

Adobe Sign at the University of Illinois

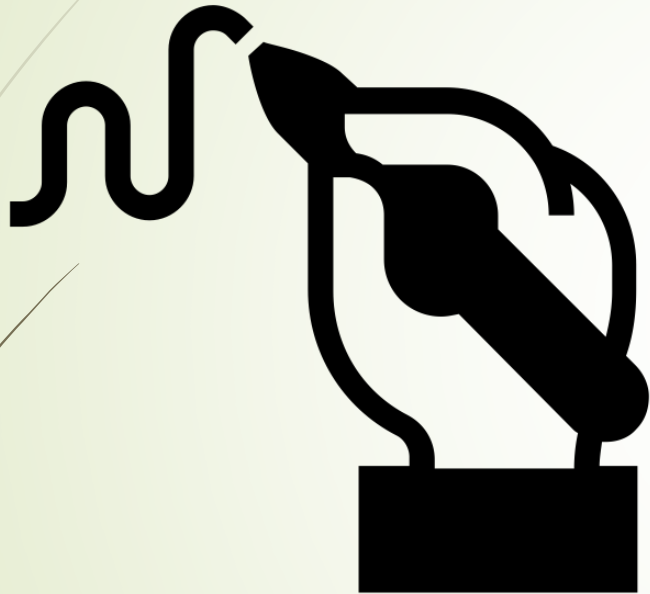
Julie Wagner

juliew@illinois.edu

Records & Information
Management Services Coordinator



Overview

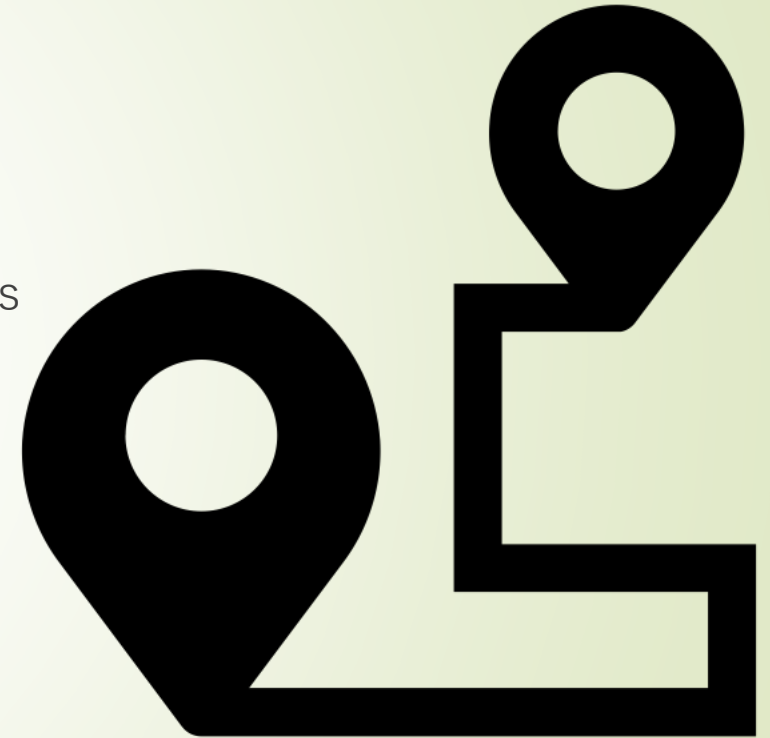


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from Noun Project

- History of eSignatures at the University of Illinois
- What is an eSignature and how does Adobe Sign help?
- Current stats
- Review of custom features
- KnowledgeBase resources
- Questions

History of eSignatures at the University of Illinois

- **2016** RIMS exploration of e-signatures
 - Adobe Sign vs DocuSign
 - Authorization Methods Task Force recommendations
- **2017** RIMS supports DocuSign “pilot”
- **2020** University Leadership engagement
 - E-signature policy
 - Procurement of e-signature tool



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from Noun Project

What is Adobe Sign?



Adobe Sign is an electronic signature application that allows users to securely sign, initial, and enter other information on an electronic document rather than a physical copy.

Benefits:

- Faster signatures
- More visibility in the approval process
- Easier storage

<https://web.uillinois.edu/esignature/>

Some details...



- **FREE** for all University departments to use
- No transaction limits (currently)
- Generate reports on usage metrics easily to share

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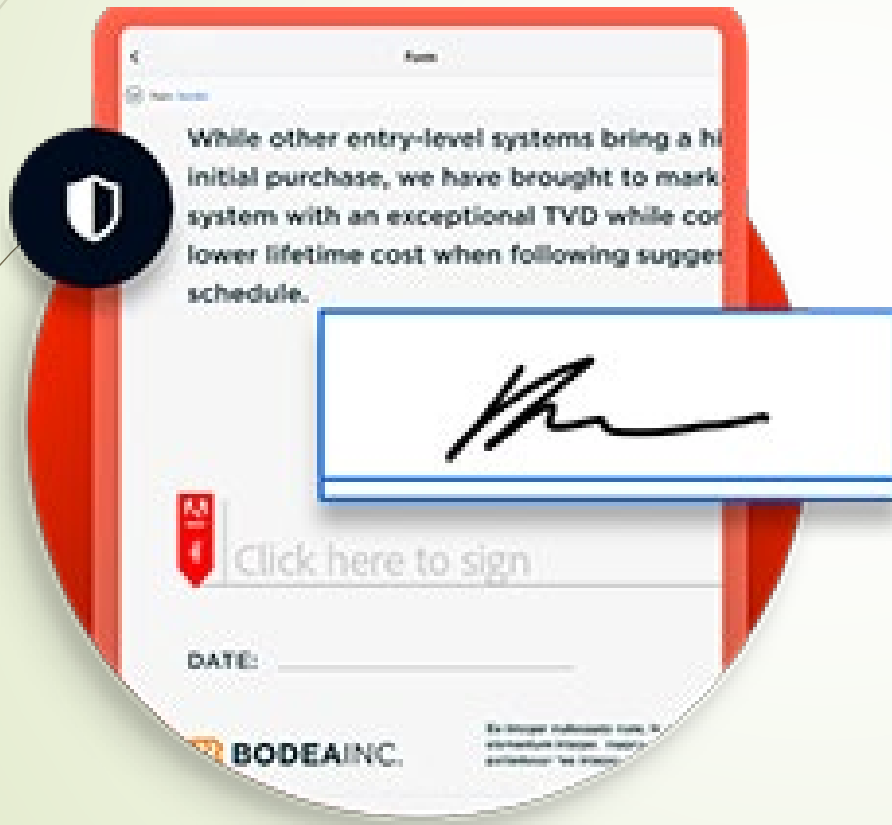
Access Distribution

- ▶ Unit Security Contacts (USCs) must initiate process for the office through <https://web.uillinois.edu/esignature/>
- ▶ USC will nominate a Group Admin to control permissions and add members to group once established



Created by Gregor Cresnar
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eSignatures: What are they?



- Legally binding
- Efficient
- Cost-effective

Digital signatures

- ▶ A step above the regular eSignature
- ▶ Uses a digital certificate issued by a TSP
- ▶ More advanced audit trails in envelope



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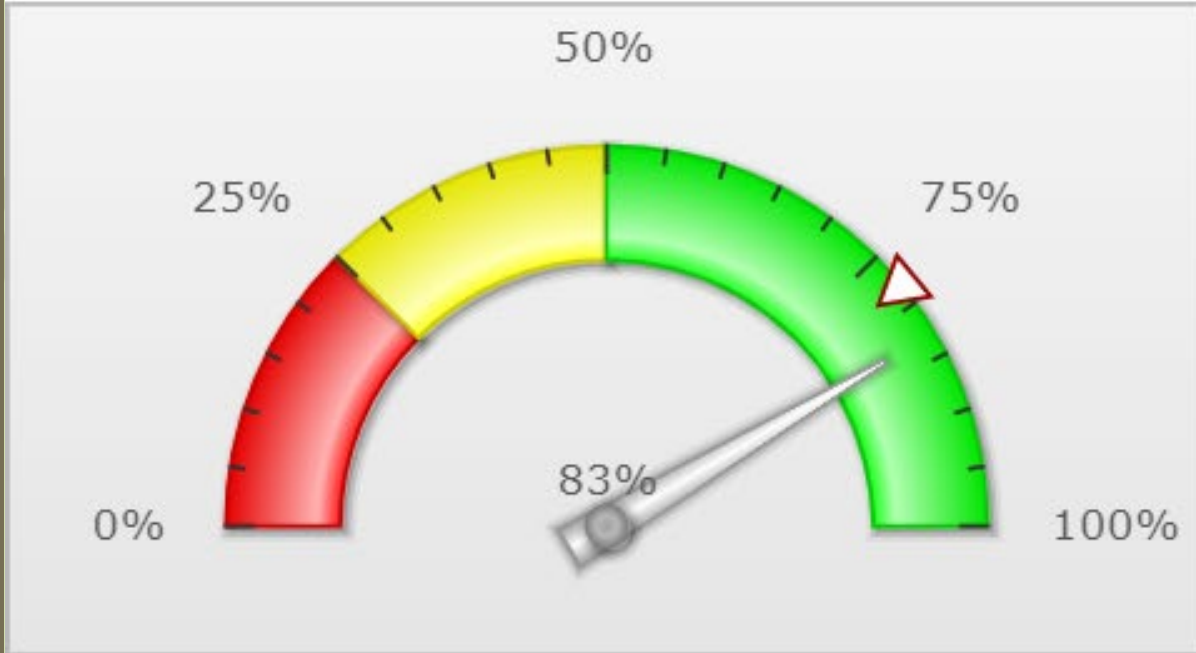


Usage Levels in 2020

TOTAL SENT	13,513
Canceled or Rejected	1,287
In Process	467
Completed	11,166 (83%)
Expired	593
Unique Senders	3,020

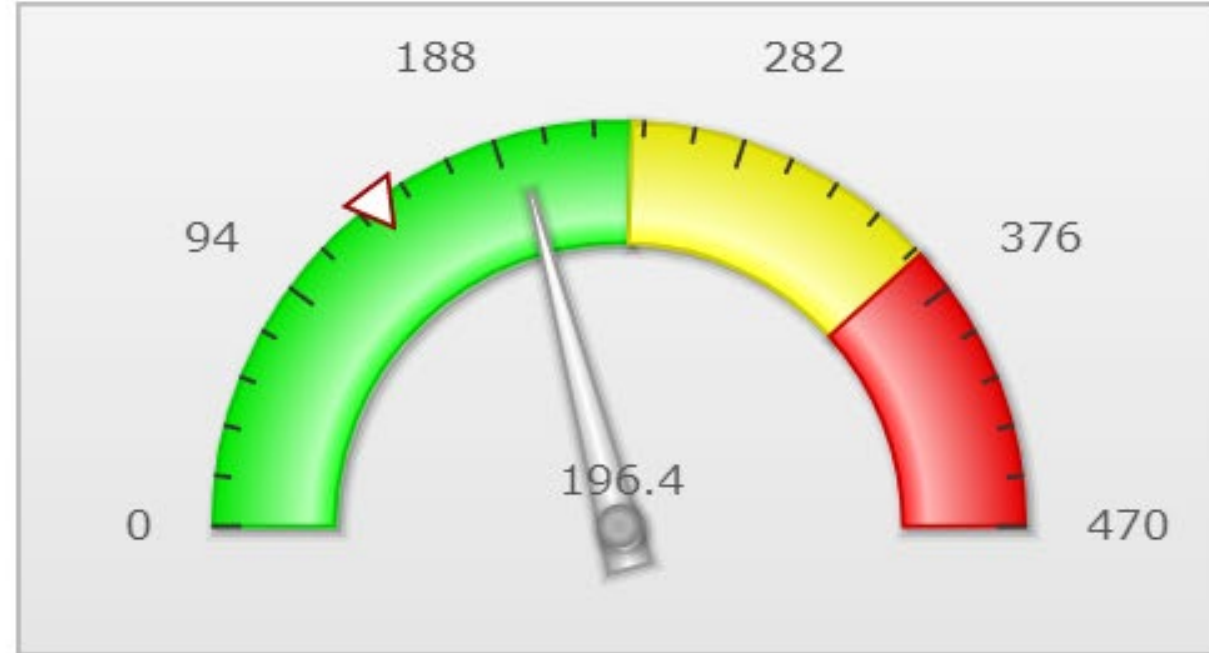
Date Range: January 1, 2020 – December 31, 2020

Agreements Completed: 83%



Benchmark: All Adobe Sign Customers - 78% signed

Median Time to Complete: 196.4 minutes



Benchmark: All Adobe Sign Customers - 139 minutes



Let's explore!



Created by Jugalbandi
from Noun Project

Adobe Sign is highly customizable
for your department's needs!

- Basics
- Templates
- Workflows
- WebForms
- APIs

Welcome, Casey

5 IN PROGRESS

1 WAITING FOR YOU

 EVENTS AND ALERTS



Send a document for signature

Request signatures on a new agreement, or start from your library of templates and workflows.

[Request signatures](#)

[Start from library](#)

Do more with Adobe Sign



Fill and sign a document



Publish a web form



Send in bulk with
Mega Sign



Create a reusable
template



Manage and track all
agreements



Enhance your account

Send and manage signatures
on the go with our mobile
app. [Learn More](#)





Basics

- Build your documents with drag & drop fields that are customizable
- Route envelopes to multiple parties easily and adjust their roles
- Attach custom messages
- Track your envelopes once sent for progress



Relative to Page

Primary_Signer_Signal ▾

Signature Approvals

Client

*Signature

Signature

*Full Name

Name

*Title

Title

Date

Date

GlobalCorp Rep

*Signature

Signature

*Full Name

Name

*Title

Title

Date

Date

Co-Signer

Signature

Name

Title

Date

GlobalCorp Exec

*Signature

Signature

*Full Name

Name

*Title

Title

Date

Date

RECIPIENTS

calliope@jupiter.dom
(Signer)



Casey Jones (me)
(Prefill)

mymanager@caseyjones.dom
(Approver)

calliope@jupiter.dom
(Signer)

Casey Jones (me)
(Signer)

mymanager@caseyjones.dom
(Acceptor)

Anyone

Send

Reset Fields



CLIENT SERVICES AGREEMENT

Client Information

Company Name			
Address		Contact	
Phone		Email	
Fax		Website	
Order Number			

Client Services

Client Services	Investment
New Customer Program <ul style="list-style-type: none">• New client onramp• Survey evaluation• Set up properties and processes• Connect to vendor channels• Marketing services• Staff training• Customer service 24/7/365	

Enter Payment Information

PO Number	
-----------	--

TERMS AND CONDITIONS



1 / 2



Template Properties

RECIPIENTS

Participant 1

Signature Fields

Signature

Digital Signature

Initials

Signature Block

Signer Info Fields

Data Fields

More Fields

Stamps

Save

Reset Fields

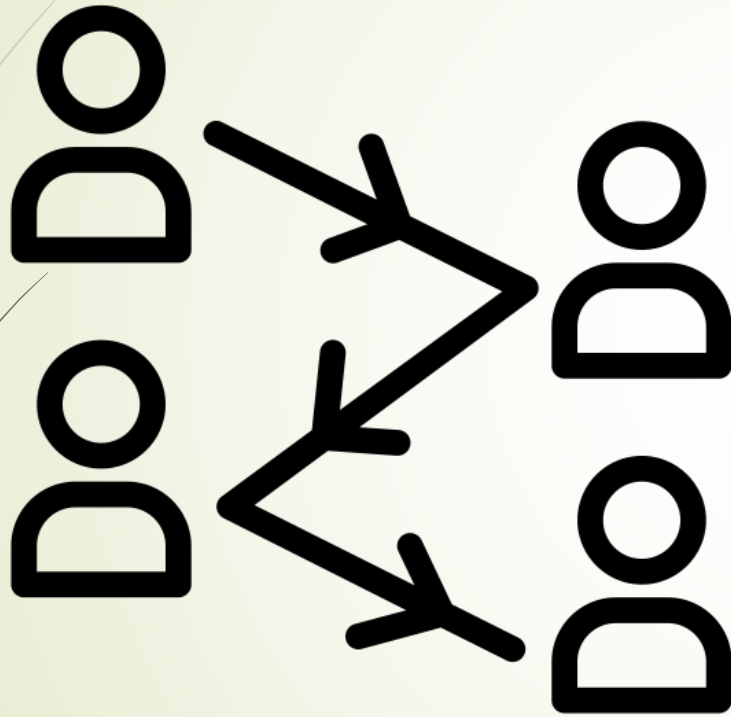
Templates

Keep your built documents and re-use them on-demand in your personal or group library



Created by joe pictos
from Noun Project

Workflows



Created by Andi Nur Abdillah
from Noun Project

- Administrators build workflows to streamline processes that take place with AS environment
- Make the process easier AND less error-prone

Service Contract

How this workflow works?


- CoSigner is an optional signer

[more](#) ▾



Recipients

Signer *

 Enter recipient email	 ▾ KBA
---	---

Co Signer

 Enter recipient email	 ▾ KBA
---	---

Sales Rep *

 Enter recipient email	 ▾ Adobe Sign
---	--

Exec Approval

 Enter recipient email	 ▾ Adobe Sign
---	--

Document Name *

Service Contract 2018

WebForms

- Self-service documents that you build then embed on your website
- Can also be sent as a link
- Each signer initiates the process individually then the document is routed to counter-signers



Created by Jason Tropp
from Noun Project

Create a web form ?

You can create reusable web forms that you share or embed on your website for visitors to easily fill and sign.

Web Form Name 2

GlobalCorp Client Services Agreement

Web Form Recipient Role 3

 Signer

Web Form Authentication

 None

Counter-Signers (optional) 4

[Add Me](#)

1	 Myself	 Email	
2	 Enter recipient email		

[Show CC](#)

Files

5 [Add Files](#)

 GlobalCorp Client Services Agreement.pdf	
Drag More Files Here	

Options 6

Password Protect

Password must contain 3 to 32 characters.

SomeC00lPassword!

SomeC00lPassword!

Show password

Recipients' Language

English: US

7

Preview & Add Signature Fields

Next



UNIVERSITY OF ILLINOIS SYSTEM

Electronic Signatures:

Adobe Sign Access Request Form

Access Request

This access request must be completed by a [Unit Security Contact](#) (USC) on behalf of a department. Once a request is approved, a new [group](#) will be created in Adobe Sign with the [Group Administrator](#) listed below as the initial member of that group. That person can then provide access to others in their department as senders and/or additional group admins. A person can be a member of only one group.

A separate request form is required for each new group, but related departments (e.g., several small sub-units of a college) can share a single group if desired.

Unit Security Contact

Name: * Email Address: *

Group Administrator (must be different from the USC)

Name: * Email Address: *

Department: * Department Code: *

Data Classification

Please indicate below if any [High Risk or Sensitive data](#) is anticipated to be collected with this software by the department.

- | | |
|---|--|
| <input type="checkbox"/> Banking Information (GLBA) | <input type="checkbox"/> Passwords or similar |
| <input type="checkbox"/> Driver's License Number (PIPA) | <input type="checkbox"/> Social Security Number (PIPA) |
| <input type="checkbox"/> Network/System Diagrams/Configuration | <input type="checkbox"/> Student Health Information (PIPA) |
| <input type="checkbox"/> Non-Disclosure Agreement (NDA) information | <input type="checkbox"/> Student Records (FERPA) |
| | <input type="checkbox"/> Other |

Adobe Sign currently must not be used for these data classifications. [Contact us](#) if you require these

Start

REST APIs



- Build your own!
- Use Adobe's library of standard APIs that you can customize
- Visit Adobe's Developer page for more information:
<https://adobe.ly/3ppUbN6>

Have more questions?

UNIVERSITY OF ILLINOIS SYSTEM

ANSWERS & SUPPORT

Search the KB...

[Topics Map](#) > [Software Applications](#) > [Adobe Sign](#)

Adobe Sign - What is Adobe Sign and how do I use it at the University of Illinois?

The University of Illinois uses Adobe Sign for e-signatures. Adobe Sign is a digital signature application that allows users to securely sign, initial, and enter other information on an electronic document rather than a physical copy. High use forms have already begun to be incorporated into Adobe Sign, with more forms being added weekly.

E-Signatures at the University of Illinois	How do I sign an electronic document?	Adobe Sign Tutorials	Tips for USCs and Group Admins	Adobe Sign Troubleshooting
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<https://answers.uillinois.edu/systemoffices/99719>



Get Started Today!

- ▶ Visit: <https://web.uillinois.edu/esignature/>
- ▶ Unit Security Contacts can jumpstart the process by requesting access!
- ▶ Additional help and guidance is available through the AITS Service Desk and KnowledgeBase.

Questions?

Visit the KnowledgeBase:

<https://answers.uillinois.edu/system/offices/99719>

Ask the Service Desk:

servicedesk@uillinois.edu

Schedule a One-on-One:

juliew@uillinois.edu



Created by Adrien Coquet
from Noun Project