Approval Page Routing Using a Template and an Adobe Sign Workflow

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Adobe Sign allows University employees to create electronic approval pages and route them for faculty signature. Please note that students may **not** initiate workflows or form routing using Adobe Sign due to software licensing constraints.

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I. Sending Approval Pages for Signature

1. Navigate to https://secure.echosign.com/public/login
2. Enter your UA Email address and hit the Tab Key.
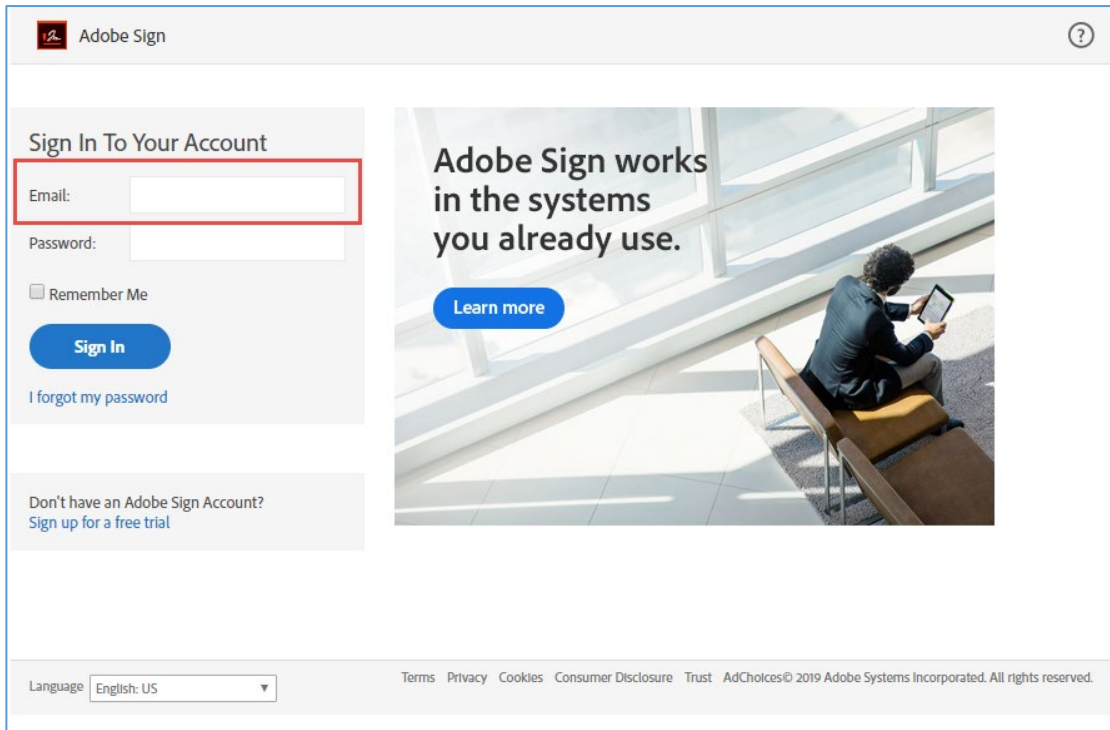

Figure 1 An image of the Adobe Sign login page with the email field highlighted.

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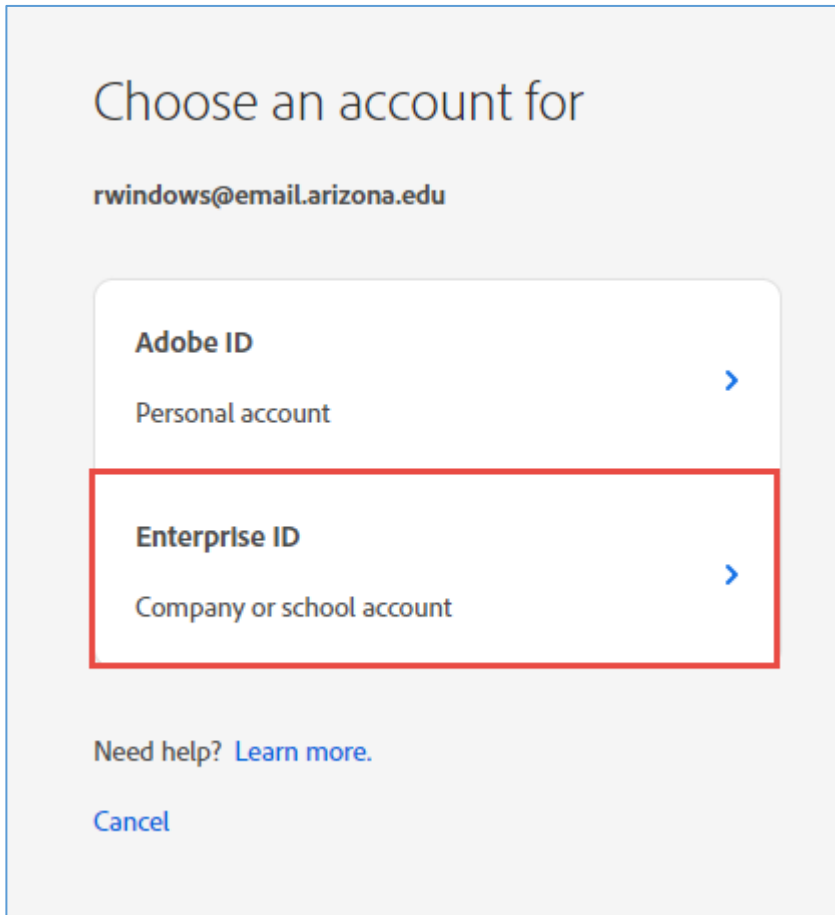
3. Click the 'Enterprise ID' link.

Figure 2 An image of the page that allows users to log in using an Adobe ID or an Enterprise ID with the Enterprise ID portion highlighted.

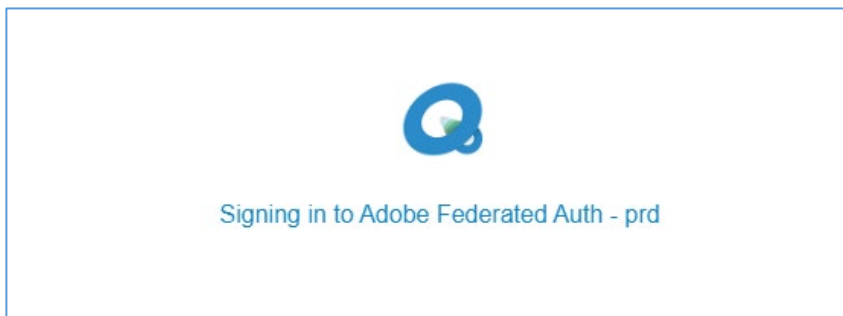4. The Adobe Federated Auth screen will appear as you're signed in.

Figure 3 An image of the Adobe Federated Authorization screen. No input is required. This displays while the system logs users into their dashboard.

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5. Once authentication is complete the Adobe Sign dashboard will appear.
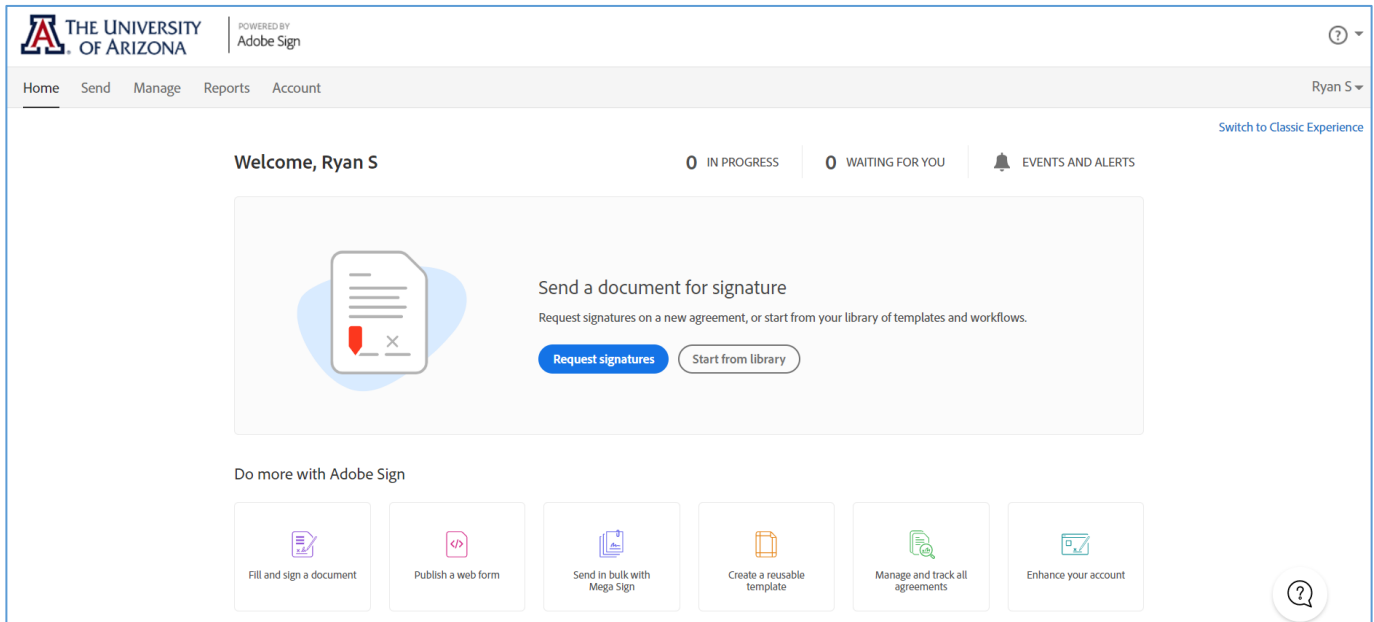

Figure 4 An image of the Adobe Sign dashboard, which contains several icons and buttons. The buttons are: Request Signatures and Start from Library. There are also icons across the bottom of the page that are not relevant to our purpose.

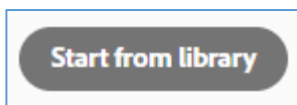6. Click the 'Start from library button'

Figure 5 Displays the 'Start from library' button

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7. Select 'Workflows' from the menu that appears and then select the workflow you'd like to use:
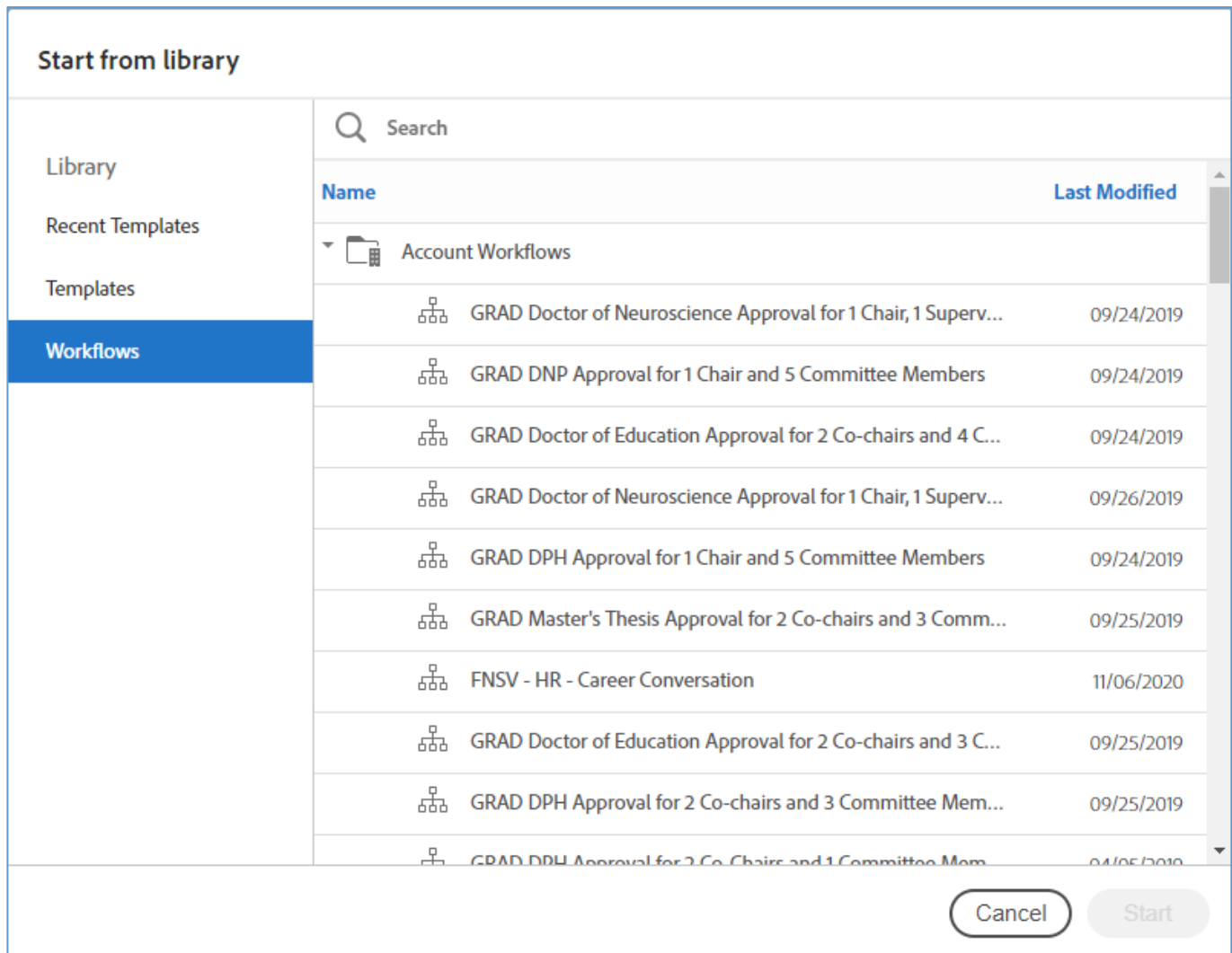
Start from library

Library		
	Search	
Recent Templates	**Name**	**Last Modified**
	▸ 🗀 Account Workflows	
Templates	⛓ GRAD Doctor of Neuroscience Approval for 1 Chair, 1 Superv...	09/24/2019
Workflows	⛓ GRAD DNP Approval for 1 Chair and 5 Committee Members	09/24/2019
	⛓ GRAD Doctor of Education Approval for 2 Co-chairs and 4 C...	09/24/2019
	⛓ GRAD Doctor of Neuroscience Approval for 1 Chair, 1 Superv...	09/26/2019
	⛓ GRAD DPH Approval for 1 Chair and 5 Committee Members	09/24/2019
	⛓ GRAD Master's Thesis Approval for 2 Co-chairs and 3 Comm...	09/25/2019
	⛓ FNSV - HR - Career Conversation	11/06/2020
	⛓ GRAD Doctor of Education Approval for 2 Co-chairs and 3 C...	09/25/2019
	⛓ GRAD DPH Approval for 2 Co-chairs and 3 Committee Mem...	09/25/2019
	⛓ GRAD DPH Approval for 2 Co-Chairs and 1 Committee Mem...	04/05/2019

Cancel   Start

Figure 6: Shows the list of available workflows and templates. There is a menu on the left side of the window and a list of workflows on the right.

8. Selecting any of the GRAD workflows and pressing the START button will prompt the user to enter the email addresses for the student, their committee chair(s) and committee member(s). These should be entered in the following order depending upon the approval page configuration:
   a. For a single chair with two committee members
      i. Student
      ii. Committee Chair

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        iii. Committee Member

        iv. Committee Member

        v. Graduate College Degree Counselor

b. For co-chairs with a single committee member

        i. Student

        ii. Committee Co-Chair

        iii. Committee Co-Chair

        iv. Committee Member

        v. Graduate College Degree Counselor

c. Once e-mail addresses have been entered, make sure to replace STUDENT NAME with the student's name in the 'Agreement Name' box.

IMPORTANT:

Use the email address where the faculty member actually receives email. Verify that they don't forward their email, and if they do enter the address where mail is actually delivered (e.g. For example, the faculty member has @arizona.edu forwarded to as.arizona.edu. Use as.arizona.edu).

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Before:

Figure 7 Displays the Recipients page before any information has been entered. The page has several sections including: Recipients, Agreement Name (Please add student's name), Message, and Files. The bottom sections are already auto populated by the workflow.

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After:

Figure 8 Displays the Recipients page after information has been entered. The page has several sections including: Recipients, Agreement Name (Please add student's name), Message, and Files. The Recipients area now contains email addresses and the Agreement Section contains the student's name, Zachary Potter. The bottom sections remain unchanged.

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9. Click 'Send'.
10. Adobe Sign will display a confirmation page.

Figure 9 An image of the confirmation email provided to the approval page's originator.

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11. The user who originated the approval page will get a confirmation e-mail indicating that the approval page has been sent for signature.
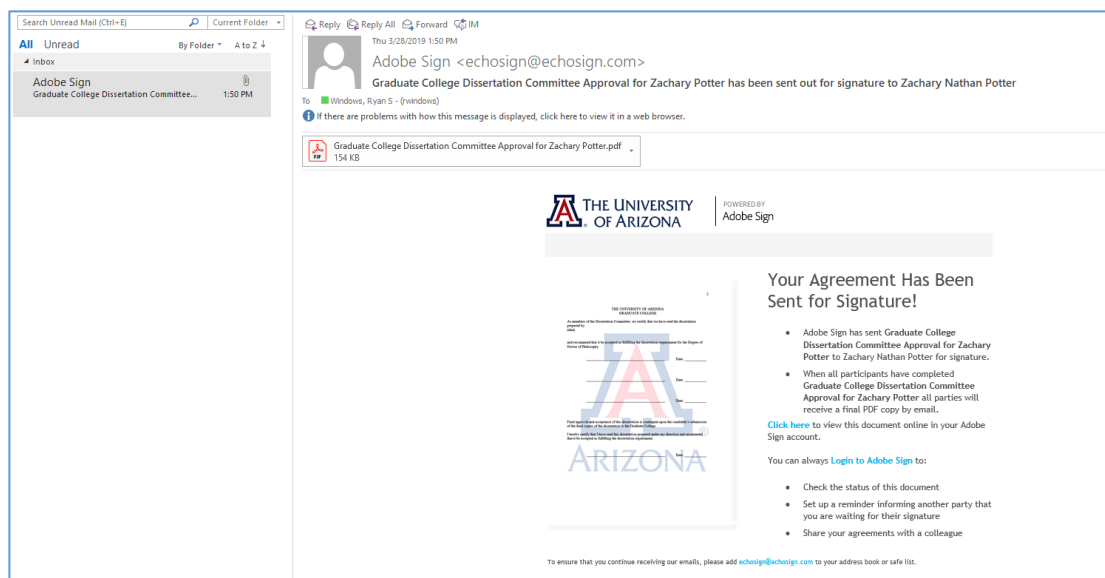

Figure 10 An image of the confirmation email sent to the approval page's originator.

12. The student will receive an email asking them to enter their name and their dissertation title on the electronic approval page.
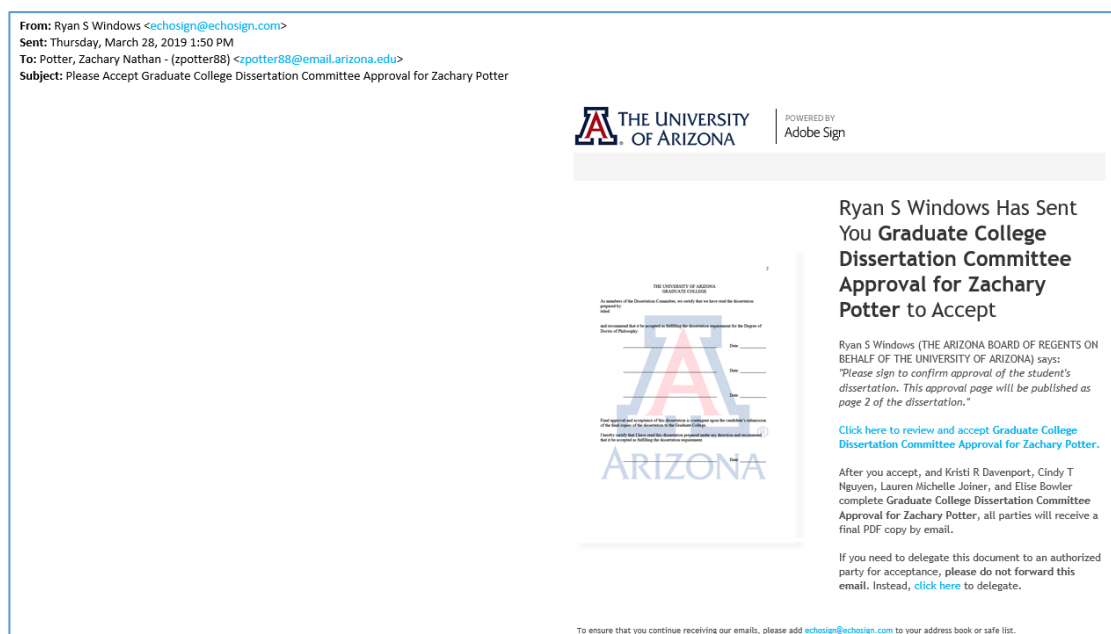

Figure 11 An image of the email sent to the student requesting that they review and approve the approval page being routed on their behalf.

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13. The student will enter their name and their dissertation title, DNP project title, or thesis title, depending upon the workflow being used.

Before:

Figure 12 An image of the approval page with the 'prepared by' and 'titled' fields highlighted, but not completed.

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After:

Figure 13 An image of the approval page with the 'Prepared by' and 'Titled' fields populated. The 'Accept' button is also visible in the bottom right corner of the screen.

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14. The student should click the 'Accept' button at the bottom of the page. The student will be taken to a confirmation page. Their portion of the process is now complete.
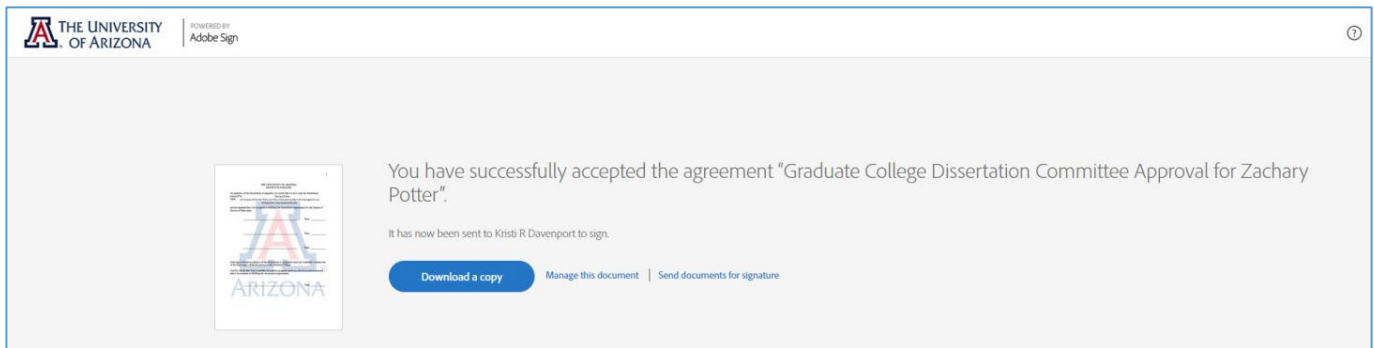

Figure 14 An image of the confirmation page indicating that the student has successfully accepted the agreement and indicating that the agreement will now be routed to the committee chair(s).

15. The committee chair will receive an email. If there are co-chairs, they will both receive emails. Every chair/co-chair will follow the same process when signing the approval page.
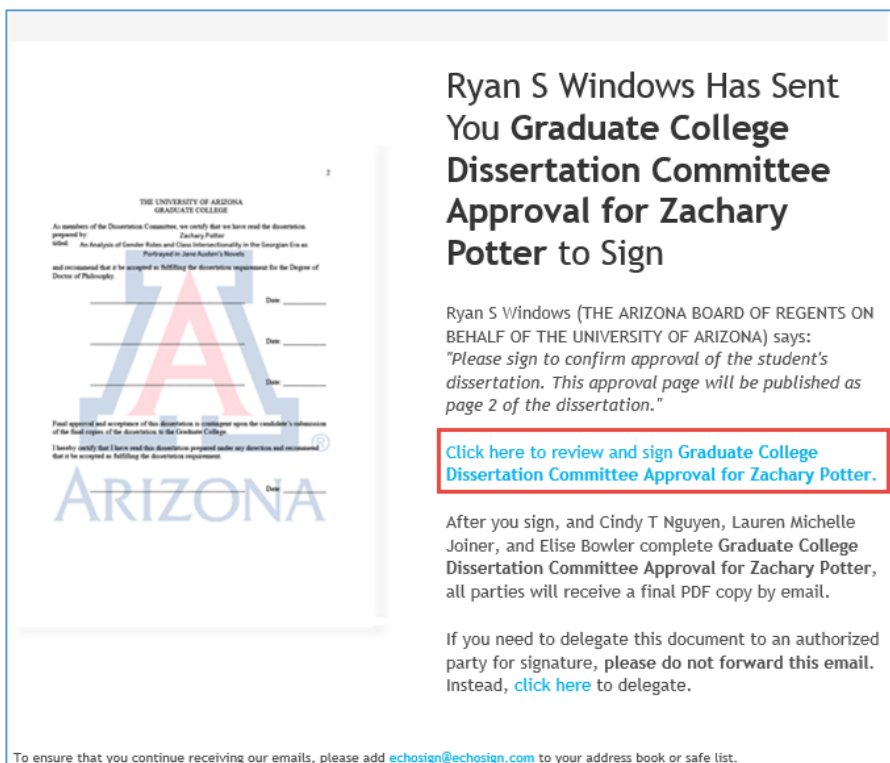

Figure 15 An image of the email the committee chair receives requesting that they sign the approval page.

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16. The chair/co-chair should click the link in the e-mail, which will take them to the approval page. The fields they need to complete will be highlighted.

Figure 16 An image of the approval page with fields the chair/co-chair is required to complete highlighted.

17. The chair/co-chair should click in the signature field next to the 'Start' tab. This will cause a signature box to appear with multiple methods for signing the document. Select a method and click 'Apply'.
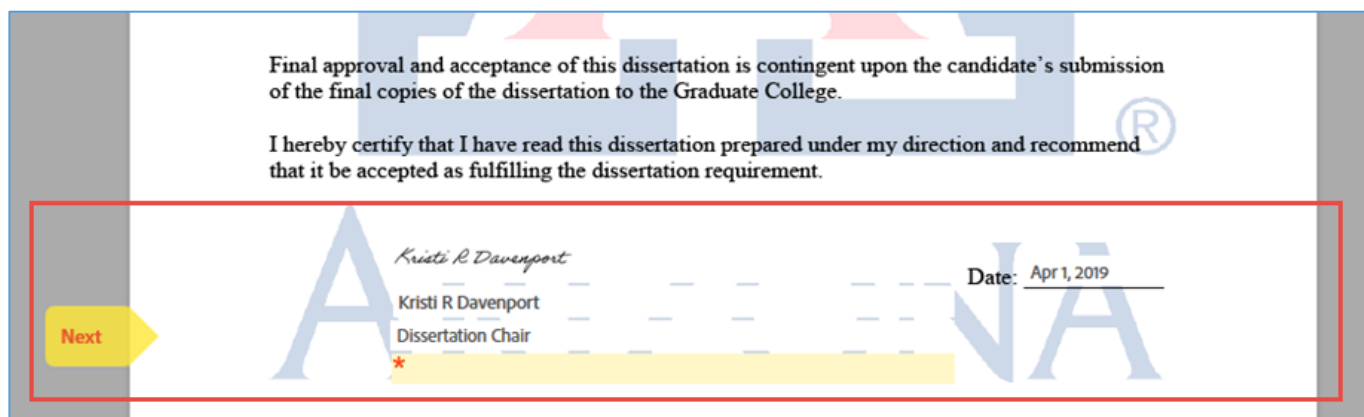

Figure 17 An image of the approval page with the signature box displayed, showing all of the methods for signing the approval page.

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Type	Allows the user to type their signature. The name field in the lower left-hand corner of the signature box is auto populated as the user types.
Draw	Allows the user to use their mouse, touchpad, drawing tablet, etc. to draw their signature. The user must type their name into the name field in the lower left-hand corner of the signature box when using this option.
Image	Allows the user to select a signature they've stored as an image, usually a written signature that has been scanned. The user must type their name into the name field in the lower left-hand corner of the signature box when using this option.
Mobile	Allows the user to create a signature on their mobile device, save it to the Adobe Creative Cloud and sign the document. For details on this method, please search 'adobe sign mobile option' in your search engine of choice.

18. Chairs and co-chairs must sign twice. They must also include their committee title (e.g. Dissertation Chair or Dissertation Co-Chair) and academic department on the page. Clicking the 'Next' tab and then clicking within the second signature field will auto fill that field. The chair/co-chair should then enter their committee role and academic department as indicated by the prompts.

Figure 18 An image of the lower portion of the approval page showing the 'Next' tab. The signature field is complete and the chair/co-chair is being prompted to enter their committee title.

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Figure 19 An image of the lower portion of the approval page. The signature field is complete and the chair/co-chair has entered their academic department.

19. After the faculty member has provided their committee title, department and signatures, the 'Click to Sign' button will appear. The faculty member should click the 'Click to Sign' button.

Figure 20 An image of the approval page with the 'Click to Sign' button displayed and an arrow indicating the position of 'Click to Sign' button at the bottom of the screen.

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20. The chair/co-chairs will be taken to a confirmation page. Their portion of the process is now complete.

Figure 21 An image of the chair/co-chair's confirmation page.

21. Once all chairs/co-chairs have signed the approval page, committee members will be notified that their approval is needed. All committee members will use the same process to sign the approval page. They will receive an email and should click the link to access the approval page.

Figure 22 An image of the email asking committee members to review and sign the approval page. The link to access the approval page is highlighted.

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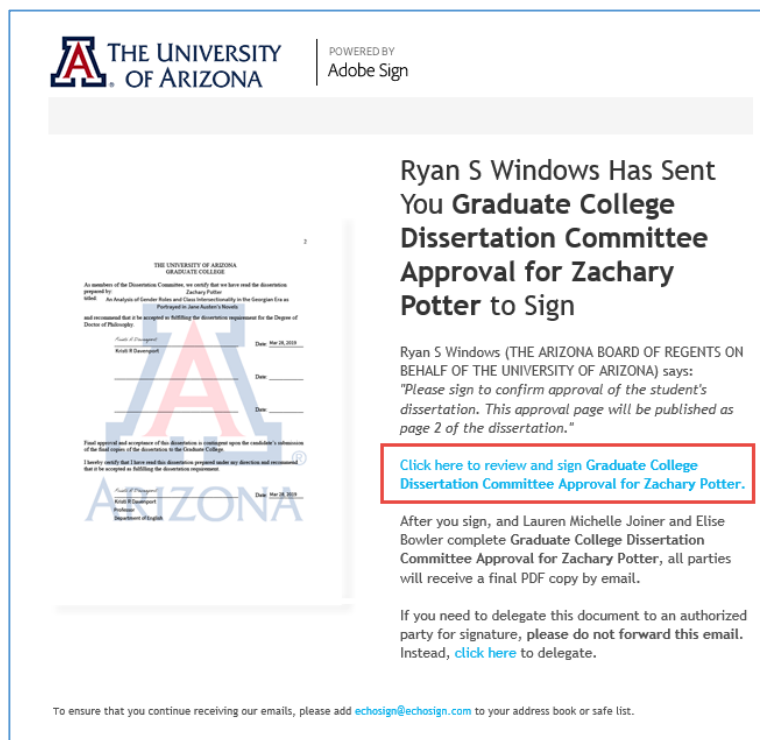22. The committee member's signature field will be highlighted and have a 'Start' tab next to it. The committee member should click in the signature field.

Figure 23 An image of the approval page with the committee member's signature field highlighted.

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23. The committee member will be presented with the signature box containing options for signing the document.
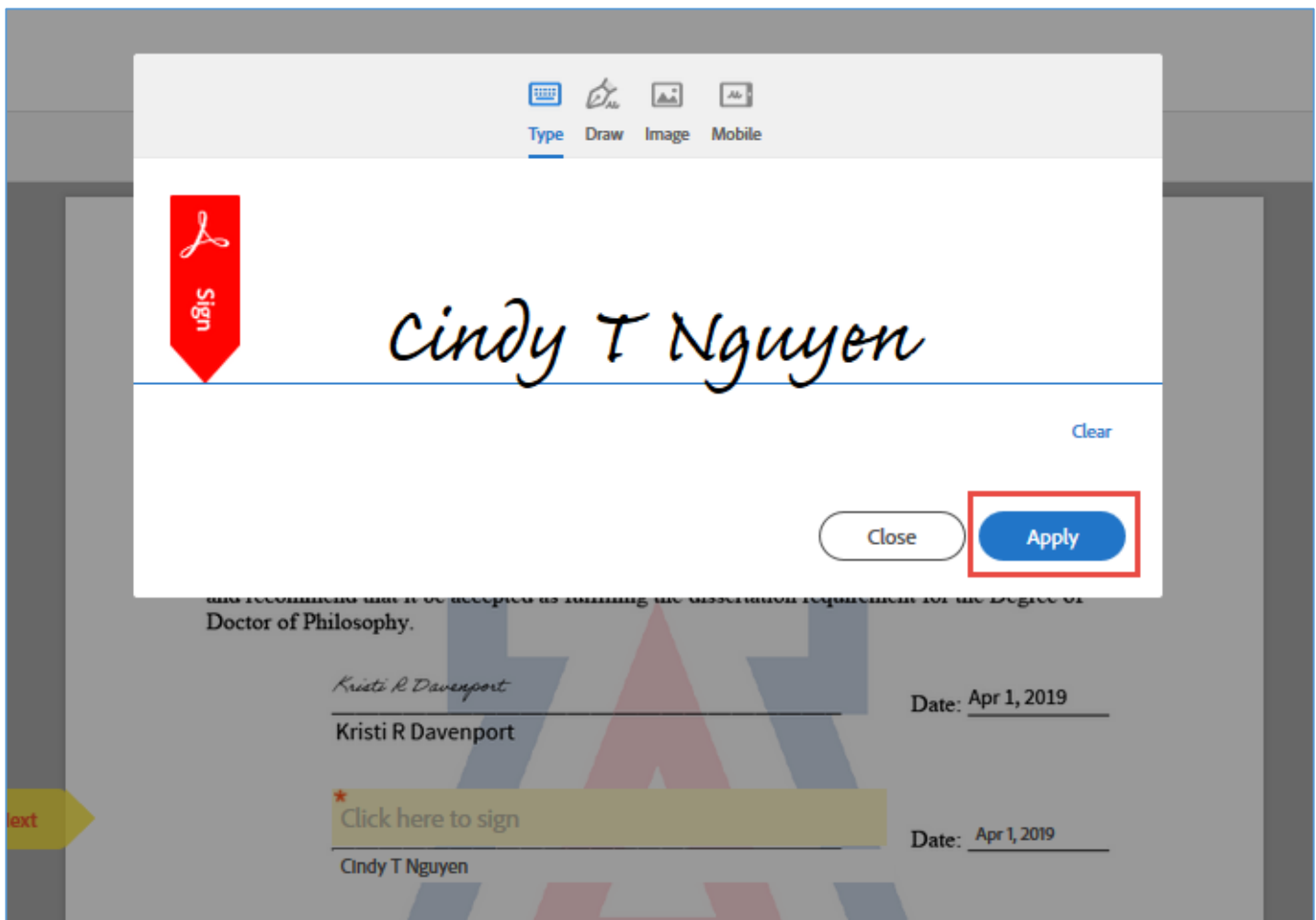

Figure 24 An image of the approval page with the signature box displayed. The box contains options for signing the approval page.

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Type Type	Allows the user to type their signature. The name field in the lower left-hand corner of the signature box is auto populated as the user types.
Draw Draw	Allows the user to use their mouse, touchpad, drawing tablet, etc. to draw their signature. The user must type their name into the name field in the lower left-hand corner of the signature box when using this option.
Image Image	Allows the user to select a signature they've stored as an image, usually a written signature that has been scanned. The user must type their name into the name field in the lower left-hand corner of the signature box when using this option.
Mobile Mobile	Allows the user to create a signature on their mobile device, save it to the Adobe Creative Cloud and sign the document. For details on this method, please search 'adobe sign mobile option' in your search engine of choice.

24. Once the committee member makes their selection they should click the 'Apply' button.

25. The 'Click to Sign' button will be enabled. The committee member should click the 'Click to Sign' button.

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Figure 25 An image of the entire approval page with the committee member's signature present in the signature field. The 'Click to Sign' button is enabled and has an arrow highlighting its location in the lower right corner of the page.

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26. The committee member will be taken to a confirmation page. Their portion of the process is now complete.
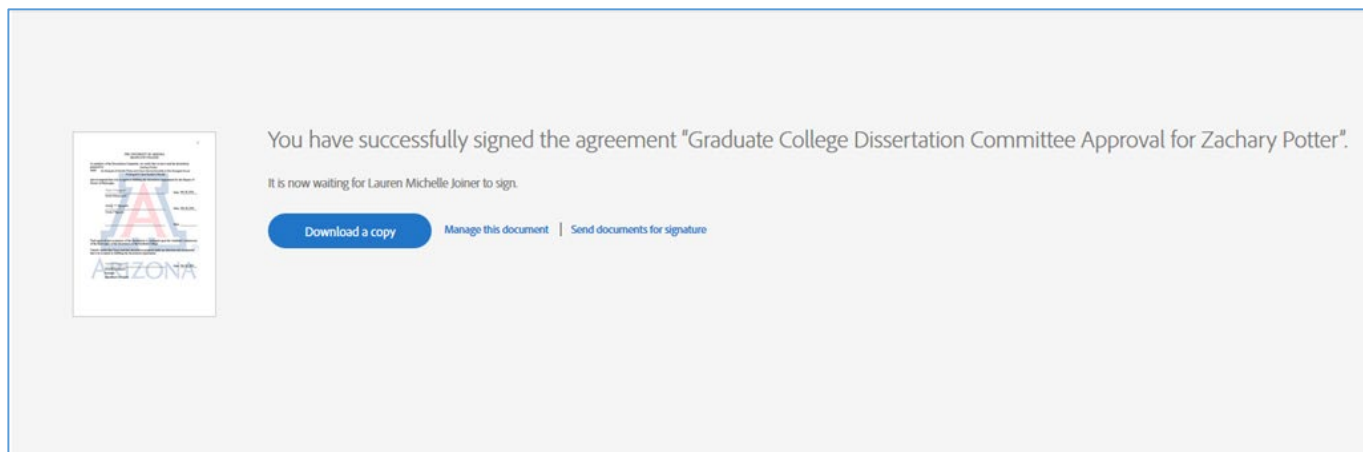
Figure 26 An image of the committee member's confirmation page indicating that the approval page will now be sent to the next signer or approver.

27. Once all committee members have signed the page, the Graduate Student Academic Services Degree Counselor will receive notification that the approval page is ready to be accepted. The Degree Counselor should click the link in the email.
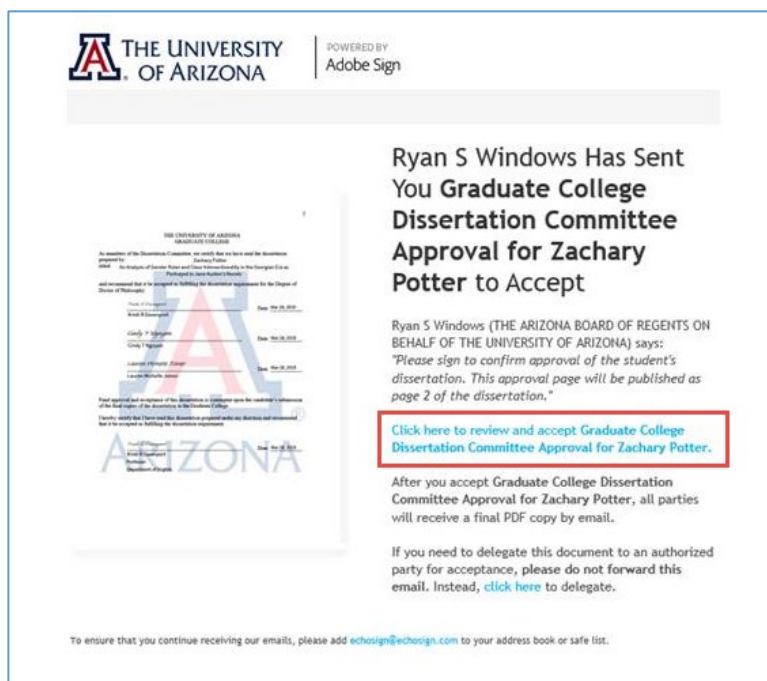
Figure 27 An image of the degree counselor's email with the link to access the approval page highlighted.

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27. The Degree Counselor should review the approval page and then click the 'Start' tab.

Figure 28 An image of the entire approval page with the 'Start' tab highlighted.

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28. The Degree Counselor should click the 'Accept' button.

Graduate College Dissertation Committee Approval for Zachary Potter

THE UNIVERSITY OF ARIZONA
GRADUATE COLLEGE

As members of the Dissertation Committee, we certify that we have read the dissertation prepared by: Zachary Potter
titled: An Analysis of Gender Roles and Class Intersectionality in the Georgian Era as Portrayed in Jane Austen's Novels

and recommend that it be accepted as fulfilling the dissertation requirement for the Degree of Doctor of Philosophy.

Kristi R Davenport
_____   Date: Apr 1, 2019
Kristi R Davenport

Cindy T Nguyen
_____   Date: Apr 1, 2019
Cindy T Nguyen

Lauren Michelle Joiner
_____   Date: Apr 1, 2019
Lauren Michelle Joiner

Final approval and acceptance of this dissertation is contingent upon the candidate's submission of the final copies of the dissertation to the Graduate College.

I hereby certify that I have read this dissertation prepared under my direction and recommend that it be accepted as fulfilling the dissertation requirement.

Kristi R Davenport
_____   Date: Apr 1, 2019
Kristi R Davenport
Dissertation Chair
Department of English

I agree to the Terms of Use and Consumer Disclosure of this document   Accept

Figure 29 An image of the entire approval page with the 'Accept' button highlighted in the lower right corner of the page.

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29. The Degree Counselor will be taken to a confirmation page. Their portion of the process is now complete.


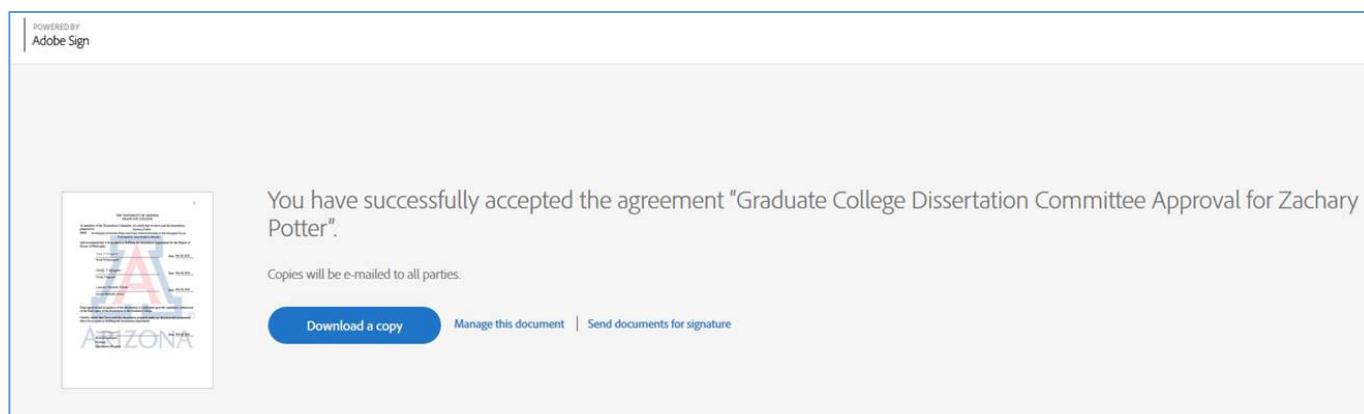*Figure 30 Screen shot of the degree counselor's confirmation page indicating that copies of the signed page will be sent to all parties.*

30. Everyone involved in the approval process will receive an email from Adobe Sign, notifying them that the process is complete.

Figure 31 An image of the email received by all parties indicating that the page has been successfully routed for signatures and approved.

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II. Declining to Accept or Sign Approval Pages

1. Whenever someone is asked to sign or accept an approval page, they also have the option to decline. Select the appropriate action from the 'Alternative Actions' drop down in the upper left corner of the screen.
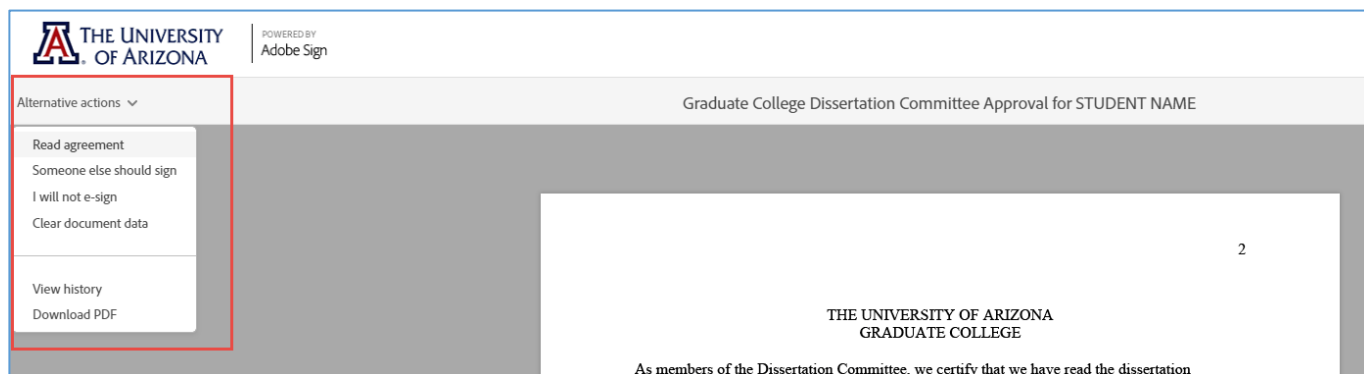

Figure 32 An image showing the top of the approval page with the 'Alternative actions' menu expanded.

Read Agreement	Opens the document in a separate PDF so you can review it before signing.
Someone else should sign	Allows you to select a delegate to sign the approval page. If you are not the correct person to sign the approval page, you should **NOT** use this option. Instead, use the 'I will not e-sign' option and explain you're not the appropriate person to sign. State why and who you believe the correct user should be.
I will not e-sign	Allows you to refuse to sign and requires that you provide a reason. The form originator will be notified.
Clear document data	Allows you to clear all of the data you have entered. This does not clear data entered by other users.

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2. The originator will receive notification that the document has been declined/cancelled.

Figure 33 An image of the cancellation email received when one of the signatories or acceptors refuses to sign/accept the page.

End of Process