fields, More Fields, and Transaction Fields.

Signer Info Fields ∧	Data Fields ∧
Title	Text Input
Company	Drop Down
Name	Check Box
Email	Radio Button
Date	Image

| More Fields ∧	Transaction Fields ∧
File Attachment	Participation Stamp
Hyperlink	Transaction Number
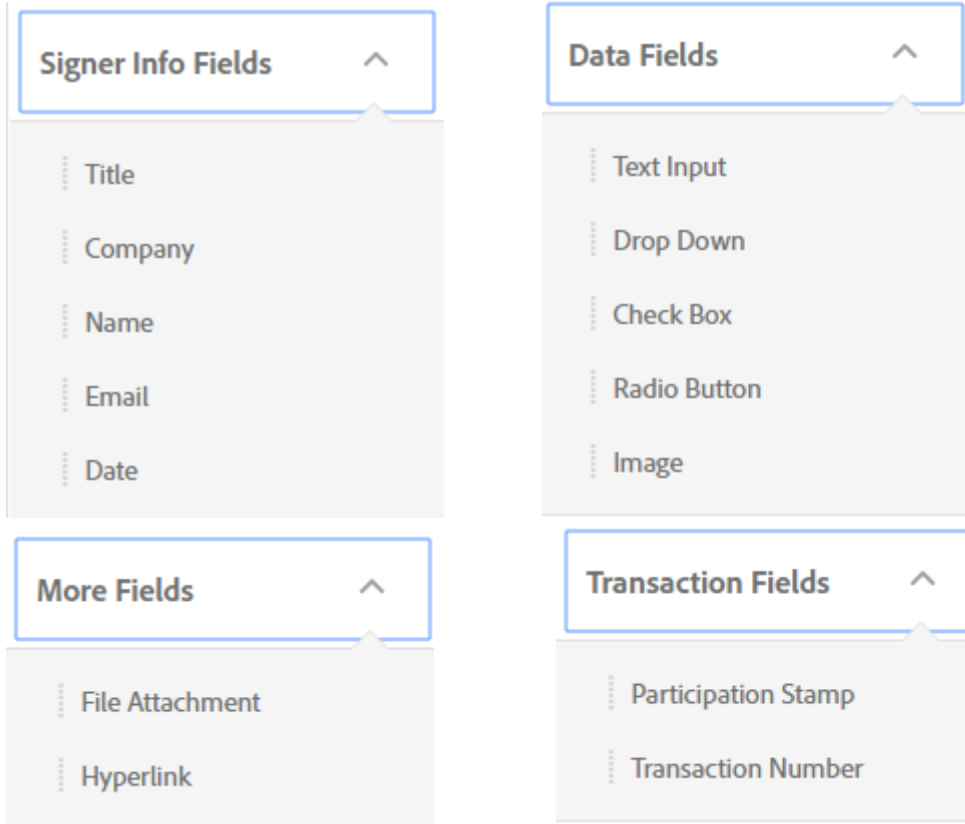
8. To add a Field, merely hold the Field name (ex. Signature) and drag it onto the document where you need them to sign. You can add multiple fields for each recipient as needed.

*Signature

*Initials

Signature: *Signer Name (Date)
Email:

*♟ Stamp
W: 1.6 in
H: 1.6 in
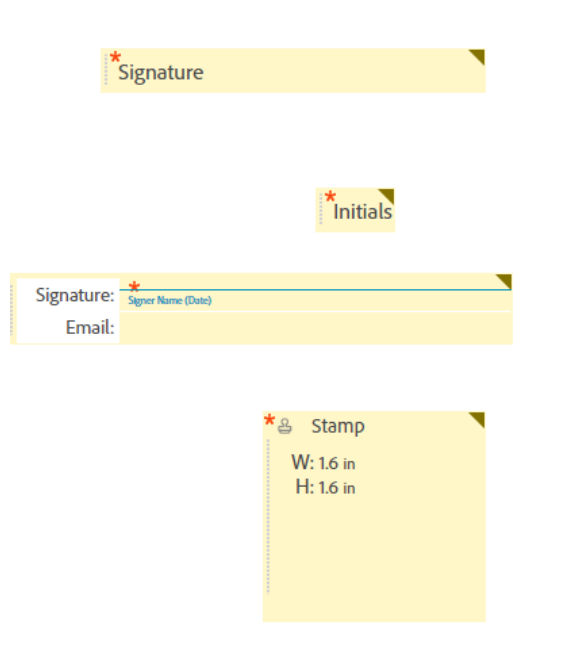
9. Once you have added each recipients fields, you will click the Send option in the bottom right corner.
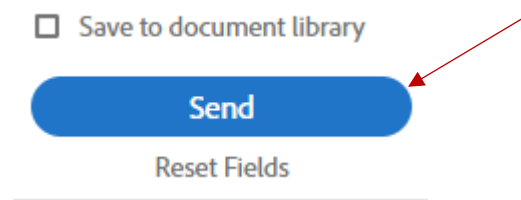
a. You can choose to Save to document library or Reset Fields.
b. Reset Fields will erase the fields you placed on the documents.

10. Your document has now been sent to the recipients to sign and return.
11. Return to the Home screen by clicking Home in the top left corner.
    a. You can see the items you have sent by clicking Manage.
    b. You can create Reports.
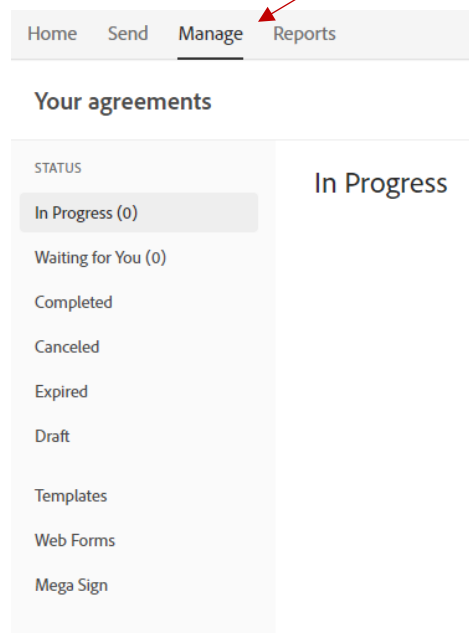
12. Manage allows you to see Your agreements that are:
    a. In Progress
    b. Waiting for You
    c. Completed
    d. Canceled
    e. Expired
    f. Draft
    g. Templates
    h. Web Forms
    i. Mega Sign

13. Reports will all you to create a specific report you are needing or to see Your Activity for This Month.
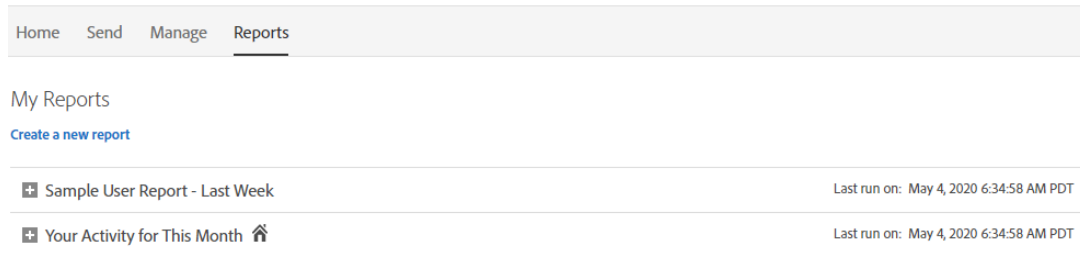
a. Create a New Report allows you to select the options you are looking for in regards to date, document, document name, Mega Sign, performance goals, Graph Agreements, and Et Cetera.
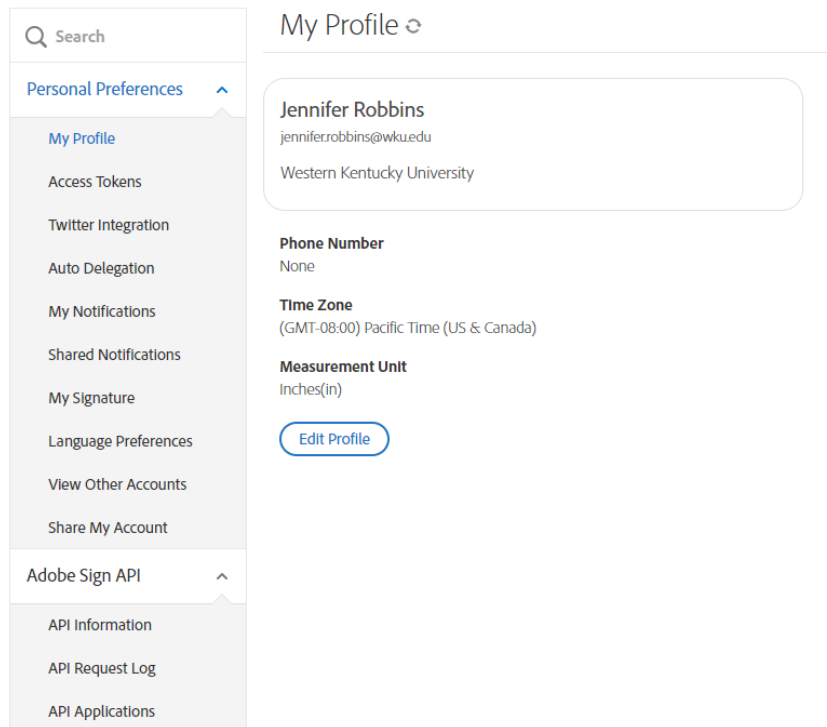

b. Click the Run Report in the bottom right corner to see your report.

14. Click on your Name to see My Profile, Quick Start Guide and Sign Out.
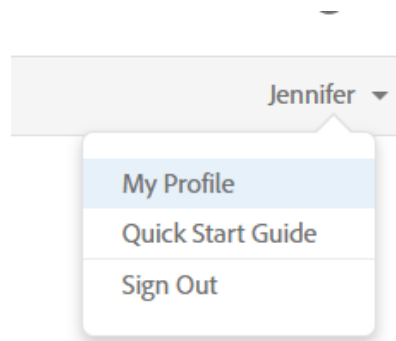
15. My Profile will show your information and allow certain edit option.
    a. Please note, you cannot change your password as this is tied to your NetID.

Password

Changing your password from within Adobe Sign is not available