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Welcome to Adobe Sign!

Before you begin using your Adobe Sign account, we've got some suggested steps to getting your account setup and customized for your company’s use. The purpose of this guide is to get you up and running with branding, security settings, users and templates.

This guide is outlined in such a way that as you move through the "chapters", you'll cover all the important features and settings. By the end, your account will be up and ready to go. Keep in mind, there are plenty of other options and settings to explore that aren't covered in this guide. Our knowledge base is an excellent resource for getting information on the other settings that can be found in Adobe Sign.

Now sit back, login and let's get you e-Signing!
Account Setup

This section will go over the suggested steps for initially setting up your account.

External Archive

Like backing up your computer or phone, it’s a good idea to keep copies of your signed agreements. Instead of downloading the agreements one by one from the Manage page, the External Archive can send a copy of signed agreements to an alternate email address, an Evernote account or a Box account.

How to set it up

Log in as an Account Admin, and navigate to: Account > Account Settings > External Archive

To have copies of your account’s agreements send to an alternate email address, enter that email address into the Send an extra copy... field and click the Save Changes button.
To have a copy sent to either Evernote or Box, click the corresponding **click here** link and specific instructions will pop-up in a new window.

You may archive a copy of every signed agreement to any one of the services below:

- **Box.com** allows people and companies to access and share their content from anywhere. For detailed instructions on how to archive Adobe Sign agreements into a folder in your Box.com account, [click here](#).
- **Evernote** allows you to save documents and notes and find them all on any computer, phone, or device you use. For detailed instructions on how to archive Adobe Sign agreements into your Evernote account, [click here](#).

**Branding your account**

Adding your company branding is an excellent way to customize Adobe Sign for the users in your account, as well as your signers.

**Company name and URL hostname**

In this section, you will set the company name and a hostname for your account. These may seem basic, but they will personalize your account.

These two settings are **Account wide** and cannot be adjusted at the **Group level**.

Log in as an **Account Admin** and navigate to: **Account > Account Settings > Account Setup**.
Company Name

The value you enter into this field will be displayed in all email correspondence from Adobe Sign. This is also automatically populated into Company Name fields for your users when they need to sign a document.

By default, Adobe Sign permits users to edit their personal settings, and this includes the Company Name value for their individual user. If you would prefer to install one immutable Company name to all users, you can check the Set company name for all users in account box.

Hostname

Setting the hostname for your account changes the URL your users log in to and the URL where agreements are hosted for your signers.

The result is a customized URL with your hostname. 

Secure https://caseyjones.na1.ecosign.com/account/home
**Upload your logo**

Log in as an Account Admin and navigate to: Account > Account Settings > Account Setup > Upload Logo.

Click the **Upload** button and navigate to the image you want to use. Keep in mind, images of the stated dimensions (60 pixels tall and 200 pixels wide) work the best.

Once you’ve chosen an image, the logo will be displayed to the right of the **Upload** button:

If you need to change the logo at any time, click the **Clear** button and the logo will be removed.
Add an email header and footer

Get your branding into your Agreement emails by setting a custom image for the header and/or footer of the email template.

Additionally, you can provide an optional Account wide plain text footer for marketing, legal information or any other content you want distributed with your Agreement notifications.

To add or edit your existing header/footers:

Navigate to: Account > Email Settings then Header & Footer Images
Plain Text Footer

At the top of the page is the plain text footer. This footer is Account wide, and cannot be overridden at the Group level.

This text will be displayed below the page thumbnail and message content of the Agreement.
User Level Footers (Signature Files)

By checking the **Allow users to have their own email footers** box, you allow each user to optionally include their own personalized footer, much like a signature file in email.

This footer is in **addition** to the Account wide footer, and any image footer that may be applied.

Users can set their individual footers by:

- Mouse over the user name in the upper-right corner of the screen to open the menu, and select **My Profile**
  - The page will refresh and display the User menu with **Personal Preferences** already expanded

- Select **My Email Footer** to open the page

**Note:** This option is only visible after the Account admin enables the setting
The user footer is inserted between the thumbnail image and the Account level text footer:
Header and Footer Images

The default email header mirrors the header you see if you log into your Adobe Sign account. It will contain either the default Adobe Sign logo, or the logo you have uploaded for your account/group.

The email image header will always be at the very top of the email content.

The default footer image is empty. If you insert a footer image, it will display at the bottom of the email (with only the safe listing message below it).

Both the email header and footer images need to be 600x200px graphics (png, jpg or gif).

To install either image:

Click on **Upload** button, navigate to the image you want to upload and select it.

Once uploaded, the graphic will appear to the right of the button.
You can remove the image by clicking the **Clear** button at any time.

Below is an example of a fully branded email:

Email header and footer images can also be set at the Group level (which will override the Account image).
Security Settings

Account, user and document security is Adobe Sign’s number one concern. Therefore, we provide several security options at the account level. We suggest reviewing the settings in this section and decide which will work the best for your use case.

User Access Security - SAML

If your company has a federated log in solution, Adobe Sign does provide 
SAML 2 options for user authentication. Configuring SAML will require that you claim your domain names.

Adobe Sing SAML settings can be found by navigating to: Account > Account Settings > SAML Settings
User Access Security

Authentication to the Adobe Sign app has multiple settings available so you can configure the security criteria to match your company policy regarding access.

User access security settings can be configured by navigating to: **Account > Account Settings > Security Settings**

**Single Sign-on Settings**

You can either allow or deny users in your account the ability to log in to Adobe Sign by authenticating through other services. It is recommended that you disable either (or both) of these settings if they are not used to keep the log in process to a single simple option for users.
**Remember-me Settings**

Enable this setting to enable the *Remember Me* setting when authentication to Adobe Sign. This setting remembers the authentication to the service (on the local system) for the time frame selected.

![Remember-me Settings](image)

**Login Password Policy**

The options under *Login Password Policy* set whether users should be required to change their password after a number of months, whether a previous password can be used as their new password, and how many log in attempts can be made before their userID is locked.

![Login Password Policy](image)

**Login Password Strength**

This setting allows you to adjust the strength or difficulty of the password set by users in your account.

![Login Password Strength](image)
Allowed IP Ranges

This option will only allow authentication to the Adobe Sign application when the request is coming from the specified IP address ranges.

Signer Identity Verification

If your users will be signing documents, this option will require them to log in to Adobe Sign before they can apply their signature. This ensures the individual signing is either the user or someone with the user's credentials.

Transaction Security

This section pertains to the security controls that are in effect while an Agreement is going through the signature process. These settings can be found by navigating to: Account > Account Settings > Security Settings

PDF Encryption Type

This setting defines the type of encryption applied to the document once it has been sent through Adobe Sign. This encryption ensures the document can be opened but cannot be edited. Each version of the encryption is compatible with different versions of Acrobat. The recommended option is 128-bit AES to ensure the document can be opened on most systems.
**Agreement Signing Password**

This setting applies to the Password Authentication option for recipients to access the document during the signature cycle. (Configured on the Send page when initially sending the agreement)

The setting limits how many attempts the recipient has to enter the correct password. Once this limit is exceeded, the Agreement is irrevocably canceled.

---

**Agreement Signing Password Strength**

This setting also applies to the Password Authentication option for recipients. The feature allows you to adjust the strength or difficulty of the password your Senders need to enter.

**Note:** The password this setting governs is embedded in the PDF, and not stored in the Adobe Sign system. If it is lost, there is no option to recover it.
Knowledge Based Authentication

This option controls the Knowledge Based Authentication (KBA) option for recipients on the Send page.

This limit dictates how many attempts the signer has to pass the KBA in order to access the document. Once the limit is exceeded the agreement is canceled. The difficulty of the KBA is also set here.

- **Default** - Signers will be presented with 3 questions and will be required to answer them all correctly. If they only answer 2 correctly, they will be presented with 2 more questions and will be required to answer them both correctly.

- **Hard** - Signers will be presented with 4 questions and will be required to answer them all correctly. If they only answer 3 correctly, they will be presented with 2 more questions and will be required to answer them both correctly.

KBA requires a social security number, so is only viable for recipients in the US.

Post-Transaction Security

These settings govern the PDF security of Agreements that have completed the signature cycle, and are fully executed.

*Certify copy of the documents for*

Find this setting by navigating to: **Account > Account Settings > Global Settings**

Adobe Sign will apply a Certificate (CDS) to any downloaded PDF for a completed transaction based on this setting. Certified PDFs readily show that the document has not been tampered with since being downloaded.

CDS will prevent any attempt to manipulate the PDF after download.
It is recommended that you enforce CDS at least for external recipients.

Signed Document Password Protection

Find this setting by navigating to: Account > Account Settings > Send Settings

This setting allows, forces or denies Senders the ability to set a password for the signed document. (This is different from the optional password to access an Agreement during the signing process)

If allowed or enforced, the Sender needs to supply the password, and communicate that password to any party that needs to review signed documents.

Note: This password is embedded in the PDF, and not visible anywhere in the Adobe Sign system. If you choose to use a password to lock access to the signed document, ensure you have a method in place to understand what those passwords are and retrieve them as needed.
Account Sharing

You can enable or disable the option for a userID to share the content of their user account to another userID.

Account Sharing

Find this setting by navigating to: Account > Account Settings > Security Settings

Account sharing allows one user to view (only) all the Agreement content of another user. This is great for managers that need to review the progress of their direct reports.

All shares that are created are one direction, there is no assumed reverse direction share that takes place.

If Account Sharing is enabled, the recommended option is to allow a user to ask to view another user’s account.

Advanced Account Sharing (Enterprise only)

For Enterprise customers that need to have a more “hands on” type of sharing that allows direct manipulation of agreements and library templates, Technical Support can enable Advanced Sharing.

Advanced Sharing is a one-way door. Once it is enabled, it changes the relationships of the shared objects in a way that cannot be reversed. For this reason, if you feel Advanced Sharing is important to your organization, it is recommended that you contact your Success Manager and have a trial account set up for you to test the functionality and verify it permits everything that you want to accomplish.
Agreement Settings

The settings in this section define the options available to a Sender when configuring an Agreement, and what the default value for those options will be.

In general, the recommendation is to reduce the number of options for the Sender to choose from or configure. Where possible, set a strong default value, and remove the option to edit that value.

This chapter will be broken into sections related to their effect on a transaction.

These settings can be found by navigating to: Account > Account Settings > Send Settings.

Note: These settings can be configured at the Group level to assure that each business unit can customize their sending experience and defaults as needed.

Recipients

"Recipients" is a generic term that refers to any userID included in the signature cycle, regardless to the assigned role. The following settings will define what types of roles those recipients can have, and what level of identity authentication you want to employ

Recipient Roles

Depending on the level of service you have, you will have access to various "roles" that define what type of actions your recipients can perform in the Agreement. More details on the various role authorities can be found in the knowledge base.

Allowed Recipient Roles

It is recommended that you only enable the roles you know you will need to better streamline the Senders experience.
Recipient Groups

Recipient Groups function as one signer, but that signer is a group of identified individuals. All members are notified at one time, and once one of the group members applies their signature, the Agreement moves to the next signer.

Recipient Groups

Enable this option if you have a need to define a group of signers for one signing event.

Recipient Authentication

Various methods of signer verification can be enabled for your users, with this setting. These methods are configured on the Send page as an element of the recipient record.

Identity Authentication Methods

It is recommended that you only enable the verification methods(s) that your internal policy demands.

- **Signing password** – Requires the signer to enter a predetermined password to sign the document. The password must be passed to the signer separate from the transaction. If this password is lost or forgotten, it cannot be recovered.
- **Knowledge based authentication** – Requires the signer to enter their Social Security Number and random identity questions will be generated by a third-party provider.
- **Social identity** – Requires signer to authenticate with one of the following services: Facebook, LinkedIn, Google, Twitter, Yahoo!, or Windows Live ID.
- **Phone (SMS)** - Requires the sender to provide a phone number for the recipient. The recipient will then get an 8-digit code they will enter and authenticate.
**Identity Authentication Methods**

Enable the following identity authentication methods for recipients:

- [ ] Signing password  
  - [ ] Track Usage
- [ ] Knowledge based authentication  
  - [ ] Track Usage
- [ ] Social identity  
  - [ ] Track Usage
- [ ] Phone authentication  
  - [ ] Track Usage

By default, use the following method:

- [ ] Email

**Sender settings**

- [ ] Allow senders to change the default authentication method

**Note:** KBA and Phone authentication are metered authentication methods that incur an additional cost. It is advised that you only enable the authentication method(s) you have high confidence you will use.

**By default, use the following method**

This setting will define the default external recipient authentication method. Only options that have been enabled will be selectable in the drop-down list.

**Sender settings**

This option either allows or denies the Sender's ability to change the default authentication method defined. Enable this option only if there are known situations where the Sender has need to elevate the verification process from the default.

**Internal Recipient Identity Authentication**

Checking this setting allows Senders to set a different method of verification for recipients that are internal to your Adobe Sign account.

The general recommendation is to leave the internal signatures as email verification, providing less authentication friction to your employees that may need to countersign a large number of Agreements per day. By also enabling the **Signer Identity Verification** feature (Security Settings), you can passively gain password verification without the signer having to explicitly authenticate multiple times.
Setting message templates (Business and Enterprise)

Enabling Message Templates for your account, allows the user to choose one of the email messages, predefined by you. This can ensure the correct message and information gets to your signers.

To enable message templates, navigate to Account > Account Settings > Message Templates
Message Templates

**Enable message templates**

Check the option to **Enable message templates**.

A link will be inserted at the top right of the message field (on the Send page) to allow selection of the template:

![Message Template Selection](image)

**Note**: For Enterprise customers, templates are linked to the *Recipients Language* option on the Send page. This limits the number of templates to scroll through for multi-language business units, and ensures that a message in the correct language is included.

**Allow senders to edit message content**

Either allow or deny users the ability to change the message template delivered to the Send page message field.

Enable this if you permit customizing Message content situationally.

How users can attach or choose documents

There is a lot of variability in how customers attach files to their agreements, and that is rooted in how the documents are created, managed and version controlled.

Customers that have "ad-hoc" files, content customized for each transaction, will likely need the ability to upload files from their local system. However, boilerplate templates that rarely change should ideally be served from one controlled source.
Attaching Documents

Please choose at least one way to attach documents

- Allow senders to attach documents from their computers
- Allow senders to attach documents from their document library
- Include documents from the Adobe Sign shared library
- Allow senders to attach documents from Google Drive
- Allow senders to attach documents from Dropbox
- Allow senders to attach documents from Box.com

Allow senders to attach documents from their computers
Unchecking this option removes the My Computer link from the Select Files pop-up on the Send page.

Allow senders to attach documents from their document library
Unchecking this option removes the Library Documents link from the Select Files pop-up.

Include documents from the Adobe Sign shared library
Unchecking this option removes the I-9, W-4 and W-9 documents provided by Adobe Sign.

Allow senders to attach documents from Google Drive
Unchecking this option removes the Google Drive link from the Select Files pop-up.

Allow senders to attach documents from Dropbox
Unchecking this option removes the Dropbox link from the Select Files pop-up.

Allow senders to attach documents from Box.com
Unchecking this option removes the Box.com link from the Select Files pop-up.
Setting default reminders

Reminders are emails sent to the recipients of documents when it is their turn to act. On a Daily or Weekly cycle, a reminder email is sent to the recipient, letting them know the agreement is still waiting for them.

Reminders

- Set a default reminder for agreements created by users in this account
- Choose the frequency in which you would like the reminder email sent
- The note entered will show in the reminder email sent to each recipient in turn

Note: Enabling default reminders will remove the option on the Send page for Senders to configure their own reminder, but still permits reminders to be configured on the Manage page.

Setting a default document expiration

In certain cases, you may want to expire or cancel documents that aren't signed after a certain number of days.

Once an agreement has expired, it cannot be restarted or retrieved and will show up under the Canceled/Declined section of the Manage page.
Document Expiration

Enable document expiration
Check the option to enable document expiration. This will reveal the options you can set for document expiration.

Allow sender to set or modify expiration settings per document
This opens the expiration option on the Send page, to all users in the account. Additionally, they can then adjust the default expiration set.

Allow modification of expiration settings after document is sent
Checking this option will allow users to adjust, extend or remove an expiration for an agreement after it has been sent.

Limit number of days signers will have to sign documents to:
This sets the number of days until the document expires.

Include internal signers when applying document expiration deadlines
If users in your account will be signing or counter-signing agreements, this option will make the expiration apply to them as well as external signers.

Include expiration information in email sent to signers
This adds the expiration date of the transaction in the email sent to the signers.
Users and Groups

Users

Users are generally added to an account because they will either be sending out agreements or be group or account level admins. Users that will be signing agreements do not need to be added, unless you want to control their ability to sign with account level settings.

User page features

To review or manipulate the users in your account, log in as an Account admin and navigate to: Account > Users

At the top of the User page, you will see a short summation of the number of licenses your account allows, and the number of active users consuming those licenses.

If this statement is missing, you have a site license, and can add an unlimited number of users.

The User page has three controls:
1. **Create a new user** – Opens a pop-up form that will permit you to create a single user, or upload a CSV to create multiple users at one time.

2. **Export user list** – Clicking the Export icon will generate a CSV file that lists all users in the account, regardless of their status (Active, Created, Inactive or Pending), as well as their personal (account) values (Name, Email, Title, Company, etc.)

3. **Options** – The options list filters what is displayed on the page. By default, only Active users are displayed. You have the option to show All users, or only Inactive users. Further, there are three options for how many users should be shown per page (15, 30 or 50)

### How to Create a User

To create a single user:

- Log in as an Account Admin, and navigate to **Account > User**
- Click the "plus" icon to create a new user. The *Create* pop-up will open.

![Create User Pop-up](image)

- Enter the email address, first name and last name for the user you want to create. Make sure all this information is correct, especially the email address. Once the user is created the email address cannot be changed until the email entered is verified. If there's an error in the email, it can't be verified.
Check the View Their Agreements option if you want to setup a share for this user to yours. This will give you visibility of all the user's agreements.

Once you're done and all the information is correct, click the Save button.

You will be returned to the User page.

Click the Options icon and select Show All Users

By showing All Users (vs Only Active Users) you will see the new userID with a Created status.

Once the user sets their password, the userID will convert to an Active status.
Note: Adobe Sign users exist in one of five statuses:

- **Active** – A fully enabled userID consuming one license.
- **Inactive** – A fully disabled userID. Inactive users cannot access the Adobe Sign application for any reason, including being a recipient to other agreements.
- **Created** – A userID that has been created by an Admin, but has not yet set their password and activated the userID. Created users do not consume a license.
- **Unverified** - A user that has changed their email address, but has not yet clicked the verification link that was sent to affirm the email change. The account is technically still Active, just locked until the email change is confirmed, so Unverified users consume a license and display in the Show Only Active Users filter.
- **Pending** – Pending userIDs are recipients. They have not been created by an admin, do not have passwords, and so they cannot log in. Pending users do not consume a license.

At any time, a Pending userID can be registered and converted to an Active status, and will have a full history of all the Agreements they have ever been party to.

How to Deactivate/Reactivate a user

**Deactivating a userID**

Sometimes the need to deactivate a user may arise. The individual could have left the company and you want to keep that user and related documents secure. As mentioned above, making a user inactive keeps anyone from logging in, sending or signing documents with that userID.

To convert a userID to Inactive:

- Log in as an Admin and navigate to **Account > Users**
- Single click the userID you want to inactivate. The possible actions for the user will appear at the top of the user list.
• Click the **Deactivate User** link. This will open the Deactivate User pop-up window.

Within the **Deactivate User** pop-up, you have the option to force a share of all agreements to yourself. This is useful if the user being deactivated has content that you may need to recover at a future date.

To complete the deactivation process, click the **Yes** button.

The userID will convert to the **Inactive** status and the password for the userID will be voided, making the userID completely inaccessible.
**Reactivating a single userID**

Reactivating a userID follows the same process as deactivation:

- Log in as an Admin and navigate to **Account > Users**
- Click the **Options** icon and select **Show Only Inactive Users**

- Find the userID you need to reactivate and single click it to expose the links at the top of the user list

- Click the **Reactivate User** link
A green banner should appear indicating you have successfully reactivated the userID. The reactivated userID converts to an **Active** status, but the password is still expired for the user.

An email will automatically be sent to the user requesting that a new password be installed. Once the password is reset, the user will have full access to all the historic content of the userID.

The user can also use the *I forgot my password* link on the log in page to reset the password.

**How to promote a user to admin**

There are three levels of authority in Adobe Sign:

- Users
- Group Administrators
- Account Administrators

All users created individually will be basic Users.

If you need to elevate the authority of any userID, you can do so by:

- Log in to Adobe Sign as an Account admin
- Navigate to **Account > Users**
- Find the userID you want to promote, and select that user to expose the action links at the top of the user list.
- Click the **Edit user** link. This will open the *Edit* pop-up
Within the Edit pop-up window, you have the option to enable the userID as a Group Admin, Account Admin or both. Check the appropriate authority option for the userID:
- Account Admins have full authority within Adobe Sign to edit settings or add users at either the Group or Account level.
- Group level Admins only have authority within the group they belong to.
- Click **Save** when done.

**Note:** Adobe Sign does not limit the number of Admins (Account or Group) that can exist within an account. It's possible (but not generally recommended) to promote all userIDs within your account to the Account Admin level.
Creating Users in Bulk

Creating Users in bulk is a process of defining all users in a CSV file, and then uploading that file to Adobe Sign.

Adobe Sign creates all users and immediately sends them emails to set passwords and activate the userIDs.

**Note:** It's worth pointing out that this process can also be used to edit the profile values for all the users in your account.

For example, if you have changed your company name, you could export your full user list, edit the value in the Company column, save it, and then upload that CSV back to Adobe Sign. All the userIDs on your CSV will update their Company name values without having to involve the various users.

To create users in Bulk:

- Log in as an Account Admin, and navigate to **Account > User**
- Click the “plus” icon to create a new user. The *Create* pop-up will open
- Click the **Create users in bulk** tab

![Create users in bulk](image.png)
Note: Three options exist:

- **Allow Create Users** - Deselecting this option only allows you to update existing users. If an e-mail address that is not in your account is provided, no user is created.
- **Allow Update Users** - Deselecting this option only allows you to create users. If an e-mail address of an existing user in your account is provided, the user is not changed.
- **Allow Create Groups** - Deselecting this option keeps you from creating groups. If a nonexistent group name is provided for a user, the group is not created, and the user is put in the Default group instead.

- Click the **download sample CSV file** link. A CSV file will download to your system.
- Open the sample CSV
- Delete the three rows of example data. Leave the first (header) row
- Enter the values needed for the new userIDs you want to create.
  - When creating new users, the required columns are:
    - Email Address
    - First Name
    - Last Name
  ```
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<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
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  ```

- Delete any columns you are not using
- Save the CSV (make sure the saved file is still a CSV and not some other format)
- Click the **Browse** button, and select your CSV
- Click **Import** to upload the file
Once the file is imported, Adobe Sign will generate all the userID.s, and a green banner will appear informing you of the number of users created.
Groups (Business and Enterprise)

Groups allow you to set specific settings for the users inside that group. This means, for example, your sales team can use Adobe Sign differently than your accounting department.

How to Create a Group

To create a new Group:

• Log in as an Account Admin and navigate to Account > Groups

Note: The Groups page has two controls:

1. Add a new group - Opens the window to create a new group.

2. Options - Controls how many records (15, 30 or 50) are displayed on the page at any time.

• Click the Add a new group icon, and the Create window will pop-up requesting the name of the group.

Create

Group Name: APAC - Sales

[Cancel, Save]
- Enter the name of the Group
- Click **Save**

Once the **Save** button is clicked, the Group is created and will display in the Group list.

### How to Add Users to a Group

Once your new group is created, the next step would be to add users to it. Adobe Sign provides three methods, depending on how many users need to be moved:

- Move a single User via the User profile
- Move multiple Users using the *Bulk Create/Edit Users CSV*
- Move multiple Users using the *Assign Users to Group* tool

### Moving a single User via the User profile

To assign a single User to a Group:

- Log in as an Admin and navigate to **Account > Users**
- Double click the specific userID you want to edit. This opens the User info panel
- Click the **User Group** drop-down box to expose the options
- Select the group the User is to be assigned to
- Click **Save**
Moving multiple Users using Bulk User Edit

The *Create Users in Bulk* feature can also be used to edit existing users.

This method tends to be better when you have multiple values you need to change in addition to just the Group setting, but if you are fully restructuring, bulk update may be the way to go.

To update your User Groups via Bulk Update:
• Log in as an Admin, and navigate to Account > Users
• Click the Export user list icon. A CSV will download to your system with the full list of users in your account

![Users table]

Your license allows a maximum of 10 active users and your account currently has 2.

- Search

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Member Of</th>
<th>Status</th>
<th>Last Login</th>
</tr>
</thead>
<tbody>
<tr>
<td>Casey Jones</td>
<td><a href="mailto:casey@caseyjones.dom">casey@caseyjones.dom</a></td>
<td>NA - Sales</td>
<td>ACTIVE</td>
<td>03/01/2017</td>
</tr>
</tbody>
</table>

• Open the downloaded CSV, and delete any columns you are not going to use
  - In the case of simply assigning users to groups, you only need:
    - Email Address
    - First Name
    - Last Name
    - Group Name
• Delete any rows of Users that you do not need to update
• Save the CSV (Make sure that the format remains CSV)

![CSV table]

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Email Address</td>
<td>First Name</td>
<td>Last Name</td>
<td>Group Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td><a href="mailto:blue@caseyjones.dom">blue@caseyjones.dom</a></td>
<td>Blue</td>
<td>Ox</td>
<td>APAC - Sales</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td><a href="mailto:casey@caseyjones.dom">casey@caseyjones.dom</a></td>
<td>Casey</td>
<td>Jones</td>
<td>APAC - Sales</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td><a href="mailto:jeanie@caseyjones.dom">jeanie@caseyjones.dom</a></td>
<td>Jeannie</td>
<td>Jones</td>
<td>APAC - Sales</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td><a href="mailto:elmo@caseyjones.dom">elmo@caseyjones.dom</a></td>
<td>Elmo</td>
<td>Kappernic</td>
<td>APAC - Sales</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td><a href="mailto:hester@caseyjones.dom">hester@caseyjones.dom</a></td>
<td>Hester</td>
<td>Mackladang</td>
<td>APAC - Sales</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

• Click the “plus” icon to create a new user. The Create pop-up will open
• Click the Create users in bulk tab
• Browse to select the CSV file you just saved
• Click Import
Once the Import button is clicked, the users will be updated in the system with the new values on the CSV. A green banner will appear at the top of the page to indicate how many users were updated.

Assign Users to Group from within the Group Settings

When you need to move multiple users to a new group, but the scope of the move isn't large enough to warrant using Bulk User Edit, the best option is to use the Assign Users to Group option within the Group settings.

To access the Assign Users to Group feature:

- Log in as an Account Admin and navigate to Account > Groups
- Double-click the group you want to move users into. This opens the Group level settings
  - You can also single click the group to select it, and then click the Group Settings link
• Click the **Users in Group** option on the left rail
• Click the **Add users to group** icon

The Assign Users to this Group window will open, showing all the Active Users that are not currently assigned to this group.

• Click the **Options** icon, and select **Show All Users**
• Double click any User you want to move to the Group. The selected users will populate in the Selected Users field at the bottom of the window.
  ○ To remove a user from the Selected Users field, click the X next to the email
• Once all users are selected, click the Assign button
Group level Admin authority controls

Account level Administrators can define the scope of the Group Administrators authority via three settings:

- Group Administrators can add new users to their groups.
- Group Administrators can edit settings for their groups.
- What report data can group admins see?

These settings are ubiquitous for all group admins, and offer no deeper granularity. If you disable the ability for Group Admins to add users, that will apply to all Group Admins within the Account.

To adjust the first two settings:

Log in as an Account Admin and navigate to Account > Account Settings > Global Settings > Group Admin Related Settings

Enabling **Group Administrators can add new users to their groups** will grant any Group Admin the authority to add any user to their group with all normal restrictions applied.

Normal restrictions include situations like:

- The user is in another Group/Account
- The user’s email domain is not an approved domain for the account

Enabling **Group Administrators can edit settings for their groups** allows the Group admin to over-ride the Account level settings for their group.
To edit the **What report data can group admins see?** setting, navigate to **Account > Account Settings > Report Settings**

**Adjusting Group level settings**

All groups will inherit the account level settings by default. However, it is possible to override most of the account level settings at the group level. This is particularly valuable if you have select users in need of special recipient roles, recipient validation methods, or even unique branding.

Account admins will navigate to **Account > Groups**, and then double click the Group to open the group level settings, or single click the group and select **Group Settings** from the link options at the top of the list.
If Group level admins have been given the authority to change Group level settings, they only need to click the **Group** link at the top of the page to open the settings.

All of the settings presented to group admins are the same as the account level settings and function in the same way.
Library Templates

A library template is a reusable document object. Adobe Sign supports two types of library templates: document templates and form field templates.

- **Document Templates**—A document template is a reusable document. Document templates can be shared with other users in your account, allowing multiple users to send out the same document without needing to make any changes.

- **Form Field Templates**—A form field template is a reusable field layer that can be applied to any document. Form field templates can also be shared with other users in your account. Form field templates are ideal in the following situations:
  - You have one field layout that works for multiple documents.
  - You have a document that can be sent several different ways.
  - You need to revise document’s content, but the fields remain in the same place.

Instead of creating a new library document every time a document is updated, the same form field layer can be applied. Form field templates can be edited to facilitate changes in the arrangement of fields or field properties. Again, all the tools in the authoring environment are available when creating a form field template.

As a best practice, a single user (Document Administrator) should be responsible for creating and maintaining templates. Creating a Doc Admin userID eliminates confusion as to what templates to use and provides version control for your reusable documents.

We recommend using a distribution list or functional email for the Doc Admin user login. This allows you to control access to this Doc Admin login while at the same time allowing the responsibility to be shared as needed.
Creating a Reusable Document

1. Click the **Dashboard** tab. Then, in the **Additional Functions** panel, click **Add Template to Library**.

The *Create a Library Template* page displays:

![Create a Library Template page](image)

- **Template Name**: Enter a name for your template.
- **Document**: Select a file to use as the template.
- **Template Options**: Check **Create as reusable document**.
- **Grant Permissions**:
  - **Only to me**
  - **Any user in my group**
  - **Any user in my organization**

**Create a document**

- **You Send**: Send your document to anyone who needs to fill it out. It only takes seconds.

**They Sign**

- They can e-sign instantly, or fax their written signature back into Adobe Sign.

**You’re Done**

- After everybody signs the document, PDF copies are immediately e-mailed to all eligible parties. We also file searchable copies of every signed form in your Adobe Sign account.
2. In the Template Name field, enter a name for your template. This can be changed later if necessary.

3. Click the Browse button to navigate to the file on your local system to be used to create your reusable template. If you are creating a reusable document, this file and its content will be used. If you are creating a reusable form field layer, the content of the file will not be included in the template.

4. Select the appropriate Template Option, either Create as reusable document, Create as a reusable form field layer, or both.

![Template Options](image)

5. Select the appropriate permissions option for sharing the template. When building and testing a new template, it is recommended that you set the permissions to just yourself, and then expand access once you are satisfied the document is working as intended.

![Grant Permissions](image)

**Note:** Group permissions can only be granted to the group you are currently in. You cannot grant permissions to other groups.

6. Click the Preview or Add Fields button. The Authoring experience displays.
7. Place the required fields that are for the intended participants by dragging them from the form fields tabs and dropping them onto the document.

8. When you're done adding fields, click the Save button.

The template will now display under the Library Templates section of your Manage page. If you have shared the template with users in your group or in your organization by granting permission, the template now also displays in the Library Templates section of their Manage pages, and they can use it to send as often as they like.

Note: Only the user who created the library template can edit it or delete it.
Editing Template Permissions

The access permissions for any template can be edited by the creator of the template. To do so:

- Log in as the template owner
- Navigating to the Manage page
- Find the template to be edited and clicking the edit link

This will open the template in the Authoring environment.

At the top of the right rail, you will see Template Properties.
Click the Template Properties header to expand the section and you will see the available options:

- **Template Name** – You can readily change the template name at any time.
- **Template Type** – At any time you can convert the available template to make it available as a document, form field overlay, or both
- **Who can use** – This setting dictates which users will have access to the template.

### Note:
You can only share a document to the Group your userID is a member of. If you are authenticated as an Account admin, make sure to move your userID to the correct group before changing the template properties from "Only Me" to "Any user in my group".
Reports (Adobe Sign – Business and Enterprise)

The report feature lets you check on how your account is using Adobe Sign. Build your own reports and gain complete visibility into your document signing process, while seeing how individual groups or users are doing.

To create a new report, navigate to the Reports page by clicking the Reports tab, then click on the Create a new report link.
The *Create a New Report* page displays:
Report Parameters

When setting up a report, multiple parameters can be set to customize the results. All the parameters described below are available.

Creation Date

The creation date is the time frame you want the report to encompass. This can be one of the four predetermined time frames (this week, last week, this month, last month) or enter a custom date range.

Users & Groups

This parameter lets you run the report on specific users or groups. One or more can be chosen for either, or you can run the report against all users in the account.
Documents & Workflows

Specific documents can be chosen to include in the report with this option. The documents listed in this field are the library documents used throughout the account. Individual, one-off documents will not be listed here.

Document Name

This parameter is used to include or exclude documents that contain or do not contain a given variable. You can choose to include or not include the string entered.

Mega Sign

Enabling this parameter includes Mega Sign agreements in the resulting report.

Performance Goals

You can set thresholds for performance, using the Performance Goal view. The gauges reflecting performance are displayed in the resulting report.
**Benchmark**

By default, the benchmark parameter is disabled for reports. Click the report settings link to enable it.

Benchmarking provides an expanded method for keeping track of agreement progress and signing rates.

![Benchmark Configuration](image)

**Graph Agreements By**

Each enabled option (by Date, Sender, Group, Form, Workflow, and Signature Type) provide a different type of graph on the report.

![Graph Agreements Configuration](image)

**Et Cetera**

The parameters in this section are for altering the graphics on the resulting report. Changing these from the default parameters can speed up the report process.

![Et Cetera Configuration](image)
Report Results

Once you click the **Run Report** button, the report will be generated based on your parameters. There are multiple actions you can take with your report.

**Update Report with Current Data**

Clicking this link is like refreshing the page. The new report will include recent transactions and activity.

**Save Report**

Saving the report allows you to run this report again in the future.
**Share Report**

Sharing allows you to send the report results to someone else. You just need to enter their email address and a message.

![Share Report Image]

**Schedule Report**

Setting a schedule for this report will run it with the same parameters at the frequency you define.

![Schedule Report Image]
**Export Report Data**

Clicking this link will prompt you to open or save a .CSV file. CSV files can be opened in Excel and all transaction information for the agreements in the report, will be categorized in the various columns.

**Printer-Friendly Version**

Clicking this link will open a printer-friendly version of the report.

**Edit Settings**

This link will open and permit editing of the configured parameters for the report.