

Adobe Sign End User Training November 2020





Agenda

- Introduction
- First Step Email from Adobe
- How to Access Adobe Sign ?
- How to Send Document/Contract for Signature ?
- How to Manage or Track Document/Contract Sent for Signature ?
- Audit Report for Document/Contract Sent for Signature ?
- How to Save Your Draft ?
- How to Hide/"Delete" Document/Contract ?
- How to Create My Signature in Adobe Sign ?
- How to Create My Signature via Mobile Phone ?
- Adobe Sign Home Dashboard
- Approver Electronically Sign the Document/Contract

Introduction



OVERVIEW

• Adobe Sign has been selected as the digital signature solution for Sime Darby employees.

OBJECTIVES

- To adopt Adobe Sign for processing and sending out documents or contracts to be signed online or via mobile app.
- To improve productivity when processing and sending out documents or contracts for signing (administrative tasks).
- To make it convenient for approvers to sign documents or contracts

First Step – Email from Adobe



You should have received an email from Adobe as shown below. Please proceed to follow the instruction to complete your account creation in Adobe Sign. Your userid (email address) and password is similar to Microsoft Office 365.



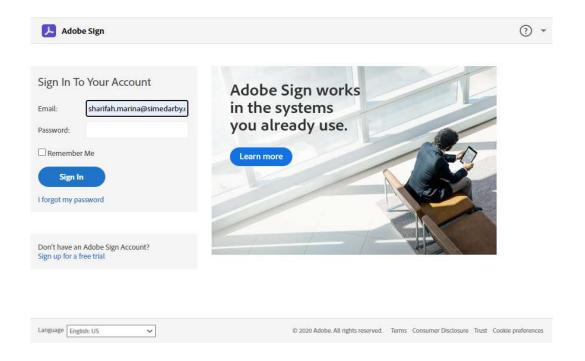
Note: If you do not do this step, you will encounter error and cannot proceed to login.

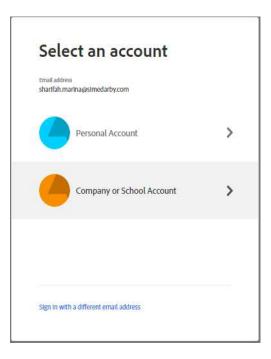
How to Access Adobe Sign?



Moving forward, you may login to Adobe Sign by the accessing the following application link. Then, enter your userid (email address) and password (similar to Microsoft Office 365).

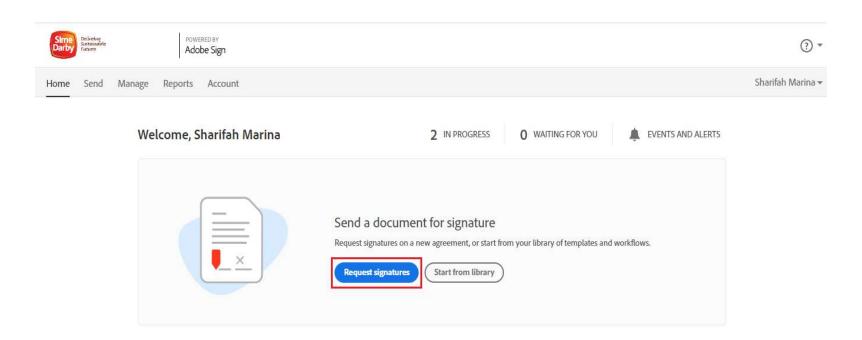
https://secure.echosign.com/public/login





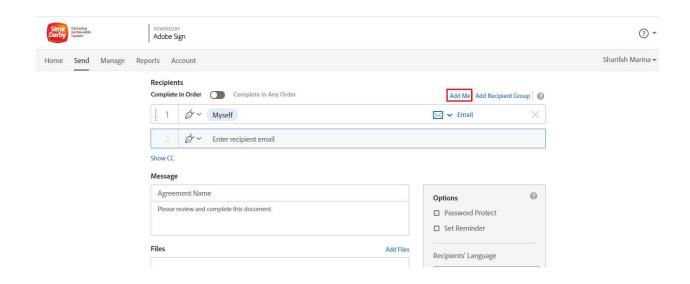


- In order to send document/contract for signature, you need to click on the Request Signatures button in the Home Dashboard as shown below.
- Alternatively, you can also click on the Send link in the Main Menu at the top of the page.





In the Recipients section of the form below, you can fill in your email address by clicking on the Add Me link.



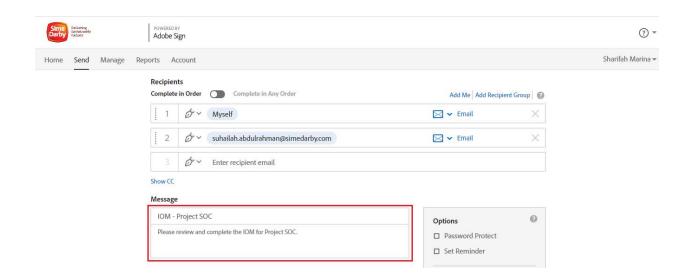


You also need to fill in the email addresses of the approvers in the Recipients section.

Sime Darby Delikoving Sunstainable Futures	POWERED BY Adobe Sign		3
Home Send Manag	e Reports Account		Sharifah Marina
	Recipients		
	Complete in Order Complete in Any Order	Add Me Add Recipient Group	
	1 & Myself	✓ Email ✓ X	
	2 & suhailah.abdulrahman@simedarby.com	✓ Email X	
	3 & Enter recipient email		
	Show CC		
	Message		
	Agreement Name	Options	
	Please review and complete this document.	Password Protect Set Reminder	

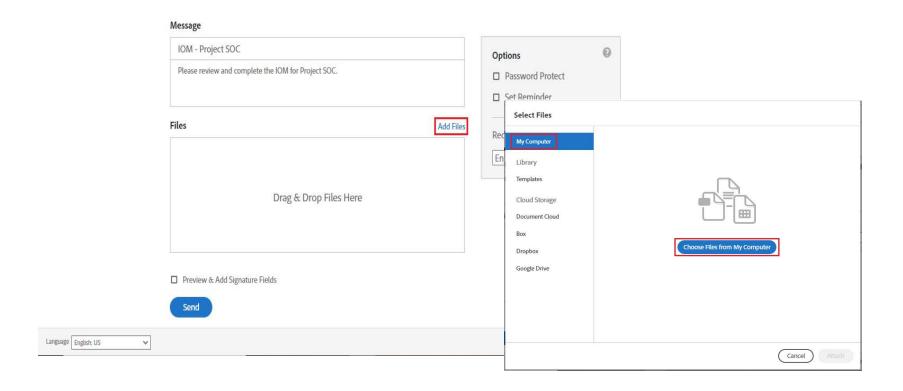


In the Message section, fill in the message title and content.



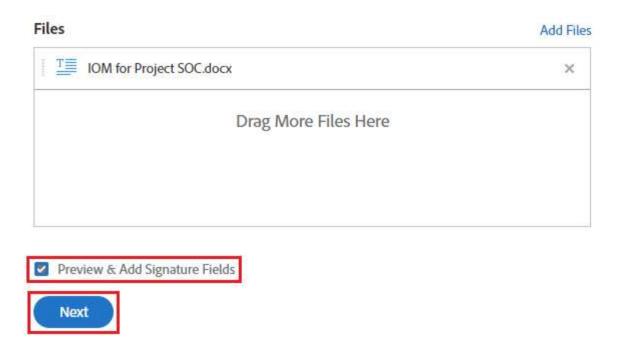


- Click on Add Files in order to upload the document/contract to be sent out for signatures.
- You may upload multiple files.



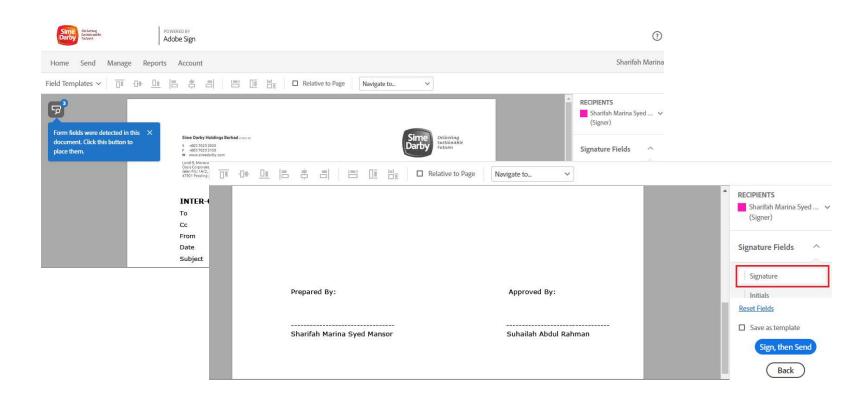


- Check the Preview & Add Signature Fields.
- Then, click the Next button.



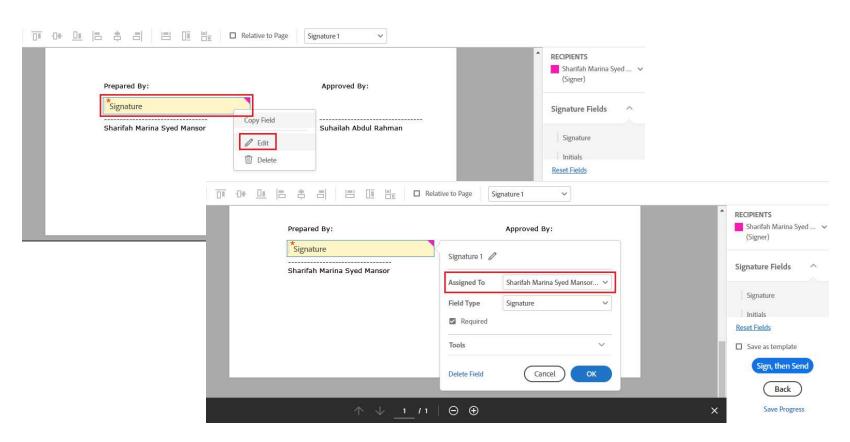


In the Form Designer page below, drag and drop the Signature field from the right pane to the form.



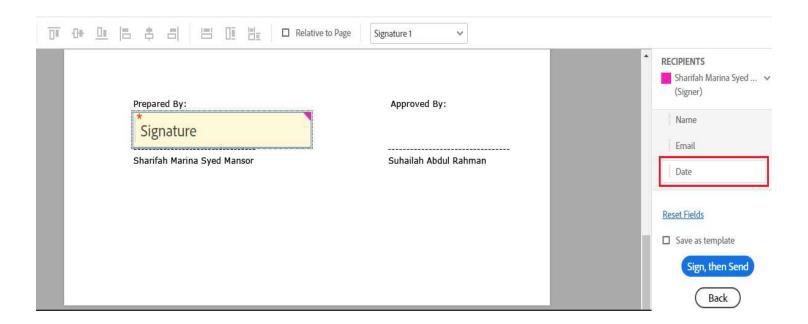


- Right-click on the Signature field that has just been dragged to the form and select Edit from the drop-down menu.
- Please ensure that the right person/approver is selected in the Assigned To field in the pop-up window.



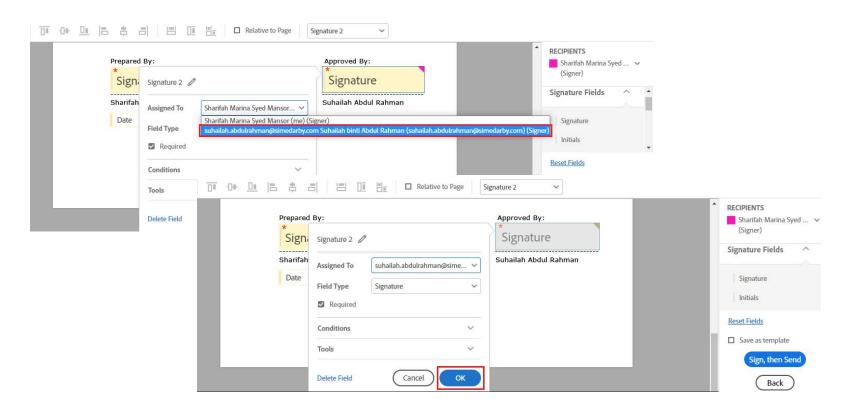


- You may resize the Signature field by clicking at the bottom-right corner of the field.
- You may also drag and drop another field to the form, for instance, the Date field.



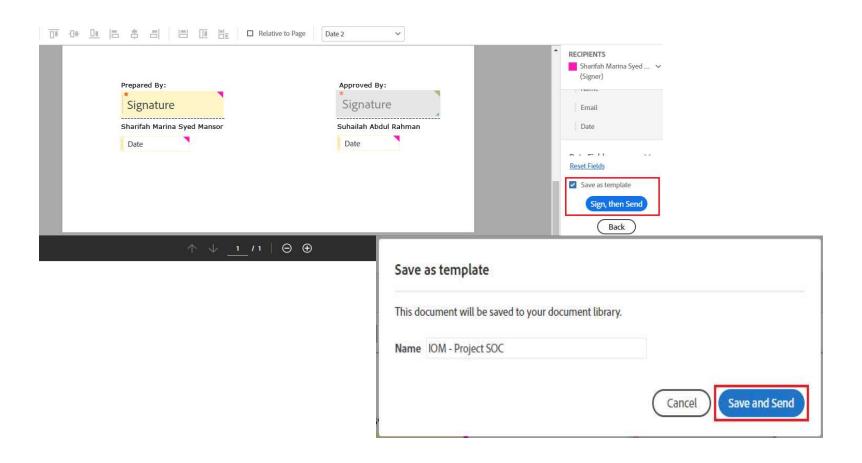


- You may proceed to add another Signature field for another approver to the form.
- Right-click on the new Signature field, click Edit and select the right approver from the drop-down menu in the Assigned To field.



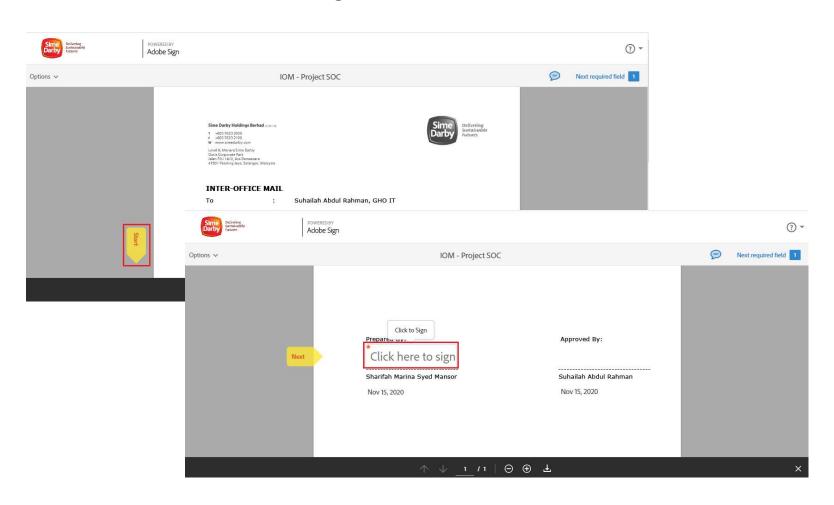


- Check the Save as Template field to reuse the form later as a template.
- Click on Sign, then Send button to proceed to the next step.



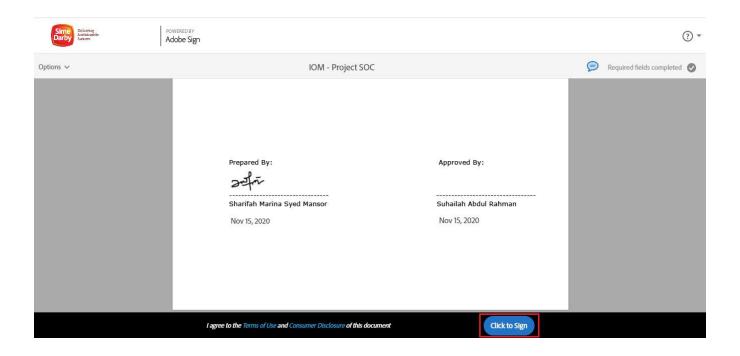


- Click on the yellow Start button to start signing the document/contract.
- Then, click on Click Here to Sign.



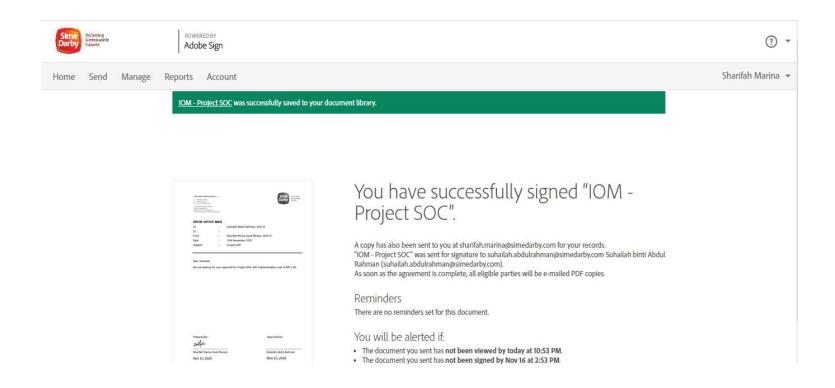


- Once you have signed the document/contract, click on the blue Click to Sign button at the bottom of the page.
- The document/contract will be emailed to the approver.



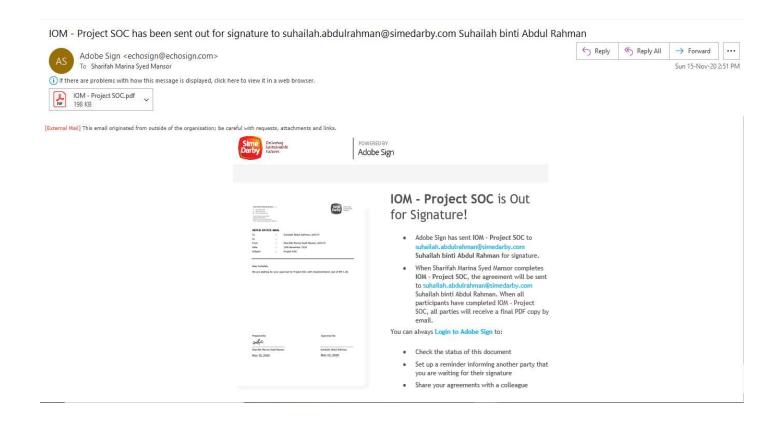


- The message below will be displayed to inform that you have successfully signed the document/contract.
- All parties will be emailed the pdf copies once the document/contract is completed.



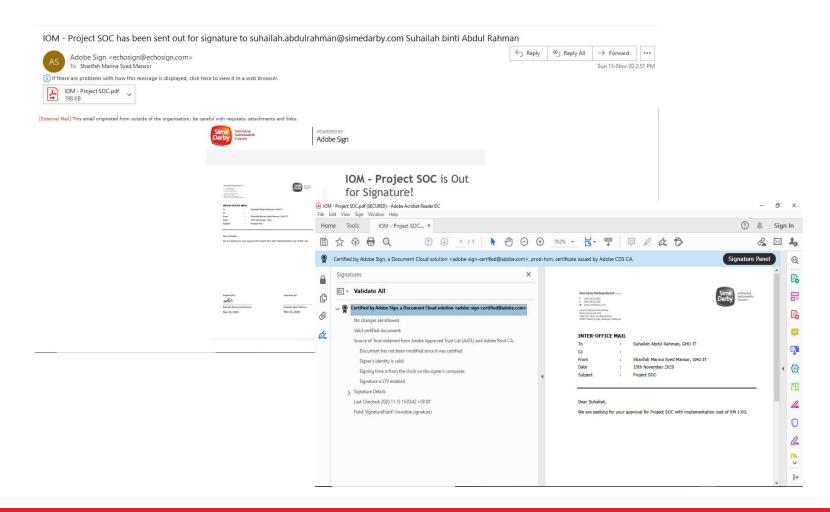


The sender of the document/contract will receive the email below in their mailbox.





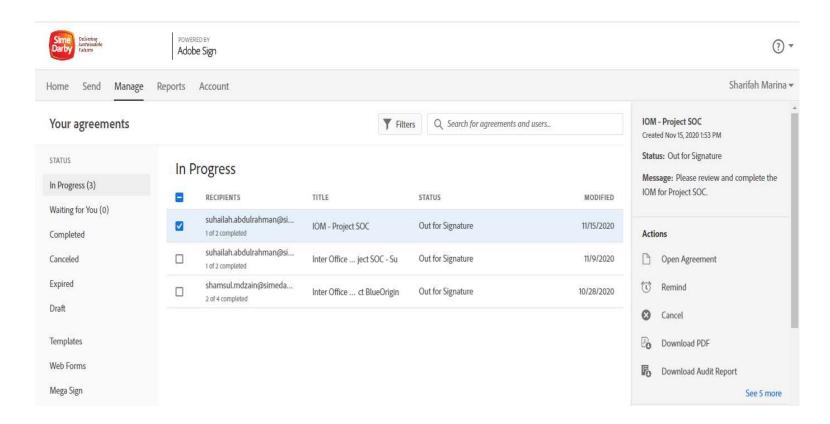
If you open the attachment in the email, you will see the Certified by Adobe Sign bar at the top of the document/contract for security purpose.



How to Manage and Track Document/Contract Sent for Signature ?



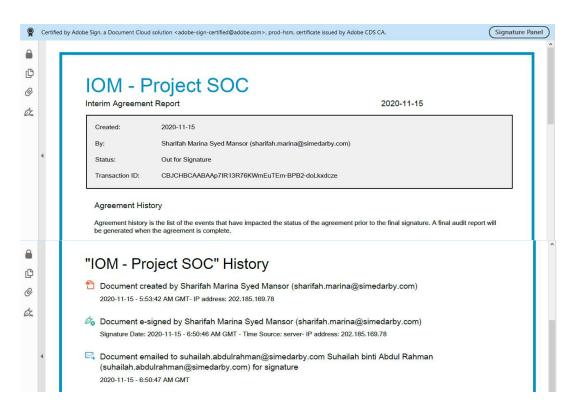
- In the Manage page, you can monitor and track the progress of the document/contract sent out for signatures.
- You can just click on the links (In Progress, Completed, Canceled) in the left navigation pane.



Audit Report for Document/Contract Sent for Signature?



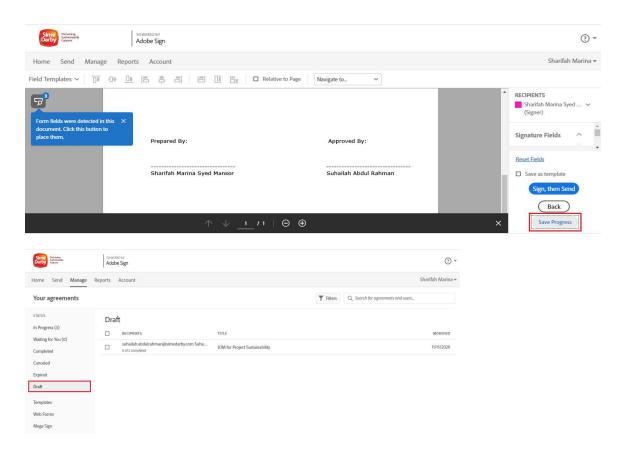
- Once the document/contract has been completed, you will receive an email attached with the signed document/contract and Audit Report.
- Alternatively, the Sender can download the Audit Report from the Manage page.
- Below is the Audit Report sample :



How to Save Your Draft?



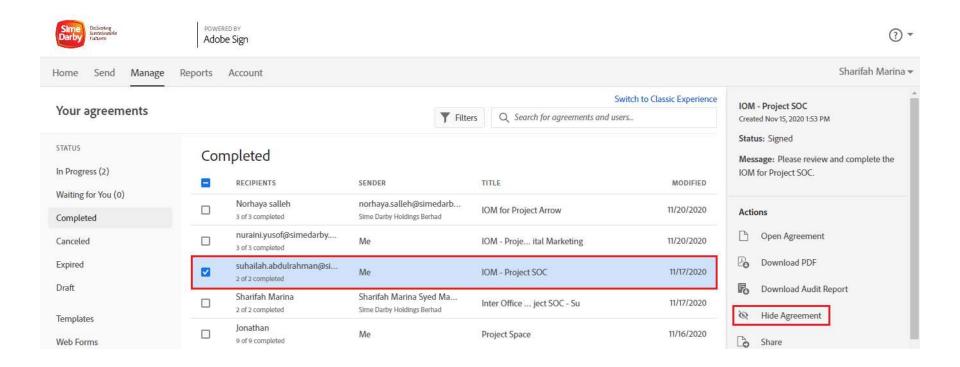
- You can save your Draft in the Form Designer page by clicking on the Save Progress link in the right pane.
- If you want to continue your work the next time, you can retrieve the Draft by clicking on the Draft link in the left navigation pane of the Manage page.



How to Hide/"Delete" Document/Contract ?



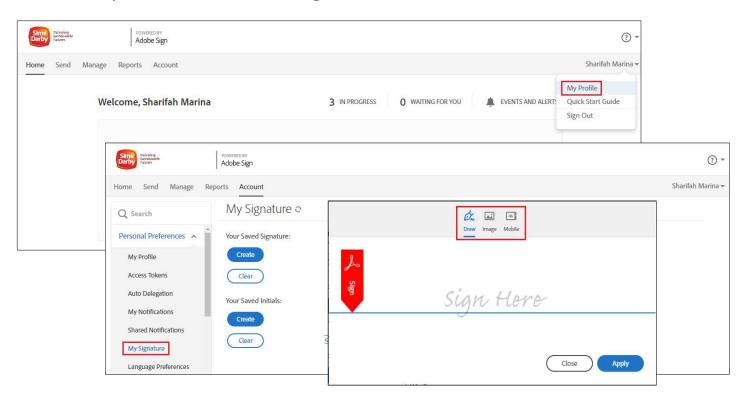
- There is no Delete link in Adobe Sign.
- You can remove your document by selecting it and then, click on the Hide Agreement link in the right pane.



How to Create My Signature in Adobe Sign?



- You can create/change your signature by clicking on My Profile in the dropdown menu of your Login Name at the top right corner.
- Then, click on My Signature in the left navigation pane.
- Click on the Create button to display Sign Here pop-up window. Choose either Draw, Image or Mobile methods. You can draw your signature using mouse or upload a scanned image.

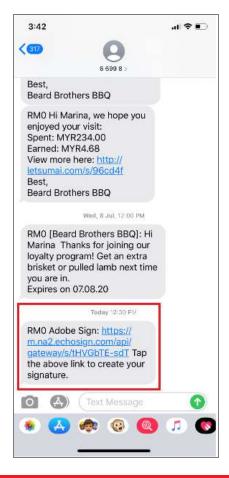


How to Create My Signature via Mobile Phone?



- If you choose to sign using the Mobile method, you will receive sms as shown below.
- Click on the link to display the Sign Here window. You can draw your signature using stylus pen etc..



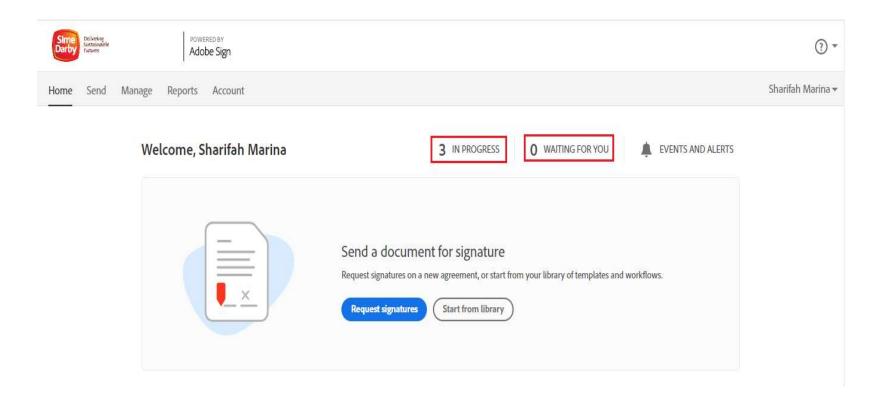




Adobe Sign Home Dashboard

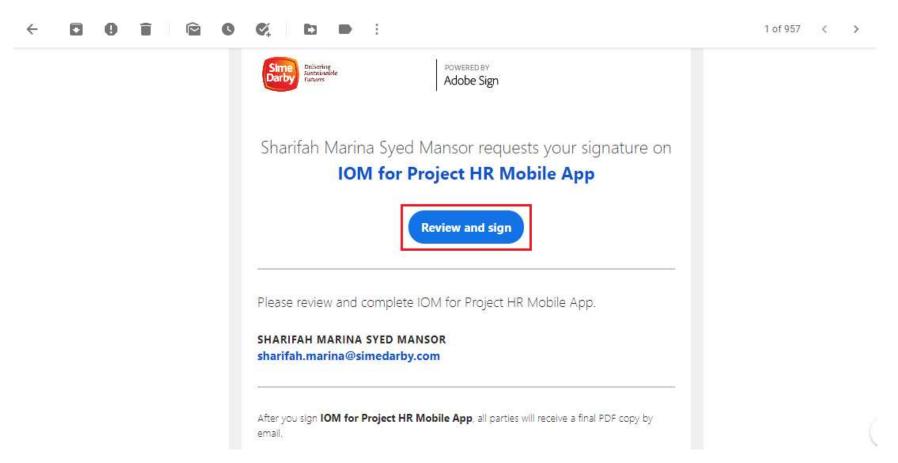


- The Home Dashboard displays a summary of items that are pending your signatures (Waiting for You).
- It also displays the status of items that you have sent out for signatures (In Progress).



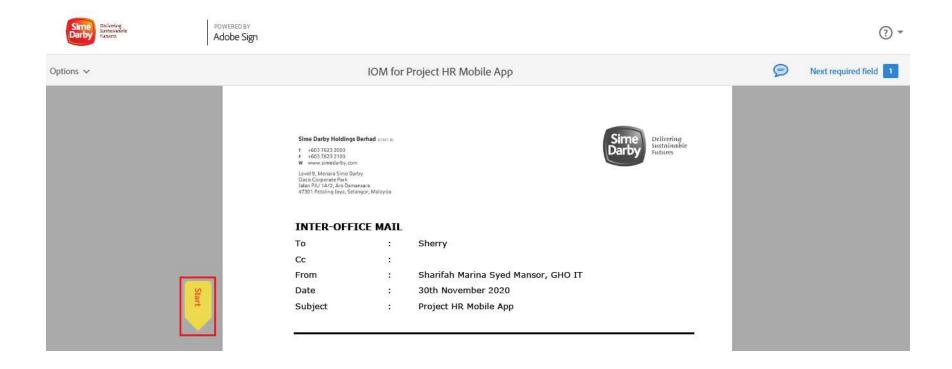


- This section describes the steps for Approver to sign the document/contract.
- The Approver will receive an email as shown below.
- Click on the Review and Sign button.





- The document/contract will be displayed for review.
- Click on the yellow Start button.



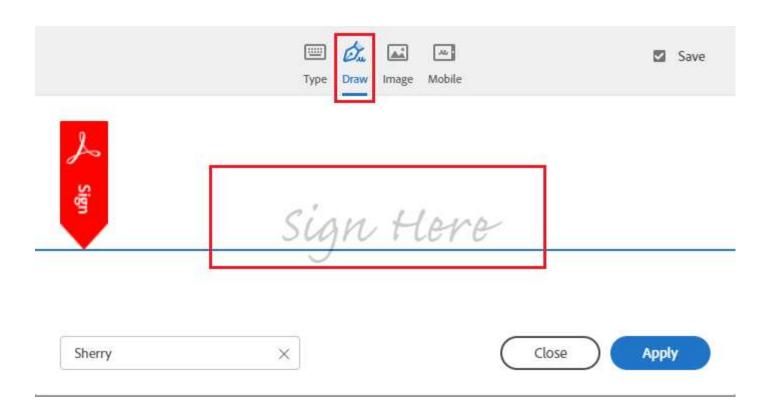


Click on Click Here to Sign to proceed signing the document/contract.



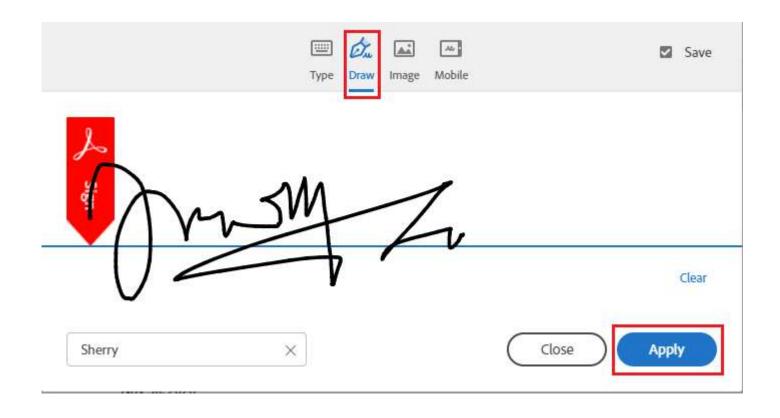


- In the Sign Here pop-up window, choose the Draw method.
- Draw your signature with mouse.
- Alternatively, you can upload the scanned image of your signature by choosing the Image method.





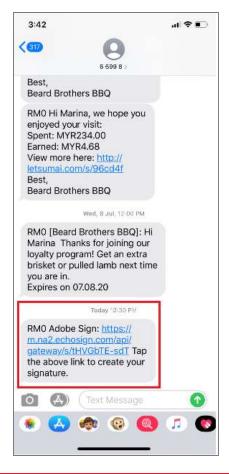
After you finish drawing your signature, click on the Apply button.





- If you choose to sign using the Mobile method, you will receive sms as shown below.
- Click on the link to display the Sign Here window. You can draw your signature using stylus pen etc..

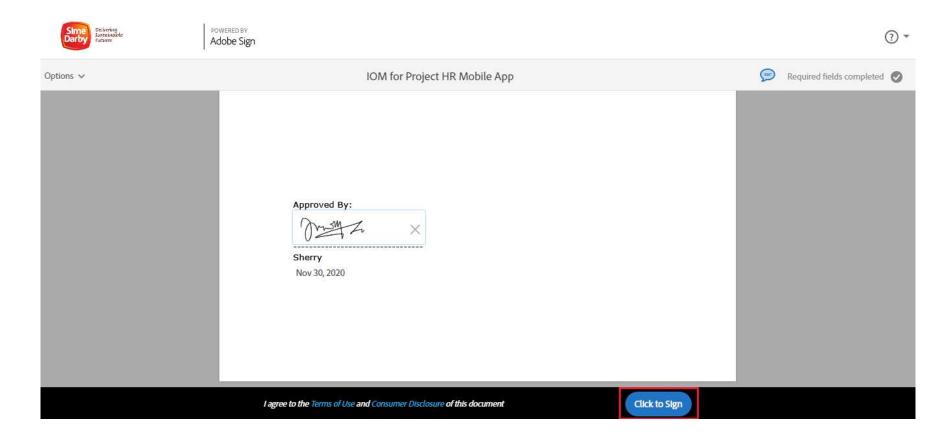






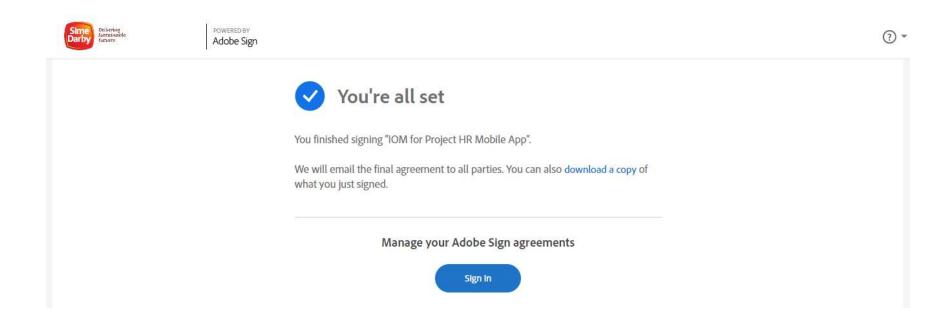


 Once you have signed the document/contract, click on the blue Click to Sign button at the bottom of the page.





- The message below will be displayed to inform that you have finished signing the document/contract.
- Once the document/contract is completed, all parties will receive pdf copies of the signed document/contract.





Thank You