

ADOBE SIGN SERIES
Faculty and Staff

Adobe Sign FORM FIELDS

Quick Reference Guide

APRIL 2020
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CSU Bakersfield

REVISION CONTROL

Document Title: Adobe Sign - Form Fields - QRG.docx
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Revision History

<i>Revision Date</i>	<i>Revised By</i>	<i>Summary of Revisions</i>	<i>Section(s) Revised</i>
5/8/2020	T. Sherman	Created document	All

Review / Approval History

REVIEW DATE	REVIEWED BY	ACTION (REVIEWED, RECOMMENDED OR APPROVED)
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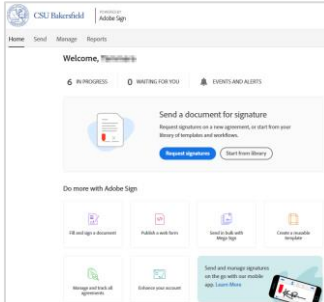
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1.0 INTRODUCTION

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 covers the different form fields available in Adobe Sign. It will walk you through the editing form fields and creating calculated fields. For information on basic Adobe Sign functionality for senders, see the [Adobe Sign Sender Basics Quick Reference Guide](#).

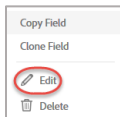
2.0 MANAGE FORM FIELDS

When you convert a document to a fillable form, you have options for adding fields for text, dates, selections, images, and hyperlinks. Additionally, you can modify the field appearance by changing the font, changing the assign to information, and field type. You can edit your form fields for consistency, data validation, and more. This section covers common edits for form fields and specific edits based on the field type. This section will cover these options.

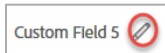
2.1 Naming Fields

You should give your form fields meaningful names, especially if you plan to use the form fields in calculations. To change the name of a field,

1. Right-click on the field
2. From the menu, click Edit



3. At the top of the screen, click the pencil icon



4. Enter a meaningful name

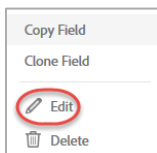


5. Click **OK**

2.2 Changing the Assigned To

You can change the form field Assigned To information. To change the Assigned To information,

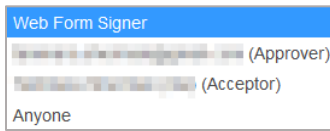
1. Right-click on the field
2. From the menu, click Edit



3. For the Assigned To , click the down arrow



4. Select the desired recipient

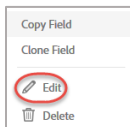


5. Click **OK**

2.3 Changing Field Types

You can change field types if necessary. To change the Field Type,

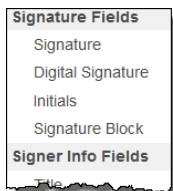
1. Right-click on the field
2. From the menu, click Edit



3. For the Field Type , click the down arrow



4. Select the desired Field Type

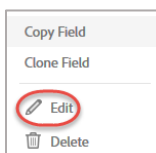


5. Click **OK**

2.4 Changing Form Field Format

You can change the format of a form field by changing its appearance. The appearance affects the font, font size, alignment, and color. To change the appearance,

1. Right-click on the field
2. From the menu, click **Edit**

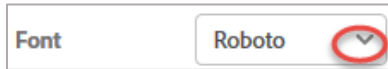


3. For the Appearance , click the down arrow

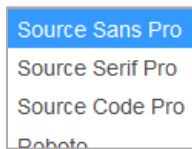


4. To change the font,

- Click the down arrow

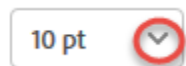


- Select the desired font

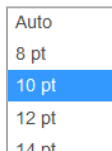


5. To change the font size,

- Click the down arrow



- Select the desired font size



6. To change the alignment, click the desired alignment



7. Click **OK**

2.5 Cloning And Copying Fields

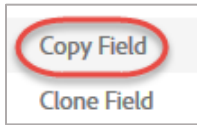
Cloning and copying fields will both duplicate a field. Cloning creates an exact copy of the source field, which is helpful if you want the same information to appear other places in your document. On the other hand, copying a field duplicates the source field but gives the copied field a different name i.e. Copy of Name.

2.5.1 Copying Fields

When copy a field, it produces a new field with all the same attributes except the name. It is best used when you want to save time from having to edit the field to make same changes, such font, font size, etc. To copy a field,

1. Right-click on the desired field

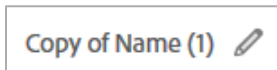
- From the menu, select **Copy Field**



- Drag the new field to the desired location



- The new field will have a new name.



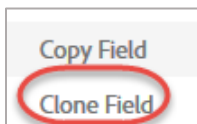
- To change the name, click the pencil icon and enter a meaningful name.



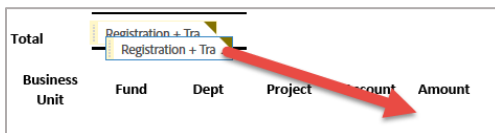
2.5.2 Cloning Fields

Cloning fields allows you to create a duplicate field with the same name. It is best used when you want the values entered or calculated to appear in other places on your document, such as a Total field. To clone a field,

- Right-click on the desired field
- From the menu, select **Clone Field**



- Drag the new field to the desired location



- The new field will have the same name as the field it was copied from. Both the original field and the copied field will show the same values.



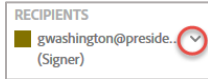
2.6 Text Input Fields

Text Input fields allow you to add areas where the recipients can input information, such as their name, address, etc.

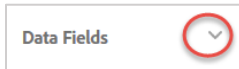
2.6.1 Adding Text Input Fields

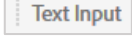
To add a Text Input field,

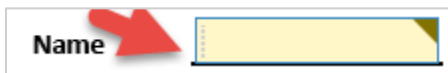
1. Select the recipient's name from the right pane



2. In the right pane, expand the Data Fields



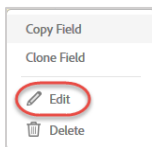
3. Drag and drop the Text Input,  to the desired areas, i.e. First Name, Last Name, etc.



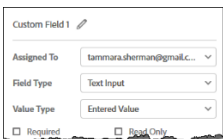
2.6.2 Editing Text Input Fields

You can edit Text Input fields to change the assigned to, field type, appearance, and more.

1. Right-click on the desired Text Input field
2. From the menu, select Edit



3. Make your changes and selections. *For more information, see the Edit Text Input Menu section.*



4. After making your changes, click **OK**

2.6.3 Edit Text Input Menu

The table below describes each menu item.

Menu Item	Description
Pencil icon	Allows you to edit the name of the Text Input field. This is handy when creating calculated fields.
Assigned To	Changes which recipient will complete the field
Field Type	Changes the Text Input field to another field type, such as Date, Signature, or Signature Info

Value Type	Changes the field to a calculated or entered value
Required	Means the recipient must complete the field
Read only	Means the recipient cannot change the field contents
Mask field date	Hides the information entered
Multi-line data entry	Allows the recipient to enter multiple lines of information
Default Value	Sets the initial value of the field
Tooltip	Text the recipient will see when hovering over the field
Validation	Controls the type of information the recipient can enter, such as numbers or text only
Conditions	Allows you to control the information that is visible based on specified criteria
Appearance	Control the format of the information entered, such as font, font size, and alignment
Tools	Allows you to copy or clone a field
Delete Field	Removes the Text Input field

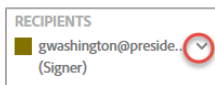
2.6.4 Masking Text Input Fields

You can mask fields when you do not want the recipient's sensitive information, such as social security number, etc., visible to others who may view the document. With masked fields, the information displays as asterisks on the completed PDF.

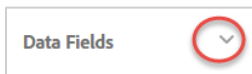
Please note: *The actual information is VISIBLE when exporting reports, such as CSV files.*

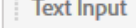
To add a masked field,

1. Select the recipient's name from the right pane



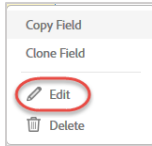
2. In the right pane, expand the Data Fields



3. Drag and drop the Text Input,  to the desired areas, i.e. First Name, Last Name, etc.



4. Right-click on the desired Text Input field
5. From the menu, select **Edit**



6. Check the Masked field data checkbox



7. (Optional) Select the type of validation (i.e date, social security number, phone, etc)



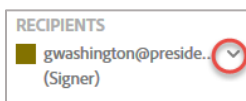
8. Click **OK** to save the field properties
9. Repeat for as many fields as you need to mask

2.7 Date Fields

Date fields allow you to add areas where the recipients can enter dates. The date fields will populate automatically with the date the recipients sign the document.

2.7.1 Adding Date Fields

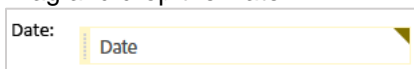
1. To add a date field,
2. Select the recipient's name from the right pane



3. In the right pane, expand the Signer Info Fields



4. Drag and drop the Date



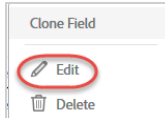
2.7.2 Editing Date Fields

You can edit date fields to change the date format and more.

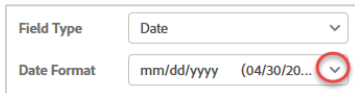
1. Right-click on the Date field



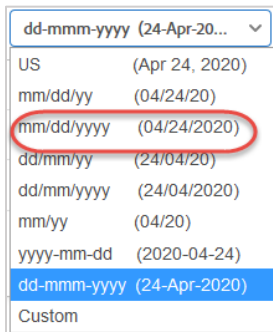
2. From the menu, select Edit



3. From the Edit screen, you can change. Click the down arrow for Date Format.



4. Select a Date Format from the list



5. Click **OK**

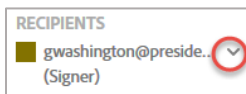
2.8 Signature Fields

You can add signature fields, initials, and signature blocks for each person who needs to sign the document.

2.8.1 Adding Signature Fields

To add signature fields,

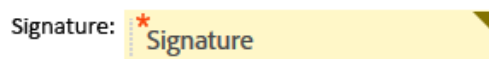
1. Select the recipient's name from the right pane



2. In the right pane, expand the Signature Fields



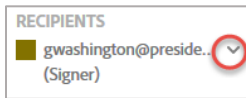
3. Drag and drop the Signature to the desired location on your document



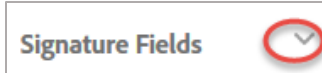
2.8.2 Adding Signature Blocks

A signature block contains areas for the form signer to sign and to enter their name and email address. The signature date is populated automatically, when they sign. To add a signature block,

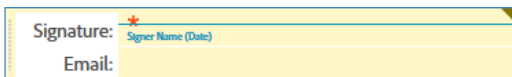
1. Select the recipient's name from the right pane



2. In the right pane, expand the **Signature Fields**



3. Drag and drop the **Signature Block** to the desired location on your document



2.9 Selection Fields

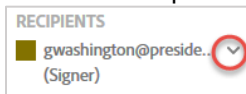
You can add Selection fields allow your recipients to choose among options that you specify. You have a choice of three selection fields: check box, radio buttons, and drop down. The table below describes their function and best use.

Selection Field	Description	Best Use
Check Box	Allows the recipient to select one or more options that apply	When the recipient can select multiple options
Radio buttons	Allows the recipient to select one option from two or more options	When the recipient can only choose one of the available options
Drop Down	Allows the recipient to select from a list of options	When the recipient has many options from which to choose

2.9.1 Adding Check Boxes

Check boxes allow the recipient to select one or more options that apply. To add a Check Box,

1. Select the recipient's name from the right pane



2. In the right pane, expand the Data Fields



3. Drag and drop the Check Box, , to the desired area

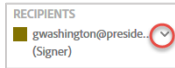


4. Repeat the above step for each check box option.

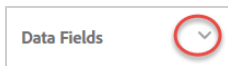
2.9.2 Adding Radio Buttons

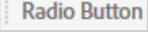
Radio Buttons allow the recipient to select one option from two or more options. To add Radio Buttons,

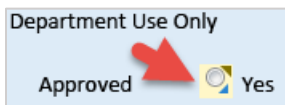
1. Select the recipient's name from the right pane



2. In the right pane, expand the Data Fields

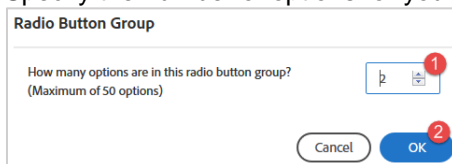


3. Drag and drop the Radio Button, , to the desired area



4. On the Radio Button Group screen,

- Specify the number of options for your radio button group

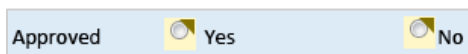


- Click **OK**

5. Adobe Sign will place the additional radio buttons on your document.



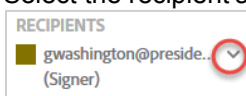
- Drag the radio buttons to the desired areas on the document



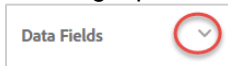
2.9.3 Adding Drop Downs

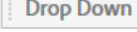
6. Drop down menus allow the recipient to select from a list of options. To add a Drop Down,

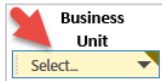
1. Select the recipient's name from the right pane



2. In the right pane, expand the Data Fields



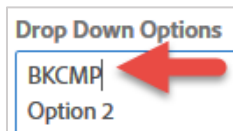
3. Drag and drop the Drop Down, , to the desired area



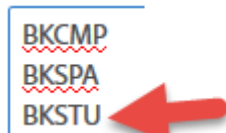
4. To add the options for the Drop Down, double-click the drop down

5. In the Drop Down Options of the pop-up menu,

- Type over the entries with your options

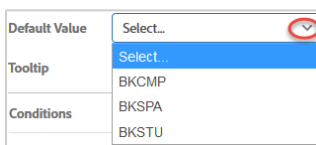


- To add more options, enter your options in the blank area



6. (Optional) Add a default value for your drop down.

(A default value allows you to specify a value that stays populated on your document, until the recipient changes it value by making a different selection from the drop down.)



7. Click **OK**

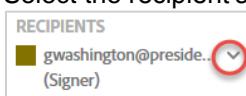
2.10 Hyperlinks, Images, and File Attachments

This section covers adding hyperlinks, images, and file attachments to your documents.

2.10.1 Adding Hyperlinks

Hyperlink fields are a great way to link from your document to a website or other location. You can use it to link to instructions for completing the document, to policies associated with the document, etc. To add a Hyperlink field,

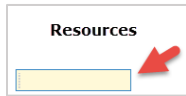
1. Select the recipient's name from the right pane



2. In the right pane, expand the More Fields



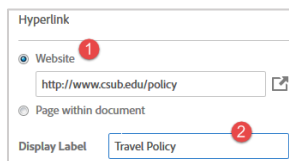
3. Drag and drop the Hyperlink field, , to the desired area



8. Double-click the Hyperlink field

9. On the Hyperlink menu,

- In the Website, enter the URL for the desired website
- In the Display Label, enter a label for the website

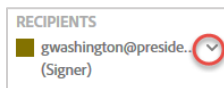


- Click **OK**

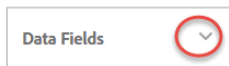
2.10.2 Adding Images

Image fields allows a recipient to attach an image, such as a student id, certificate of completion, etc. You can export the attached image for later use. To add an Image field,

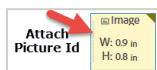
1. Select the recipient's name from the right pane



2. In the right pane, expand the Data Fields



3. Drag and drop the Image field, , to the desired area



4. Resize the image field as necessary

5. Double-click the Image field

6. In the Display Label, enter a label for the Image field

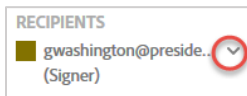


7. Click **OK**

2.10.3 Adding File Attachment fields


While Image fields allow you to attach an image to a document, File Attachment allows the recipient to attach a file, such as a certificate of completion, receipts, or other supporting documentation. To add a File Attachment field,

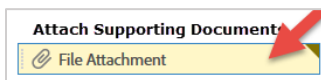
1. Select the recipient's name from the right pane



2. In the right pane, expand the More Fields



3. Drag and drop the File Attachment field, , to the desired area on your document



8. Double-click the File Attachment field
9. On the menu,
 - In the Display Label, enter a label for the file attachment field



- Click **OK**

2.11 Aligning And Sizing Fields

The Alignment bar, shown below, allows you to ensure that your form fields are aligned and sized properly. This bar is activated once you select two or more fields.












To align and size fields,

1. Click on a form field in your document
2. While holding down the Shift key on your keyboard, click additional form fields
3. With the fields selected, click the desired alignment and spacing icon

For descriptions of each alignment and spacing icon, see the next section.

2.11.1 Alignment and Sizing Options

The table below shows the different alignment and spacing icon, their names, and descriptions.

Icon	Menu Item	Description
	Align Top	Aligns the top of the fields
	Align Middle	Aligns the center of the fields
	Align Bottom	Aligns the bottom of the fields
	Align Left	Aligns the fields to the left
	Align Center	Aligns to the fields to the center
	Align Right	Aligns the fields to the right
	Match Width	Resizes field to the same width
	Match Height	Resizes field to the same height
	Match Both Width and Height	Resizes fields to the same width and height

3.0 CALCULATED FIELDS

With Adobe Sign, you can add form fields that contain formulas. The formulas can contain addition, subtraction, division, multiplication, and more. Before you add your calculated fields, you should prepare the fields. This section covers preparing your form fields and adding calculated fields.

3.1 Preparing Fields for Calculations

Before you use your form fields in calculations, it is recommended that you format the fields in a specific manner for best results.

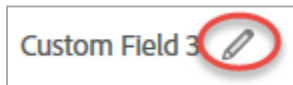
1. Give the form fields meaningful names (See the [Naming Fields](#) section for instructions).
Using meaningful names makes it easier for you to identify the right form fields for your formulas.
2. Edit the format of the form fields
If you will use the form fields for calculations, then format them as numbers. If you are using the form fields for comparisons, you can format them as text or numbers depending on your needs.

3.2 Adding Calculated fields

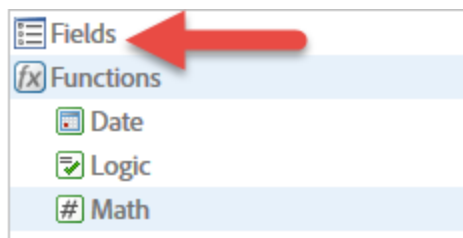
Before you add calculated fields, be sure that the fields you will use in your formula are setup properly. See the section [Preparing Fields for Calculations](#).

1. In the right pane, expand Data Fields
2. Drag Text Input field

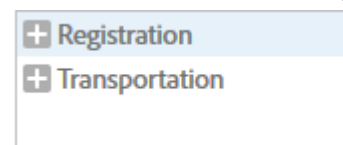
3. Right-click on field
4. Click Edit
5. Click pencil to edit name



6. For Value Type, change to **Calculated value**
7. Click the **f(x)**
8. Click Fields to expand it



9. Your fields will show in the right pane.



10. To complete your formula,

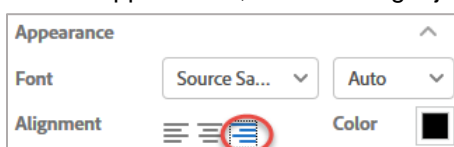
1. Select a field from the right pane
2. Select an operator from the menu



3. Select another field if appropriate
4. Your formula will appear in the formula section as you make your selections.

Registration + Transportation

5. When satisfied, click Check Syntax
6. Click OK
11. For the Display As, select Number
12. For the Number Format, select a format
13. For the Appearance, select the right justified



14. Click **OK**

3.3 Formula Operators

The table below shows each formula operator and provides a description of its function. (Source: [Adobe Sign Supported Operators](#))

+	Add	Add two numbers together.
-	Minus	Subtracts two numbers.
/	Divide	Divides two numbers.
*	Multiply	Multiplies two numbers together.
&	Concatenate	Concatenate two strings together.
=	Compare Equals	Compares two values and returns true if the two values are equal and false if they are not.
!=	Compare Not Equal	Compares two values and returns true if the two values are not equal and false if they are.
<	Less Than	Compares two values and returns Boolean (true or false) if the first value is less than the second value.
>=	Greater than or Equals	Compares two values and returns Boolean (true or false) if the first value is greater than or equal to the second value.
<=	Less Than or Equals	Compares two values and returns Boolean (true or false) if the first value is less than or equal to the second value.
>	Greater than	Compares two values and returns Boolean (true or false) if the first value is greater than the second value.
%	Modulo	Returns the remainder of the division between two numbers.
^	Exponent	Returns the exponential value of the specified numbers.

4.0 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 Resources](#)
- **Service Center**
661-654-4357
servicecenter@csub.edu