Approval Page Routing Using an External Document without an Adobe Sign Workflow



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.

I. Creating an Approval Page

- 1. Navigate to https://grad.arizona.edu/gsas/dissertations-theses/sample-pages
- 2. Select the template that matches your committee configuration (e.g. Dissertation with 1 Chair, Thesis Approval with Co-Chairs, etc.).
- 3. Complete the template per the embedded instructions.

Before:

2
THE UNIVERSITY OF ARIZONA
GRADUATE COLLEGE
As members of the Dissertation Committee, we certify that we have read the dissertation
prepared by [Enter Student Name -remove brackets and italics after entering information], titled
[Enter Dissertation Title] and recommend that it be accepted as fulfilling the dissertation requirement for the Degree of Doctor of Philosophy.
Date:
[Committee Chair Name]
Date:
[Committee Member Name]
[Committee Member Name] Date:
Date:
[Committee Member Name]
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.
, ,
Date:
[Committee Chair Name]
Dissertation Committee Chair [Academic Department]

Figure 1 An image of an entire doctoral dissertation approval page. Fields that require input are highlighted, including, Student Name, Dissertation Title, Committee Chair Name, Committee Members' Names and Committee Chair's Academic Department.

After:

	2
THE UNIVERSITY OF ARIZONA GRADUATE COLLEGE	
As members of the Dissertation Committee, we certify that we have read prepared by Zachary Potter, titled An Analysis of Gender Roles and Class Georgian Era as Portrayed in Jane Austen's Novels and recommend that fulfilling the dissertation requirement for the Degree of Doctor of Philosophics	ss Intersectionality in the it be accepted as
Kristi Davenport	Date:
Christina Inocencio	Date:
Cindy Nguyen	Date:
Lauren Joiner	Date:
Final approval and acceptance of this dissertation is contingent upon the of the final copies of the dissertation to the Graduate College.	
I hereby certify that I have read this dissertation prepared under my direct that it be accepted as fulfilling the dissertation requirement.	and recommend
Kristi Davenport Dissertation Committee Chair English Department	Date:

Figure 2 An image of an entire doctoral dissertation approval page. Fields that require input are now completed.

4. Save the document to your computer.

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.

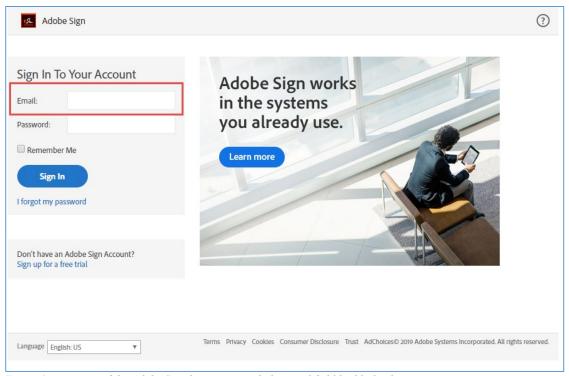


Figure 3 An image of the Adobe Sign login page with the email field highlighted.

3. Click the 'Enterprise ID' link.

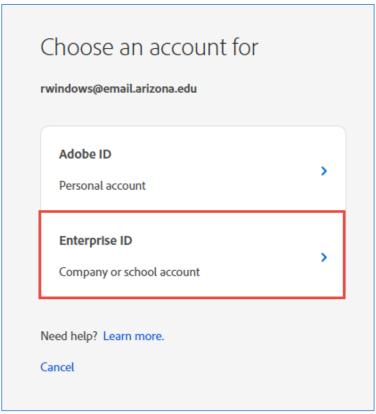


Figure 4 An image of the page that allows users to log in using an Adobe ID or an Enterprise ID with the Enterprise ID portion highlighted.

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



Figure 5 An image of the Adobe Federated Authorization screen. No input is required. This displays while the system logs users into their dashboard.

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

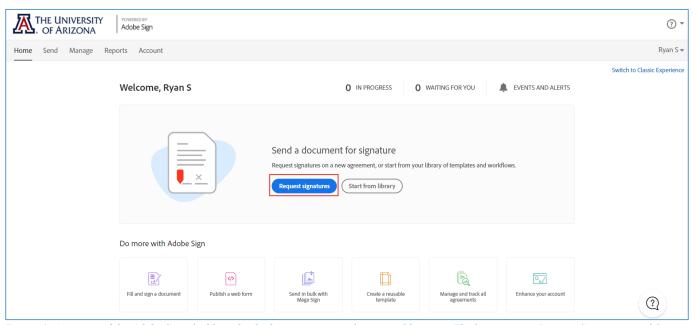


Figure 6 An image of the Adobe Sign dashboard, which contains several icons and buttons. The buttons are: Request Signatures and Start from Library. There are also icons across the bottom of the page that are not relevant to our purpose.

6. Click the 'Request signatures' button



Figure 7 Displays a close up of the 'Request Signatures' button

7. Enter the committee members' email addresses in the 'Recipients' section of the page.

Before:

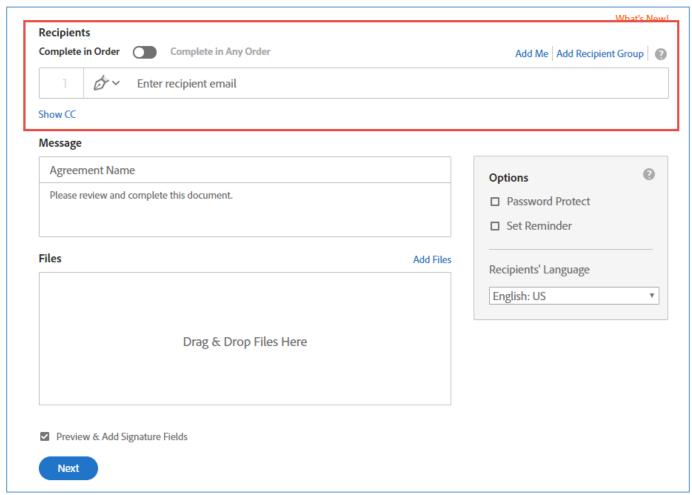


Figure 8 Displays the Adobe Sign page before any information has been entered. The page has several sections including: Recipients, Message, and Files. The Recipients section is highlighted.

IMPORTANT:

- **Do not password protect documents**. Students will be unable to access them to add them to their dissertations if the document is password protected.
- 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).

After:

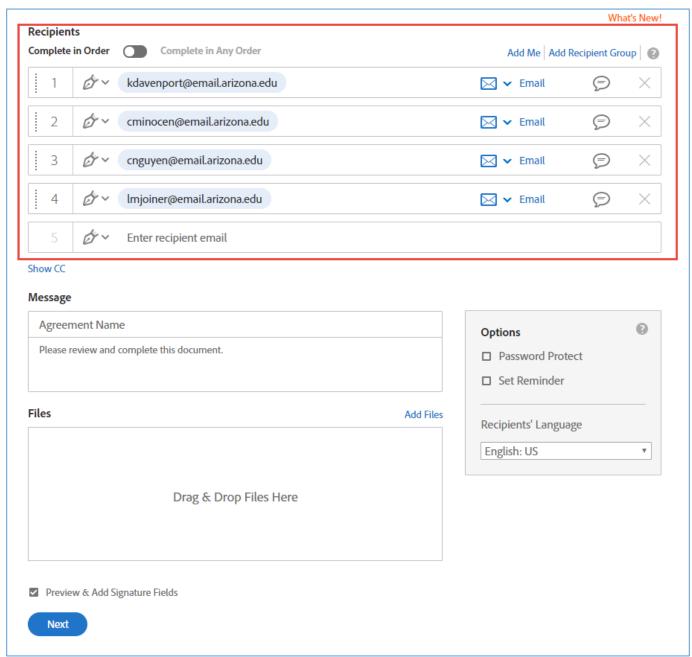


Figure 9 Displays the Adobe Sign page with the Recipients section highlighted. All of the email addresses for the students' committee members have been entered into that section.

8. Complete the 'Message' section by replacing 'Agreement Name' with a descriptive name. In this example the student's name is Zachary Potter, so entering, "Dissertation Approval Page for Zachary Potter", would be appropriate.

Before:

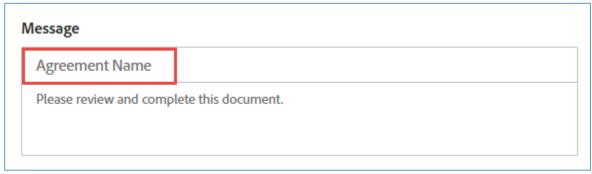


Figure 10 An image of the Message section of the Adobe Sign page before any data have been entered. The Agreement Name is highlighted.

After:

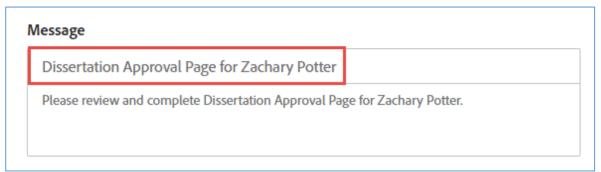


Figure 11 An image of the Message section of the Adobe Sign page after data have been entered. The Agreement Name is highlighted and has been replaced with, 'Dissertation Approval Page for Zachary Potter'.

- 9. Attach the document you created in section I above. There are two options for doing this:
 - a. Drag the file into the 'Drag & Drop Files Here' box or
 - b. Click 'Add Files' and browse for the file

Before:

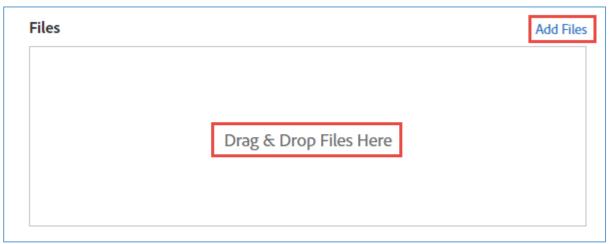


Figure 12 An image of the Files section of the Adobe Sign page with 'Drag & Drop Files Here' and 'Add Files' highlighted.

Note: Clicking 'Add Files' will result in a pop up window that shows all possible data sources including:

- An Adobe Sign Library Document
- My Computer
- The Adobe Document Cloud
- Box
- Dropbox
- Google Drive
- OneDrive

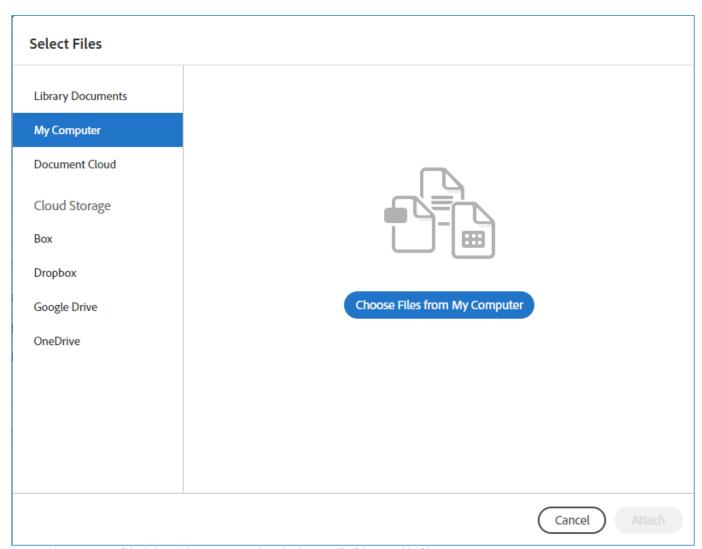


Figure 13 An image of the Select Files pop up window displaying all of the possible file sources.

After:

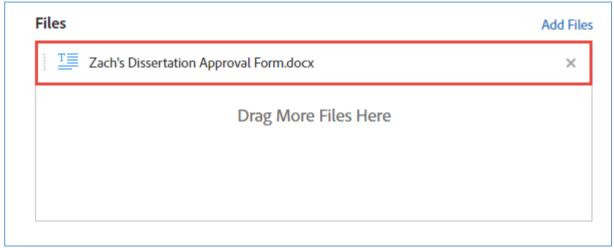


Figure 14 An image of the File section of the Adobe Sign page showing that Zach's Dissertation Approval Form has been added.

- 10. After the file has been attached:
 - a. Ensure that the 'Preview & Add Signature Fields' check box is checked.
 - b. Click the 'Next' button.

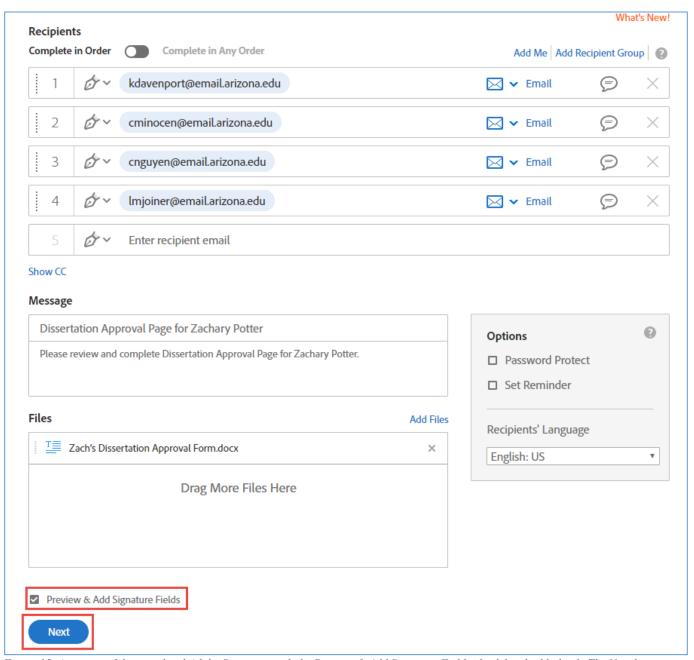


Figure 15 An image of the completed Adobe Sign page with the Preview & Add Signature Fields check box highlighted. The Next button is also highlighted.

11. The approval page originator will be taken to a page where the document template is displayed. Signature fields need to be added. Adobe Sign can auto detect fields and place blank fields in the document where it thinks they should be. The approval page originator should click "Form fields were detected in this document. Click this button to place them".

Before:

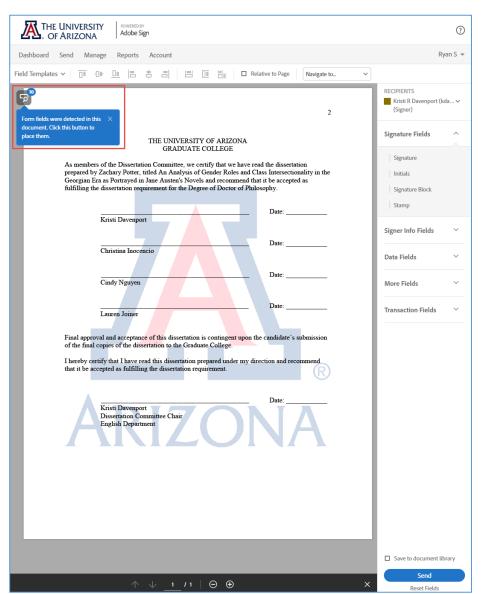


Figure 16 An image of Adobe Sign showing a preview of the file that was uploaded for signature. The button to automatically place fields is highlighted in the upper left corner of the page and the document field options appear down the left side of the screen.

After:

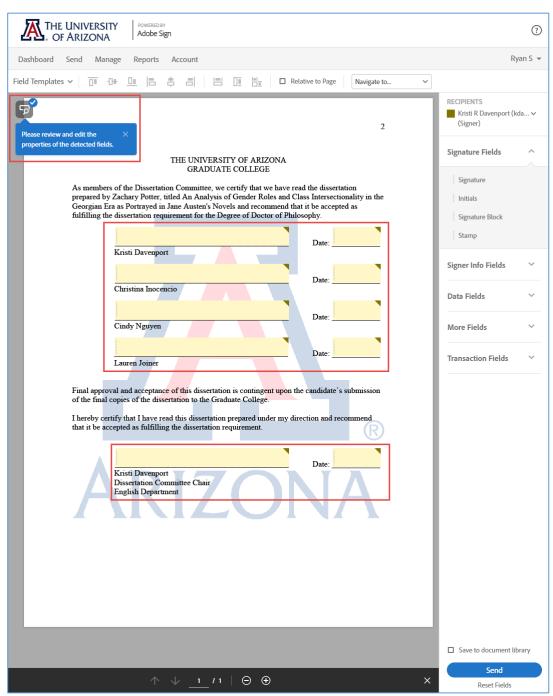


Figure 17 An image of Adobe Sign showing a preview of the file that was uploaded for signature. The button that automatically placed fields is highlighted in the upper left corner of the page and the document field options appear down the left side of the screen. The preview now contains fields that are ready for configuration.

12. Right click each signature field and complete the following actions:

- a. Click 'Edit'
- b. Ensure the 'Assigned To' field matches the name beneath the signature field.
- c. Change the 'Field Type' to 'Signature.'
 - i. This will change the field properties window and make the field required.
 - ii. Click the OK button.

Before:

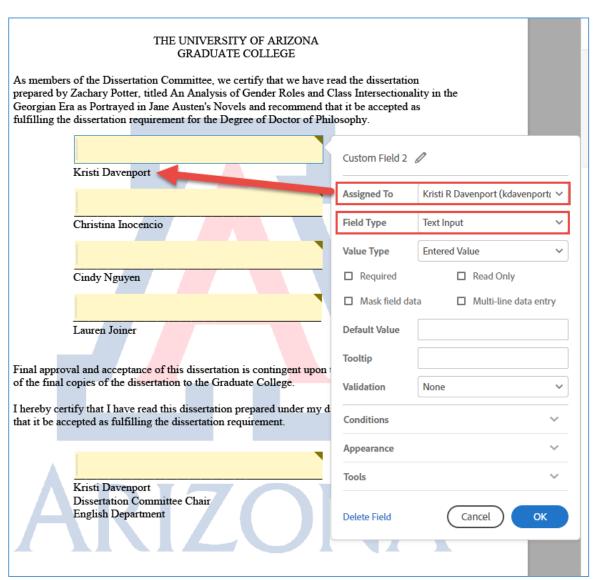


Figure 18 An image of the dissertation approval page with the field properties window displayed. An arrow points from the Assigned To drop down in the field properties window to the name under the first signature field on the approval page, indicating a match. The Field Type drop down in the field properties window is highlighted.

After:

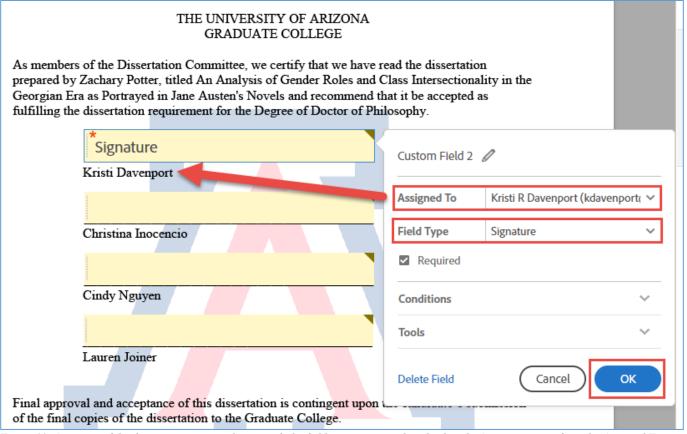


Figure 19 An image of the dissertation approval page with the field properties window displayed. An arrow points from the Assigned To drop down in the field properties window to the name under the first signature field on the approval page, indicating a match. The Field Type drop down in the field properties window is highlighted and has now been changed to Signature, which removes many configuration options for the field. The OK button is highlighted.

NOTE: If the 'Assigned To' field does not match, you can change it by clicking the 'Assigned To' drop down in the field properties window and selecting the correct user.

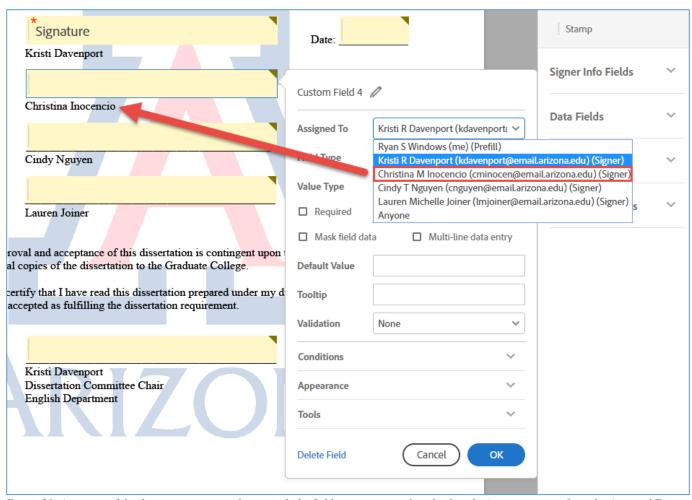


Figure 20 An image of the dissertation approval page with the field properties window displayed. An arrow points from the Assigned To drop down in the field properties window to the name under the first signature field on the approval page, indicating a mismatch. The Assigned To drop down in the field properties window is displayed with the correct user highlighted.

- 13. Once all of the signature fields are configured, right click on each of the Date fields
 - a. Ensure that the Date field is 'Assigned To' the correct user. For example, the Date next to Kristi Davenport's signature should be assigned to Kristi Davenport, so it will auto populate when she signs the approval page.
 - i. When 'Date' in the 'Field Type' is selected the field properties window will change to display the 'Date Format' field.
 - 1. Select US.
 - ii. Click OK

Before:

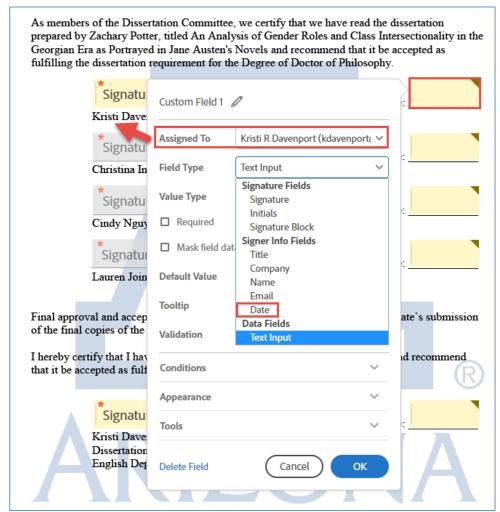


Figure 21 An image of the dissertation approval page with the field properties window displayed. An arrow points from the Assigned To drop down in the field properties window to the name under the first signature field on the approval page, indicating a match. The Field Type in the field properties window is set to Date.

After:

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. Signatu Date Custom Field 1 / Kristi Dave Assigned To Kristi R Davenport (kdavenport 🗸 Signatu Field Type Date Christina In US Date Format (Apr 3, 2019) Signatu Cindy Nguy Conditions Signatui Appearance Lauren Join Tools ate's submission Final approval and accep Cancel Delete Field OK of the final copies of the I hereby certify that I have read this dissertation prepared under my direction and recommend that it be accepted as fulfilling the dissertation requirement.

Figure 22 An image of the dissertation approval page with the field properties window displayed. Date has been selected in the Field Type drop down in the field properties window and the Date Format is set to US in the Date Format drop down. The OK button is highlighted.

- 14. Verify that all signature and date fields are correctly configured.
 - a. Each participant has a color code and each field associated with that participant gets a small tab with that user's color in the upper right corner of the field. It's easy to scan the document and ensure every signature field and date field pair is associated with the correct participant.
 - b. Once all signature fields and date fields have been configured, click the Send button. NOTE: Do **NOT** check the 'Save to document library' checkbox. If you do accidentally click this box, please contact your Graduate Student Academic Services Degree Counselor and request that they ask Graduate IT to remove the form from the library.

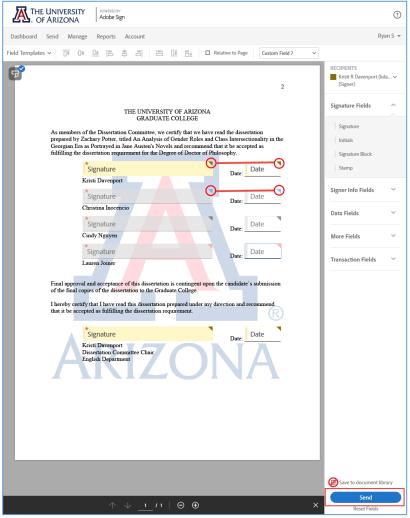


Figure 23 An image of the entire approval page with all of the signature fields and all of the date fields configured. The color-coded tabs are highlighted as is the Send button.

15. The approval page originator will be taken to a confirmation page. Their portion of the process is now complete.

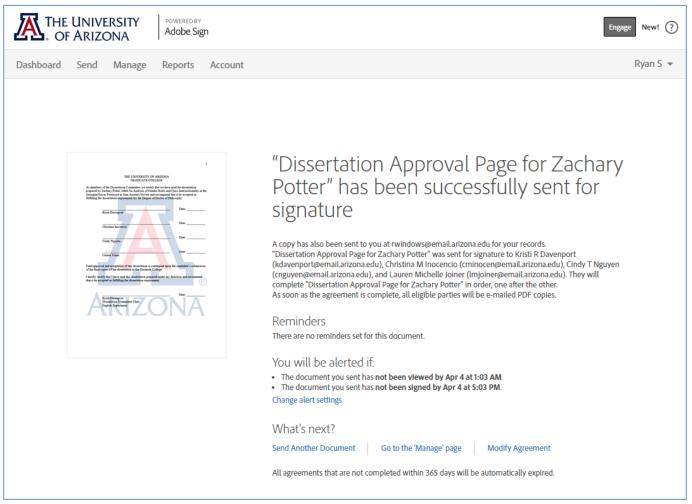


Figure 24 An image of the confirmation page the approval page originator receives after pressing the Send button.

16. The approval page originator will receive an email indicating the approval page has been sent for signature.

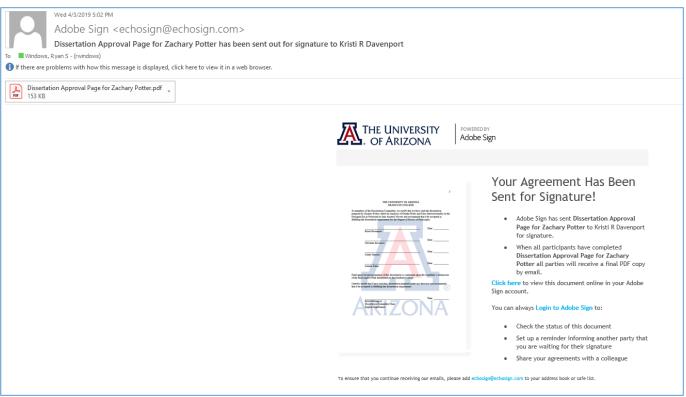


Figure 25 An image of the approval page originator's confirmation e-mail from Adobe Sign.

17. The committee chair/co-chairs will get an email requesting that they sign the approval page.

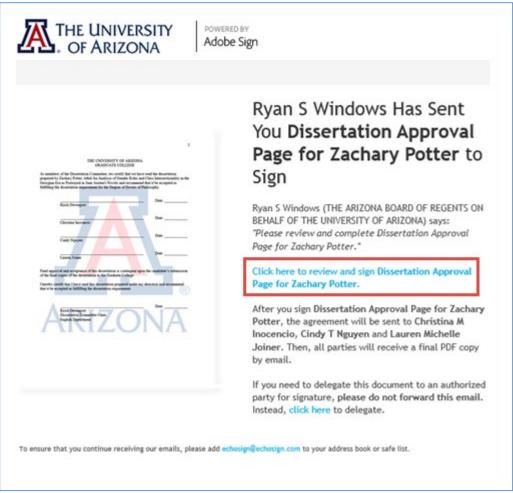


Figure 26 An image of the Adobe Sign email to the committee chair/co-chairs with the link to access the approval page highlighted.

22. The chair/co-chairs will need to sign the document twice. They can do so by clicking in each of the highlighted areas and selecting a method to sign the document. If co-chairs exist, they will all use the same process to sign the approval page.

	Dissertation Approval Page for Zachary Po	otter
		2
	THE UNIVERSITY OF ARIZONA GRADUATE COLLEGE	
	As members of the Dissertation Committee, we certify that we have re prepared by Zachary Potter, titled An Analysis of Gender Roles and C Georgian Era as Portrayed in Jane Austen's Novels and recommend th fulfilling the dissertation requirement for the Degree of Doctor of Phil	lass Intersectionality in the at it be accepted as
Start	Click here to sign Kristi Davenport	Date: Apr 4, 2019
	Christina Inocencio	Date:
	Cindy Nguyen	Date:
	Lauren Joiner	Date:
	Final approval and acceptance of this dissertation is contingent upon to of the final copies of the dissertation to the Graduate College.	he candidate's submission
	I hereby certify that I have read this dissertation prepared under my di that it be accepted as fulfilling the dissertation requirement.	rection and recommend
	Kristi Davenport Dissertation Committee Chair English Department	Date: Apr 4, 2019
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Figure 27 An image of the approval page with fields the chair/co-chair is required to complete highlighted.

18. When the chair/co-chair clicks in the signature field next to the 'Start' tab, a signature box will appear with multiple methods for signing the document. Select a method and click 'Apply'.

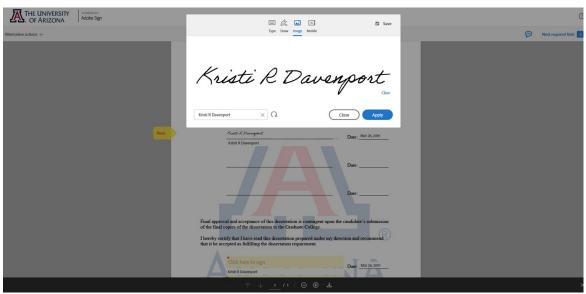
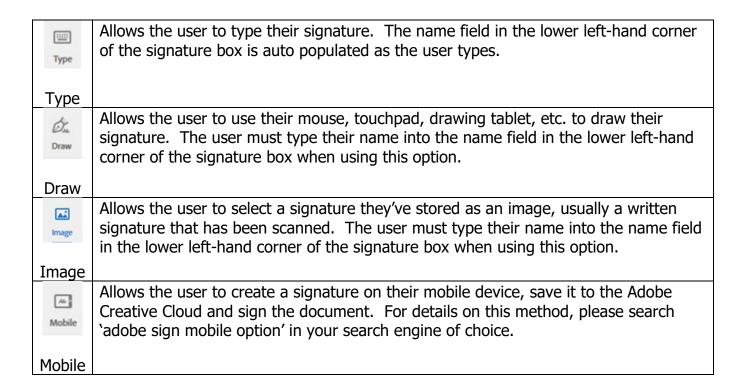


Figure 28 An image of the approval page with the signature box displayed, showing all of the methods for signing the approval page.



19. Clicking the 'Next' tab and then clicking within the second signature field will auto fill that field.

	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.
Next	Kristi Davenport × Date: Apr 4, 2019
	Christina Inocencio
	Cindy Nguyen Date:
	Lauren Joiner
	Final approval and acceptance of this dissertation is contingent upon the candidate's submission
	I hereby certify that I have read this dissertation prepared under my direction and recommend
	that it be accepted as fulfilling the dissertation requirement.
	Click here to sign Date: Apr 4, 2019 Kristi Davenport

Figure 29 An image of the approval page showing the 'Next' tab. The first signature field is complete and the chair/co-chair is being prompted to enter their signature at the bottom of the page.

After the second signature field is completed, the 'Click to Sign' button will be enabled. The committee chair/co-chair should click the 'Click to Sign' button.

THE UNIVERSITY OF ARIZONA GRADUATE COLLEGE	
As members of the Dissertation Committee, we certify that we have re prepared by Zachary Potter, titled An Analysis of Gender Roles and C Georgian Era as Portrayed in Jane Austen's Novels and recommend th	lass Intersectionality in the
fulfilling the dissertation requirement for the Degree of Doctor of Phil	•
Kristi R Davenport	Date:Apr 4, 2019
Kristi Davenport	
Christina Inocencio	Date:
Christina mocencio	
Cindy Nguyen	Date:
Lauren Joiner	Date:
Final approval and acceptance of this dissertation is contingent upon the	ne 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 distant it be accepted as fulfilling the dissertation requirement.	rection and recommend
Kristi R Davenport ×	Date: Apr 4, 2019
Kristi Davenport Dissertation Committee Chair	Date:
English Department	N A A
	AX XX
I agree to the Terms of Use and Consumer Disclosure of this document	Click to Sign

Figure 30 An image of the entire approval page with the Click to Sign button visible in the lower right corner of the screen. An arrow points to the highlighted button.

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



Figure 31 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.

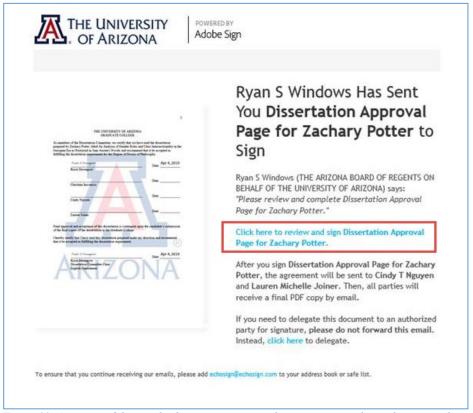


Figure 32 An image of the email asking committee members to review and sign the approval page. The link to access the approval page is highlighted.

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.

	Dissertation Approval Pag	e for Zachary Potter	
	GRADUATE C	OLLEGE	
pr G	s members of the Dissertation Committee, we cert epared by Zachary Potter, titled An Analysis of G corgian Era as Portrayed in Jane Austen's Novels a lfilling the dissertation requirement for the Degree	ender Roles and Class Intersectionality in the and recommend that it be accepted as e of Doctor of Philosophy.	
	Kristi R Davenport	Date: Apr 4, 2019	
	Kristi Davenport		
Start	* Click here to sign	Date: Apr 4, 2019	
	Christina Inocencio	and the second	
of I1	Cindy Nguyen Lauren Joiner nal approval and acceptance of this dissertation is the final copies of the dissertation to the Graduate tereby certify that I have read this dissertation prepare it to be accepted as fulfilling the dissertation requirements.	e College. pared under my direction and recommend	
	Kristi R Davenport Kristi Davenport Dissertation Committee Chair English Department	Date: Apr 4, 2019	
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Figure 33 An image of the approval page with the committee member's signature field highlighted.

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

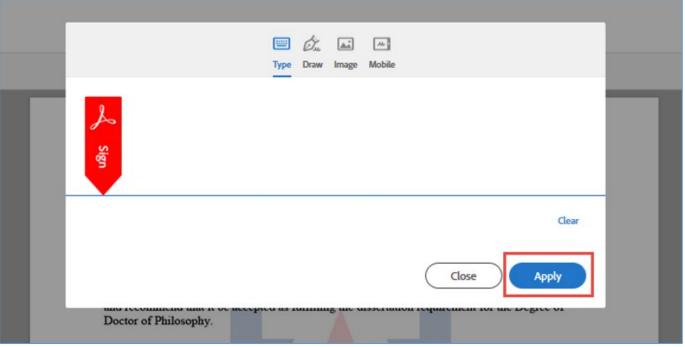


Figure 34 An image of the approval page with the signature box displayed. The box contains options for signing the approval page.

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.
Type	
Gr. 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.
Draw	
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.
Image	
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.
Mobile	

- 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.

	Dissertation Approval Page for Z	achary Potter
	THE UNIVERSITY OF ART GRADUATE COLLEC	
pre Ge	members of the Dissertation Committee, we certify that epared by Zachary Potter, titled An Analysis of Gender R eorgian Era as Portrayed in Jane Austen's Novels and reco filling the dissertation requirement for the Degree of Doo	toles and Class Intersectionality in the commend that it be accepted as
	Kristi R Davenport	Date: Apr 4, 2019
	Kristi Davenport	Date.
	Christina M Inocencio	X Date: Apr 4, 2019
	Christina Inocencio	
	Cindy Nguyen	Date:
	Cmay Nguyen	Davis (
	Lauren Joiner	Date:
of I h	nal approval and acceptance of this dissertation is conting the final copies of the dissertation to the Graduate Colleg ereby certify that I have read this dissertation prepared us at it be accepted as fulfilling the dissertation requirement.	nder my direction and recommend
	Kristi R Daverport	Date: Apr 4, 2019
	Kristi Davenport Dissertation Committee Chair English Department)NA
I agree to	the Terms of Use and Consumer Disclosure of this document	Click to Sign

Figure 354 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.

26. The committee member will be taken to a confirmation page. Their portion of the process is now complete.



Figure 36 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 approval page originator will receive an e-mail with the completed approval page attached. The approval page originator should send a copy to the student and a copy to the Graduate Student Academic Services (GSAS) Degree Counselor.

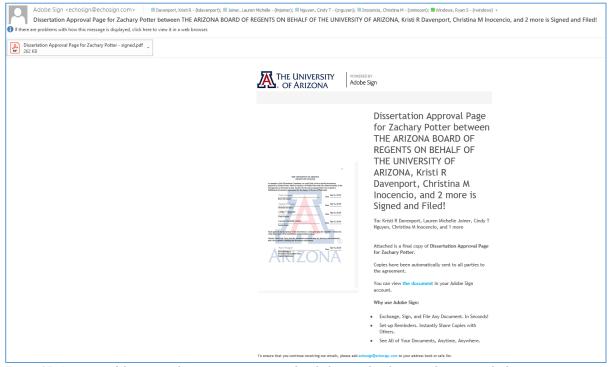


Figure 37 An image of the approval page originator's email with the completed approval page attached.

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 38 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 the user can review it before signing.
Someone else should sign	Allows the user to select a delegate to sign the approval page. If the user is not the correct person to sign the approval page, they should NOT use this option. Instead, they should use the 'I will not e-sign' option and explain they're not the appropriate person to sign. They should state why and who they believe the correct user to be.
I will not e-sign	Allows the user to refuse to sign and requires that they provide a reason. The approval page originator will be notified.
Clear document data	Allows the user to clear all of the data they have entered. This does not clear data entered by other users.

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



Figure 39 An image of the cancellation email received when one of the signatories or acceptors refuses to sign/accept the page.

End of Process