



Adobe Sign • • v \$tudy • Guide

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- Integrating Adobe Sign using the APIs.

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Using Library Templates

Library templates allow users to create reusable, interactive documents. Templates can be defined in two ways: [Form Field Layers](#) and [Documents](#). Form Field Layers are the fields that are applied to the uploaded file. Documents include the base file in addition to the fields. Document templates work best for documents that do not have any dynamic content. Form Field Layers are most appropriate when the underlying content changes often. Once library templates have been set up, senders can use these templates to make preparing agreements a much simpler process.

Using Text Tags on an Agreement

Using Text Tags on an Agreement provides a faster, easier, and more consistent way of preparing Agreements for signature. Furthermore, Text Tags allow the content and layout of the Agreement to be dynamic.

Text Tags are specially formatted text that can be placed anywhere within the content of a document in formats such as PDF, Microsoft Word, PowerPoint, Excel, and text files (.txt, .rtf). They may specify the location, size, and type of fields (such as signature and initial fields, check boxes, radio buttons and form fields). Text Tags can specify advanced field processing rules as well.

Text tags are converted into Adobe Sign form fields when the document is sent for signature or uploaded. The [Sign Text Tag Guide](#) describes in detail how Text Tags are formulated.

Creating Workflows

Library Templates and Text Tagged documents provide repeatability and consistency for the Agreement preparation process. [Workflows](#) provide similar benefits by creating a 'template' of participants, roles, authentication, messaging, and the flow of the signing process. Workflows are useful when:

- multiple individuals in the organization need to perform the same process,
- routing to a specific set of individuals or roles occurs each time; and
- the same document or set of documents is routed each time.

Administrators can create Workflow processes that Senders can use to send Agreements. Using the [Workflow Designer](#), the Administrator can choose to predetermine the send options, recipients, the email message, and documents, or to allow the Sender to specify any or all of them. This gives organizations great flexibility and control to meet their business

[Office](#), [Dropbox](#), [Workday](#) and many more integrate with Adobe Sign. To confirm if an integration to a particular application is available, refer to [the integration documentation](#).

Using Adobe Sign's APIs

If an integration to a particular 3rd party application is not available, S65()2.2 (p)2.3 (ID (o)-1.9 (b)4 (i)

Privacy

The [General Data Protection Regulation \(GDPR\)](#) is the European Union's privacy law. The rules have a broad definition of personal data and a wide reach, affecting any company that collects personal information of individuals in the EU. Part of the regulation requires that individuals have the right to understand what personal data has been collected, and to have that data deleted upon request, when appropriate. Adobe Sign implementers should be aware of the controls that Adobe Sign provides and how they can keep organizations in compliance with this regulation.