



## ADOBE SIGN QUICK START GUIDE

# IT instructions: How to set up Adobe Sign

Congratulations on your purchase of Adobe Sign!

This Quick Start Guide includes step-by-step instructions to get you and your teams up & running immediately. Follow the six steps below to set up Adobe Sign in the Admin Console.

- 1** Are you an Acrobat DC customer? If so, the recommended best practice is to “turn off” Adobe Sign services in Acrobat DC for enterprise. [Learn how.](#)  
  
If you are an Acrobat for teams customer please see the details on [page 10](#) to turn off Adobe Sign.
- 2** Create an Adobe Sign administrator. [Learn how.](#)
- 3** Assign the Adobe Sign administrator to the Adobe Sign product. [Learn how.](#)
- 4** Customize your Adobe Sign global settings. [Learn how.](#)
- 5** Add Adobe Sign users in the Admin Console. [Learn how.](#)
- 6** Add Sign User Groups and/or Sign User Group Admins in the Adobe Sign console. [Learn how.](#)

Once you've completed these steps, you can share the instructions on the following pages with Line of Business users, so they can set up Adobe Sign for their use cases.

**If you need tech support, [here's how to reach us.](#)**



## ADOBE SIGN QUICK START GUIDE

# Adobe Sign Line of Business Users: How to deploy a new use case in three steps

In this guide, we'll show you what to consider before deploying a new use case and give you the resources you need to quickly deploy on your own.

### STEP 1: IDENTIFY YOUR NEED >

1. Identify your use case
2. Consider your requirements

### STEP 2: DESIGN AND BUILD YOUR USE CASE >

1. Map out your use case
2. Set up your template(s) OPTIONAL
3. Send for signature
4. Manage your transactions

Additional features for specialty use cases:

- Mega Sign
- Web forms
- Workflow designer
- Integrations

### STEP 3: ENABLE YOUR TEAM >

Enabling senders

### ADDITIONAL RESOURCES >

Getting Adobe Sign support

# Glossary

Here are a few key terms we use throughout this guide:

## **Transaction**

A transaction is one send, regardless of how many signers, documents or pages.

## **Account Administrator**

The account administrator for Adobe Sign is responsible for setting up the account, as well as adding users to the account and setting up groups.

## **Group admin**

A group admin has certain administrative privileges needed to administer the group, but not the broad range of privileges assigned to the account admin.

## **End user**

We sometimes refer to the sender as an end user. Senders need an Adobe Sign account to initiate a transaction.

## **Signer/Approver/Delegator**

These are recipients of the transaction, whether internal or external.

## **Form fields**

Input fields on a form that allow a signer to enter the requested information.

## **Text tag**

Text tags are specially formatted text that can be placed anywhere within the document. They specify fields such as signature, initial fields, date, check boxes, radio buttons and more.

## **Use case**

Your intended process that you want to digitalize with Adobe Sign.

## STEP 1

# Identify your need

## Identify your use case

Before jumping into this guide, please take a minute to think about and document the use cases you want to address. If you need help identifying use cases in your organization or group, you can find some examples of high-value use cases for Adobe Sign [on page 9 of this document](#).

## Consider your requirements

It will be helpful to document the answers to the following questions, specific to each use case, before proceeding:

**What documents need to be digitized and do they need editing?** Many documents were originally designed to reduce printing costs, so you may find that they now need to be optimized for digital use. This may mean adjusting layout, font size, or spacing to accommodate form fields, adding your organization's branding, or making other modifications. These changes are not always necessary for each use case, so consider your particular needs as you assess your process.

**Who will the senders for your document(s) be?**

**Do the senders need training?** If so, please make sure you read Step 3: Enabling your team

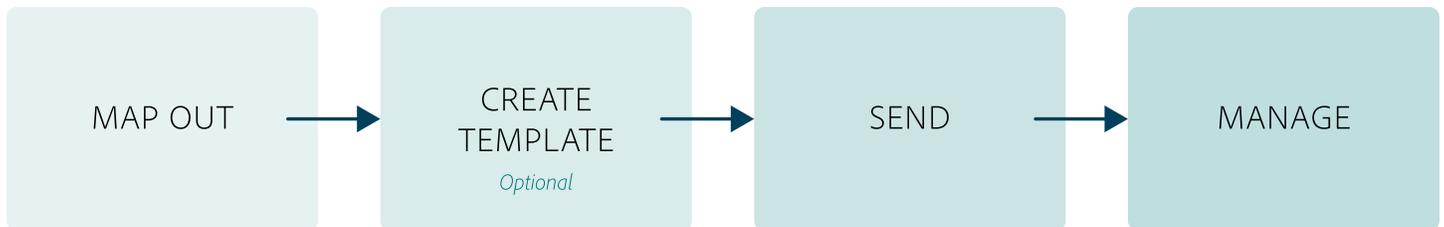
**Who will approve and/or sign the document?** Signing is very intuitive, and signers can quickly sign on their own. Signers don't need a license to sign.

**What [other roles](#) might be needed for the document participants** (e.g. approver, acceptor, certified recipient, etc.)?

## STEP 2

# Design & build your use case

There will be 4 main steps in designing and building out your use case.



### 1. Map out your use case

Start by documenting your current document workflow and then map out what your equivalent digital workflow will be taking into consideration your findings from step one. If you are moving from a paper workflow to a digital, you can [find some helpful tips here](#).

### 2. Set up your template(s) OPTIONAL

If users in your account need to send the same document more than once, we recommend setting up a document template for them to use. Library templates allow your end users to easily access documents that are sent often so that they don't have to add fields each time they are sending. It can be as simple as a document with one signature field (like a non-disclosure agreement), or a highly complex form (like tax forms or onboarding documents).

Here are some resources to help you get started:

- Learn how to create a document template [here](#).
- Another template option is to create just a form field layer. This is a reusable layer of fields that can be applied to any document. Form field layers are commonly used for contracts that are regularly redlined or generated outside of Adobe Sign. You can [learn more about them here](#).

When creating your template in Adobe Sign, you can add form fields in two ways:

### **Drag and drop method**

This is done from inside the Adobe Sign application and is as simple as dragging the fields on to your document. You can also make adjustments to the properties of the fields to best suit your needs. Learn more [here](#) or watch [this video](#).

### **Text tagging**

Text tagging is a powerful way of specifying form fields in those documents. Using specifically formatted text, fields are defined in a document outside of the Adobe Sign application. When the document is imported into Adobe Sign as a template the text tags convert in form fields. Get more information in [this article](#).

## **3. Send for signature**

Now you can start sending immediately. Adobe Sign makes it easy — you can [sign a document yourself](#), or request signatures from [one person or multiple people](#). Adobe Sign will guide you through the send process intuitively.

Some of the powerful features that you may utilize in your signature transactions are setting [deadlines and reminders](#), and [using second-factor authentication](#).

Use [participant roles](#) for your document recipients if you have individuals in your signing workflow who will be simply approving or adding information to the document, or who will need to delegate to another person to sign.

## **4. Manage your transaction**

Once you've sent your document out for signature, you can manage the transaction using some of the many features available on the [Manage page](#).

## Additional features for specialty use cases

Your use case may warrant leveraging some other powerful functionality in Adobe Sign:

### Mega Sign

If you are sending the same document to hundreds of recipients at once, use the Mega Sign feature. Each person reviews and signs their own copy of the document. Learn how in this [video](#) or get more detail [here](#).

### Web forms

A fillable, signable web form can be created to embed on your website, or send as a link, so multiple people can easily access your document to sign. It's especially useful if you need to post a form on your own website for signature. Learn how in this [video](#).

### Workflow Designer

The Workflow Designer (available only in Adobe Sign for enterprise) is a powerful tool, used to create easily accessible and repeatable document workflows that tailor the signing process to fit your specific business requirements. It is useful when you have complex document workflows with many documents or many participants.

It allows for a high level of control of all aspects of the transaction - from sending to completion. Learn more about Workflow Designer [here](#).

### Integrations

Adobe Sign (available only in Adobe Sign for enterprise) integrates seamlessly with many other business systems and applications. Integrations can be set up at any time, and leveraging integrations is a great way to scale your processes. [Click here to learn more](#). For integration guides, [click here](#).

## STEP 3

### Enable your team

You're almost done! Now it's time to train, enable and launch. Let's start with your senders (end users).

### Enabling senders

New senders or anyone needing a refresher can start here:

Take a guided learning path in the [Experience League](#) for Adobe Sign.

This will give your senders a strong knowledge base to get started using Adobe Sign.

## Additional resources

Here are some additional resources that you may find useful when designing and deploying your use case:

[Adobe Sign FAQ](#)

[Managing Adobe Sign in the Admin Console](#)

ARTICLE

[Adobe Sign Mobile App](#)

ARTICLE

### Getting Adobe Sign support

ARTICLE

To get Adobe Sign assistance, please have your Admin open up a support case through the Adobe Admin Console, chat or call Adobe customer service. All options are available [here](#).

# Use case examples

If you are looking for more opportunities to take existing processes at your organization from paper to digital, here are some examples of successful transformations made by many Adobe Sign customers:

<i>Department</i>	<i>Common forms &amp; workflows</i>	
<b>SALES</b>	Sales order processing New customer sign-ups Terms & conditions	Sales compensation agreements Reseller agreements Account provisioning
<b>HR</b>	New hire paperwork Candidate NDA Employee policy sign-off	Contractor agreements Authority to recruit forms Leavers forms
<b>PROCUREMENT</b>	Statements of work NDAs Purchase order approvals	Supplier compliance RFP sign-off Contracts
<b>LEGAL</b>	NDAs Contracts Internal compliance	Board minutes IP licensing Finance agreements
<b>MARKETING</b>	Brand compliance audits Events & vendor approvals Campaign approvals	Supplier contracts Data cleansing forms
<b>FINANCE</b>	Invoice approval & processing Audit sign-off Expense reporting	Direct debit mandate forms Asset transfer Hire freeze exemption
<b>PRODUCT DEVELOPMENT</b>	Change management Release management Code review reports	Release commitments Project sign-off Approvals
<b>OPERATIONS</b>	Change requests Requirements sign-off Incident reporting	Product change authorization Order fulfillment



## ADOBE SIGN QUICK START GUIDE

# Turning off Adobe Sign services in Acrobat DC for teams

### For an existing Acrobat DC for teams customer (Acrobat DC is already installed)

- 1 Every tool that allows you to remote manage desktops allows you to modify the registry. Modify the registry setting.  
[https://www.adobe.com/devnet-docs/acrobatetk/tools/PrefRef/Windows/FeatureLock-down.html#Services-AdobeSign\(DC\)](https://www.adobe.com/devnet-docs/acrobatetk/tools/PrefRef/Windows/FeatureLock-down.html#Services-AdobeSign(DC))
- 2 Click on Services-Adobe Sign (DC)

### For new Acrobat Teams customers (haven't deployed Acrobat DC yet)

- 1 Download the Acrobat Customization Wizard from the Packages tab in the Admin Console. On the left hand rail select Tools. In the middle pane, you will need to download the Acrobat Customization Wizard for Windows. The Customization Wizard allows you to customize the Acrobat installer and application features prior to deployment to suit the needs of your organization. [Learn more](#) about the Customization Wizard.
- 2 You will need to create a transform to be applied to the MSI of Acrobat DC. Choose On-line Services and Features and check the box to disable Adobe Sign.
- 3 Once you have applied your transformation to the MSI you will deploy the new MSI of Acrobat DC and Adobe Sign services will be off.
- 4 Users will now need to login to Acrobat once the new install has been performed.