

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

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

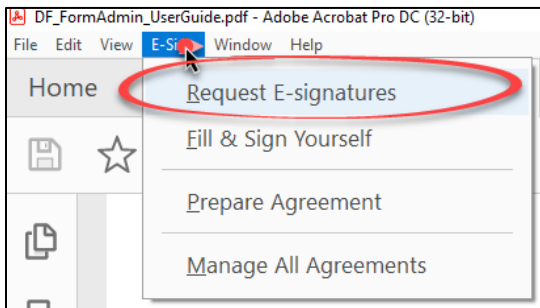
- Adobe Sign at Cuesta College is intended for use by employees gathering signatures on an ad-hoc basis. Test
- When using Adobe Sign for gathering signatures you must know the names of all the recipients who need to sign prior to sending the document.
- Document signatories cannot be dependent on prior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

### Where to find the Adobe Sign tool

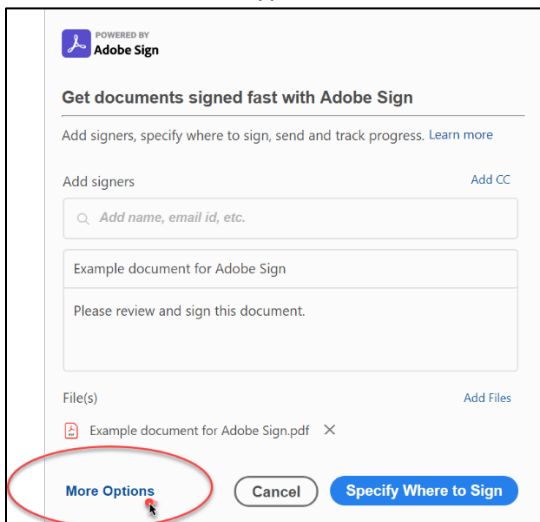
- Not all accounts have access to the Adobe Sign tool. To request access email [ITsupport@cuesta.edu](mailto:ITsupport@cuesta.edu).
- Locate the tool in Adobe Acrobat DC by selecting the Sign dropdown menu or by using the Tools tab and selecting the Adobe Sign tool under the Forms & Signatures category.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

Recipients

Complete in Order  Complete in Any Order  [Add Me](#) | [Add Recipient Group](#) ?

|   |  |                       |  |       |  |
|---|--|-----------------------|--|-------|--|
| 1 |  | SignerOne@cuesta.edu  |  | Email |  |
| 2 |  | SignerTwo@gmail.com   |  | Email |  |
| 3 |  | 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

Message [Message Template](#) v

Enter a Subject Line here for your Agreement

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.*

Files [Add Files](#)

Example\_Fillable\_Requisition\_Form.pdf

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.

Options ?

Password Protect

Set Reminder

Every week v

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

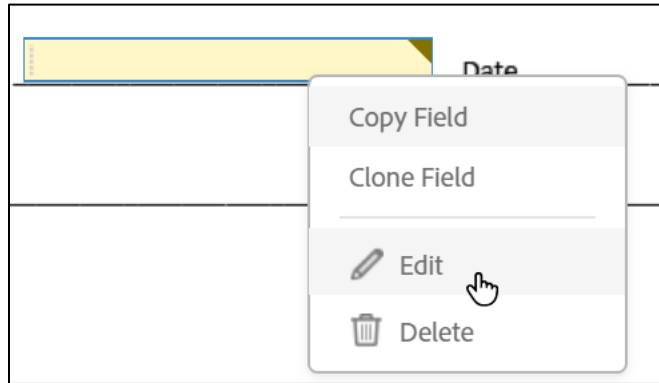
Preview & Add Signature Fields

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

The screenshot displays a user interface for configuring a form. At the top, a toggle switch labeled "Advanced editing on" is turned on. Below this, the "RECIPIENTS" section shows a dropdown menu with the selected recipient "signerone@cuesta.edu" and a "(Sign)" button. The "Signature Fields" section is expanded, showing a list of options: "Signature" (highlighted with a red circle and a mouse cursor), "Initials", "Signature Block", and "Stamp". Below this are several collapsed sections: "Signer Info Fields", "Data Fields", "More Fields", and "Transaction Fields", each with a downward arrow.

- 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.