



Adobe Sign

Adobe Sign Essentials Study Guide

February 10th, 2021

Spark Page

Get Noticed. Get your Adobe Sign Credential.

Proving your expertise with Adobe Sign will raise your professional profile inside your organization and customer base. Your demonstrated expertise can also create career development opportunities. We make it easy to earn your digital badge with suggested training and study materials.

Why pursue your Adobe Sign Credential?

The Adobe Sign Credential demonstrates to your team and your clients that you are able to configure, manage, and implement Adobe Sign use cases and integrations.

You earn the credential by passing the Adobe Sign Credential exam and receiving Adobe's official Digital Badge. By presenting the Adobe Sign Credential digital badge on your social channels, you announce that you are skilled with Adobe Sign and ready to assist in implementing Adobe Sign.

Target Audience

Adobe and partner professional services consultants and pre-sales consultants or IT staff within an Adobe Sign customer organization.

Credential Expiration: Your Adobe Sign Credential Digital Badge expires 24 months from the date of certification.

Recommended Reading

The Adobe Sign Essentials Assessment (AD3-D104) will test your knowledge of the following subjects:

- Legality of electronic and digital signatures
- Preparing and sending agreements
- Supplying the Recipient
- Using Roles
- The authentication process
- Prepare forms for an agreement
- Using library templates
- Using text tags on an agreement
- Configuring profiles
- Signing for mobile
- Creating and select messages
- Creating workflows
- How to scope use cases
- Configuring Adobe Sign
- Integrating Adobe Sign with 3rd party software using existing connectors

- Integrating Adobe Sign using the APIs.

Estimate time: 80 minutes

Format: multiple choice, multiple select

Language offered: English

Delivery: online

Passing score: 72%

Exam price: \$95 (passcode may apply)

Recommended Training Material: Adobe Sign Study Guide

You are not required to complete the Adobe Sign Study Guide before taking the exam; however, training can significantly increase your knowledge and skills. It is important to note that training alone will not provide you with the knowledge and skills required to pass the exam. This guide provides introductory information to all areas covered by the certification exam. Following embedded links within these summaries provides the deeper knowledge and information required to successfully achieve certification. This exam is designed to evaluate and certify the skills of those already familiar with and working in Adobe Sign. New users may wish to gain practical experience with Adobe Sign before taking this exam.

Table of Contents

Adobe Sign Study Guide	1
Spark Page	2
Get Noticed. Get your Adobe Sign Credential.	2
Why pursue your Adobe Sign Credential?	2
Target Audience	2
Recommended Reading	2
Table of Contents	4
Adobe Sign Study Guide	5
Purpose & Background	5
Legality of Electronic and Digital Signatures	5
Preparing and Sending Agreements	5
Supplying the Recipients	6
Signing for Mobile	6
Using Roles	6
The Authentication Process	6
Prepare Forms for an Agreement	6
Using Library Templates	7
Using Text Tags on an Agreement	7
Creating Workflows	7
Adding Users and Configuring Profiles	8
Account and Group Administrators	8
Integrating Adobe Sign with 3rd Party Applications	8
Using Adobe Sign's APIs	9
Additional Topics	9
Transactions and Reporting	9
System Requirements	9
Privacy	10

Adobe Sign Study Guide

Purpose & Background

This document is intended to prepare individuals to take the Adobe Sign assessment exam. The assessment is designed to determine if an Adobe Professional Services team member, Adobe system integration (SI) partner, or a member of an Adobe customer's information systems team is qualified to implement Adobe Sign applications. By using this study guide and the associated linked content published by Adobe, implementers will be exposed to the product functionality tested by the Adobe Sign assessment exam. It is important to note the exam is designed to evaluate and certify the skills of those who are already familiar with and working in Adobe Sign. New users may wish to gain practical experience with Adobe Sign before taking the exam.

Legality of Electronic and Digital Signatures

An Electronic Signature is a legal way to get consent or approval on electronic documents or forms. An electronic signature is: "an electronic sound, symbol, or process attached to or logically associated with a record [...] adopted by a person with the intent to sign the record."

Electronic signatures are legal in nearly every industrialized nation in the world and in many developing countries as well. To better understand the applicable laws, read the [Global Overview of Electronic Signatures Law](#). In the United States, they are governed by the ESIGN Act. In other countries, a variety of [electronic signature laws exist](#).

A Digital Signature is a specific type of electronic signature that requires the signer to authenticate their identity using a certificate-based digital ID issued by an independent Certificate Authority (CA). The EU distinguishes between the two types of signatures (electronic and digital) with a preference for digital signatures. For more details on the EU regulations regarding electronic signatures see [:https://helpx.adobe.com/sign/using/legality-european-union.html](https://helpx.adobe.com/sign/using/legality-european-union.html). Adobe Sign supports both electronic and digital signatures and makes it easy to comply with the signature laws of most countries.

Preparing and Sending Agreements

Preparing and sending agreements is the foundation of all activities within Adobe Sign. More complex topics such as Workflows, Library Templates, Text Tagging and Integrations all build on the foundation of preparing and sending agreements. These capabilities simply help enterprises scale their use of Adobe Sign so it is more efficient, more consistent and easier to maintain.

[Sending an agreement for signature](#) involves providing:

- one or more documents to be signed,
- one or more recipients with message(s); and,

- option settings such as [passwords](#), [deadlines](#), and [reminders](#).

Supplying the Recipients

The sender must specify the recipient's email addresses, their [role](#) in the signing process, the [order](#) in which they will participate, and how they will be [authenticated](#),

Signing for Mobile

Adobe Sign publishes mobile applications for [iOS](#) and [Android](#) devices to their respective App stores.

Adobe Sign mobile apps provide:

- the ability to send and sign documents,
- insight into signing workflows,
- the ability to search file repositories,
- the ability to work with 3rd party cloud storage services,
- the ability to view audit trails, and;
- the ability to work with files offline.

Using Roles

The [Roles](#) the sender can select from may vary by the service level and the configuration of the Adobe Sign account by the administrator. The roles may include Signer, Approver, Acceptor, Certified Recipient, Form Filler and Delegator.

The Authentication Process

In order to confirm the identity of the individual signing an agreement (as well as other participants), a variety of different [authentication](#) methods may be used. Email is the default first factor authentication method. Other methods include Password, Social, Adobe Sign Authentication. Premium methods are also available, including KBA, Phone (SMS) and Government ID at additional cost.

Prepare Forms for an Agreement

After the participant details have been provided and the options set, the sender may want to [add a signature or other data fields](#) to the agreement. The sender can use the [authoring environment](#) to add these fields. In this environment, the sender can add fields and associate them with the roles already specified. This determines the behavior of the form throughout the signing workflow. The user of a [form field template](#) can make this process faster, easier and more consistent.

Using Library Templates

Library templates allow users to create reusable, interactive documents. Templates can be defined in two ways: [Form Field Layers, and Documents](#). Form Field Layers are the fields that are applied to the uploaded file. Documents include the base file in addition to the fields. Document templates work best for documents that do not have any dynamic content. Form Field Layers are most appropriate when the underlying content changes often. Once library templates have been set up, senders can use these templates to make preparing agreements a much simpler process.

Using Text Tags on an Agreement

Using Text Tags on an Agreement provides a faster, easier, and more consistent way of preparing Agreements for signature. Furthermore, Text Tags allow the content and layout of the Agreement to be dynamic.

Text Tags are specially formatted text that can be placed anywhere within the content of a document in formats such as PDF, Microsoft Word, PowerPoint, Excel, and text files (.txt, .rtf). They may specify the location, size, and type of fields (such as signature and initial fields, check boxes, radio buttons and form fields). Text Tags can specify advanced field processing rules as well.

Text tags are converted into Adobe Sign form fields when the document is sent for signature or uploaded. The [Sign Text Tag Guide](#) describes in detail how Text Tags are formulated.

Creating Workflows

Library Templates and Text Tagged documents provide repeatability and consistency for the Agreement preparation process. [Workflows](#) provide similar benefits by creating a 'template' of participants, roles, authentication, messaging, and the flow of the signing process. Workflows are useful when:

- multiple individuals in the organization need to perform the same process,
- routing to a specific set of individuals or roles occurs each time; and
- the same document or set of documents is routed each time.

Administrators can create Workflow processes that Senders can use to send Agreements. Using the [Workflow Designer](#), the Administrator can choose to predetermine the send options, recipients, the email message, and documents, or to allow the Sender to specify any or all of them. This gives organizations great flexibility and control to meet their business

requirements. The Administrator creating a Workflow can use Sender Input Fields to prefill Agreement content prior to sending the agreement to the recipient.

Adding Users and Configuring Profiles

Organizations can add users through the [Account Page in Adobe Sign](#), or they can choose to manage users through the [Adobe Admin Console](#). The Adobe Admin Console provides a central location for managing Adobe entitlements across your entire organization. The [User Sync Tool](#) can be installed and configured to synchronize an Organization's IDP with the Console. Once Adobe Sign licenses have been assigned through the Admin Console, they can be further configured through the Adobe Sign Account Page.

When a user account for Adobe Sign has been created, the user will receive a confirmation email with a link to log into their personal account. Users should then set up their personal preferences. The [quick setup guide for users](#) is a good place for users to start. Users may also want to consider leveraging [account sharing](#) when business requirements dictate the need to view the transactions in another user's account.

Account and Group Administrators

[Global settings](#) that affect the behavior of Adobe Sign for all users can be set by Administrators. Organizations want to have different settings and reports for different groups within organizations (HR, Legal, Purchasing, etc.) Admin Users can [create Groups](#), assign users to Groups, and create Group Administrators. This allows the Group Administrators to [configure and customize](#) the behavior of Sign to meet the needs of their Group. A short video on [creating and managing Groups](#) as well as [creating reports](#) will be helpful to Account and Group Admins. The [quick setup guide for Admins](#) is a helpful resource to get Adobe Sign Administrators started.

Integrating Adobe Sign with 3rd Party Applications

Enterprise organizations use many different software applications to run their business. Adobe Sign provides [integrations](#) with these applications in order to make electronic signatures part of an overall business solution. Applications such as [Salesforce](#), [Microsoft SharePoint](#), [Microsoft](#)

[Office](#), [Dropbox](#), [Workday](#) and many more integrate with Adobe Sign. To confirm if an integration to a particular application is available, refer to the [integration documentation](#).

Using Adobe Sign's APIs

If an integration to a particular 3rd party application is not available, or a special behavior is required, the organization may want to leverage the [APIs](#). Adobe Sign's APIs provide a standard REST interface, allowing developers to build client-side applications in any scripting language that supports REST-based API calls. Adobe Sign itself uses these APIs, so anything possible within the Adobe Sign application is possible through the APIs. Developers can read the [API reference](#) documentation to better understand how to use this powerful tool.

[Webhooks](#) can be used to send data updates to other applications. Webhooks are HTTPS callbacks that receive real-time notification messages for events. In other words, Webhooks are web services that listen to HTTPS POST requests. A developer can create webhooks in Adobe Sign to listen to events in their custom application.

Often Webhooks and the REST APIs are used together by developers so a client application can listen for a Webhook message, and then act upon it by making a call to an Adobe Sign REST API.

Additional Topics

Transactions and Reporting

An Adobe Sign [transaction](#) is defined as the sending of a document for signature, regardless of whether it's been completed, cancelled, rejected or is in progress. Adobe Sign's [reporting capabilities](#) allow organizations, groups and users to track their transaction usage.

System Requirements

Adobe Sign implementers should be able to guide organizations to adhere to the [system requirements](#) which include supported browsers, mobile apps, and language support.

Privacy

The [General Data Protection Regulation \(GDPR\)](#) is the European Union's privacy law. The rules have a broad definition of personal data and a wide reach, affecting any company that collects personal information of individuals in the EU. Part of the regulation requires that individuals have the right to understand what personal data has been collected, and to have that data deleted upon request, when appropriate. Adobe Sign implementers should be aware of the controls that Adobe Sign provides and how they can keep organizations in compliance with this regulation.