SONOMA STATE UNIVERSITY

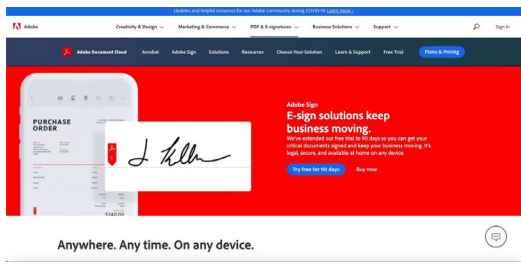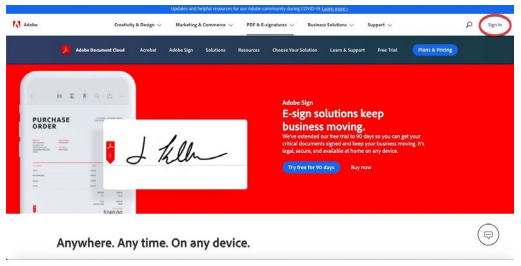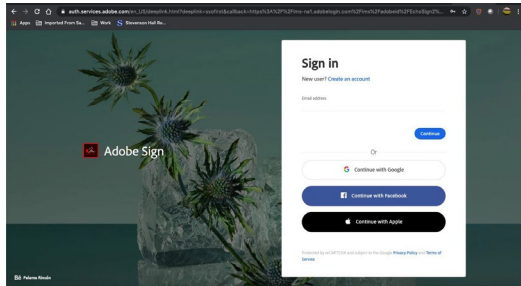**Routing a Completed Performance Review for Signature in Adobesign**

Purpose: This procedure document will detail the steps involved with routing a performance evaluation for signature using a workflow within the Adobesign platform.

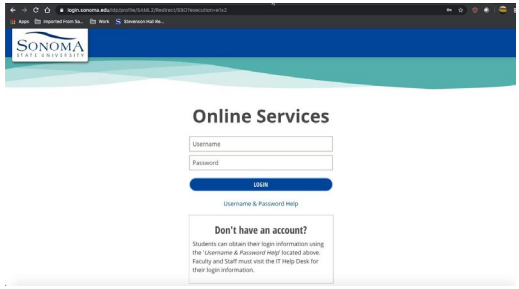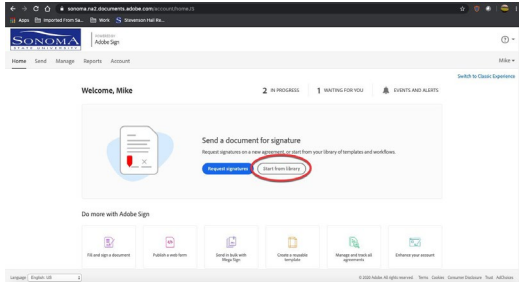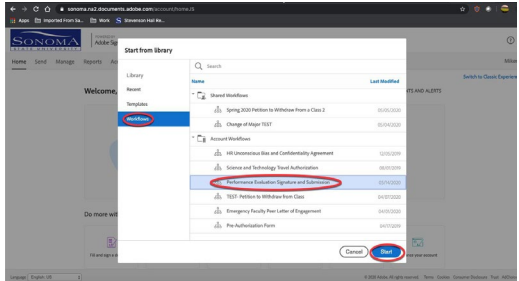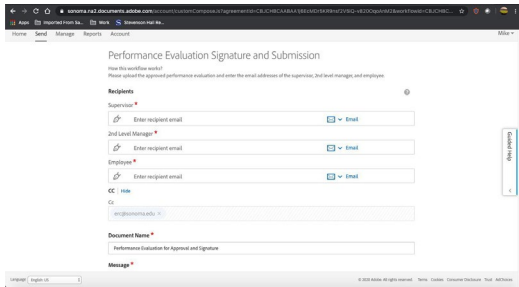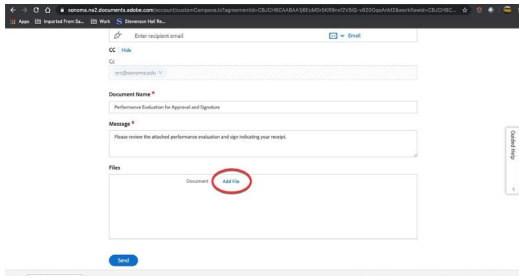**Audience:** Supervisors and Managers (MPPs)

Summary: Performance evaluations are an iterative process that requires the sharing of a document between parties using email or Google Docs. Once the performance evaluation is completed, the process below will allow all parties to sign the document.
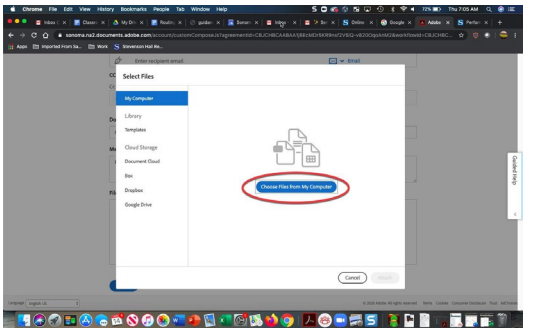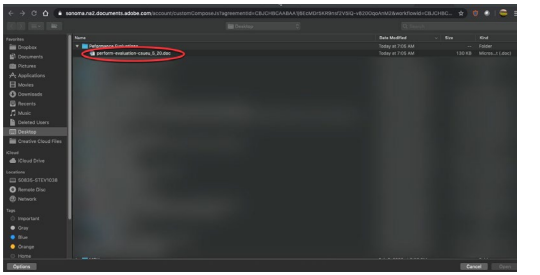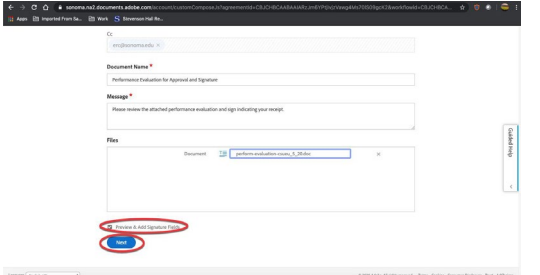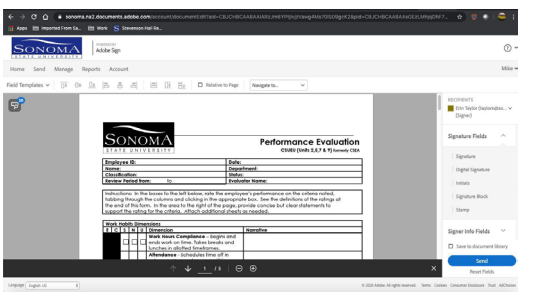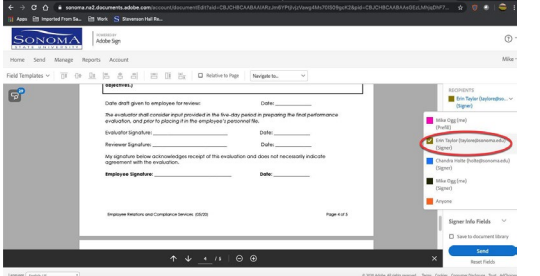
Assumptions: This document assumes the following things:
1) The performance review is completed and just require final signatures
2) The document is saved, locally, to computer
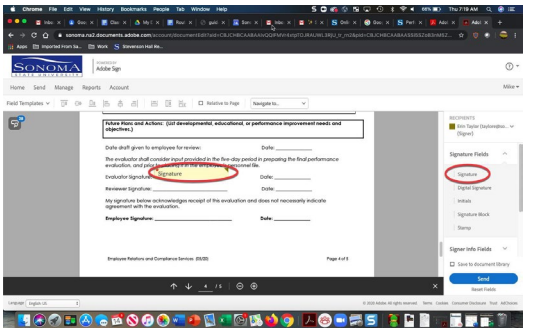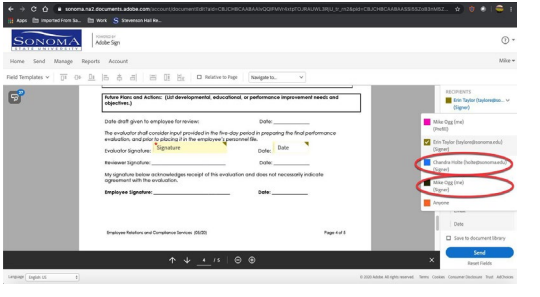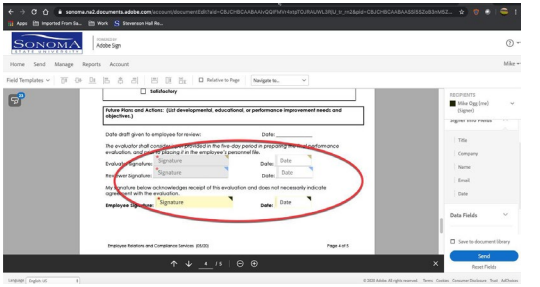
Step	Action	Screenshot
1	Open AdobeSign in a web browser: https://sonoma.na2.documents.adobe.com/public/login	
2	Click *Sign In* on the AdobeSign homepage.	
3	Enter your LDAP@sonoma.edu (SSU login email*) into the sign in field. * note, this should not be your first.last@sonoma.edu email address	

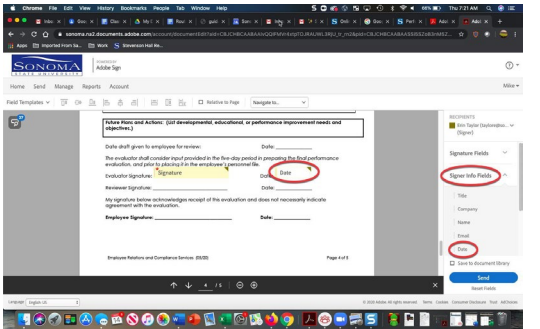| 4	Enter SSU LDAP credentials.	
5	Once in the AdobeSign console click on the *Start from Library*.	
6	Click on *Workflows* and then select *Performance Evaluation Signature and Submission* and click *Start.*	
7	Enter the email addresses for supervisor, 2nd level manager (supervisor's manager) and the employee. NOTE: Use LDAP@sonoma.edu	
8	Scroll down and click *Add File*.	

9	Select *Choose Files from My Computer.* Note: If a file is stored on Google Drive it may also be imported using the link on the left side of the screen.	
10	Select the performance evaluation to be sent for signature.	
11	Ensure the box next to *Preview & Add Signature Fields* is checked. Click *Send*	
12	The document and signers will appear in the authoring window.	
13	Select the supervisor's name from the *Recipients* list.	

14	Click on *Signature* in the Signature Fields menu and drag it to the correct signature location.	
15	Click on the *Signature Info* menu and select *Date*. Drag the *Date* to the correct location for the signer.	
16	Repeat steps 13-15 for each of the signers in the Recipients menu.	
17	When complete all signature fields should be populated.	

18	Click *Send* to route for signature.	
19	The final confirmation page will show that the performance review has been routed to the appropriate people for signature. Each signer will receive a signed copy once it is completed.	

Questions:

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https://hr.sonoma.edu/erc