

ADOBE SIGN SERIES  
Faculty and Staff

# Adobe Sign **SIGNER BASICS**

*Quick Reference Guide*

APRIL 2020  
© 2020. All Rights Reserved.



CSU Bakersfield

## REVISION CONTROL

**Document Title:** Adobe Sign - Signer Basics - QRG.docx  
**Author:** Campus Training, Dr. Tammara Sherman

### Revision History

<i>Revision Date</i>	<i>Revised By</i>	<i>Summary of Revisions</i>	<i>Section(s) Revised</i>
4/30/2020	T. Sherman	Created document	All

### Review / Approval History

REVIEW DATE	REVIEWED BY	ACTION (REVIEWED, RECOMMENDED OR APPROVED)
-------------	-------------	--

## TABLE OF CONTENTS

---

1.0	INTRODUCTION .....	4
1.1	About This Guide .....	4
2.0	FILLING AND SIGNING DOCUMENTS .....	4
2.1	Completing and Signing Fillable Documents .....	4
2.2	Completing and Signing Non-Fillable Documents .....	5
3.0	APPROVING REQUESTS FOR SIGNATURE / APPROVAL .....	6
4.0	DECLINING REQUESTS FOR SIGNATURE / APPROVAL .....	6
5.0	DELEGATING REQUESTS FOR SIGNATURE / APPROVAL.....	7
6.0	GETTING HELP.....	8

## 1.0 INTRODUCTION

---

Adobe Sign is an electronic form and signature application. It allows you to send electronic documents to recipients for signature. Additionally, you can take existing documents, make them fillable, and prepare them for electronic signatures.

### 1.1 About This Guide

---

This guide focuses on the basic Adobe Sign functionality for form fillers and signers. Form fillers are individuals who receive documents from Adobe Sign for signature and completion. Signers may complete and sign a document. This guide will walk you through common tasks performed by form fillers and signers. These common tasks include:

- Signing documents
- Completing and signing documents
- Delegating documents to someone else
- Denying documents

For information on Adobe Sign functionality for senders, see the Adobe Sign Sender Basics or Adobe Sign Sender Advanced quick reference guides.

## 2.0 FILLING AND SIGNING DOCUMENTS

---

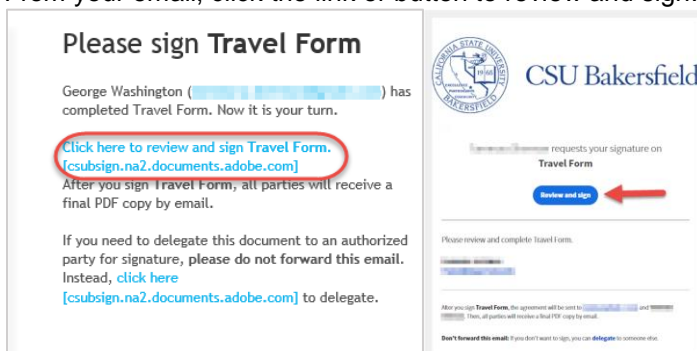
You can complete and sign any document even if it is not a fillable form from Adobe Sign. This section will instruct you in completing and signing both types.

### 2.1 Completing and Signing Fillable Documents

---

You can sign a document from an email link or from within Adobe Sign. These instructions will walk you through the basic steps for signing a document from an email link.


1. From your email, click the link or button to review and sign.... depending on your email account



2. Your default browser will open.
3. If necessary, complete the form
4. Click the Click to Sign button (bottom of the screen)

## 2.2 Completing and Signing Non-Fillable Documents

You can complete and sign any document even if it is not a fillable form using Adobe Sign. To fill and sign a document from Adobe Sign,

1. Open a web browser.
2. In the address bar, type the following: <https://adobesign.csub.edu>
3. When the page opens,
  - Enter your email address
  - Click **Continue**
4. On the account selector page, click **Company or School Account**
5. On the CSU Bakersfield authentication page,
  - Enter your NetID
  - Enter your password
  - Click **LOG IN**
6. The Adobe Sign page opens.
7. From the Home tab, click the **Fill and sign a document**  button
8. Click **Add Files** to add your documents. (You can also drag and drop the files)








9. On the Select Files screen, click **Choose Files from my Computer**
10. Navigate to the desired document and click **Open**
11. Your selected documents will appear in the Files section. You can click Add Files to add more documents. To remove a document, click the X.



12. When you are finished adding documents, click **Next** button
13. Use the menu bar to complete the document and sign.



The table below provides a description of each item on the menu bar.

	Type Text	Allows you to enter text for a field
	Cross mark	Allows you to check a field using an X (cross mark)
	Check mark	Allows you to check a field using a check mark
	Filled Dot	Allows you to check a field using a dot
	Sign	Allows you to add your signature or initials

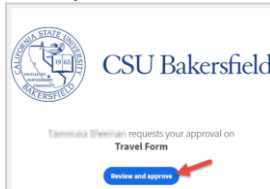
14. When you are finished, click **Done**

### 3.0 APPROVING REQUESTS FOR SIGNATURE / APPROVAL

---

As a reviewer or acceptor, you can approve documents To approve a document,

1. From your email, click the link or button to review and approve.... depending on your email account



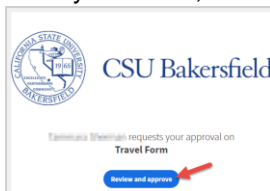
2. Your default browser will open.
3. If necessary, complete the form
4. Click the **Click to Approve** button (bottom of the screen)



### 4.0 DECLINING REQUESTS FOR SIGNATURE / APPROVAL

---

You can deny documents sent to you for approval or for signature. Once declined, Adobe Sign notifies the requestor that their request was declined and the workflow ends for the document. To deny a document,

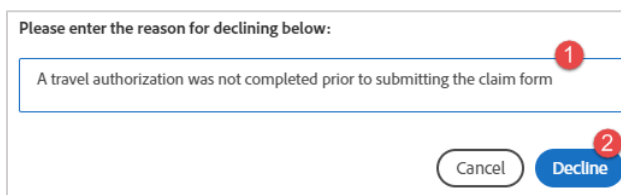
1. From your email, click the link or button to review and approve.... depending on your email account



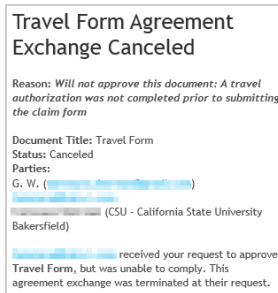
2. Your default browser will open.
3. Click the Options button  or drop down 
4. From the menu, click **I will not approve**



5. In the box,
  - Enter your reason for declining
  - Click **Decline**



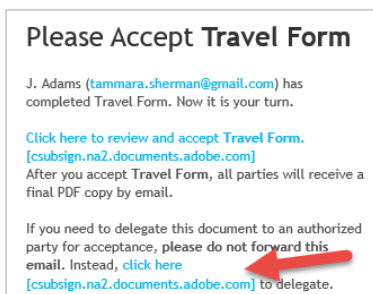
6. The requestor will receive an email stating that the request was denied and your reason for denying the request.



## 5.0 DELEGATING REQUESTS FOR SIGNATURE / APPROVAL

You can delegate a document to another authorized signer. To delegate to someone else,

1. From the document email, click the link, **click here .... to delegate**



2. On the Delegate this Document screen,
  - In the Email, enter the email address of the authorized signer to whom you want to delegate the document
  - In the Message, enter a reason for delegating the document
  - Click **Delegate**

3. After delegating the document, you will see the following message.

"Travel Form" Has Been Forwarded to hstruman@presidents.isp for Acceptance.

## 6.0 GETTING HELP

---

If you are unsure or need assistance, please consider the preferred sources and order in which to contact listed below:

### Web Resources

- [Adobe Sign Tutorials](#) (videos)
- [Adobe Sign Resources](#)

### Training Resources

- [Training Schedule](#)

### Technical Assistance

- Service Center  
661-654-4357  
[servicecenter@csu.edu](mailto:servicecenter@csu.edu)