



Adobe Sign For Administrators Course Outline:

Duration: 1 Day

Prerequisites:

Basic Computer Skills and Basic Internet Browser Skills

Course Objectives

The purpose of this course is to get you familiarizes you with the user interface, use the standard “send” work flows in Adobe Sign as well as how to manage your agreements, and how to generate reports. Please note that the content of the course will vary dependant on the version of the product you have.

Related Courses:

Adobe® Acrobat

Personalize your Account (User)

- Verify your profile information – All users
- Define your signature – All users
- Configure personal events/alerts – team, business & enterprise service levels
- Define your personalized footer – business & enterprise service levels
- Select language preference

Personalize your Account (Administrator)

- Set up external archive – All plans
- Branding your account – team, business & enterprise service levels
- Agreement Settings
- Users and Groups
- Configure signature preferences – All plans
- Company and host name setup – All plans
- Configure global settings
- Configure send page
- Upload your e-mail header/footer
- Configure security settings
- Enable API if needed – Enterprise Only
- Configure groups – business and enterprise service levels
- Add users – team, business & enterprise service levels

Page by Page Overview

- Home page
- Send page
- Manage page
- Reports page (business and enterprise service levels only) - (creating & report results)

Sending Agreements

- Recipients section
- Hybrid work flows
- Recipient groups
- Message section
- Options section
- Files section
- Send an agreement for signature

Signing Environment

- Signers Experience

Managing Agreements

- Manage page structure (Filters & Agreement list)
- Agreement tools

Preview & Authoring Environment

- Accessing the authoring environment
- Form Field Template
- Field Layout and Alignment
- Select Recipient (Role)
- Form Field Tabs
- Zoom and Reset

Library Templates

- Document templates
- Form Field template
- Creating a reusable template

Alternate Workflows for Signatures

- Sending to multiple recipients
- Sending to a recipient group
- Using Fill & Sign
- Mega sign
- Web forms
- Mobile devices
- Adobe Sign in Microsoft Office 365
- Adobe Sign using Teams (if required)

Pre-Tagging Documents - (if required)

- Name, Company & Title Fields
- Email Fields
- Date Fields
- Multiline Fields
- Signature, Digital Certificate & Initial Fields
- Check Boxes, Radio Buttons & Drop Down Fields