

## Using the Adobe Sign Tool in Adobe Acrobat DC – Cuesta College

### When to use to use the Adobe Sign tool

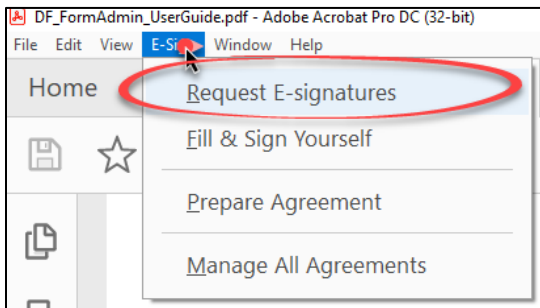
- Adobe Sign at Cuesta College is intended for use by employees gathering signatures on an ad-hoc basis. Test
- When using Adobe Sign for gathering signatures you must know the names of all the recipients who need to sign prior to sending the document.
- Document signatories cannot be dependent on prior signatures or dollar limit amounts that are learned about after the document is sent.

### Where to find the Adobe Sign tool

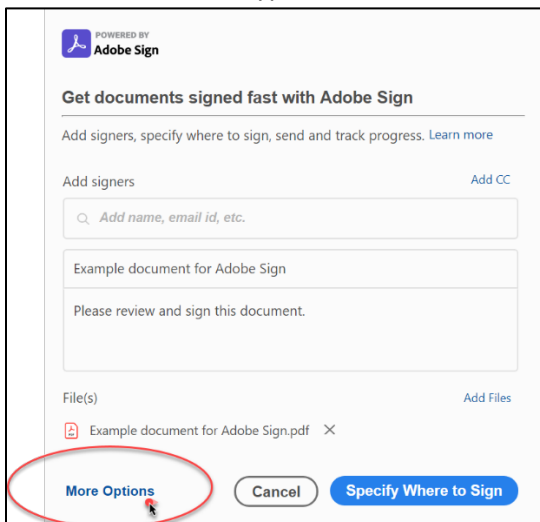
- Not all accounts have access to the Adobe Sign tool. To request access email [ITsupport@cuesta.edu](mailto:ITsupport@cuesta.edu).
- Locate the tool in Adobe Acrobat DC by selecting the Sign dropdown menu or by using the Tools tab and selecting the Adobe Sign tool under the Forms & Signatures category.
- Go to the [Adobe Sign portal](#) for full access to all Adobe Sign options.

### How to use Adobe Sign tool

1. Open the PDF document that requires signatures
2. Select the **E-Sign dropdown menu**, then choose **Request E-Signatures**



3. In the new window, type in at least one email address, then select **More Options**



4. In the **Recipients section**:
  - a. Use the toggle to choose to Complete in Order or Complete in Any Order

- b. Enter an email address for each person who needs to sign the document (emails/recipients can be internal or external)

The screenshot shows the 'Recipients' section of a document signing interface. At the top, there is a toggle for 'Complete in Order' (currently off) and a link for 'Add Me | Add Recipient Group'. Below this, there are three rows for adding recipients. The first row is numbered '1' and contains the email 'SignerOne@cuesta.edu' with an 'Email' button and a close icon. The second row is numbered '2' and contains the email 'SignerTwo@gmail.com' with an 'Email' button and a close icon. The third row is numbered '3' and contains the placeholder text 'Enter recipient email'.

5. The request for signature will be sent via email. In the **Message section**:
- Edit the text to provide a subject line
  - Edit the text to provide an email message to be sent with the request

The screenshot shows the 'Message' section of a document signing interface. At the top right, there is a link for 'Message Template' with a dropdown arrow. Below this, there are two text input fields. The first field contains the placeholder text 'Enter a Subject Line here for your Agreement'. The second field contains the placeholder text 'Enter a message for your recipients.'

6. In the **Files section**:
- Confirm that you see the name of the file that you opened to begin the process
  - (Optional) Add any additional files that also need to be included, by selecting the Add Files option. *Note: All files will be returned as one file and you will not be able to separate the files once returned with signatures.*

The screenshot shows the 'Files' section of a document signing interface. At the top right, there is a blue button labeled 'Add Files' which is circled in red. Below this, there is a list of files. The first file is 'Example\_Fillable\_Requisition\_Form.pdf' with a red Adobe PDF icon and a close icon. Below the list, there is a large area with the text 'Drag More Files Here'.

7. In the **Options section**:
- Password Protect – typically this feature is not utilized by Cuesta employees. Learn more about this feature on the [Adobe support](#) pages.
  - Set Reminder – use this option to set automatic reminders to recipients about the request for signature if the document has not yet been signed.

The screenshot shows the 'Options' section of a document signing interface. At the top right, there is a question mark icon. Below this, there are two checkboxes: 'Password Protect' (unchecked) and 'Set Reminder' (checked). Below the 'Set Reminder' checkbox, there is a dropdown menu with the text 'Every week' and a downward arrow.

8. Ensure the Preview & Add Signature Fields box is checked and select Next.

Preview & Add Signature Fields

Next

9. Assign Signatures and fillable fields by:
  - a. Select the correct recipient
  - b. Expand the Signature Fields section and select Signature to drag and drop a signature field to the appropriate location on the form. Note: if you do not see the option to select signature fields, ensure “Advanced editing on”, is toggled on.
    - i. Repeat steps a and b as necessary for each recipient

Advanced editing on

RECIPIENTS

signerone@cuesta.edu (Sign)

Signature Fields

Signature

Initials

Signature Block

Stamp

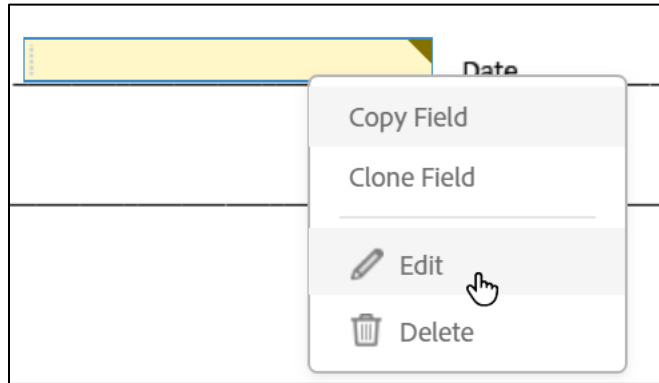
Signer Info Fields

Data Fields

More Fields

Transaction Fields

- c. Add or Edit any other fillable fields on the form. To edit a field, right click on an existing fillable field and select Edit.



10. Once all new fillable fields and signature fields are added and assigned, select Send.

### Managing the Form After Sending

- You will receive email communications as recipients complete and sign the form
- Once all recipients have signed you will want to download and save the final copy
- You can also manage the form by logging into the online [Adobe Sign portal](#) and select Manage

To learn more about Adobe Sign, visit the [Adobe Sign support](#) page.