User Accounts in Adobe Sign Integration

When setting up Adobe Sign integration in a knowledgebase, it is important to understand how user accounts are managed with Adobe to avoid complications when attempting to add users for sending agreements. Decide at an early stage of the implementation whether to use a single administrator account for one system or to allocate individual user accounts.

You should also understand how to manage the transition between development systems and production systems in relation to user accounts. For information about our recommendations for this procedure, see Manage Development and Production Environments.

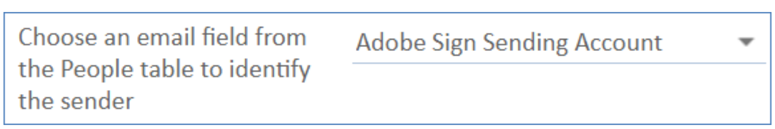
Single or Multiple User Accounts

The sections below explain the different approaches of using either a single admin account for all Adobe Sign agreements or using multiple accounts. There are some drawbacks and considerations for either approach, so it is important to understand how they both function.

Whether you send agreements from a single account or multiple accounts is determined by the "Choose an email field from the People table to identify the sender" field in the Adobe Sign wizard. To access the wizard go to **Setup > Integrations** and click Configure under Adobe Sign.

Single Account for all Senders

In the Adobe Sign wizard, select the Adobe Sign Sending Account field to use a single account for all senders. When you choose this option, set the Adobe Sign Sending Account field in the People table to a default value that is the same as the email address associated with your Adobe Sign account.



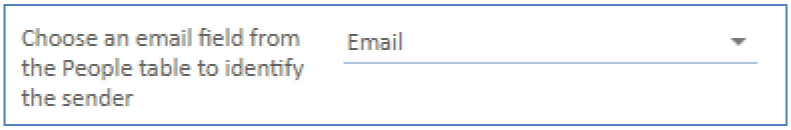
It's important to know that if you use a single account for all senders, non-admin users can access admin functionality on the Adobe Sign website by creating and previewing agreements. If you want to prevent this sort of access, you need to use multiple accounts. If this is not an issue for your organization, consider using a single account, which is simpler to maintain and more reliable than using multiple accounts for senders.

Sending Agreements from a Single Account

Using a single account for all senders does have a drawback. With a single Adobe Sign account, all agreements from the system appear to come from the same sender, which is the name defined in the Adobe Sign account settings. However, you can still provide individualized messages to each recipient.

Multiple Accounts for Senders

In the Adobe Sign wizard, select the Email field or another unique field to use a different account for each sender. For whichever field you select, make sure that it has a value in the People table for each user who will act as a sender.



If you choose to set up multiple Adobe Sign accounts, you can add internal users as senders through their own email address. When the Add Adobe Sign User action is run, the user is created in Adobe Sign and they can send agreements through their own user account. This has the advantage that each agreement comes from the email address associated with the user. For more information, see Add Users in Agiloft below.

Using Senders with Existing Adobe Sign Accounts

Using multiple accounts for senders comes with a drawback. If the user already exists in Adobe Sign—for example, if they have ever signed an Adobe Sign document with their email address, including signing test documents using a Development account, or if they have been associated with another Adobe Sign account—they cannot be added via the Agiloft API. Instead, they are locked at Adobe, and you need to send a manual email request to Adobe Support to have the account unlocked and migrated.

Migrate a locked account

To request an account migration, you can use the Adobe Sign Request Account Move action to send an email request to Adobe to carry out the migration. To set up the action with an action button:

1. Click Setup Employees on the left pane under the Employees subtable. Internal employees are typically the only people who act as agreement senders.
2. In the Table wizard, click the Fields tab.
3. Create a new action button with the label "Migrate Adobe Sign Account" or similar.
4. Add the Adobe Sign Request Account Move action to the button.
5. Save your field.
6. Click the Layout tab and add the field to the layout.
7. Click Finish.

When you use this action button, the following confirmation message appears: "Status: A request to transfer your account has been submitted to Adobe. You can send documents out for signing using this email address once Adobe has confirmed that the account has been transferred."

Add Users in Agiloft

If you're using multiple accounts for senders, additional users can be added to the Adobe Sign account by using a rule or action button in the Employees subtable.

> ⚠ For either method of adding users to the Adobe Sign account, users must validate their email address and create a login to activate their account after they have been added.

Add Users to the Account with a Rule

We recommend using the preconfigured "'Handle Changes to Adobe Sign Sender Value" rule to add users to the Adobe Sign account. This option is easier than manually adding users with an action button. The rule evaluates a user account when it's edited and determines whether to add or remove them from Adobe Sign. The rule looks at the value of the Adobe Sign Sender field and, if it contains a Yes value, attempts to create them as an Adobe Sign user. If the value is No, the rule deactivates their account.

To add users with a rule:

1. Click Setup Employee on the nav bar under the Employees subtable. The Table wizard opens.
2. Click the Rules tab and edit the rule called "Edit: Handle Changes to Adobe Sign Sender Value." The Rule wizard opens.
3. On the General tab, change Rule is Enabled to Yes.
4. Click Finish and go to the Employees subtable.
5. Edit the desired user record.
6. Click the History tab and change the value of Adobe Sign Sender to Yes. You might need to expand the Background Fields section to see the field.
7. Save the record. The user is added to the Adobe Sign account.

Add Users to the Account with an Action Button

You can also add users to the Adobe Sign account manually with an action button. This option requires more initial setup than the rule mentioned above, but it may be used if desired.

To add users with an action button:

1. Click Setup Employee on the left pane under the Employees subtable. The Table wizard opens.
2. Click the Fields tab.
3. Create a new action button with the label "Add Adobe Sign User" or similar.

4. Add the Add/Activate User to Adobe Sign action to the action button.
5. Save your field.
6. Click the Layout tab and add the field to the layout.
7. Click Finish.
8. Edit the desired user record and use the action button. The user is added to the Adobe Sign account.

Add Users in Adobe Sign

You can also add and manage users from the Adobe Sign account menu:

1. Log in to your Adobe Sign account at https://agiloft.na2.echosign.com/public/login.
2. Click Account.
3. Click the Users tab.
4. Click the plus sign to open the user form.
5. Enter the user's information and click Save.

> ⚠ If you're unable to add users, make sure your account has permission to do so by selecting your account, clicking Edit User, and check the "User is an account administrator" checkbox.
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