



## WORK ANYWHERE WITH ADOBE DOCUMENT CLOUD

# Set up a workflow in Adobe Sign

Often you have forms with multiple signatures and need routing logic, or even calculations. Let's see how to use Adobe Sign's Workflow Designer tool to help streamline the process.

### Requirements:

1. An Adobe Sign account

**Please note:** *If you do not have an account already, please contact your Adobe team or IT administrator.*

2. A PDF form to post

*This example will show the process using HomeCare Requisition Form, which you can find attached to this document for your own use.*

### This guide covers:

#### PART 1

Create a document template with form fields, ready to send. [Start >](#)

#### PART 2

Set up a new workflow to route the agreement in pre-determined steps, then put that workflow to use. [Start >](#)

#### PART 3

Track the progress of the workflow. [Start >](#)

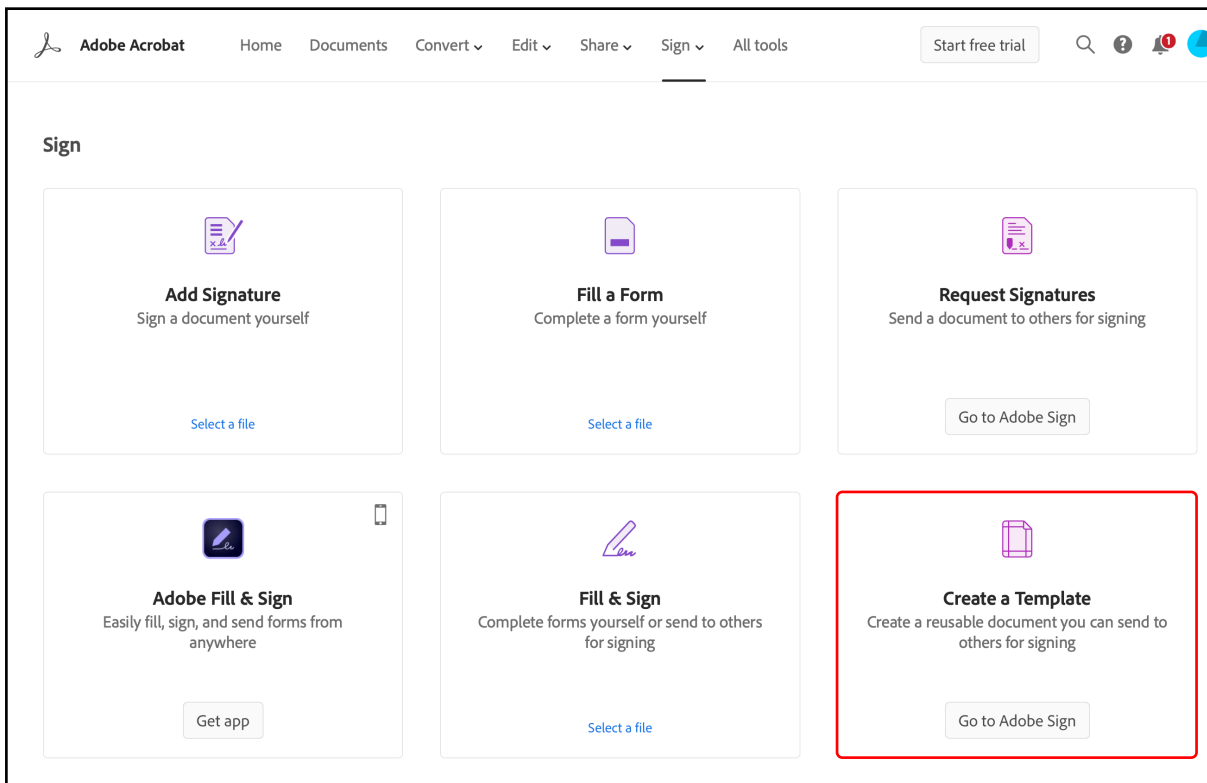
**Note:** *If your Adobe Sign account doesn't show you the option to create a workflow, check with your account administrator to verify that the feature has been enabled in Global Settings.*

## PART 1

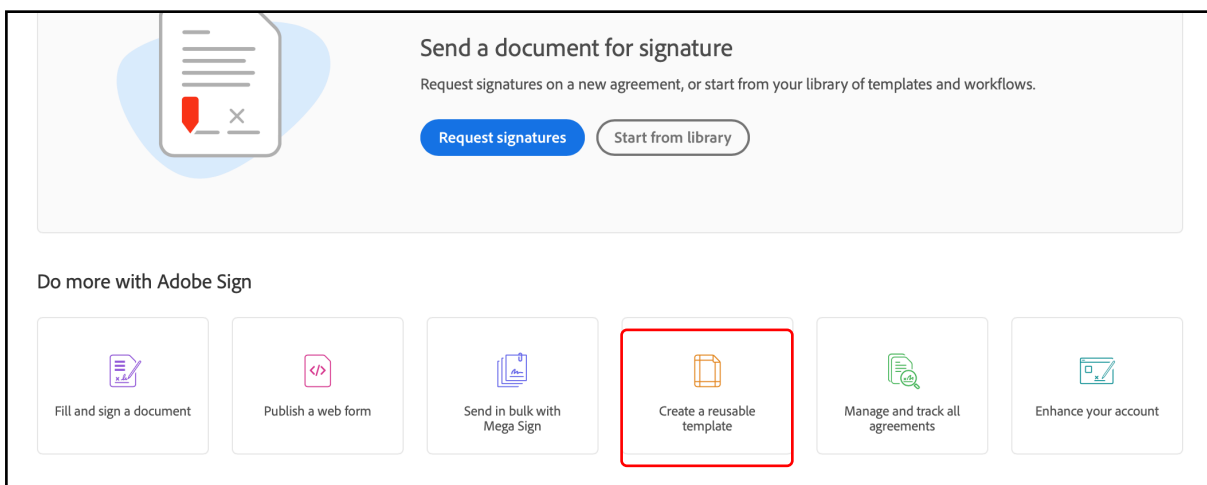
# Create a library template

To set up a workflow in Adobe Sign, you'll need an existing library template to work from. In this first step, we'll set up a template that you can access from your library at any time, whether using it in a workflow or just sending it out for signature.

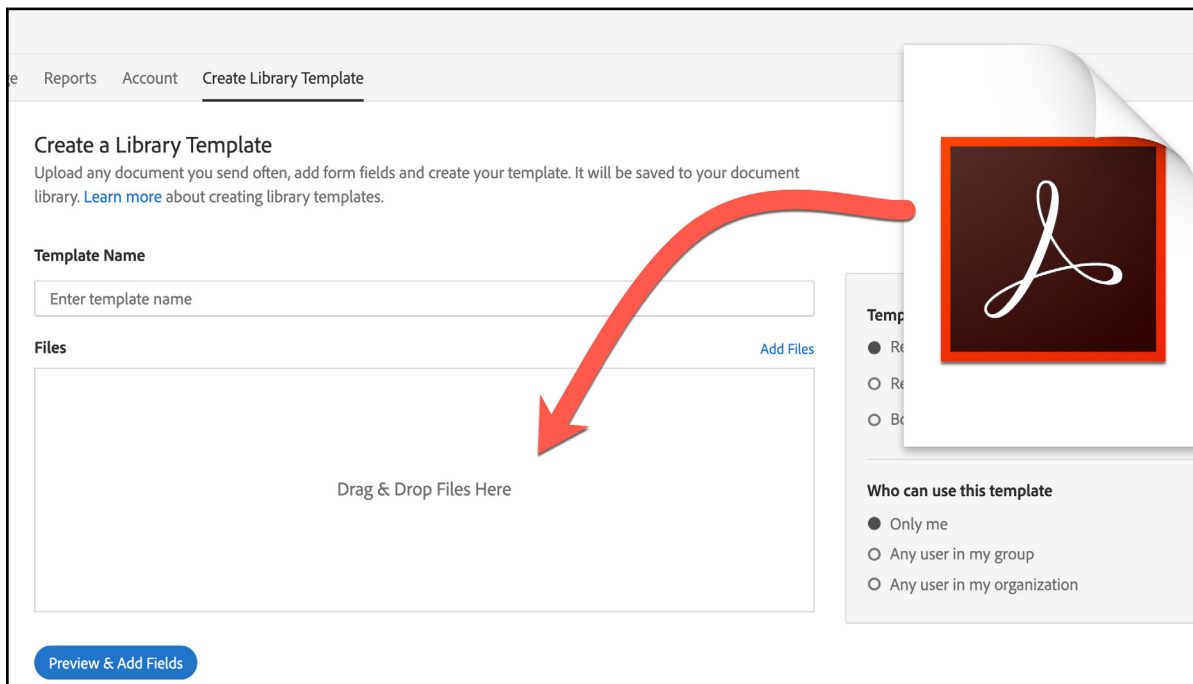
1. In your web browser, navigate to <https://documentcloud.adobe.com>.
2. Sign in using your username and password credentials.
3. From the top menu bar, hover over **Sign**, then select **Request Signatures**. This will take you to Adobe Sign.



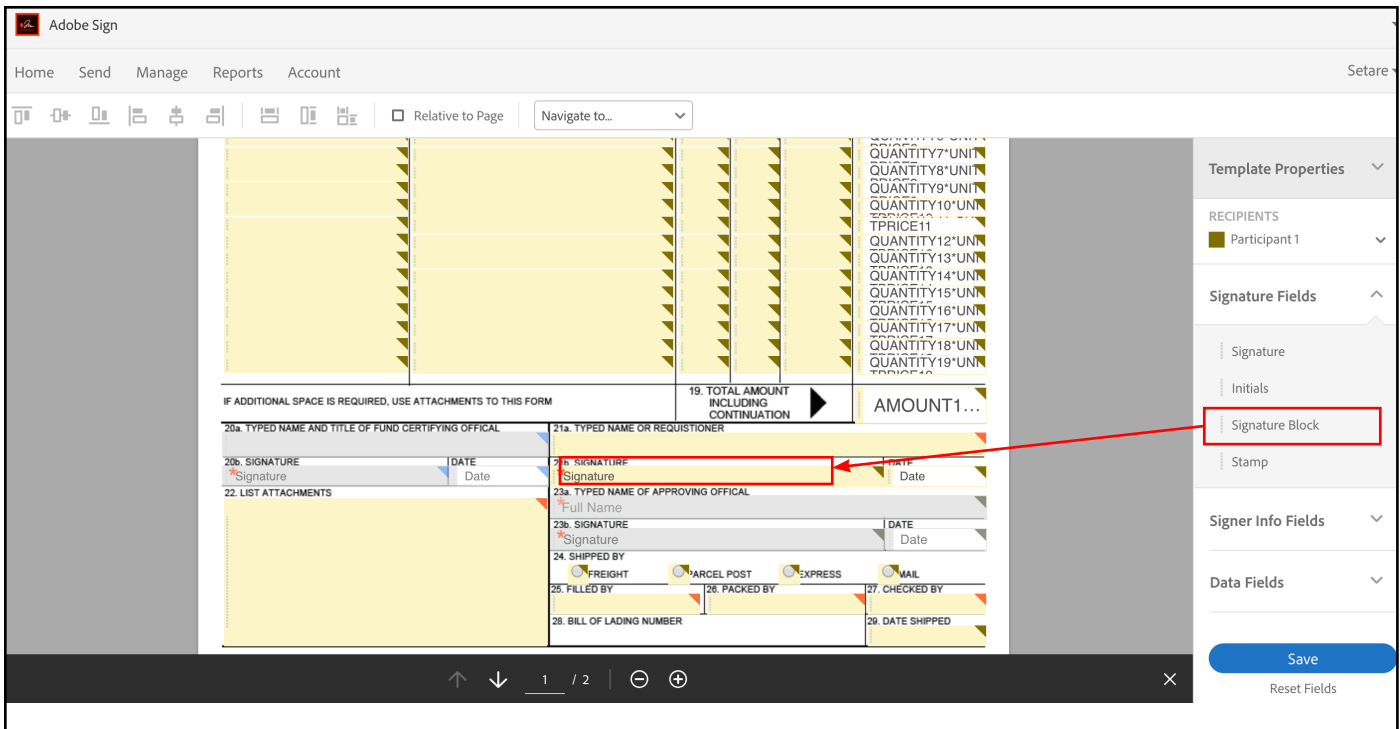
4. From the Home screen, click on **Create a reusable template**.



5. Set the **Template Name** to the desired name for the form.  
*Ex. HomeCare Requisition.*
6. Drag and drop the form you want to use for your web form (in this example, HomeCare Requisition Form.pdf) from your File Explorer (Windows) or Finder (Mac) into the Files section.

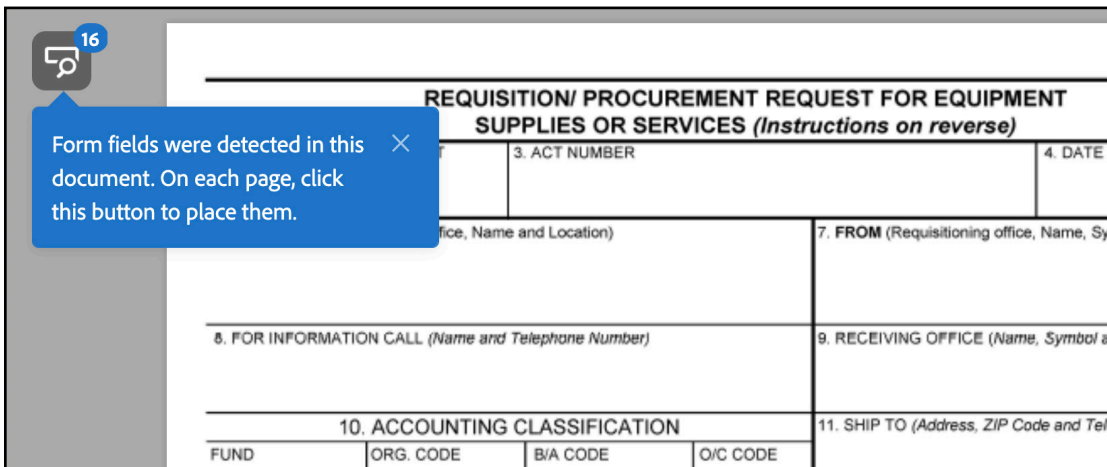


7. In the options under Who can use this template, select **Any user in my organization** or **Any user in my group** to make this form available for others to access.
8. Click on **Preview & Add Form Fields** to prepare the form file.



9. The drag and drop authoring environment allows you to add fillable form fields to your file. Simply drag fields from the right rail onto your document in the desired spaces.

Or, let Adobe Sign suggest form fields for you: Adobe Sensei's AI technology can detect form field candidates based on analyzing the content, attributes, and relative placement of attributes on the form. In the authoring environment, look in the upper left to find the blue alert that says "Form fields were detected in this document. On each page, click this button to place them."




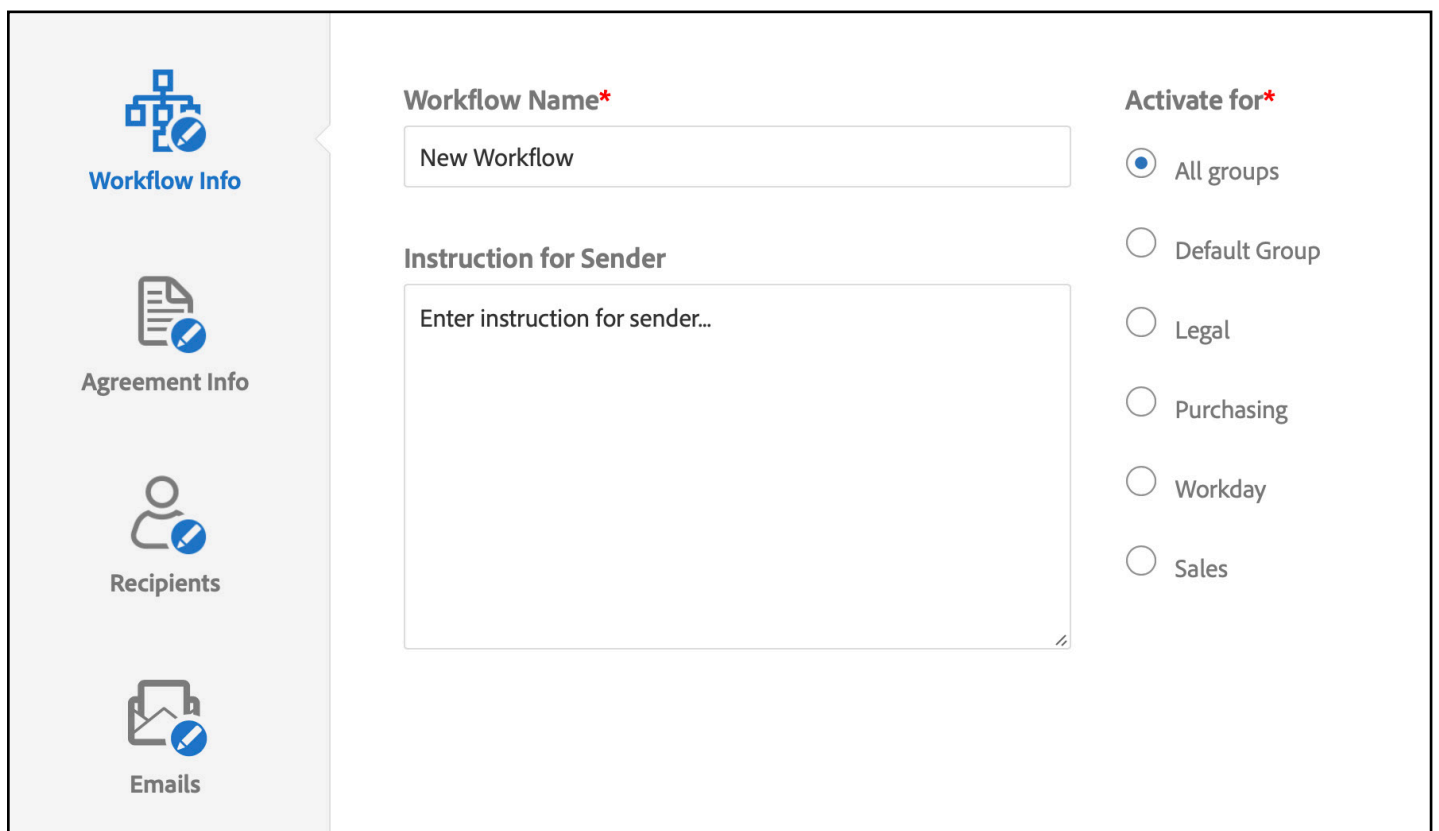
10. When the form setup is complete, click **Save** in the lower right.

## PART 2

# Create & use your workflow

Now that you have created your reusable library template, you need to create a workflow to define the routing of the document.

1. In the main Adobe Sign navigation bar, click on **Account**.
2. This will open your account preferences. From the left sidebar, click on **Workflows**.
3. This screen is where you will define your new workflow or access existing workflows. Click on the  icon to create a new workflow.
4. In the **Workflow Name** field, give your new workflow a unique name.  
*Ex. HomeCare Requisition*
5. The **Instructions for Sender** let you specify what instructions you would like to be displayed to the signer when they are completing the sending step. Enter any information you need to be displayed when someone is using this workflow.  
Similar to determining who can access your template (Step 1), you can define who can access this workflow based on your agency's groups. For more info about working with groups, [click here](#).



**Workflow Name\***

New Workflow

**Instruction for Sender**

Enter instruction for sender...

**Activate for\***

- All groups
- Default Group
- Legal
- Purchasing
- Workday
- Sales

6. Now you will configure the agreement that will be used in this workflow. In the left sidebar, click on **Agreement Info**.

- Next to **Agreement Name**, click on the pencil icon to edit the name of the agreement that will be sent out during this workflow.  
*Ex. Requisition name*
- In the **Message** field, you can specify the default message that will be sent in the emails to each of the recipients.
- If someone in your agency needs to be copied on the agreement, add their email address in the **CC field**. You can use the Minimum and Maximum boxes to set the number of CC emails required, or check the box marked **Editable** to allow the sender to edit the email address(es) in the CC field each time the workflow is used.

The screenshot shows the 'Workflow Designer' interface for a workflow named 'GS49'. The left sidebar contains four menu items: 'Workflow Info', 'Agreement Info', 'Recipients', and 'Emails'. The main content area is divided into several sections:

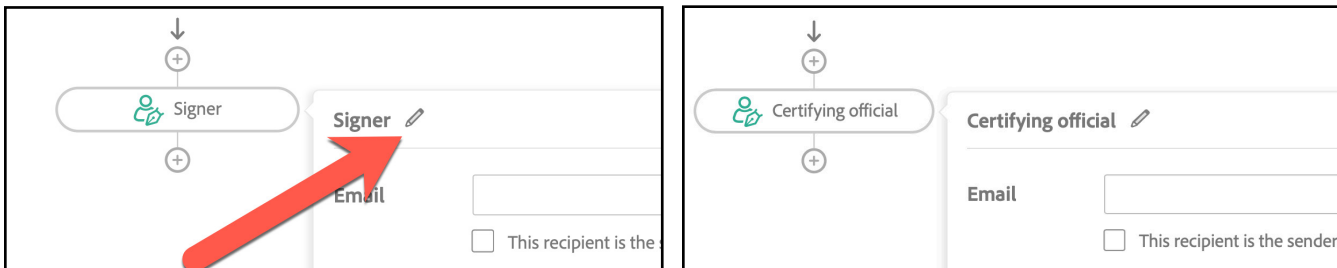
- Agreement Name\***: A text input field containing 'Requisition for Supplies'.
- Message\***: A text area containing 'Please complete and sign this form.'
- Cc**: A text input field with the placeholder 'Enter email address...'. Below it are 'Minimum' and 'Maximum' dropdown menus, and an 'Editable' checkbox.
- Recipient's Language**: A dropdown menu set to 'Do not show language selector'.
- Send Options**: A list of checkboxes:
  - Set password to open downloaded PDF
    - Required
  - Completion deadline
    - days to complete the agreement
  - Allow authoring of documents prior to sending
  - Enable authoring by default

- When you have finished configuring the agreement, you will be ready to define the routing order for this workflow. In other words, *who* needs to take *what* action, and *when*? In the left sidebar, click **Recipients**.
- Any workflow starts with one required participant: the signer. We'll start by configuring this individual's information, then add additional signers and steps. In the workflow diagram, select the **Signer** icon.



- Click the pencil icon next to Signer to change the name of this participant to something specific to this agreement and workflow.

*Ex. Certifying official*



- If the first signer is the person initiating the workflow, select the box labeled **This is the sender**. Configure any other options for this individual: determine this recipient's role, select whether this participant is required, and choose any extra identity verification needed. If you have an email address that you would like to have pre-defined for a given signer, enter it in the Email field. The email address you specify will be populated automatically in the workflow.

- When you're done making changes, click **OK**.

- Now you can add the next participant to the workflow — the person who will receive the document after the first signer has completed his or her step. Click on the **Plus sign** (+) under your first signer to add another recipient.

- You can now go through the same process as you did for the first signer: click the **Signer** you want to edit, then change the details as needed. It's recommended that you change the name of the second recipient (*ex. Requisitioner*).

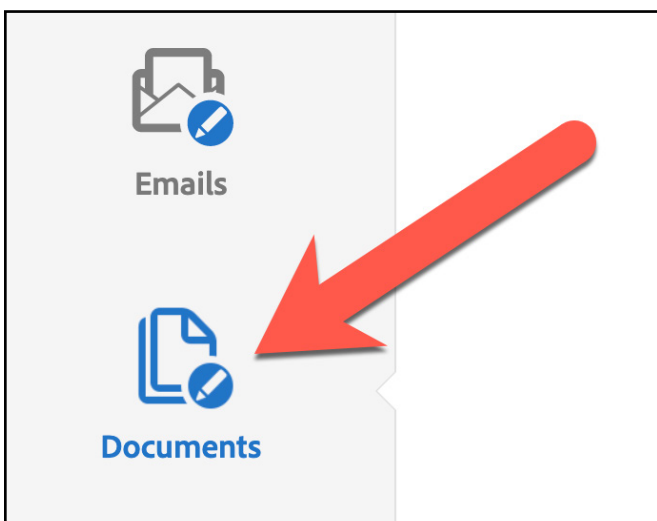
- Click on the Plus sign (+) to add another recipient after the second recipient.


- Click **Signer** to edit the third signer.

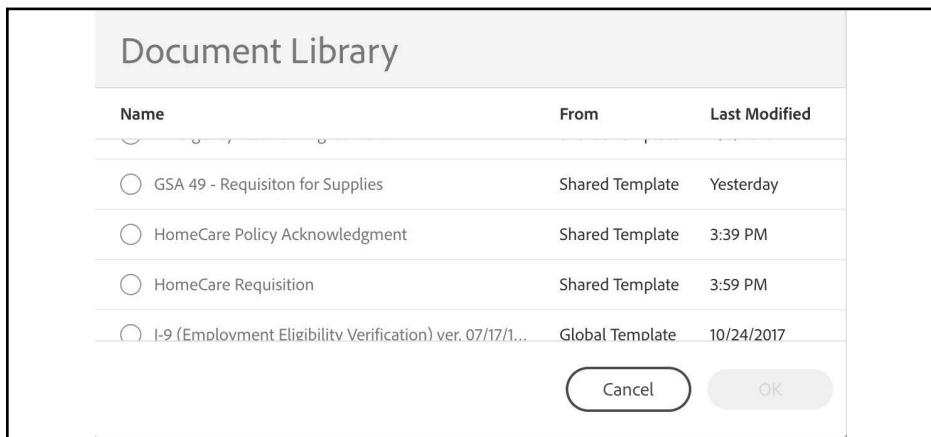
- Click the pencil icon to change the name of the third recipient.

*Ex. Approving official.*

- In the left sidebar, click on Documents.



21. In the **Document Title** field, enter your form name.
22. Click on the **Add File**  button.
23. From the list, select the template you created in a previous step.



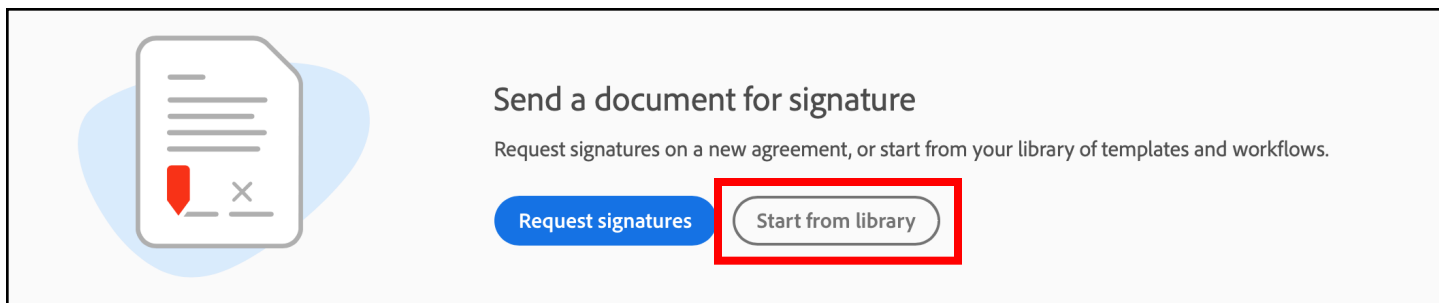
24. Check the box marked **Required**.



25. In the top right corner, click the blue button marked **Activate**.
26. Click **OK**.

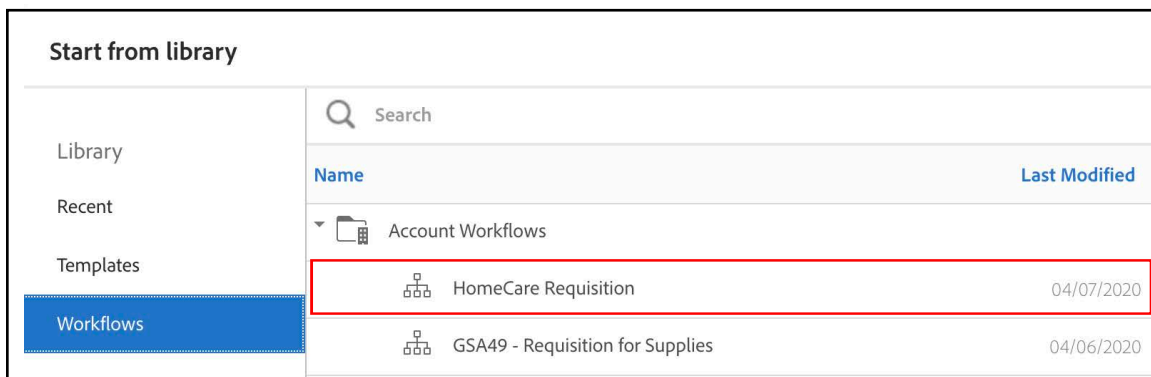
Now you're ready to use your workflow to request signatures. Here are the steps for beginning a new request using the workflow you just created.

1. If you are not already logged in, log into your Adobe Sign account.
2. In the Home screen, click on **Start from library**.





3. In the lefthand menu, select **Workflows**.
4. Select your Workflow from the list.



5. Click **Start**.
6. Specify the email addresses where needed for each recipient.
7. Set agreement name and message if those have not already been entered.
8. Click **Send**.

HomeCare Requisition

Signer: csimmsdemo@gmail.com ✕

Certifying official: tbbluedemo@gmail.com ✕

Approving official: demo@email.domain ✕

Document Name: HomeCare Requisition

Message: Please Complete and Sign this form.

Documents

Documents HomeCare Requisition

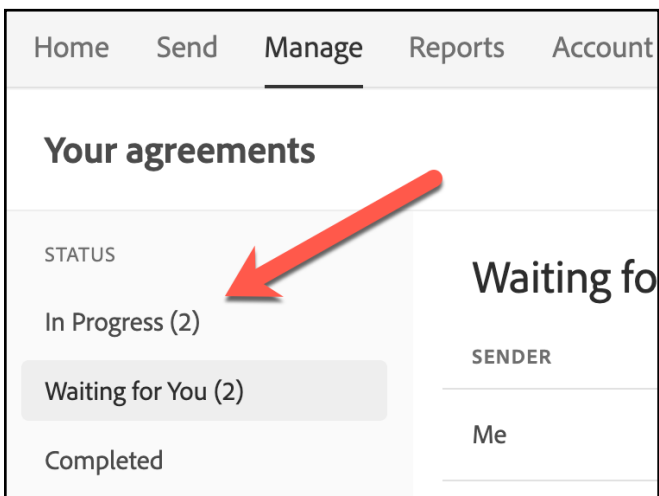
Send

## PART 3

# Track the request

While the agreement is out for signature, you can track its current status.

1. Log into Adobe Sign.
2. Click on **Manage** in the navigation bar.
3. In the sidebar, select **In Progress**.



4. Select your agreement workflow from the list.
5. In the right sidebar, click **Activity** to view the document's history and current status.

