Adobe Sign

Glossary of e-signature terminology

Adobe Sign and DocuSign terminology reference

DocuSign terminology (in alphabetical order)	Adobe Sign terminology
Account Subsets of users that have access to different envelopes, templates, and settings. Users can be a member of more than one account.	**Group** Separate subsets of users that have access to different library documents, templates, and settings (such as logos and cc'd parties). When you add a user to your account, they're automatically placed in the default group. As of fall 2020, users can be members of more than one group.
Account admin This administrator permission profile controls viewing and managing organization accounts and account settings. The account administrators can view, compare, export, and import account settings. They are also able to link and unlink accounts from the organization. They are not able to do any user management and do not have access to any other organizational capabilities.	**Group admin** Group admins have the authority to override the account level settings and configure the group. This includes most account level settings, including branding, default signature and verification settings, workflows, templates, and so on.
Bulk sending Send multiple envelopes at once by uploading details in a CSV file.	**Mega Sign/Giga Sign** Each signer signs an individual copy of the document; the signed documents are then returned to the sender. This process can be used to collect NDAs, HR documents, or permission slips. • CSV files can be used to import recipient details, data for custom fields, and customized messages for each signer. • Minimum of two recipients is needed for mega signing. • Signer email is the only mandatory field in the CSV, and there are few optional fields. • If multiple signers are required, you may need to use the Adobe Sign Giga Sign desktop application.
Conditional fields Show/hide fields using conditions. Fields can be shown if certain conditions are met. There will be a trigger for each	**Conditional form fields** Conditions can be applied to the field types to show/hide/enable/disable a field type. There will be a trigger for each condition.

Conditional fields-continued

condition. For example, the textbox will only be shown if the checkbox is clicked. Conditions can be applied to Checkbox, Radio button, Dropdown, and Text, one of which will act as a trigger field. There is an option to modify/delete the conditions by selecting the trigger field.

Conditional form fields-continued

- Multiple conditions can be set for the same field.
- Trigger can be set for any one condition or all conditions must be met.
- Users can modify or delete conditions.

DocuSign admin

DocuSign admin is a management infrastructure that empowers you to control and manage how DocuSign is used by your company. Through centralized administrative tools, you can govern the use of DocuSign in an efficient and logical way, and control with confidence how the application is deployed at your company. DocuSign Admin changes the way you administer DocuSign by bringing together the accounts, users, and components necessary to support your workflows.

Account admin

Account admins control the settings at the account level. Account-level settings are automatically inherited by all groups in the account unless the group level admin overrides them (see above). At the account level, admins can configure settings like Federated ID sign in, account level branding, templates, and workflows.

Privacy admin

Privacy admins are an extension of the account admin role. Privacy admins must first be an account admin to add the additional toolset. The privacy admin has the authority to fully delete agreements and user IDs from the Adobe Sign servers (per GDPR requirements).

Decline to sign

A recipient can choose to decline to sign an envelope. This voids the envelope, and it can no longer be viewed or signed.

Decline to sign

A recipient can choose to decline to sign a document, and enter comments if desired. The sender can view the comments entered by the signer.

Document

A digital file that contains content to be reviewed and/or signed or initialed by one or more recipients. Documents are always encrypted while stored in the system and can be supplied through client devices, cloud storage systems, or additional document sources. DocuSign accepts almost all document types. For example, PDF, DOCX, RTF, TXT, and PNG, and you can store multiple documents in a single envelope. Note that you must set the file extension document property when sending non-PDF documents through the API.

Document

A digital file that contains content to be reviewed and/or signed or initialed by one or more recipients. This document is used to create an agreement, workflow, or web form. The document is first uploaded to Adobe Sign by the sender and can be supplied through client devices, cloud storage systems, or selected from existing library templates in your account. Documents uploaded via the API are referred to as transient since they are available for use for only 7 days after the upload.

Acceptable file types:
PDF, DOC, DOCX, XLS, XLSX, PPT, WP, JPG, TXT, GIF, TIF, BMP, PNG, and RTF

Document Markup

With Document Markup, a sender can allow recipients to make changes to

Modify (partial functionality match)

The modify agreement setting can be enabled in account settings to allow users to modify in flight agreements as long as *no one* has acted on the agreement yet. In this case the

Document Markup-continued

documents by covering up existing text and adding new text. Recipients can use a special markup text field, which they can place anywhere on a document. All changes must be reviewed and approved by all signers.

Modify (partial functionality match)-continued

sender would be able to fully modify the agreement until such time as the first participant acted on it (signed it, approved it, and so on).

Envelope

An envelope is a container or "package" that is used to send documents to recipients and manage transactions. Envelopes have statuses (that is, sent, delivered, completed, voided) and typically contain documents, recipients, and tabs. They also contain information about the sender and timestamps that indicate the progress of the delivery procedure. When an envelope is completed, the DocuSign platform automatically generates a certificate of completion which details the full audit history of the transaction. The envelope also holds the recipient information and the fields placed on the documents.

Agreement

When a document is sent to recipients for signing or approval, an agreement is created. You can track the status and history of your document in your Adobe Sign account. Agreements have statuses (that is, sent, viewed, completed, canceled) and typically contain documents and recipients. They also contain information about the sender and timestamps that indicate the progress and action that was taken.

Agreements also include the recipient information and the fields placed in the documents.

Envelope ID

This is the unique ID assigned to your DocuSign envelope. Refer to this number for troubleshooting issues with technical support.

Agreement ID

Agreement IDs are given by the API and are used for manipulation and updates to a specific agreement. They can also be used for issues with technical support.

Fields

Indicate where a signer needs to take action on the document. For example, filling in data, making a selection, or applying a signature.

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Indicate where a signer needs to take action on the document. For example, filling in data, making a selection, or applying a signature.

See description of form field layers in the Template section.

Integration key

An integration key is a unique identifier that serves two purposes. First it is used to identify your app. Second, it is used as your client ID during OAuth authorization flows. Integration keys can only be created through your developer sandbox, from the API, and Keys admin menu. When you are ready to go live with your integration, you

Client ID/Client Secret

The Adobe Sign equivalent are called Client IDs and Client Secrets. They are used during OAuth authentication flows (*only works with OAuth 2*). To learn how to create Client IDs and Client Secrets, read How to create Client ID and Client Secret.

Integration key-continued

will select one of your sandbox integration keys to enable in your live production account.

Language and custom email messages

When you send to recipients who have different language preferences, you can customize the envelope to address each recipient in their preferred language.

Localization

Localization can be set at the time of send via the API or by changing account/group settings to match the region intended.

Needs to sign

The default recipient action. The recipient must complete the required fields assigned to them, such as signature or text fields.

Signer

The default recipient action. The recipient must complete the required fields assigned to them, such as signature or text fields.

Needs to view

The recipient must open and view the document.

For example, you want to be able to prove that each employee received and viewed the new employee handbook. You add the employees in a need-to-view role, so they will be required to open the envelope to change the status to complete.

Approver/acceptor

The recipient must open and view the document.

For example, you want to be able to prove that each employee received and viewed the new employee handbook. You add the employees in a need-to-accept or approver role, and they are required to accept/approve the agreement.

PowerForm

PowerForms are on-demand, self-service, hosted documents for signature. Eliminate document preparation time, and easily pull collected data into your existing applications.

Web form (widget)

Web forms are hosted documents that can be signed by anyone who has access to them. They are ideal for sign-up sheets, waivers, or any document you need many people to access and sign online. See Parental Consent for an example.

Receives a copy

The recipient receives a copy and no further action within DocuSign is required.

For example, you can add a company's records department in the receives-a-copy role, so staff members can download or print the completed documents after the envelope is completed.

Carbon copy

The recipient receives a copy and no further action in Adobe Sign is required.

For example, you can add a company's records department in the carbon copy field, so staff members can download or print the completed documents after the envelope is completed.

Recipient

Someone who receives an envelope and, depending on the settings, can sign the documents or add information where indicated by tabs. Recipients do not need a DocuSign account to sign or participate in transactions, and there are seven (7) different recipient types available in the platform. When you embed document signing into your user interface, your recipients are known as embedded recipients; users who sign through the DocuSign website are known as remote recipients.

Recipient

The person who receives the agreement and signs or approves the agreement (depending on the role). The recipient can be a:

- **Signer:** Person who needs to sign the document.
- **Approver:** Person who needs to approve the document.
- **Delegator:** Person who needs to delegate to someone who needs to sign or approve the document.
- **CC:** People who receive a signed copy of the agreement.

Reminders and expirations

An administrator can choose to enforce the default email reminder and envelope expiration settings for all envelopes or allow senders to modify the values for each envelope that they send.

Reminders and deadlines

Senders can set deadlines for the agreement to expire during the send process. Check the option Completion Deadline under the Options section, and enter the number of days the signers have to sign the document.

Senders can customize reminder settings. A reminder is just an email that the signer receives in their inbox. There are a couple of different ways you can set up reminders.

- The first way to set up a reminder is immediately after you send a document for signature. On the confirmation screen, click Create A Reminder and choose if you want a weekly or daily reminder. Click Create Reminder.
- The second way you can set up a reminder is on the Manage tab, after you've sent the document for signing. Setting up reminders this way allows you a bit more flexibility in the settings of the reminder.
- Find your document in your "out for signature" list of transactions. Select it and scroll over to the right-hand pane, and click the Remind tab.
- Under Create A Reminder, Who Do You Want To Remind, select the signer's name.
- Then select when you want to send the reminder. You can send a one-time reminder right now, or you can set up a daily or weekly reminder. You can even choose to send a reminder at a future date.
- Type a personal note to the signer that will be included in the email, and click Set Reminder.
- When you click Set Reminder, you can instantly see all the details of the reminder in the same window.
- If you decide you want to cancel the reminder, select the document under Out For Signature, and click the trash can icon beside the reminder.

Sandbox

Sandbox accounts—also called demo or developer accounts—let you test DocuSign APIs for free. They are also the only place where you can create an integration key, which is needed to go live. Sandbox accounts operate in the DocuSign demo environment, which is identical

Developer account

Developer accounts are free and help you use APIs from Adobe Sign to create custom applications for your teams, partners, and customers. Create your developer account now to get started.

Your developer account includes:

- Access to the Adobe Sign API
- Testing for document exchange and execution

Sandbox-continued

to production except that documents sent through demo are not legally binding and have test stamps on them. Sandbox accounts do not expire and have enterprise-level features enabled so you can test everything out before going live.

Developer account-continued

- Testing for emailing copies of signed agreements

Note: These accounts are not sandbox equivalents. However, they allow testing of features in a development environment.

Sender

Users that can create, send, and manage DocuSign envelopes.

Sender

The person who initiates the transaction of sending an agreement for signing or approval.

Senders are registered users that have full access to the Adobe Sign interface. Authority within the terms of an agreement includes the ability to send an agreement, replace or modify an agreement they have sent, and reporting against their agreements and templates. Additional tools include the event notification system, reminders, account sharing, language/locale configuration, and other tools specifically designed to improve the personalization of the sender's account.

Service integration

A service integration is a service that integrates directly with a DocuSign account. This kind of integration is typically reserved for back-end services that authenticate on the DocuSign platform, without the involvement of an end user. For example, a back-end application could be integrated into a line of business application to automatically send new member sign-ups. For service integrations JSON Web Tokens (JWT) authentication is recommended.

Integration key

Integration keys are used for back-end authentication. See [How to create an integration key](#).

Set signing order

If your envelope has more than one recipient, you can choose to set a signing order. The signing order lets you control the order in which your recipients receive and sign your documents.

With Set Signing Order enabled, you can specify a recipient routing order. You can set up a simple sequential routing order, where each recipient receives the email notification once the previous recipient has completed an action. You can also have a mix of sequential and parallel routing.

Routing order

Adobe Sign supports having multiple recipients and routing orders, making it easy to collect signatures in the right order. The sequence for the transaction can be sequential, parallel, or hybrid. In sequential signing, a definite order is followed for signing or approving. In a parallel workflow, every recipient will get the agreement simultaneously, allowing them to sign or approve in any order. You can even have a combination of the two (hybrid routing).

Set signing order-continued

When you use a signing order, you can route an envelope to the same person multiple times. For example, you could send a purchase order to your manager to approve, then send it on to purchasing to sign, and finally send a copy to your manager again.

With Set Signing Order disabled, all recipients receive the document in parallel.

Signer

An envelope recipient who is required to take action on an envelope or documents within an envelope.
Note that all envelopes have recipients but not all recipients are signers. For example, you are copied on a document where you don't need to take an action, so, you are not a signer.

Signer

Signers have authority specific to the agreements they have been sent. They can view, decline, or complete an agreement. Their Manage tab retains the history of the agreements sent to them, and they have the authority to view and print these agreements.

Signing groups

Signing groups are a predefined group of recipients where everyone can review the document and any one member can sign it. Signing groups are created/edited/deleted at the account level. The in-process envelope needs to be resent for any new user added to the group.

All actions—including sending and signing documents—are tracked in the history and certificate of completion. Access code authentication is only provided for signing groups. All members receive the signed copy after completion.

Recipient group/set

A group of recipients where only one member of the group needs to take action, sign, or approve, depending on the role specified for the set. Recipients are always specified as recipient sets when using Adobe Sign APIs.

Supplemental documents

Supplemental documents contain additional information and are included with a document in an envelope. Supplements can include but are not restricted to:

- Terms and conditions

Add files

You can add supplemental documents to a document you're sending for signature. Simply drag them to the Add Files field when creating your agreement.

File attachment field

The file attachment field can be added to a document and is available to business and enterprise service plans, and can be used to attach documents or images to the transaction.

Supplemental documents-continued

- Disclosures
- Financial statements

The sender of a document can request that each recipient perform certain actions for each supplemental document included in the envelope.

File attachment field-continued

File attachment fields can be used to collect supporting documents or images from signers during the signing process. The uploaded documents are included as part of the signed document and are attached at the end of the signed agreement after the signature process is complete.

The file attachment field can be resized by dragging the hashes in the lower-right corner of the field. These are appended to the agreement after signing is completed.

- Maximum file size 25MB
- Supported formats: PNG, JPG, JPEG, GIF, BMP, PDF, DOC, DOCX, WP, TXT, RTF, HTM, or HTML

Tab

DocuSign tabs—also called fields or tags—are used in several ways. First, they are used to indicate to a recipient where a signature or initials are required. Second, tabs can be used to show data or information to recipients, such as dates, company names, titles, and so on. Third, tabs may be used as editable information fields where signers can add data to a document.

Tag

Adobe Sign text tags are specially formatted text that can be placed anywhere within the content of your document specifying the location, size, and type of fields, such as signature and initial fields, checkboxes, radio buttons, and form fields; and advanced optional field processing rules. Text tags can also be used when creating PDFs with form fields or even for setting up conditional logic.

Template

A pre-set "cookie-cutter" envelope with specific documents, set recipient roles, tabs, and other business logic. Templates are great for any DocuSign workflow you do repeatedly—like sending the same document to different recipients, for example. Templates can be simple one-signer, one-document workflows, or they can be more complex transactions with multiple recipients, documents, tabs, and more. Additionally, composite templates allow you to easily combine multiple templates into a single envelope.

Workflow

The Workflow Designer is used to create workflows that tailor the signing processes to fit your specific business requirements. With this tool, administrators can design and manage workflow templates easily with an intuitive drag-and-drop editor. It's easy to specify the documents to be included in an agreement; and the characteristics of the participants—including predefined names, roles, and routings; form fields to be pre-filled by the sender; emails to be sent to the participants; agreement expiration or password options; and more.

Library template

A library template can be reused or repurposed multiple times. Adobe Sign supports two types of library templates:

- **Document templates:** A document template is a reusable document that can be shared with other users in your account, allowing multiple users to send out the same document without needing to make any changes.
- **Form field templates:** A form field template is a reusable field layer that can be applied to any document. Form field templates can also be shared with other users in your account.

Form field templates are ideal in the following situations:

- You have one field layout that works for multiple documents.
- You have a document that can be sent in a number of different ways.
- You need to revise a document's content, but the fields remain in the same place.

Library template-continued

- Instead of creating a new library document every time a document is updated, the same form field layer can be applied. Form field templates can be edited to facilitate changes in the arrangement of fields or field properties.

Template sharing

Templates can be shared across users.

Template sharing

Templates can only be shared within own group or own organization.

User application

A user application is a client that authenticates every end user with DocuSign. These applications are typically web services, mobile applications, or desktop programs that involve a user agent authenticating with the DocuSign platform. Once authenticated, users give consent for the application to display, send, or sign envelopes from their account. For user applications, the Authorization Code Grant and Implicit Grant OAuth flows are recommended.

Integrations/applications

Integrations and applications are similar to user applications and are developed by users, Adobe, or third parties. These applications are typically web services, mobile applications, or desktop programs that involve a user agent authenticating with the DocuSign platform. Once authenticated, users give consent for the application to display, send, or sign envelopes from their account. Sometimes these applications use integration keys. The scope can be controlled with either authentication method.