# Adobe Sign Step by Step Guide

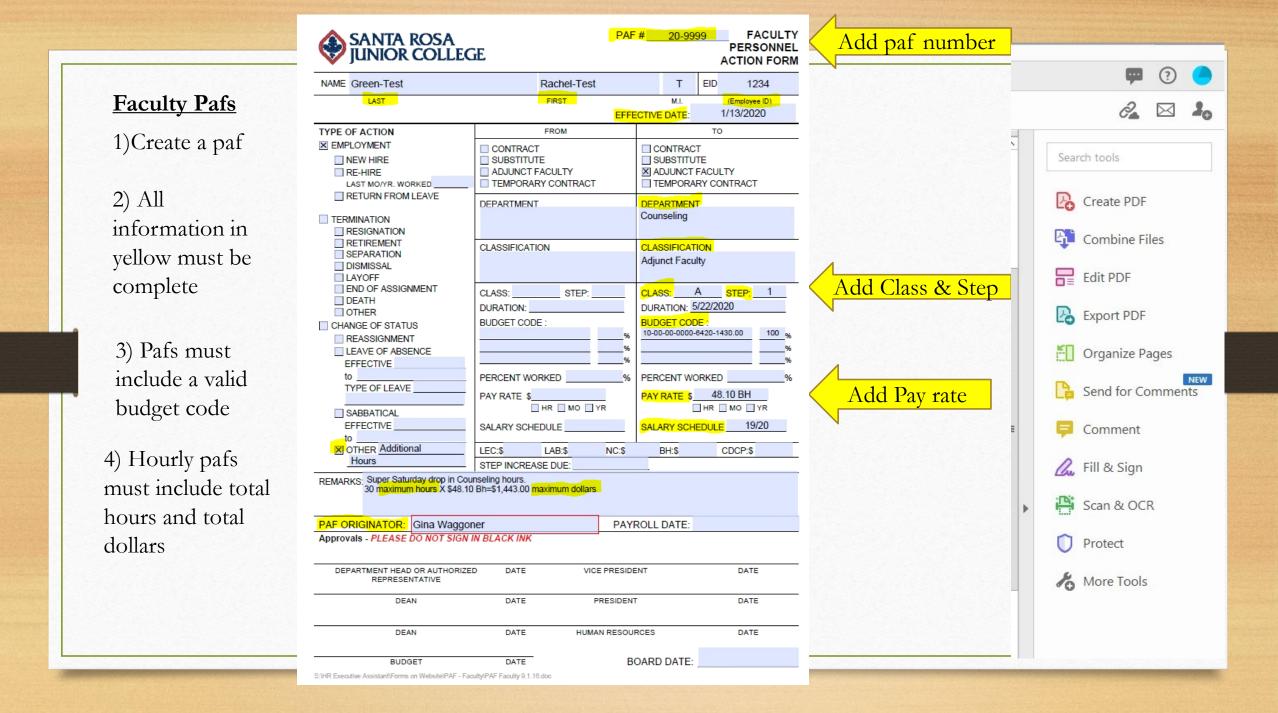
How to route pafs for signatures electronically

### What is adobe sign?

Adobe Sign, an Adobe Document Cloud solution is a cloudbased, enterprise-class e-signature service that lets you replace paper and ink signature processes with fully automated electronic signature workflows. With it, you **can** easily send, **sign**, track, and manage signature processes using a browser or mobile device.

Please watch this tutorial video for an overview

https://www.youtube.com/watch?v=va1o7mSrzLs&t=91s



				Add paf number	
	SANTA ROSA JUNIOR COLLEGE	Contact Danielle Donica or Linda jay for PAF #	PAF #_20-9876 CLASSIFIED /   MANAGEMENT PERSONNEL ACTION FORM		📮 🕜 🦲
	NAME Rhee	Glenn	R EID 002196		
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		PROBATIONARY PERIOD - EXPIRES:	STEP INCREASE DUE:		-754
	REMARKS: Working Out of Class to cover Executive form attached.	Assistant, position currently vacant. Reque	est for Out-of-Classification Compensation		Scan & OCR
	PAF ORIGINATOR: Linda Jay, HR		ROLL DATE:		V Protect
	Approvals - PLEASE DO NOT SIGN				Kore Tools
	DEPARTMENT CHAIR/SUPERVISOR	DATE VICE PRESIDENT	DATE		
	DEAN/DIRECTOR	DATE PRESIDENT	DATE		
	DEAN	DATE BUDGET	DATE		
	VICE PRESIDENT	DATE HUMAN RESOURCES	DATE .		

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# File naming for easy searching in adobe

- When you create an individual paf the file name should include the employee last name, first name, date started and paf number.
- Example:
- WaggonerGina7-26-21(22-1234)

• Master Paf number file name should include:

Department name, date started, paf number

- Example:
- Health Sciences7-26-21(22M-1234)

Add signers, specify where you	ned fast with Adobe Sign	
Signers	ocument electronically. Learn more. Add CC   ③	
Q Add recipient emails		
Subject & Message		
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Select more

options

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	Show CC Message Sample paf for adobe Please review and complete this document.  Files Add Files  Message Drag More Files Here Preview & Add Signature Fields



POWERED BY Adobe Sign

### This is the routing order for Instructor &

#### Reports Group Send Manage Home

## Management pafs only

#### gwaggoner@santarosa.edu 1)

- wschultz@santarosa.edu and\*/or 2) sdirks@santarosa.edu (Categorical)
- 3) Dept chair/Director email
- Dean email 4)
- lsaldana-Talley@santarosa.edu 5)
- shopkins@santarosa.edu 6)

## CC:

## knazario@santarosa.edu (For Academic Affairs pafs)

\*If Budget on paf includes categorical and general funds the paf must be sent to both Stephanie Dirks AND Whitney Schultz

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10

p: Email addresses are case ensitive, so always use lowercase letters for email

Recipien	its in Order	Complete in Any Order		-
	¢~	gwaggoner@santarosa.edu	Add Me Add Recipient	Group 🕑
2	6~	wschultz@santarosa.edu and/or sdirks@santarosa.edu	🖂 🗸 Email	×
3	6~	mferguson@santarosa.edu	🖂 🗸 Email	×
4	6~	vtam@santarosa.edu	🖂 🗸 Email	×
5	6~	lsaldana-talley@santarosa.edu	🖂 🗸 Email	$\times$
б	ø~	shopkins@santarosa.edu		
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knaza	rio@santa	rosa.edu ×		
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### Files

### Add Files

# Recipients' Language English: US

Drag & Drop Files Here

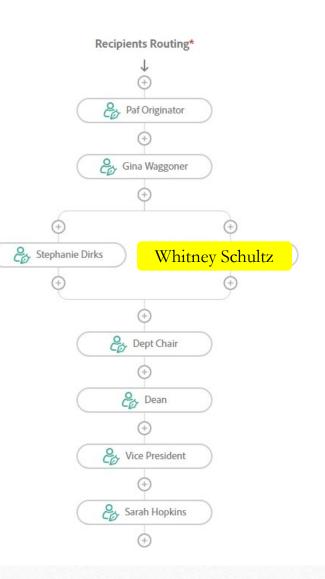
# Sample routing path FOR INSTRUCTOR & MANAGEMENT PAFS

- PAF ORIGINATOR (Administrative Assistant/Dept)
- HUMAN RESOURCES (Gina Waggoner for accuracy check)
- BUDGET (Whitney Schultz and/or Stephanie Dirks-Categorical)
- DEPARTMENT CHAIR/DIRECTOR
- DEAN
- VICE PRESIDENT
- HUMAN RESOURCES FINAL (Sarah Hopkins)

CC:

Academic Affairs Pafs (Karolina)

Employee for final copy at end (Optional)

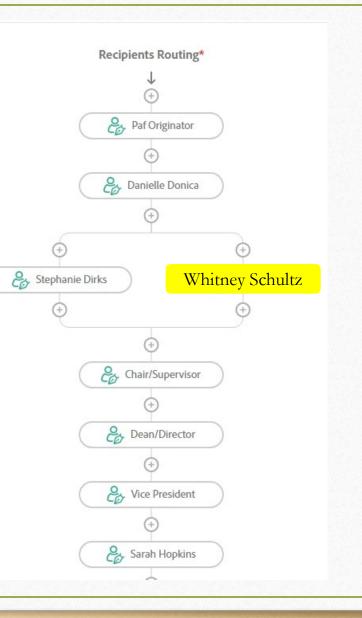


# Sample routing path FOR CLASSIFIED PAFS

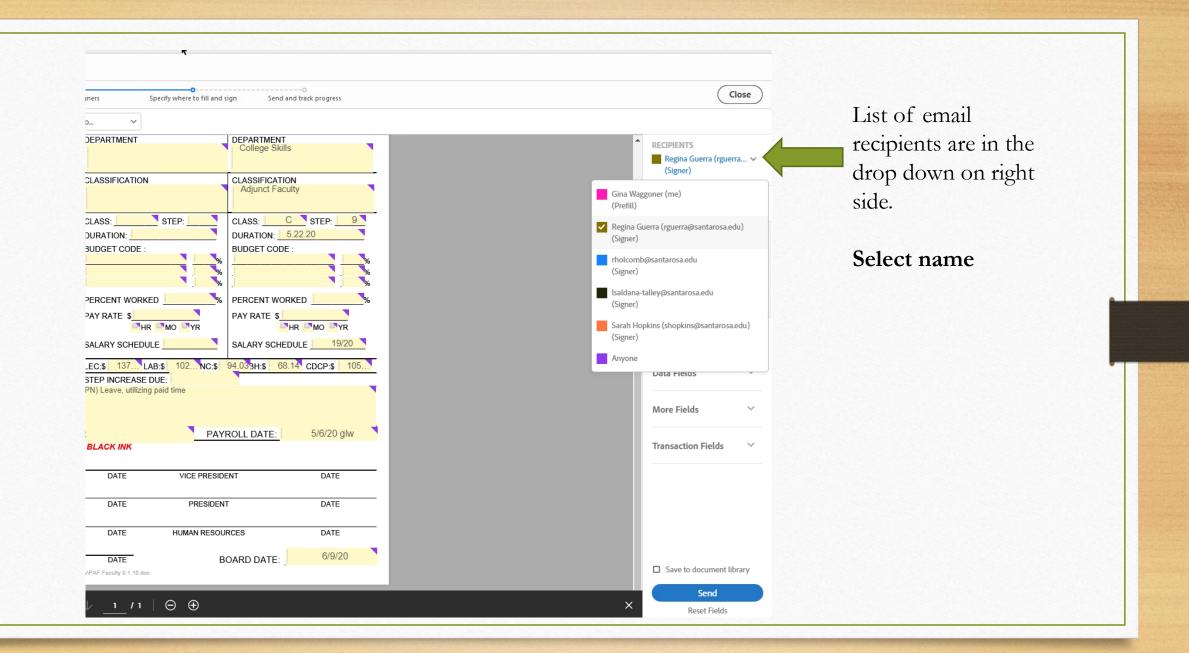
## <u>CLASSIFIED PAFS</u>

- PAF ORIGINATOR (Administrative Assistant/Dept)
- HUMAN RESOURCES (Danielle Donica for accuracy check)
- BUDGET (Whitney Schultz or/and Stephanie Dirks-Categorical)
- DEPARTMENT CHAIR/SUPERVISOR
- DEAN/DIRECTOR
- VICE PRESIDENT
- HUMAN RESOURCES FINAL (Sarah Hopkins)

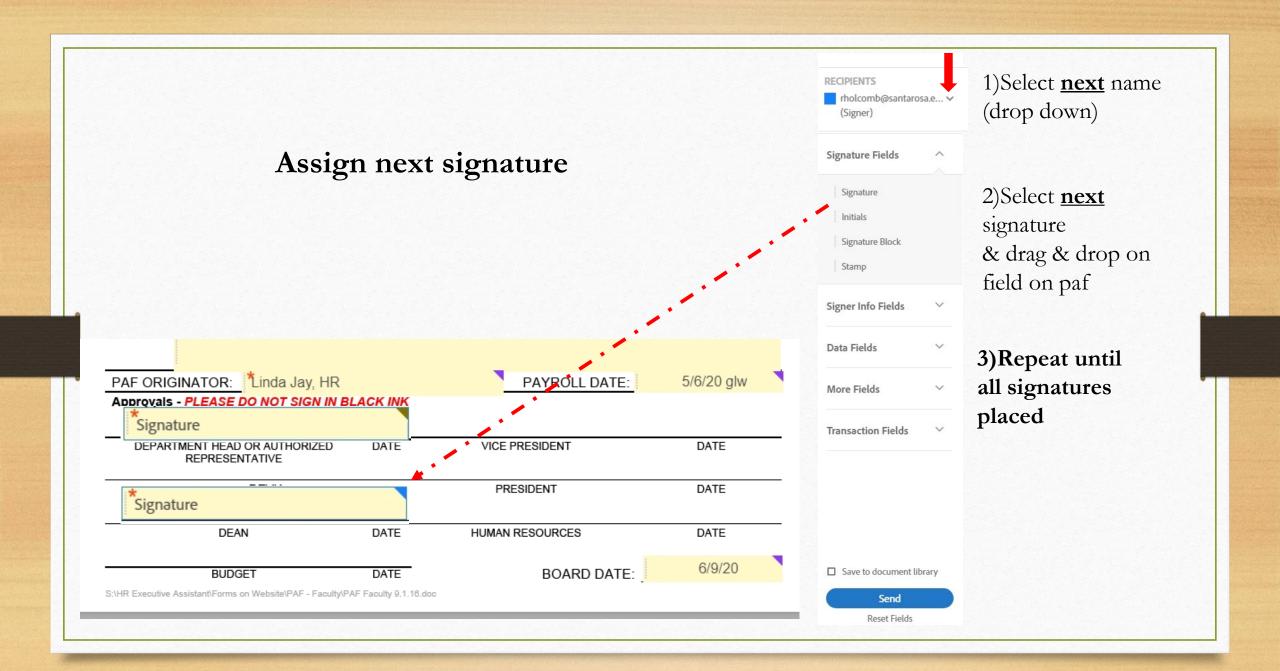
CC: Linda Jay, HR

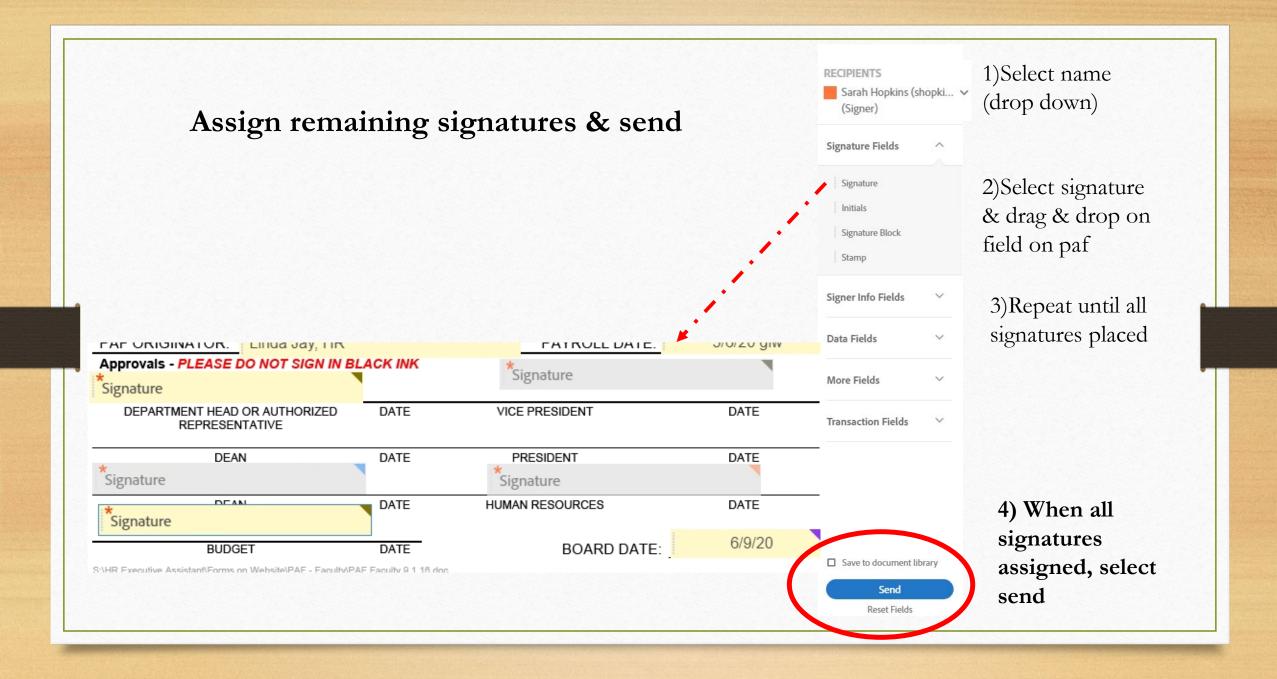


Test Paf	Options
Please review and complete Test Paf.	Password Protect
Files	Recipients' Language
	English: US
A Testing paf-signatures3-31-20.pdf	×
Drag More Files Here	
Preview & Add Signature Fields	
Next	









Add signers

#### Specify where to fill and sign

Send and track progress

Once submitted, this is an example of what you will appear on your screen

×.

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# "ShimizuG5-6-20 glw" has been successfully sent for signature

A copy has also been sent to you at gwaggoner@santarosa.edu for your records. "ShimizuG5-6-20 glw" was sent for signature to Regina Guerra (rguerra@santarosa.edu), rholcomb@santarosa.edu, lsaldana-talley@santarosa.edu, and Sarah Hopkins (shopkins@santarosa.edu). They will complete "ShimizuG5-6-20 glw" in order, one after the other. As soon as the agreement is complete, all eligible parties will be e-mailed PDF copies.

#### Reminders

Reminders sent until completion: Every day

#### You will be alerted if:

- The document you sent has not been viewed by today at 11:27 PM.
- The document you sent has not been signed by May 7 at 3:27 PM.

#### Change alert settings

All agreements that are not completed within 365 days will be automatically expired.

# This is a sample of the Confirmation email you will receive when document starts routing

ShimizuG5-6-20 glw.pdf 124 KB	
	SANTA ROSA JUNIOR COLLEGE Adobe Sign
	<section-header><section-header><section-header><list-item><list-item><list-item><section-header></section-header></list-item></list-item></list-item></section-header></section-header></section-header>

 Adobe Sign <echosign@echosign.com>
 Saldana-Talley, Jane; Hopkins, Sarah; + 2 +
 U 1
 4/11/20

 [External] AFA pafs between FCCC - Santa Rosa Junior College (Sonoma), L. Jane Saldana-Talley, Li...
 If there are problems with how this message is displayed, click here to view it in a web browser.
 Image: Constant of the second seco

AFA pafs - signed.pdf 3 MB

### File name changed to-signed (Final signed copy emailed to you)



This is the email you receive at the end of processing.

The file name will change to "signed" and all parties that signed document or were CC on the routing will receive a final copy of the signed paf. AFA pafs between FCCC -Santa Rosa Junior College (Sonoma), L. Jane Saldana-Talley, Linda Close, and 1 more is Signed and Filed!

To: L. Jane Saldana-Talley, Sarah Hopkins, Linda Close, and Gina Waggoner

Attached is a final copy of AFA pafs.

Copies have been automatically sent to all parties to the agreement.

You can view the document in your Adobe Sign account.

#### Why use Adobe Sign:

- Exchange, Sign, and File Any Document. In Seconds!
- Set-up Reminders. Instantly Share Copies with Others.
- See All of Your Documents, Anytime, Anywhere.

Signed & Filed! Routing is now complete

# Deeper Dive into Adobe Sign



Tracking pafs and sending reminders using Adobe dashboard



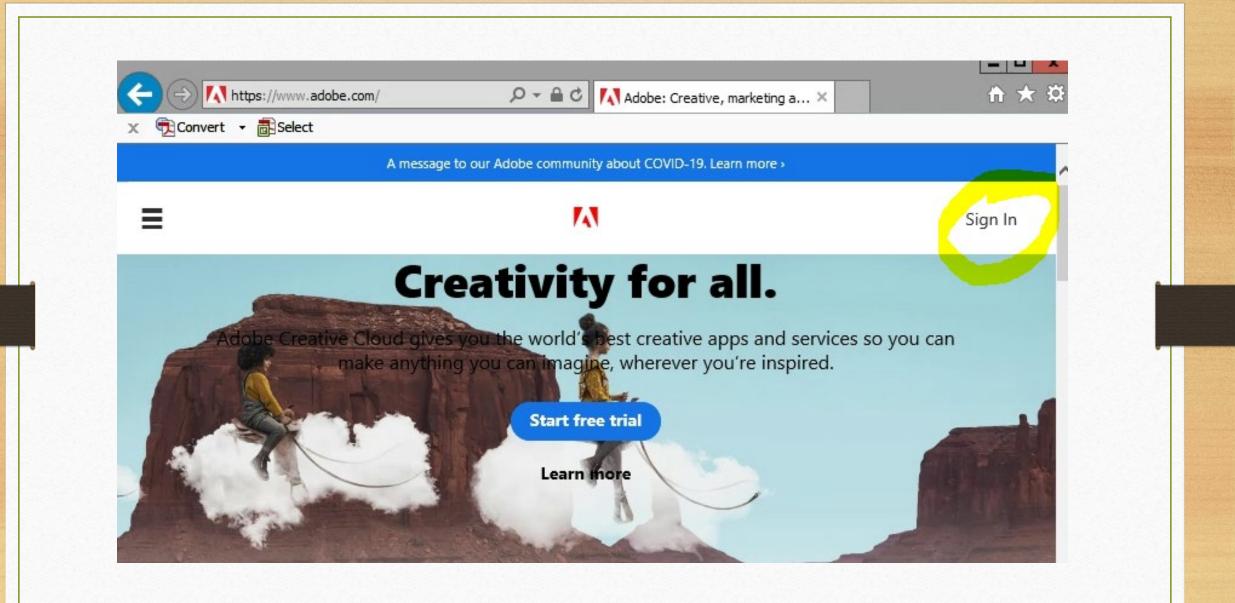
For the best user experience in Horizon please use Chrome Browser

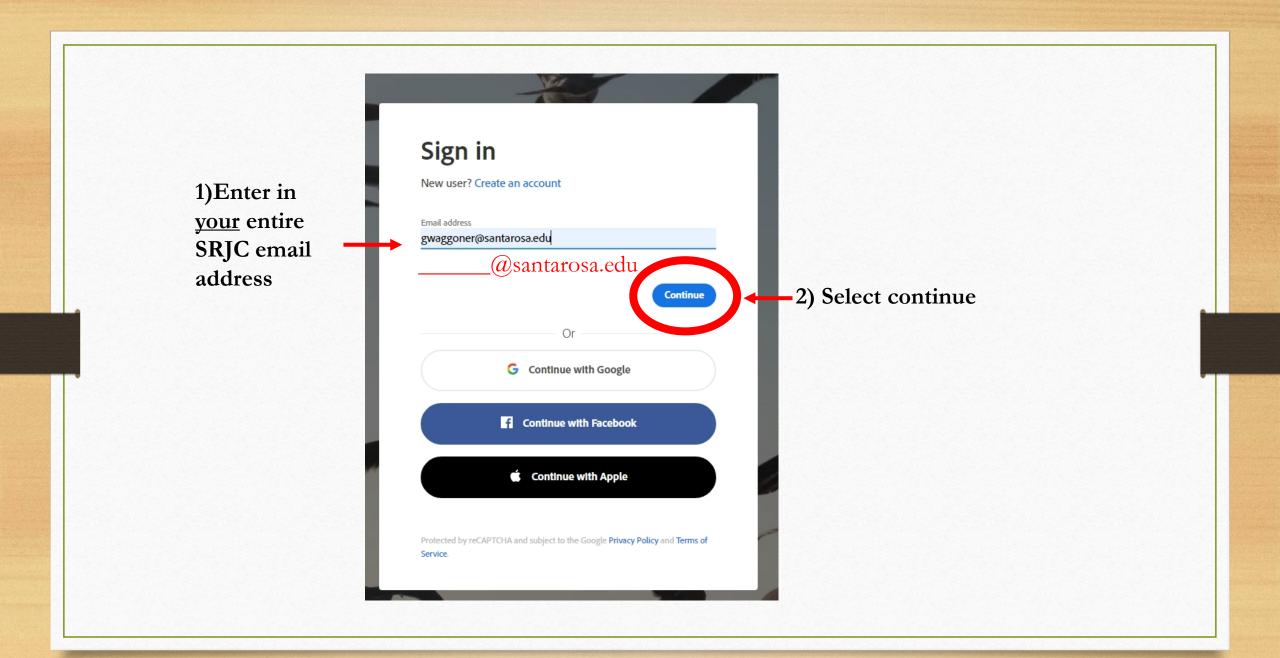


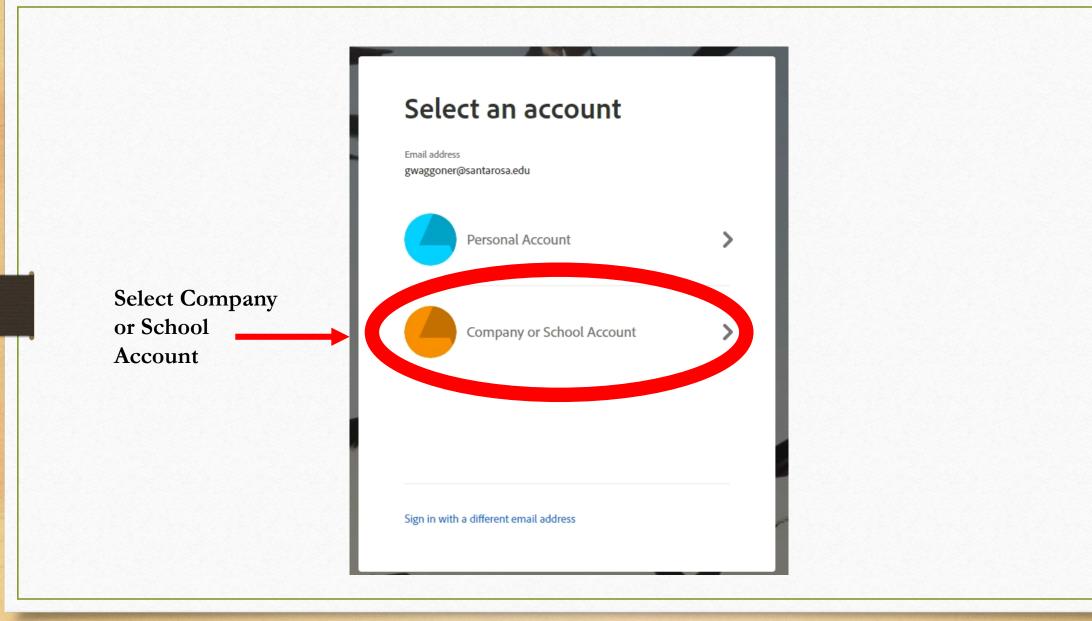
To access your Adobe dashboard go to:

https://santarosajc.na1.documents.adobe.com

https://www.adobe.com/





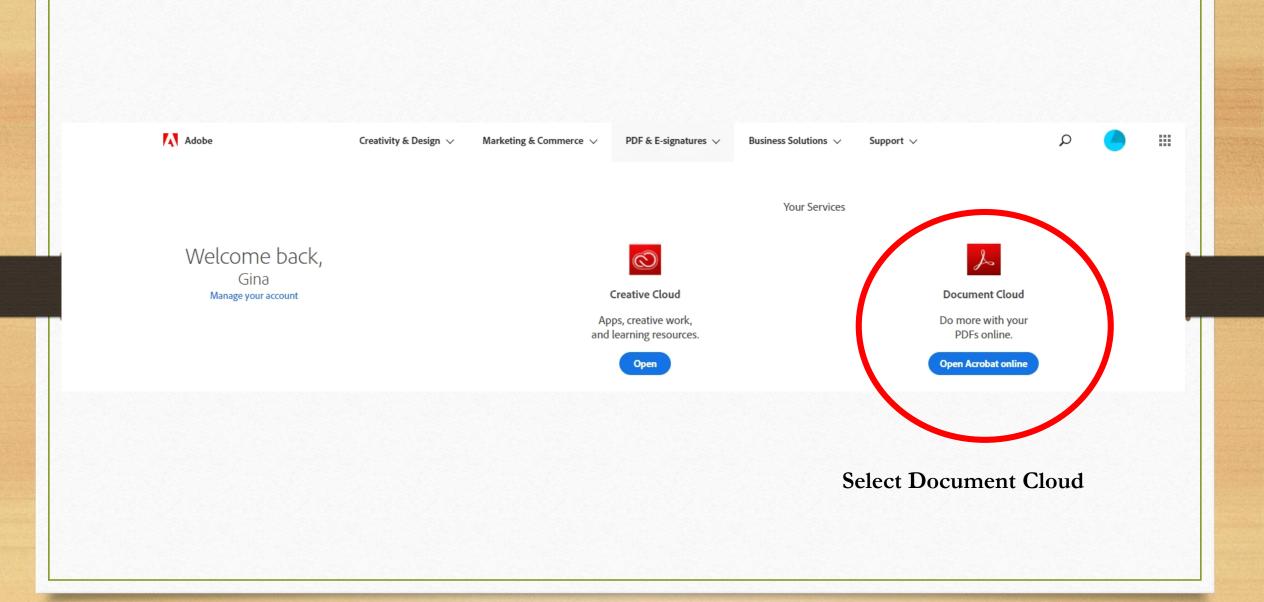


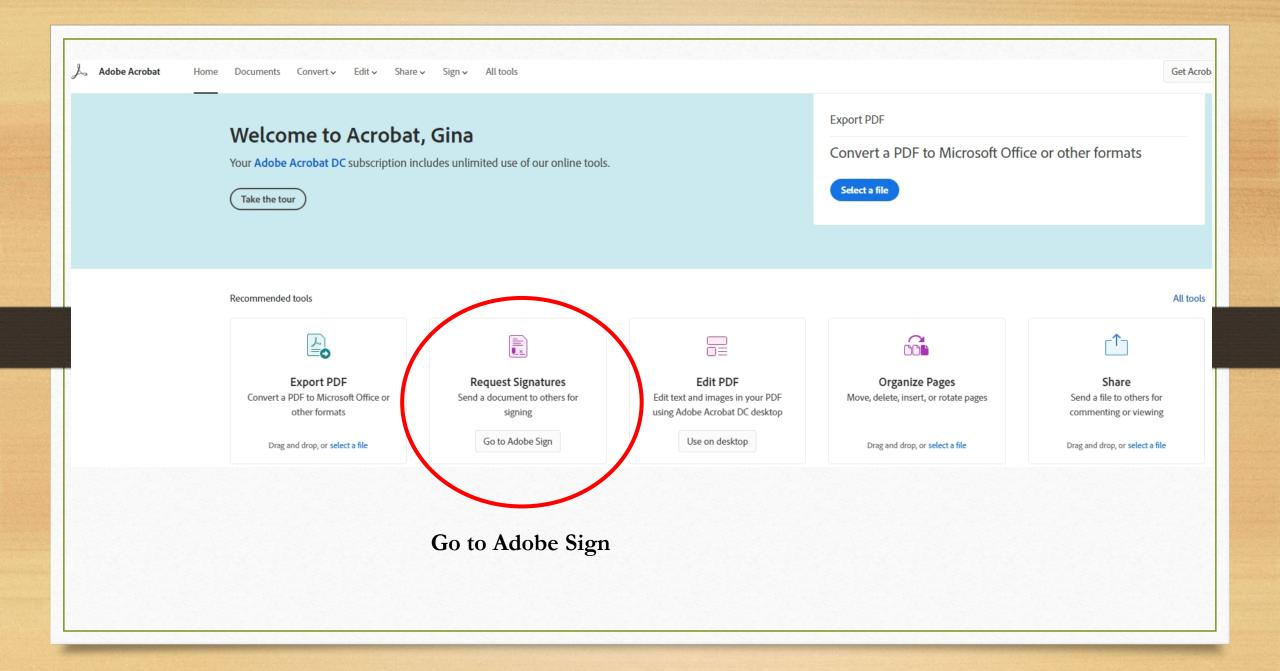
Type in your SRJC user name

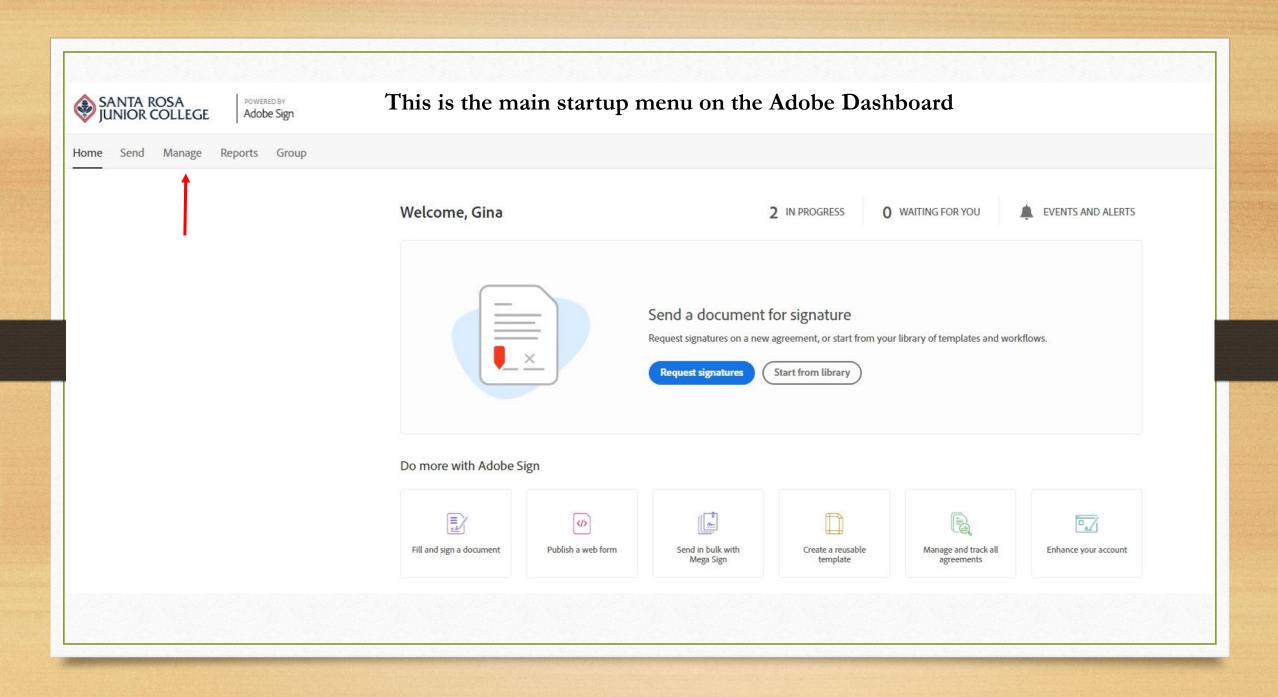
Example: gwaggoner

Type in your SRJC Network Password

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#### Home Send Manage Reports Group Gina 🔻 Your agreements **Filters** Q Search for agreements and users... STATUS In Progress In Progress (3) RECIPIENTS TITLE STATUS MODIFIED Waiting for You (0) Regina Guerra ShimizuG5-6-20 glw Out for Signature 5/6/2020 Completed 0 of 4 completed Sarah Hopkins Out for Signature Canceled DPS-3215E (Batch) glw 5/6/2020 3 of 4 completed Expired Robert Ethington Out for Signature EpsteinB05-06-20 glw (Revised) 5/6/2020 1 of 5 completed Archived

From the Manage screen in Adobe Dashboard you can track the status of your pafs & send reminders

# How to Cancel a paf (During Routing)

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nceled	Sarah Hopkins 4 of 5 completed	TamayoJ05-11-20 glw	Out for Signature	Open Remind 5/11/2020
bired	rholcomb@santarosa.edu 1 of 5 completed	MartinezF5-11-20 glw	Out for Signature	5/11/2020

As a paf originator you cancel the paf **<u>before</u>** it is fully signed off. In the adobe sign dashboard hoover your mouse two options where the yellow circle is on my document Open and Remind appear.

If you select **Open** this menu opens on the right side of your pdf. Select cancel.

Signed on May 11, 2020

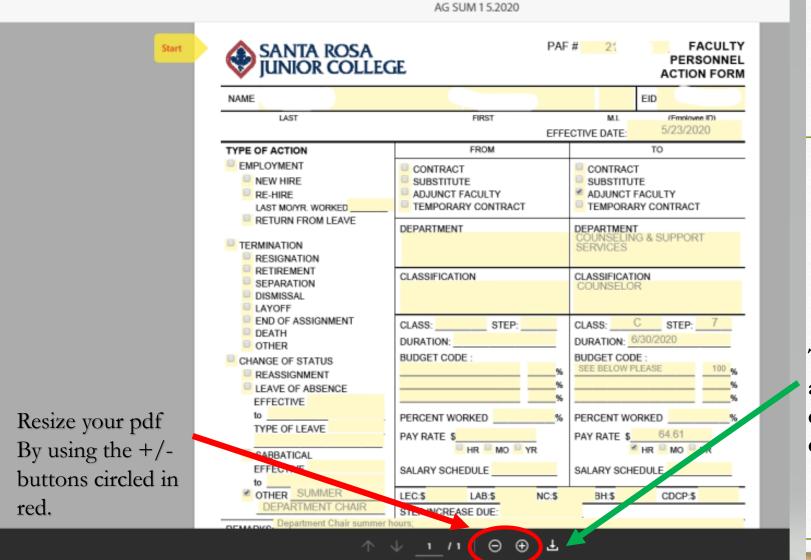
TuttleN5-11-20 glw

# FOR ASSISTANCE, QUESTIONS, OR TRACKING:

(Full-Time Faculty, Adjuncts or Management Pafs)

Contact: Gina Waggoner HR Specialist- Systems & Compensation Direct: (707) 527-4786 gwaggoner@santarosa.edu (Classified, Professional Experts or STNC Pafs)

Contact: Jenne Arden Human Resources Technician Direct: (707) 527- 4785 jarden@santarosa.edu gn.com/public/esign?aid=CBJCHBCAABAA0IEWpxRqWdtZ1ZCY3eLLoWg2850rgFT3&pid=CBJCHBCAABAAIU8ZDzDKX-nfKISe\_vOq6uw3rqG4RRmy&locale=en\_US&client\_id=CBJCHBCAABA



This button allows you to download the document If Adobe is crashing, please contact Bill Wagy in IT to have your Adobe license updated. His email is <u>wwagy@santarosa.edu</u>

## For additional resources please check out Adobe help section

	Send Manage Reports Group	Welcome, Gina	1 IN PROGRESS 0 WAITING FOR YOU	EVENTS AND ALERTS	User Guide Tutorials Contact Sup
		welcome, Gina		EVENIS AND ALERIS	Release Not
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