Adobe Sign Step by Step Guide

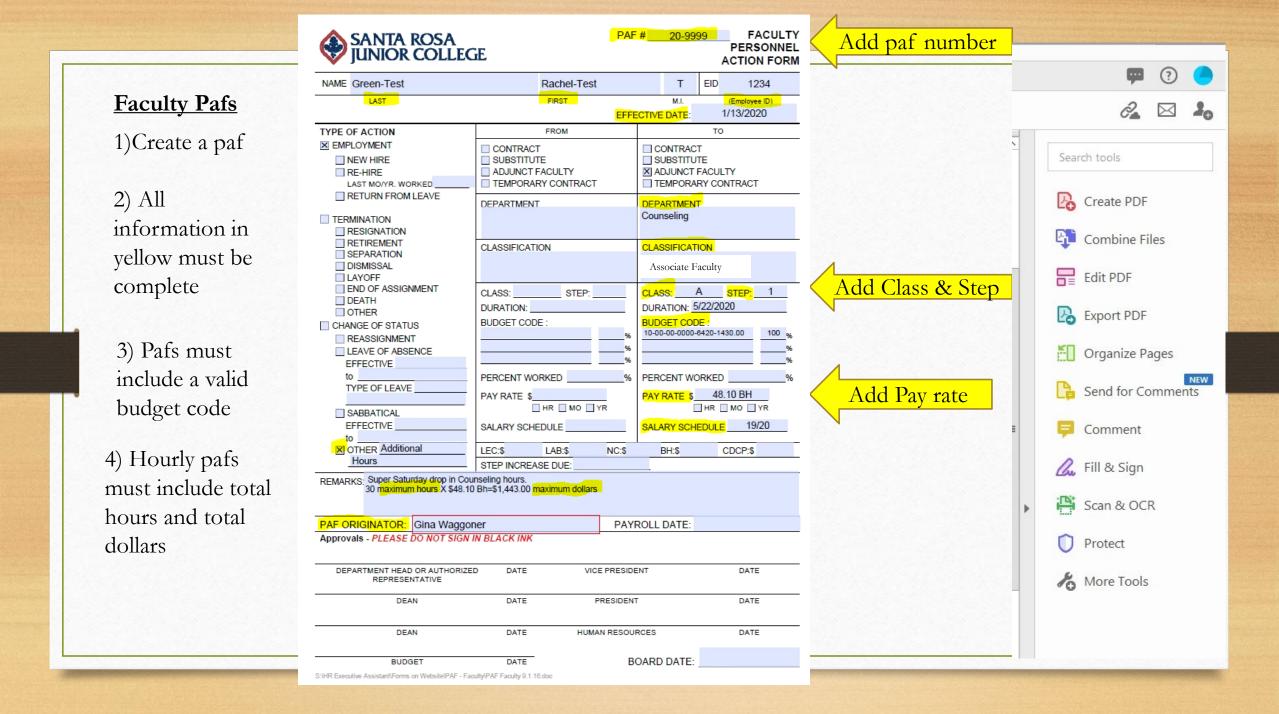
How to route pafs for signatures electronically

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		
<u>Classified &</u>	LAST	FIRST	M.I. (Employee ID)		<i>c</i> _ 🖂 🚣
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<u>Management Pafs</u>		FROM	TO		
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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:
- SmithVeronica7-26-24(24-3241)

• Group Paf number file name should include:

Department name, date started, paf number

- Example:
- Health Sciences7-26-24(24G-1234)

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Select more options

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Home

Send Manage

This is the routing order for Instructor &

Management pafs only (Academic Affairs)

- 1) gwaggoner@santarosa.edu
- 2) <u>wschultz@santarosa.edu</u> <u>and*/or</u> <u>sdirks@santarosa.edu</u> (Categorical)

Reports Group

- 3) Dept chair/Director email
- 4) Dean email
- 5) <u>rholcomb@santarosa.edu</u>
- 6) trichmond@santarosa.edu

CC:

Kransbottom@santarosa.edu (For Academic Affairs pafs)

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

Tip: Email addresses are case
sensitive, so always use
lowercase letters for email

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Home

Send Manage

This is the routing order for Instructor &

Management pafs only (Student Services)

- 1) gwaggoner@santarosa.edu
- 2) <u>wschultz@santarosa.edu</u> <u>and*/or</u> <u>sdirks@santarosa.edu</u> (Categorical)

Reports Group

- 3) Dept chair/Director email
- 4) <u>msenecal@santarosa.edu</u>
- 5) <u>angelicagarcia@santarosa.edu</u>
- 6) trichmond@santarosa.edu

CC: Originator jbarrett@santarosa.edu

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

case

Tip: Email addresses are c
sensitive, so always use
lowercase letters for email

1 & gwaggoner@santarosa.edu	🖂 🛩 Email	×
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Sample routing path FOR INSTRUCTOR & MANAGEMENT PAFS

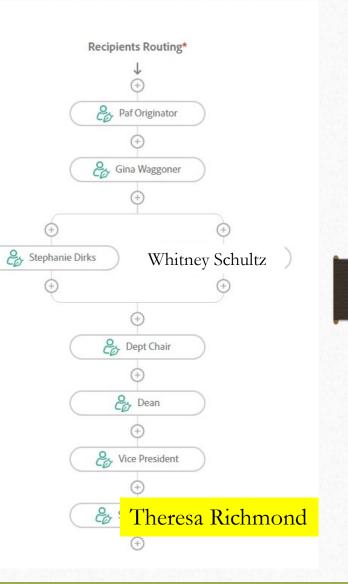
- #1 HUMAN RESOURCES (Gina Waggoner for accuracy check)
- #2 BUDGET (Whitney Schultz and/or Stephanie Dirks-Categorical)
- #3 DEPARTMENT CHAIR/DIRECTOR
- # 4 DEAN
- #5 VICE PRESIDENT
- # 6 HUMAN RESOURCES FINAL (Theresa Richmond)



C: Academic Affairs Pafs (Kelly Ransbottom)

OR

Student Services Pafs (Jenna Barrett)

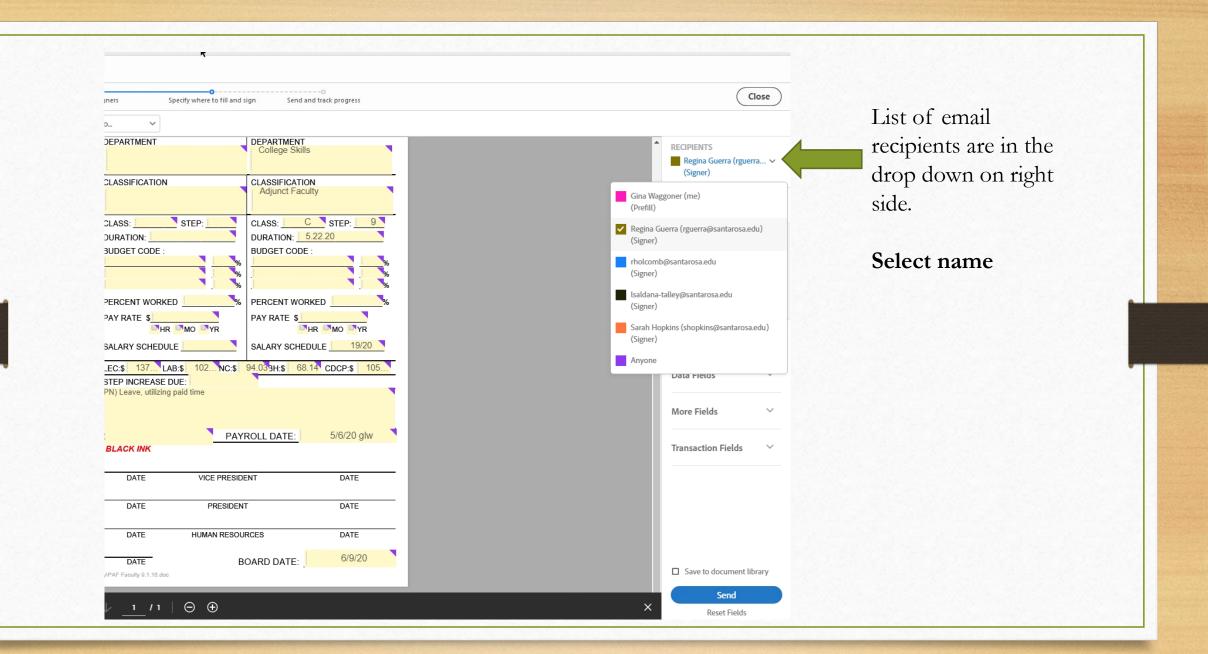


Sample routing path FOR CLASSIFIED PAFS

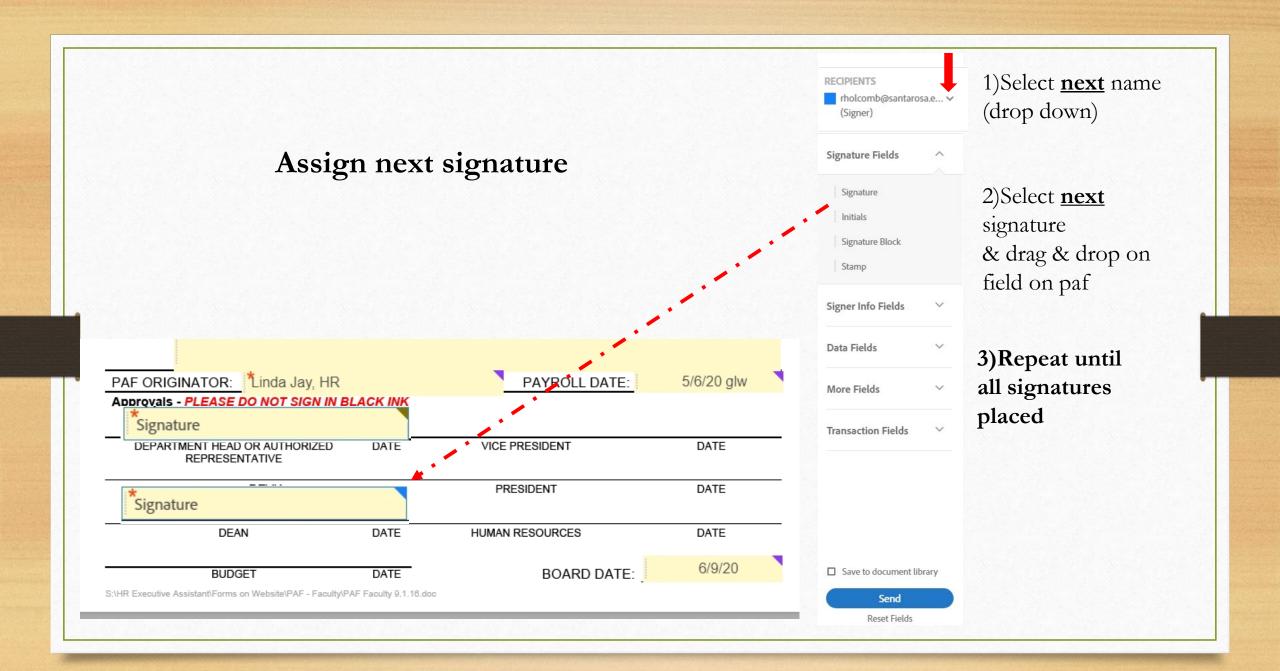
<u>CLASSIFIED PAFS</u>

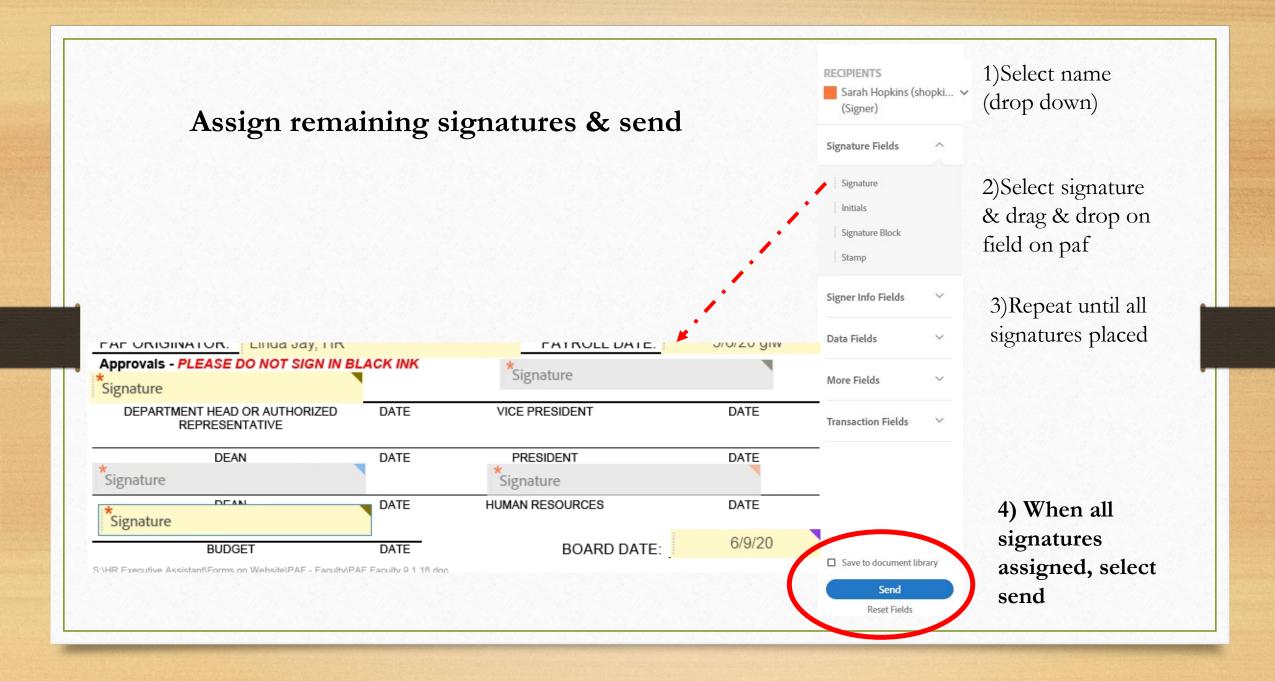
- PAF ORIGINATOR (Administrative Assistant/Dept)
- HUMAN RESOURCES (Jenne Arden for accuracy check)
- BUDGET (Whitney Schultz or/and Stephanie Dirks-Categorical)
- DEPARTMENT CHAIR/SUPERVISOR
- DEAN/DIRECTOR
- VICE PRESIDENT
- HUMAN RESOURCES FINAL (Theresa Richmond)

Test Paf	Options
Please review and complete Test Paf.	Password Protect
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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
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 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: Control of the cont

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



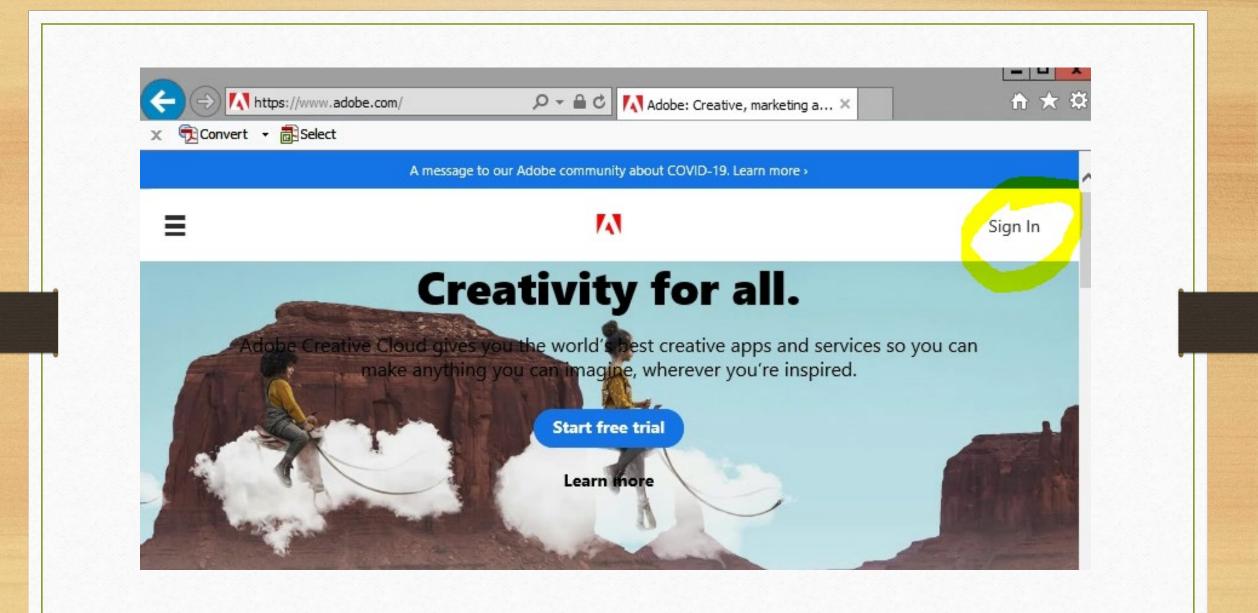
For the best user experience in Horizon please use Chrome Browser

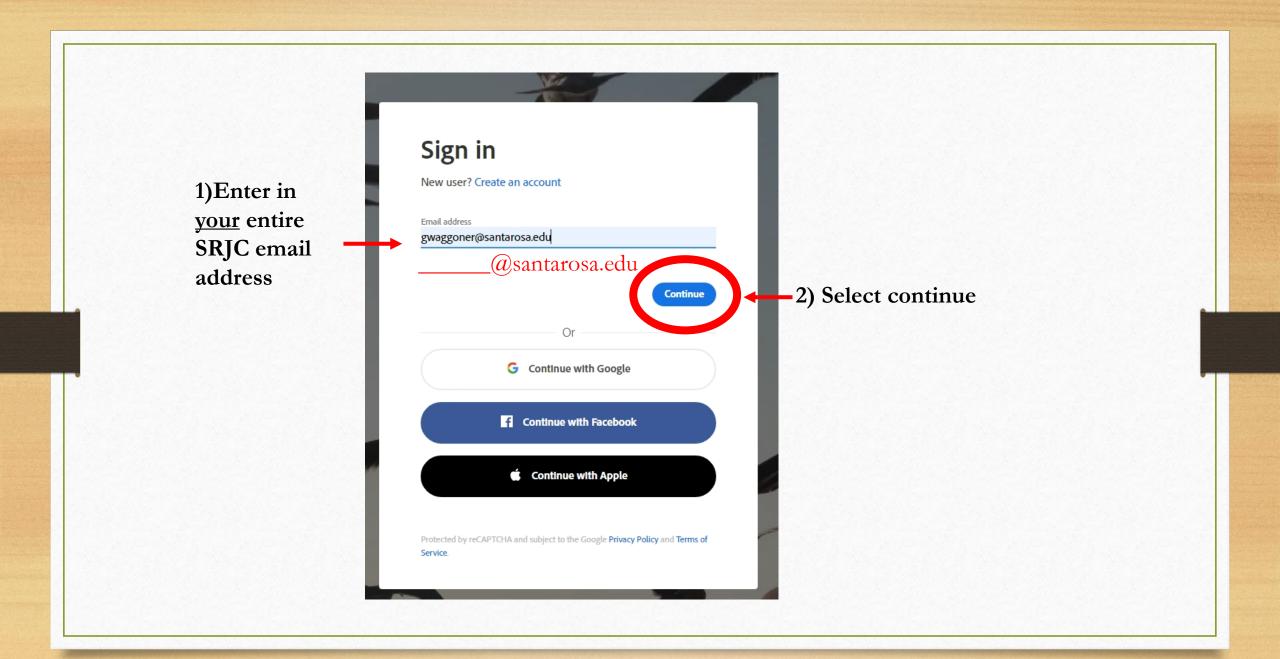


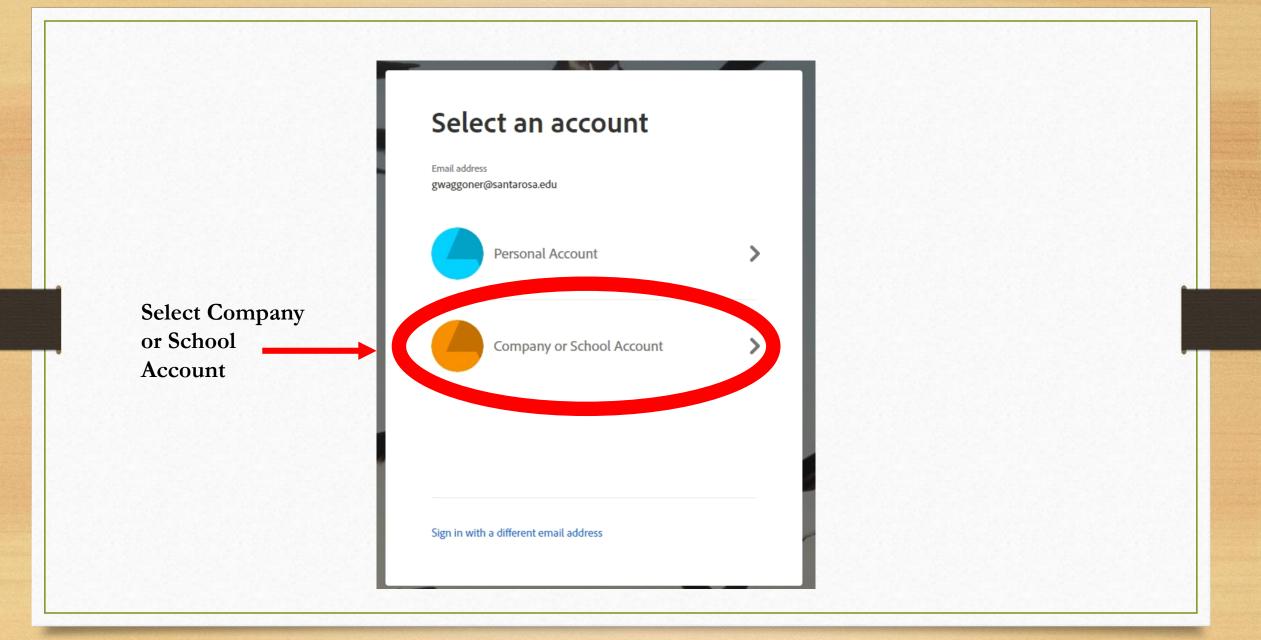
To access your Adobe dashboard go to:

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

https://www.adobe.com/





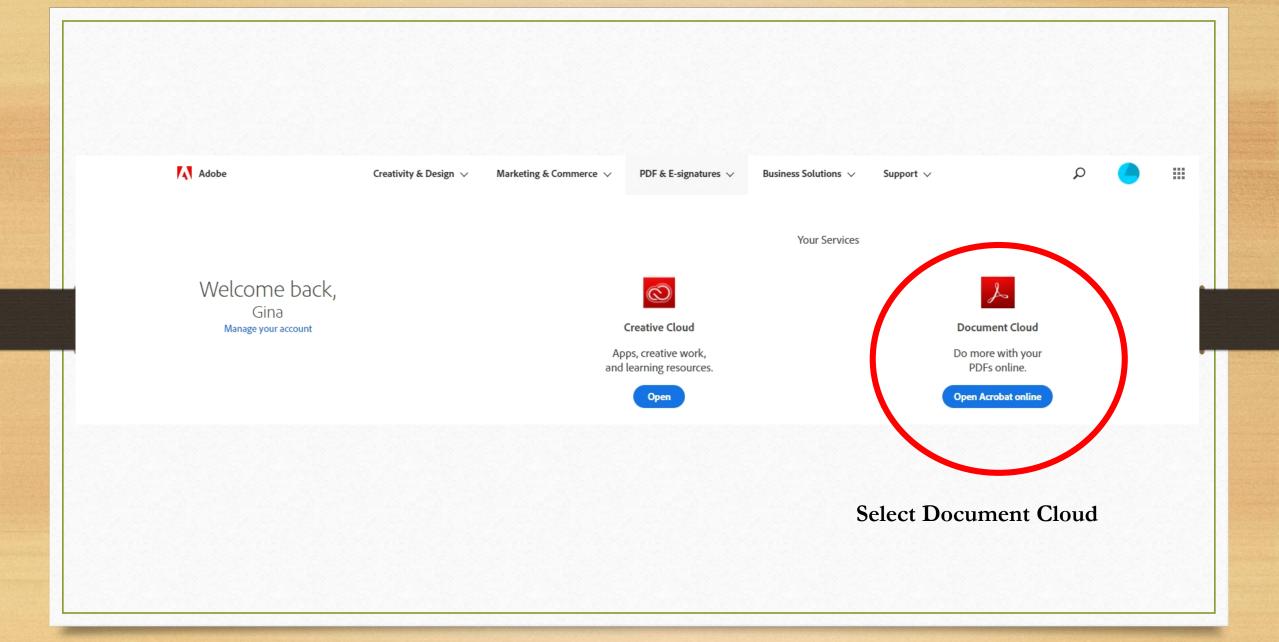


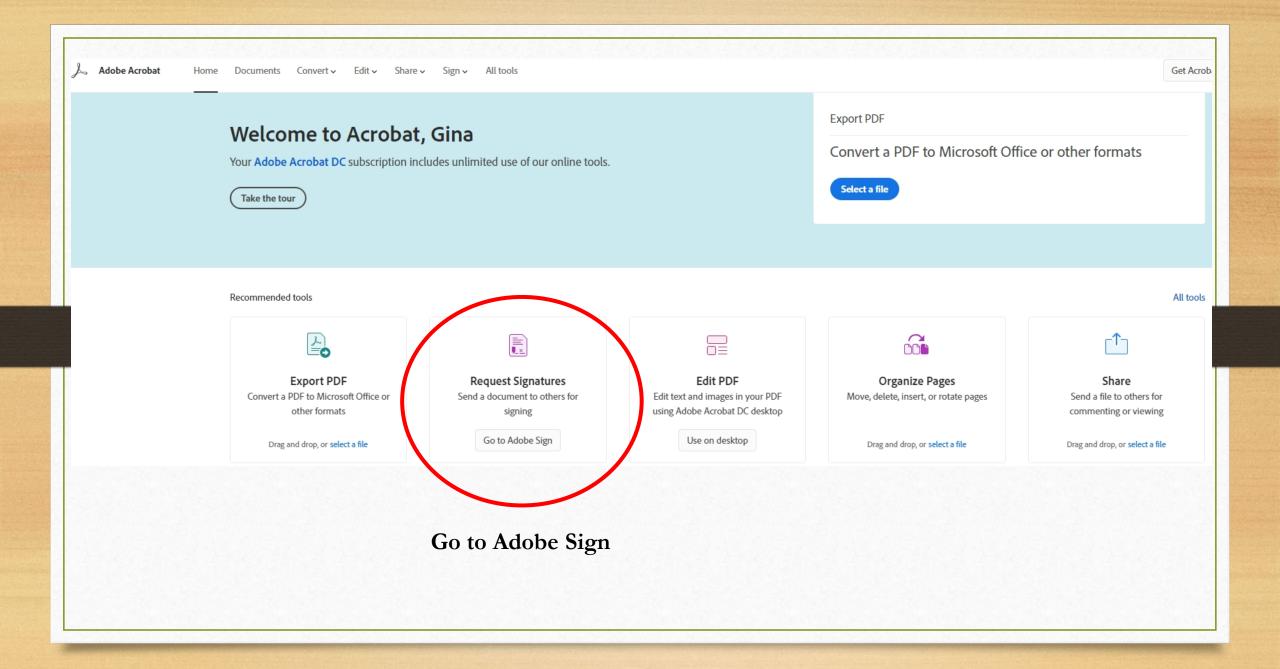
Type in your SRJC user name Example:

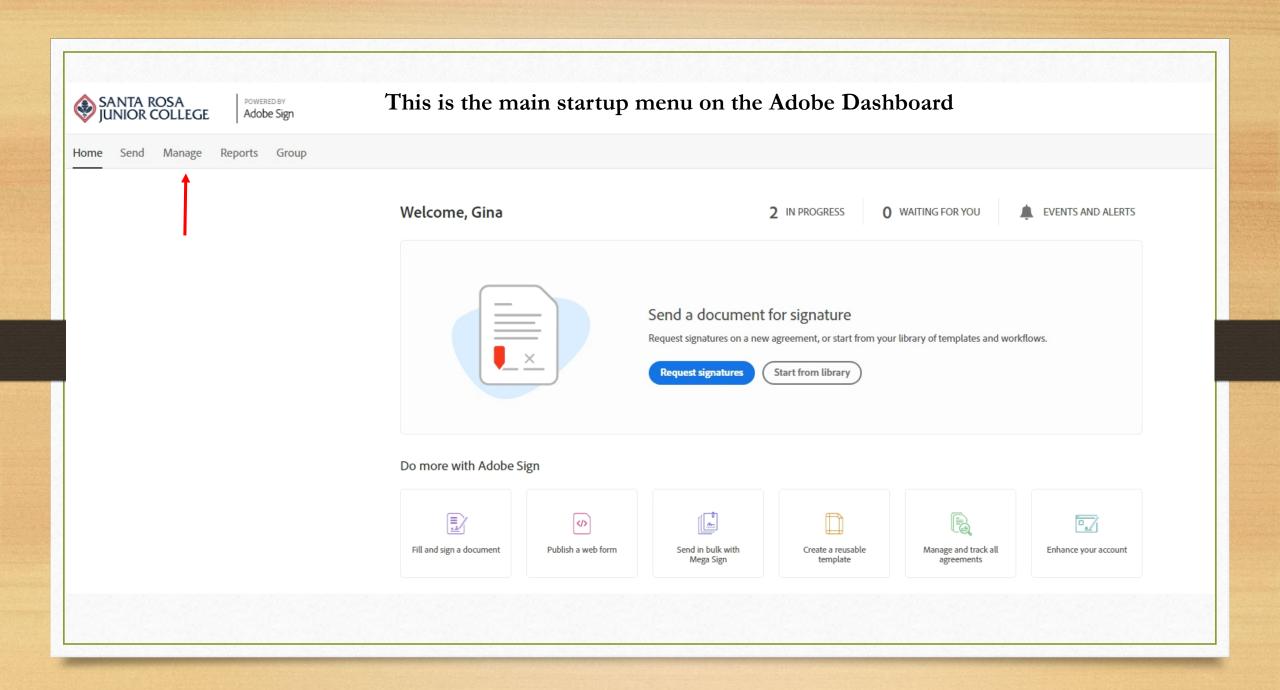
gwaggoner

Type in your SRJC Network Password

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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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Home Send Manage	e Reports Group			Gina 🛩
Vour agroomonte	-			Switch to Classic Experience
Your agreements				Filters Q. Search for agreements and users_
STATUS	In Progress			
In Progress (8)	RECIPIENTS	TITLE	STATUS	Modified
Waiting for You (0)	Sarah Hopkins			
Completed	4 of 5 completed	TuttleN5-11-20 glw	Out for Signature	5/11/2020
Canceled	Sarah Hopkins 4 of 5 completed	TamayoJ05-11-20 glw	Out for Signature	Open Remind s/11/2020
Expired	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

How to share view access

SANTA ROSA JUNIOR COLLEGE	Powered by Adobe Home Send Manage Workflows Reports Acrobat Sign	Group	◎ ●#1
Q Search	Share My Account o		Gina Waggoner
Personal Preferences	Q Search		gwaggoner@santarosa.edu
My Profile	Name 🔺	Email	English: US
Access Tokens	Linda Jay	ljay@santarosa.edu	
Auto Delegation	Sarah Hopkins	shopkins@santarosa.edu	Sign Out
My Notifications	Jenne Arden	jarden@santarosa.edu	1)Go to main access button
Shared Notifications			1)00 to main access button
My Signature			2) Salast and file settings
Language Preferences			2) Select profile settings
View Other Accounts			
Share My Account			

Q Search	Steps: 1) Select Personal preferences 2) Share my account, 3) Select the + key, 4) Enter email address of those you wish to Share My Account •	to share with and save
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Language Preferences		
View Other Accounts		
Share My Account		

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)

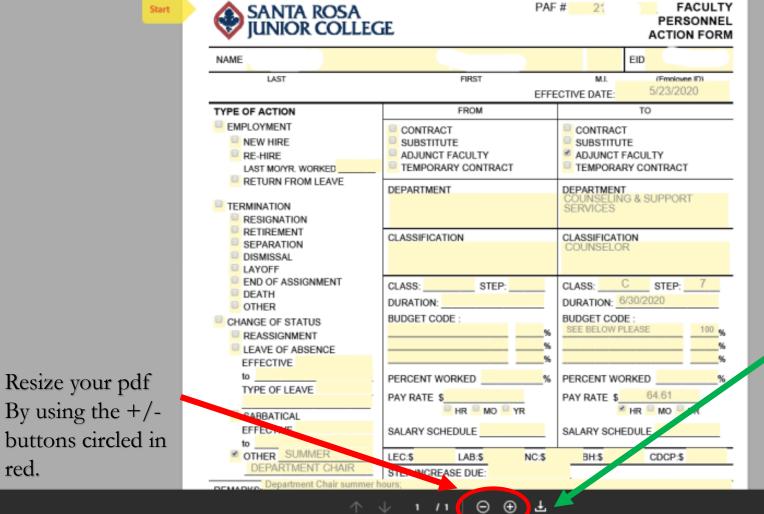
Contact: Human Resources Technician Jenne Arden(707) 527-4785 jarden@santarosa.edu

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AG SUM 15.2020

PAF #

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FACULTY

This button allows you to download the document

If Adobe is crashing, please contact SRJC Help Desk to have your Adobe license updated.

For additional resources please check out Adobe help section

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