

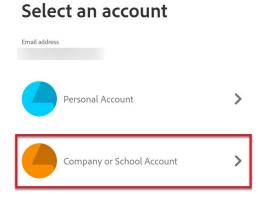
Initiating a CSUN Form Using the Adobe Sign Workflow

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Logging in to Adobe Sign

- Log in to the <u>myNorthridge Portal</u> and navigate to the Staff tab, then the Technology pagelet.
- 2. Enter your CSUN email and select Continue.
- 3. Select Company or School Account.



- 4. You will be brought to the CSUN login screen. Enter your *my*Northridge Portal **User ID** and **Password**.
- 5. If you are signed up for multi-factor authentication using Duo, you will need to authenticate yourself.





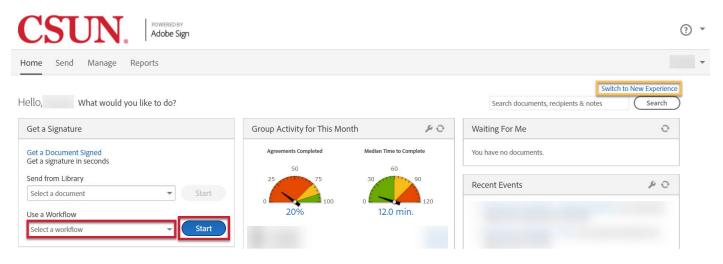


Accessing Workflows

In the Classic Experience

You are in the Classic Experience if you see "Switch to New Experience" in the upper-right of the Home page.

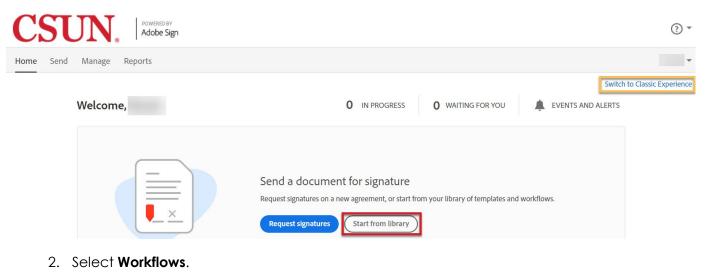
1. On the Home tab, under Use a Workflow, select the appropriate workflow from the dropdown list. Select **Start**.



In the New Experience

You are in the New Experience if you see "Switch to Classic Experience" in the upper-right of the Home page.

1. On the Home tab, select Start from library.





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3. Select the workflow you wish to initiate. Select Start.

Start from library

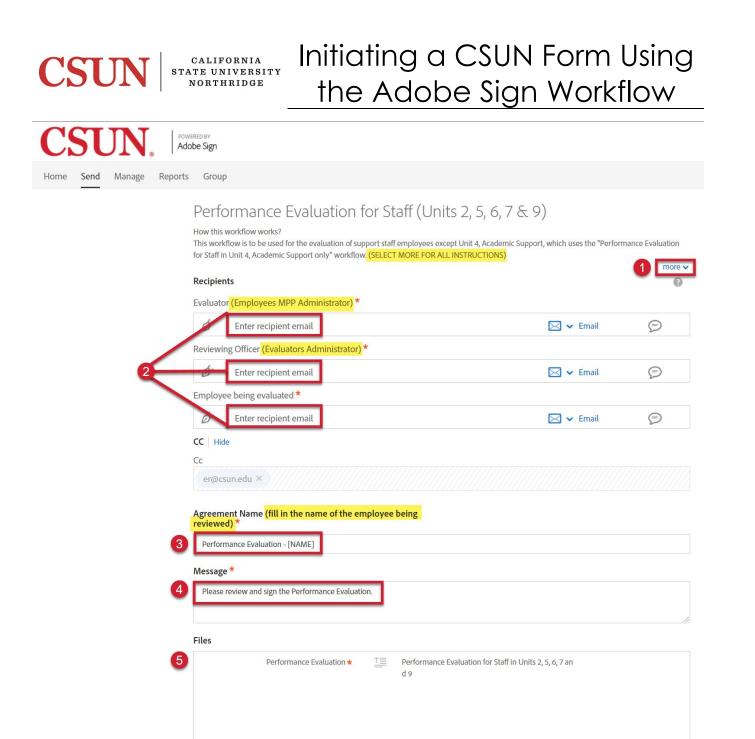
| Library | INditie | Last mounted |
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| Workflows | 品 | - |
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Initiating a Workflow

Once you have started a Workflow, you will need to enter recipient emails, attach documents as needed, and send the form. If you are required to complete any fields on the form, you will be taken to the form after selecting Send.

The Performance Evaluation for Staff (Units 2, 5, 6, 7 & 9) Workflow is shown below as an example. Steps below are numbered on the image.

- 1. Select more to see more instructions.
- 2. Enter email addresses for all Recipients. There will usually be some guidance to help you select the correct Recipient, such as "Employee's MPP Administrator".
- 3. Update the Agreement Name to include Employee's Name or other details to help uniquely identify the form. The Agreement Name is used as the subject line of Adobe Sign emails for the process.
- 4. Update the Message if desired, this will change the text that comes in the body of the Adobe Sign emails.
- 5. Attach optional/required documents in the Files section. You may also have opportunities to attach documents on the form itself.
- 6. Select **Send**. If any fields on the form are assigned to the person initiating the form, you will be brought to the form to complete those fields. If there is nothing for you to complete, the form will send to the Recipients you indicated.



For Assistance with Adobe Sign

Contact the IT Help Center by phone (818-677-1400), online at (<u>http://techsupport.csun.edu</u>) or in person in (Oviatt Library, First Floor, Learning Commons).