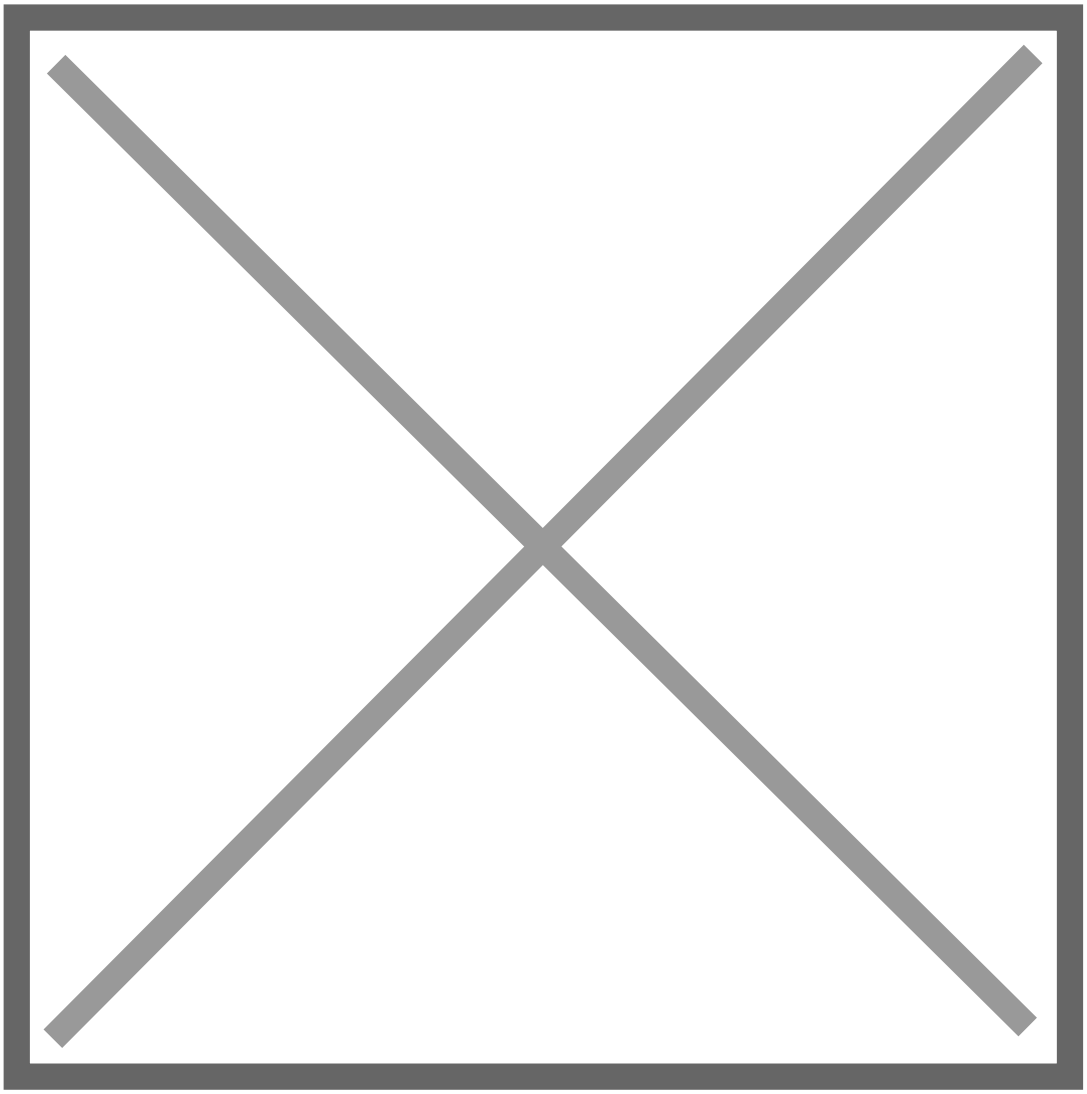
Step Guides

Learn to configure Form, Document, Sign, Logic, and other steps involved in designing Streamline workflows.

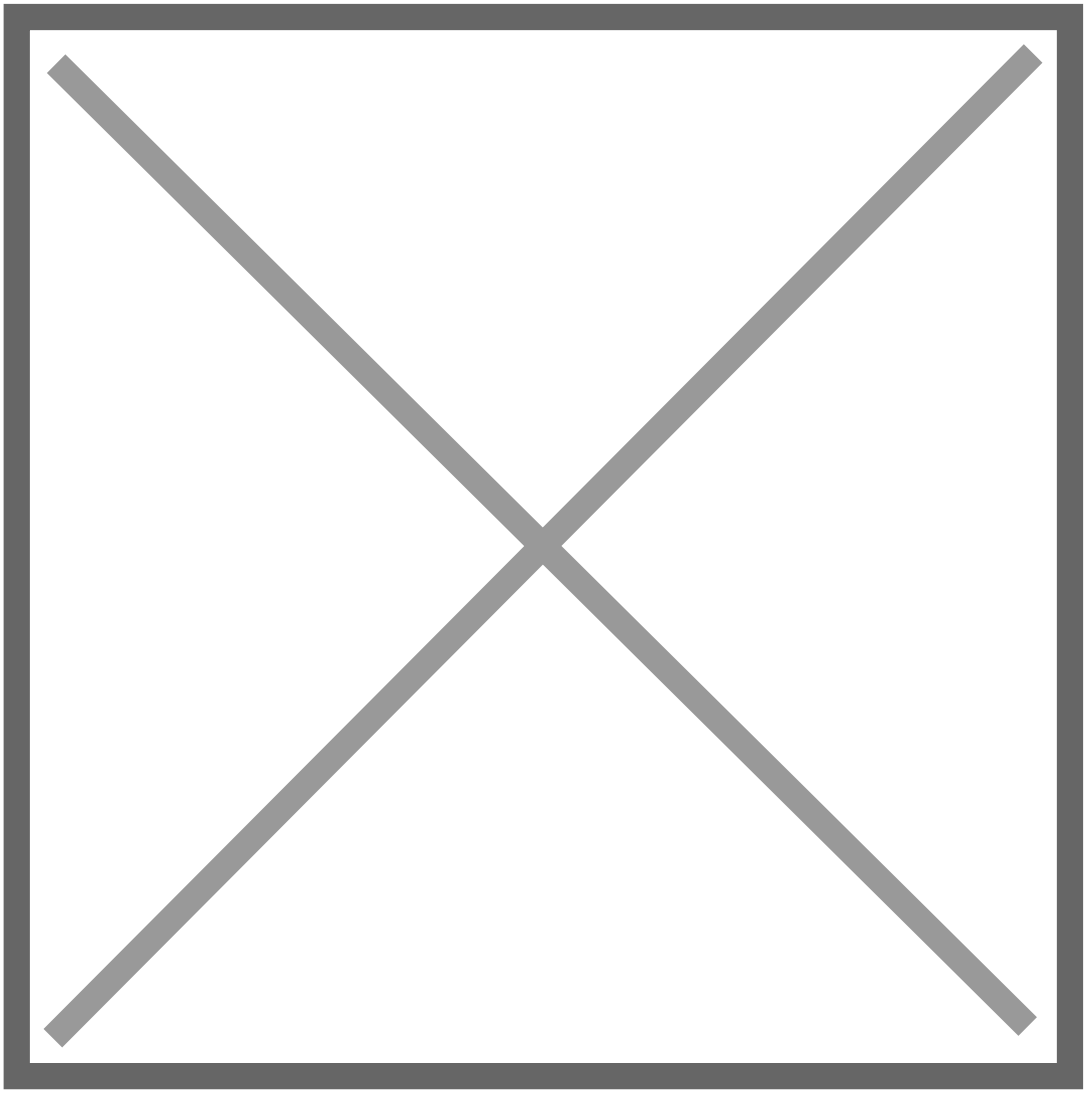
- Sign Step Configuration

Sign Step Configuration

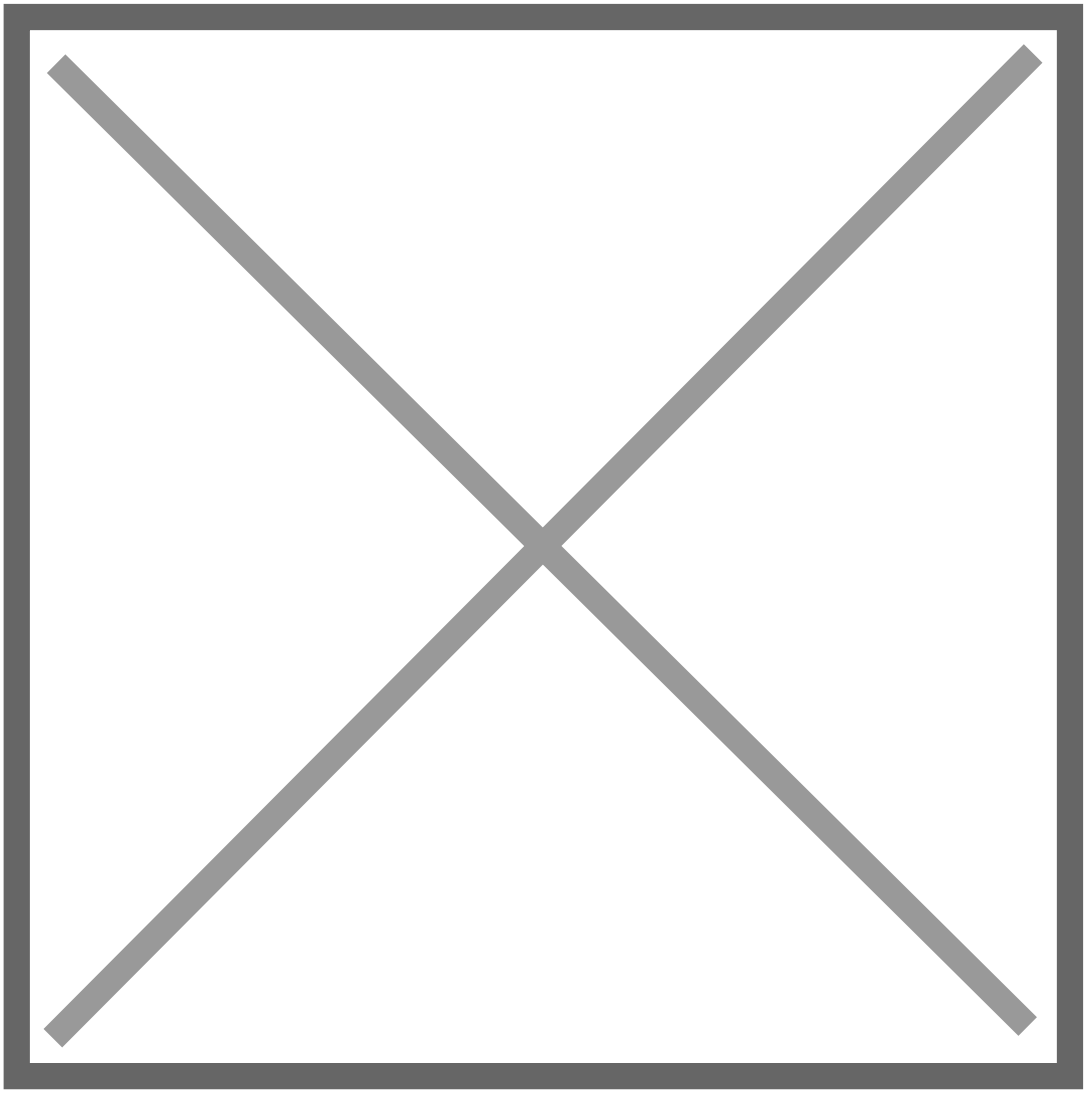
1. Click "Sign" if it already exists in the workflow, otherwise add the step.



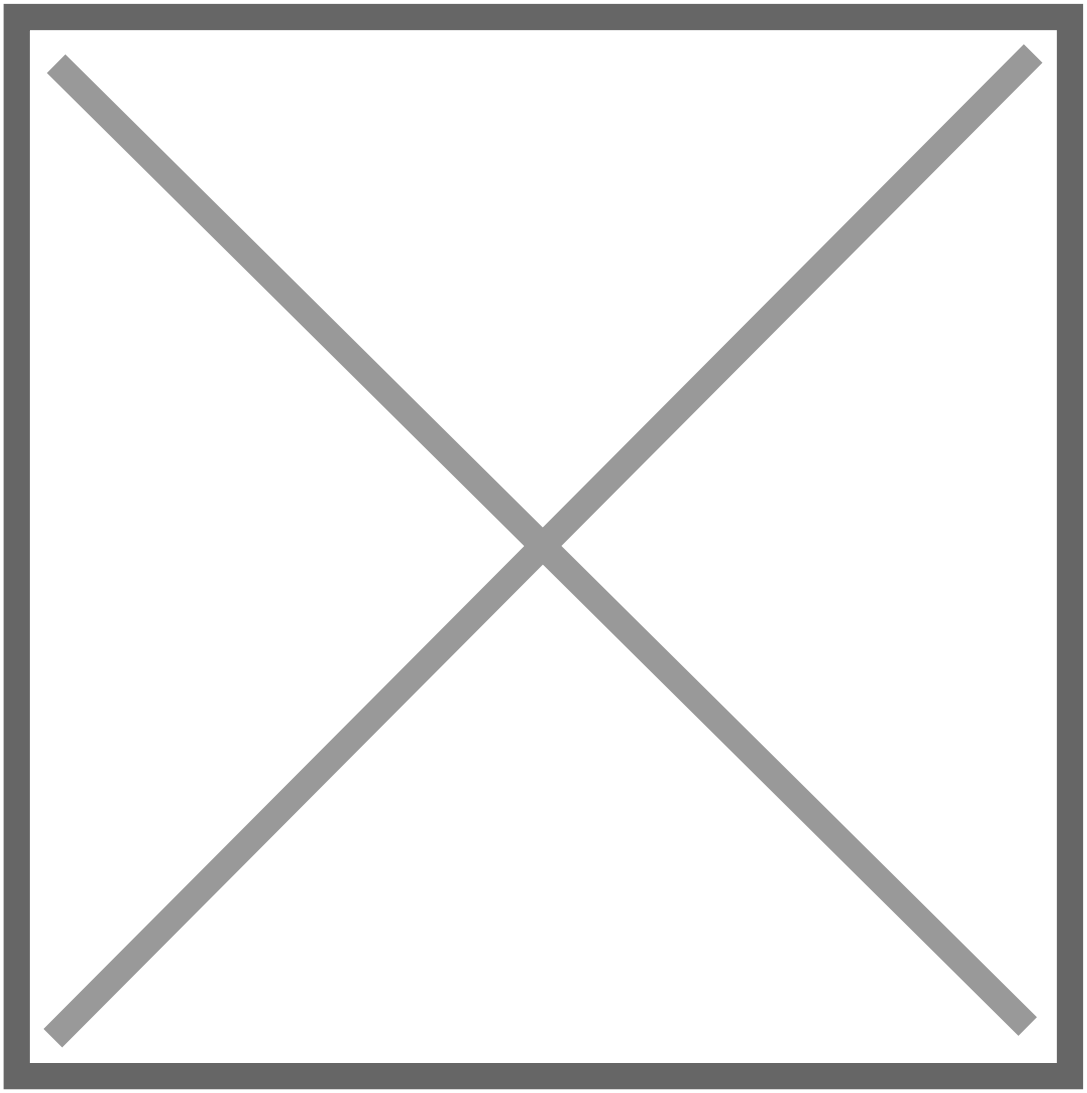
2. Name the document



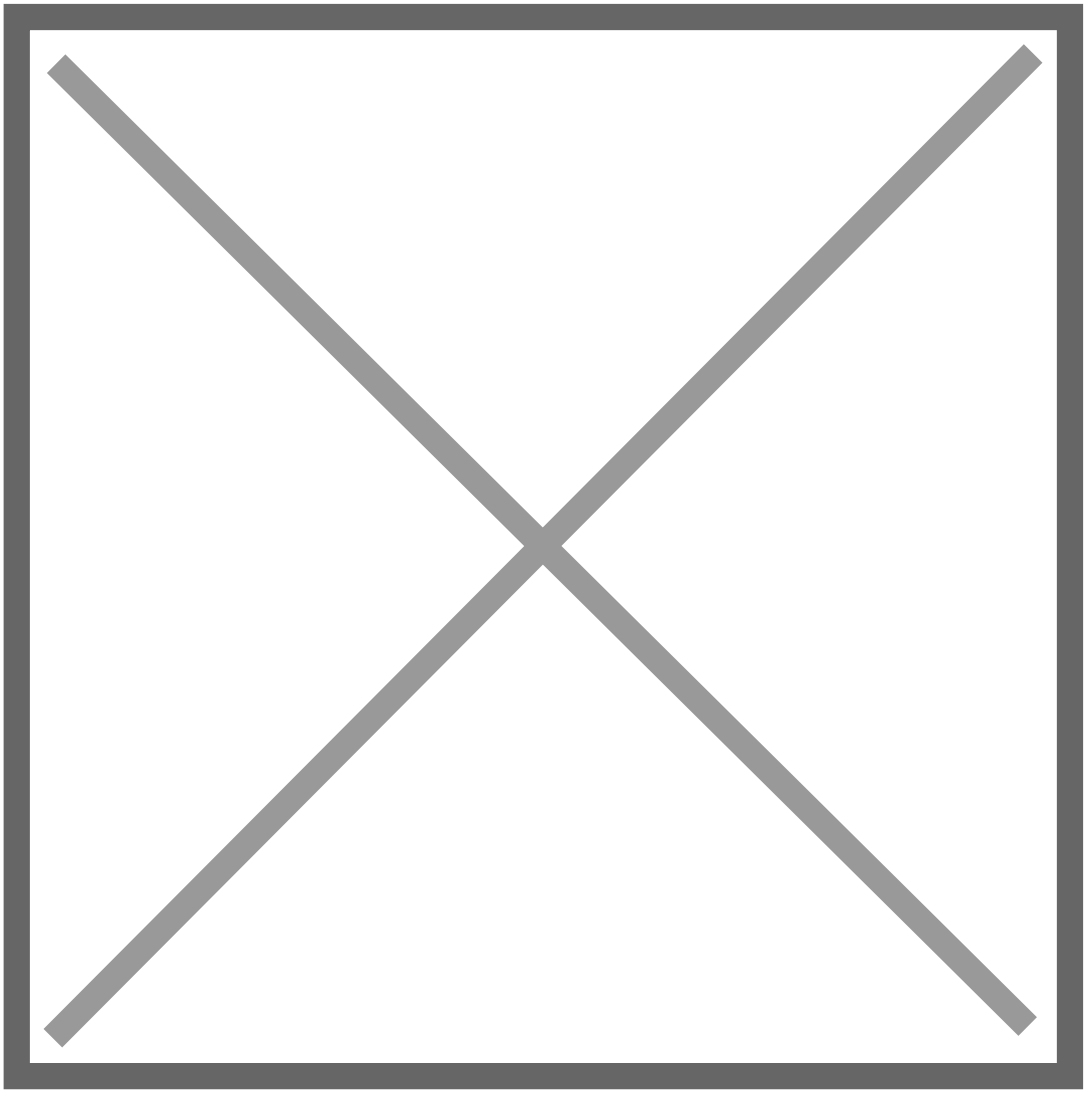
3. Make sure Collect signer name IS CHECKED



4. Click "Allow reassignment" if you want a signer to have the option to enter an email address to forward the assignment to.

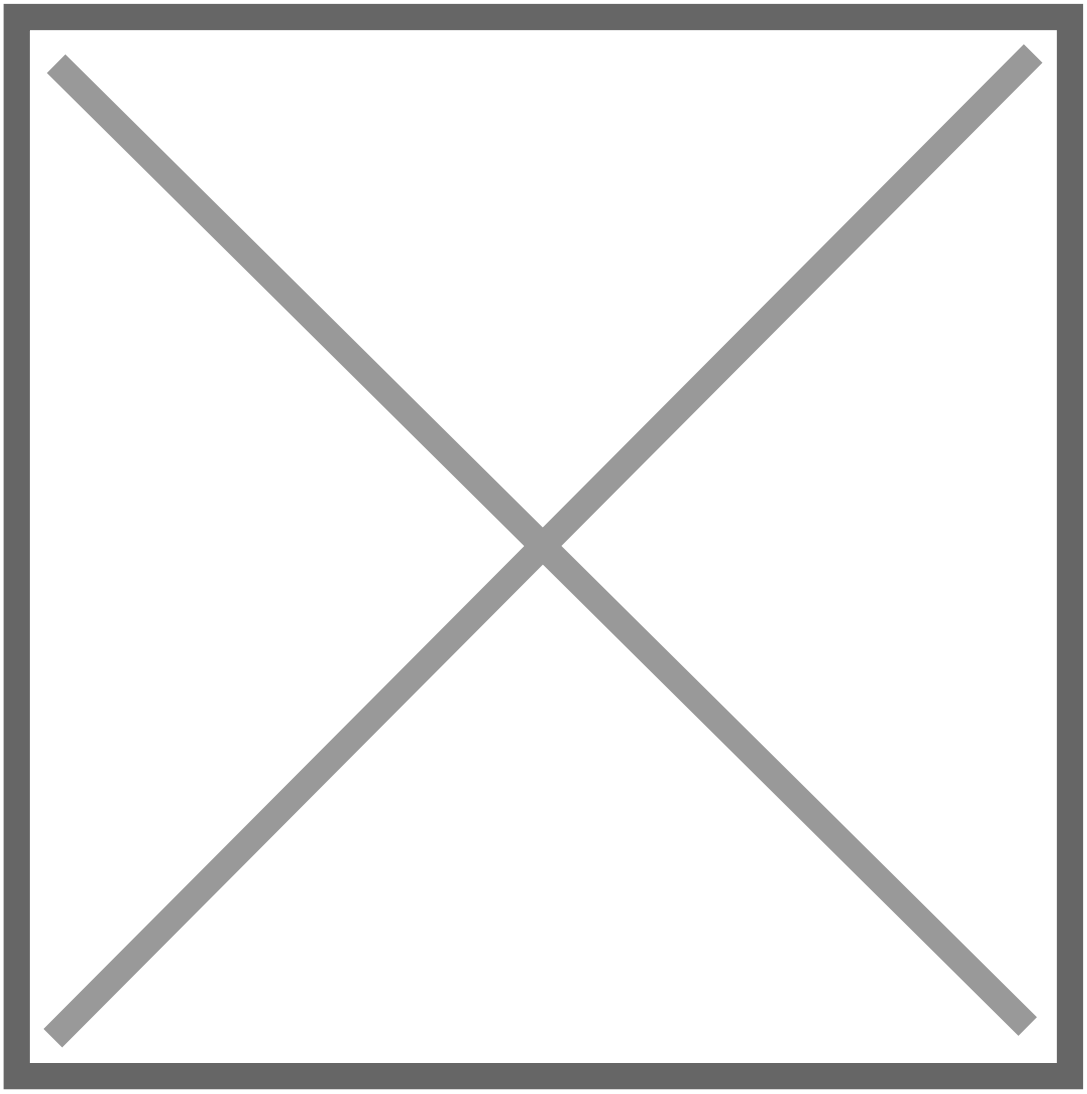


5. Click "Allow declining". By default, you will likely want to allow declining, but if you don't want to mess with the logic step, you can deselect it.
(If enabled, make sure you create a logic step for declining.)

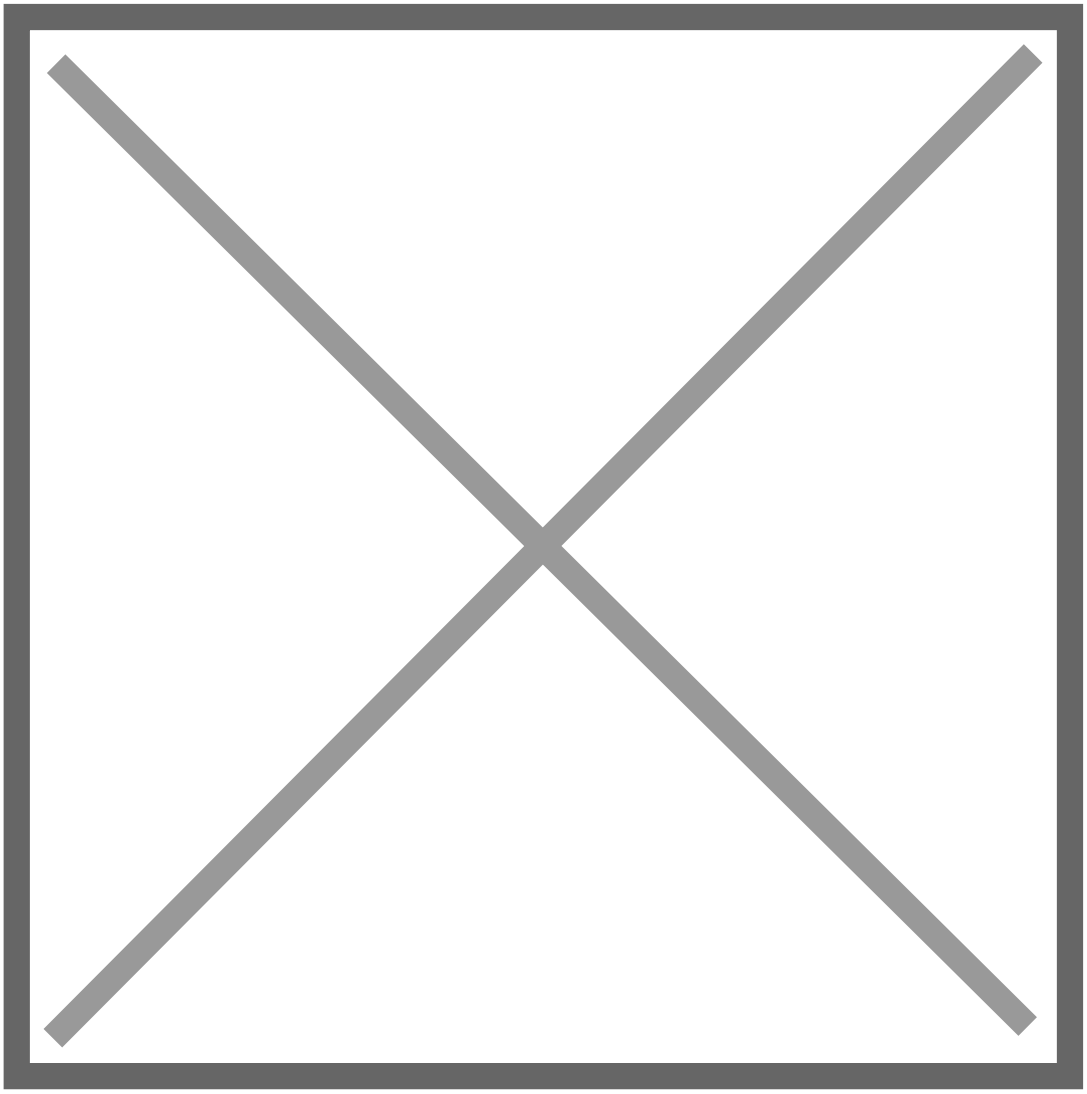


6. The recipients field here should be left blank. This will send an arbitrary email with every signature, alerting everyone that X has signed.

This is not the section that sends the final notification with deliverables.



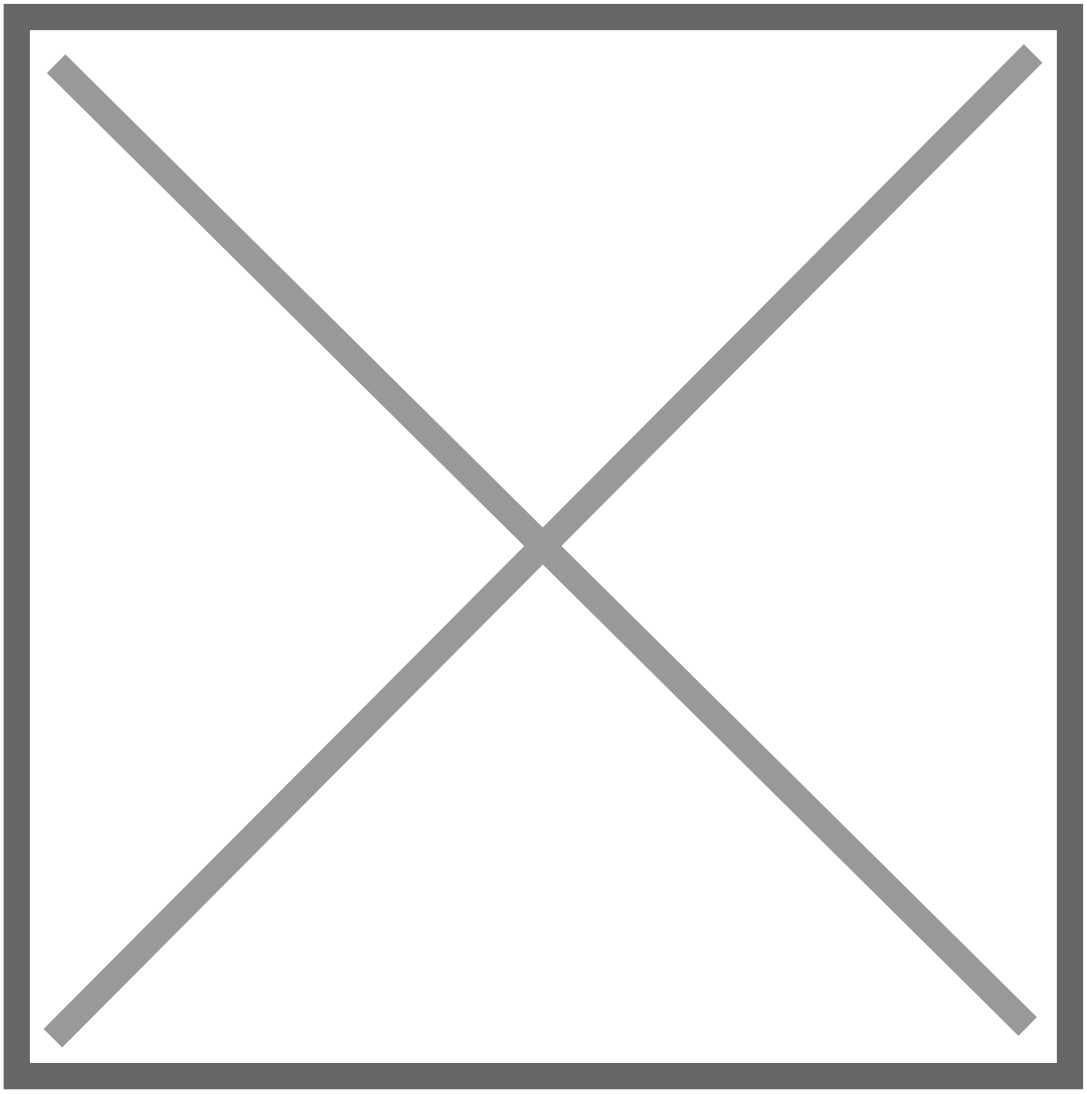
7. In the document name, you can click data and drag names.



Assignee Configuration

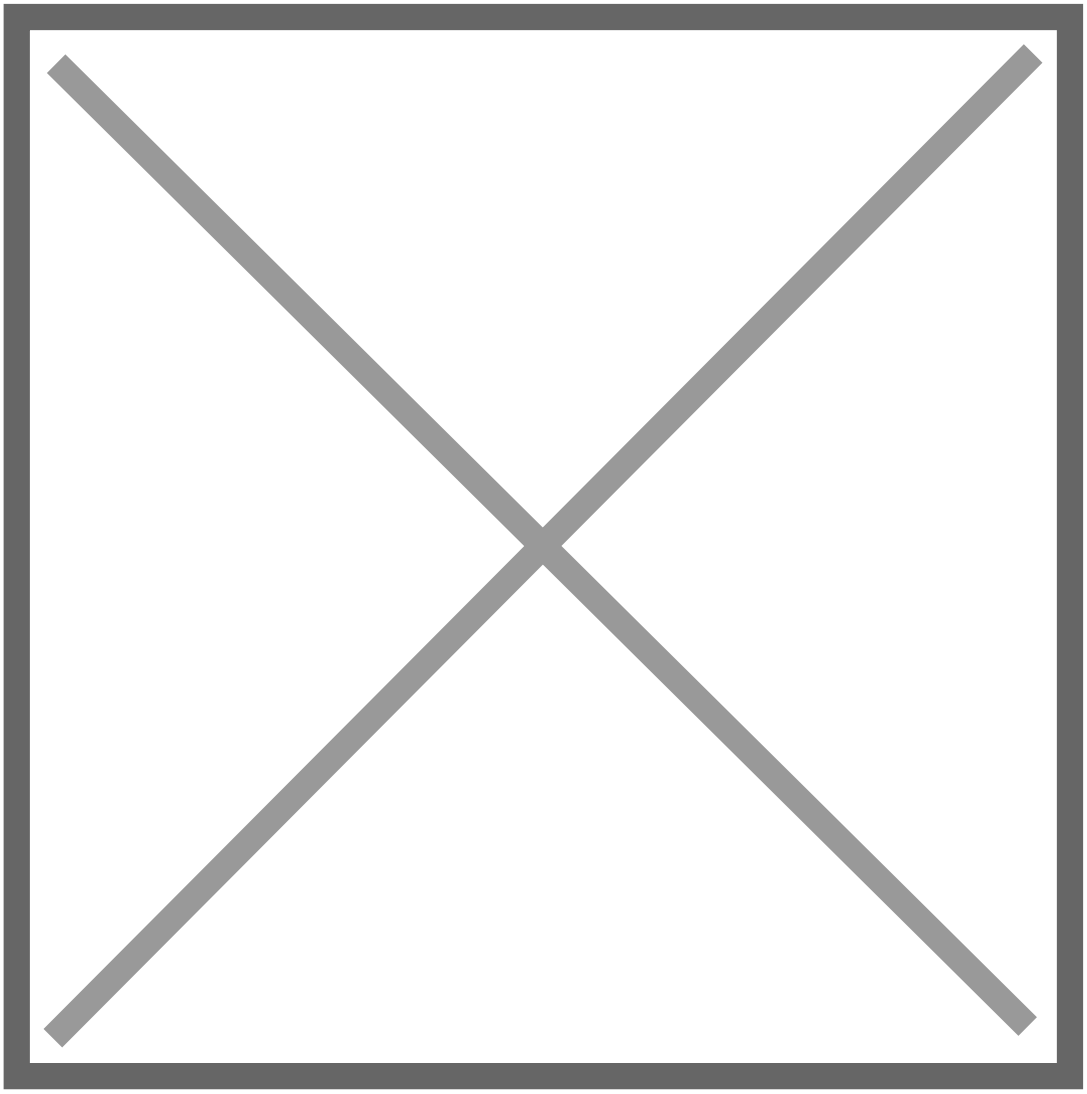
8. You can drag the names to the document name and it will dynamically fill with the form data.

Select Assignments.

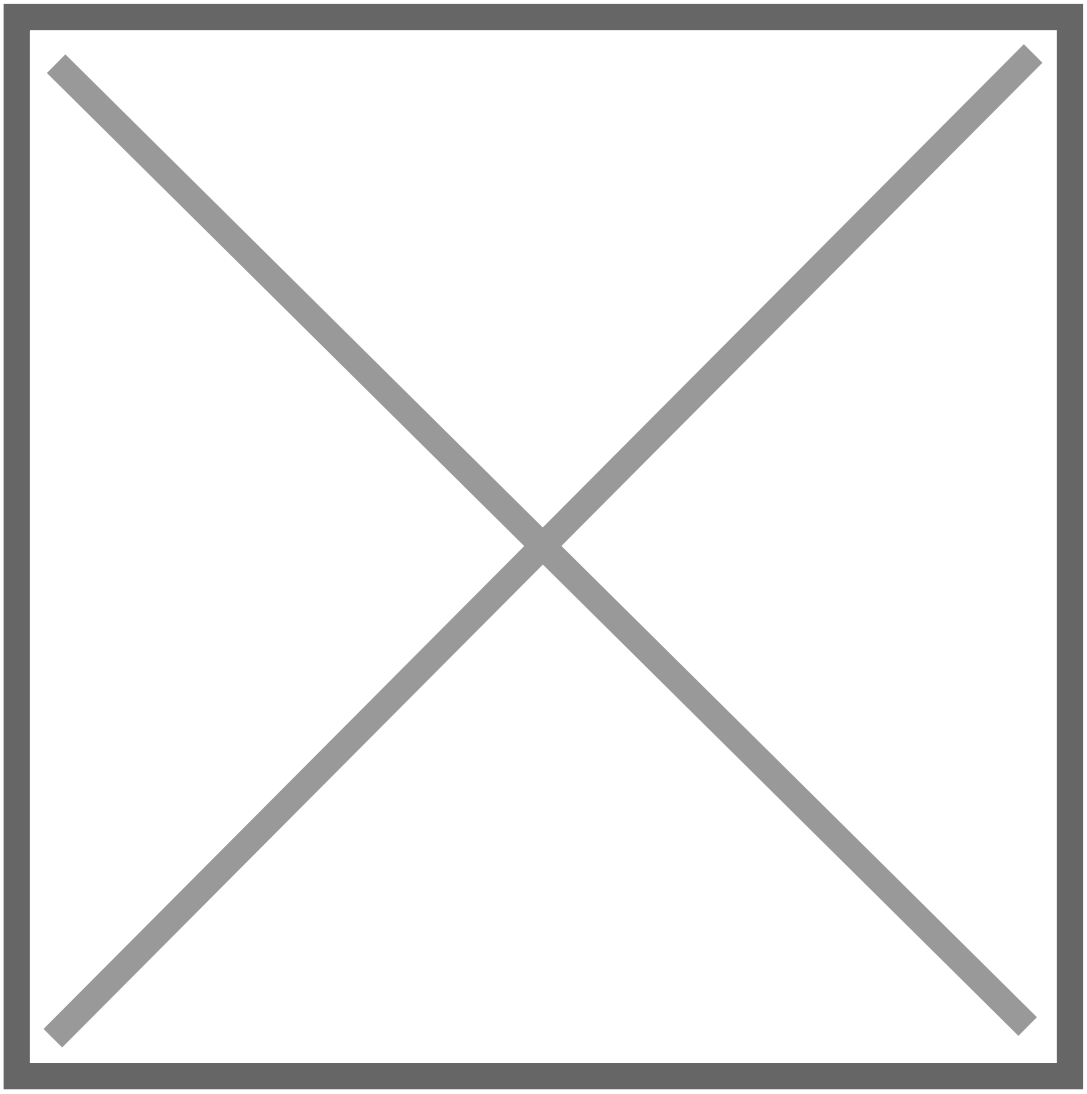


9. Select Email from the Assign via dropdown.

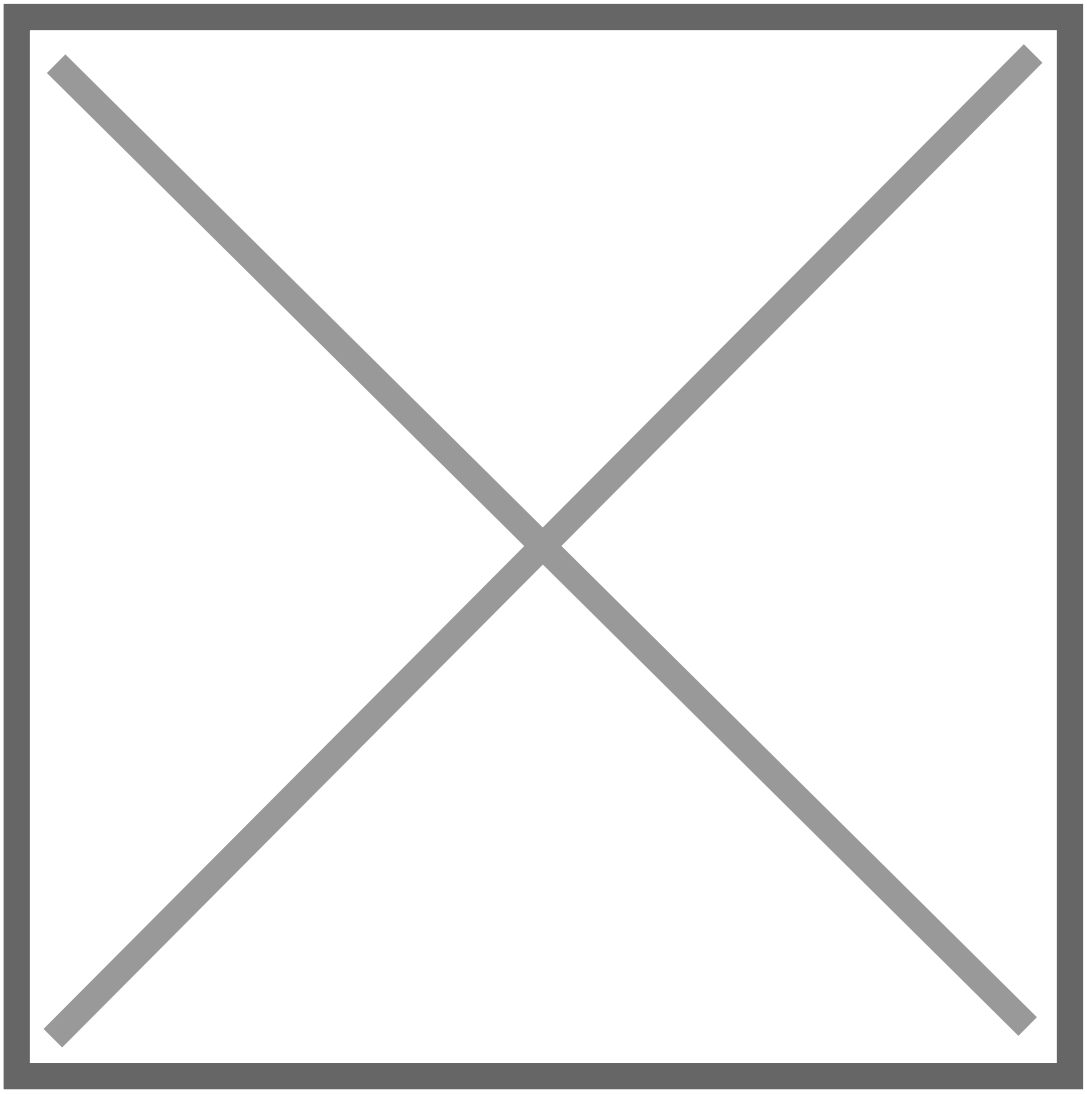
If you need the person filling out the form to sign first, select "From previous step"



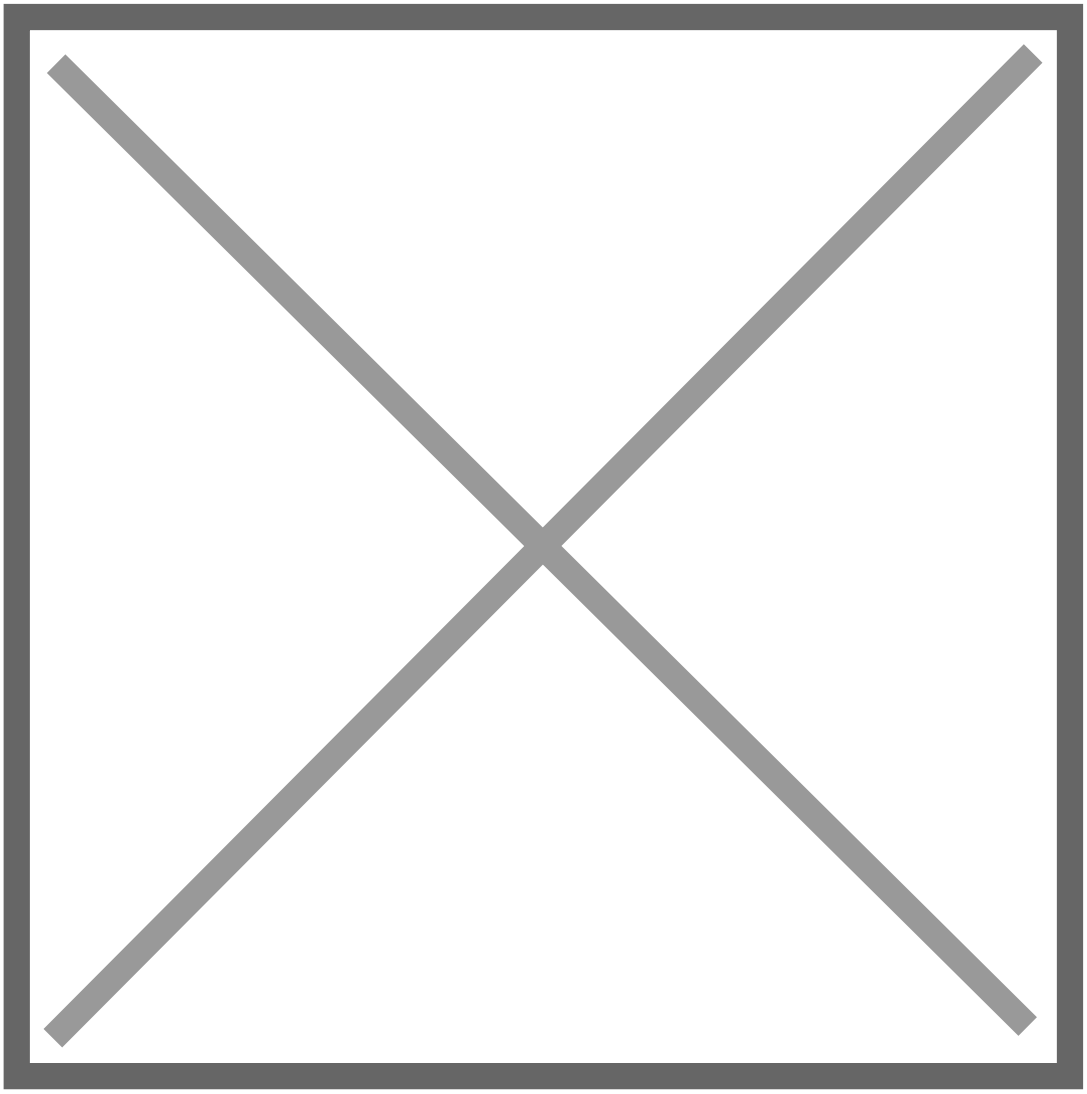
10. You can drag the "Chair Email" data to the field to dynamically populate with the email that gets input.



11. You can also start typing to select a data source.

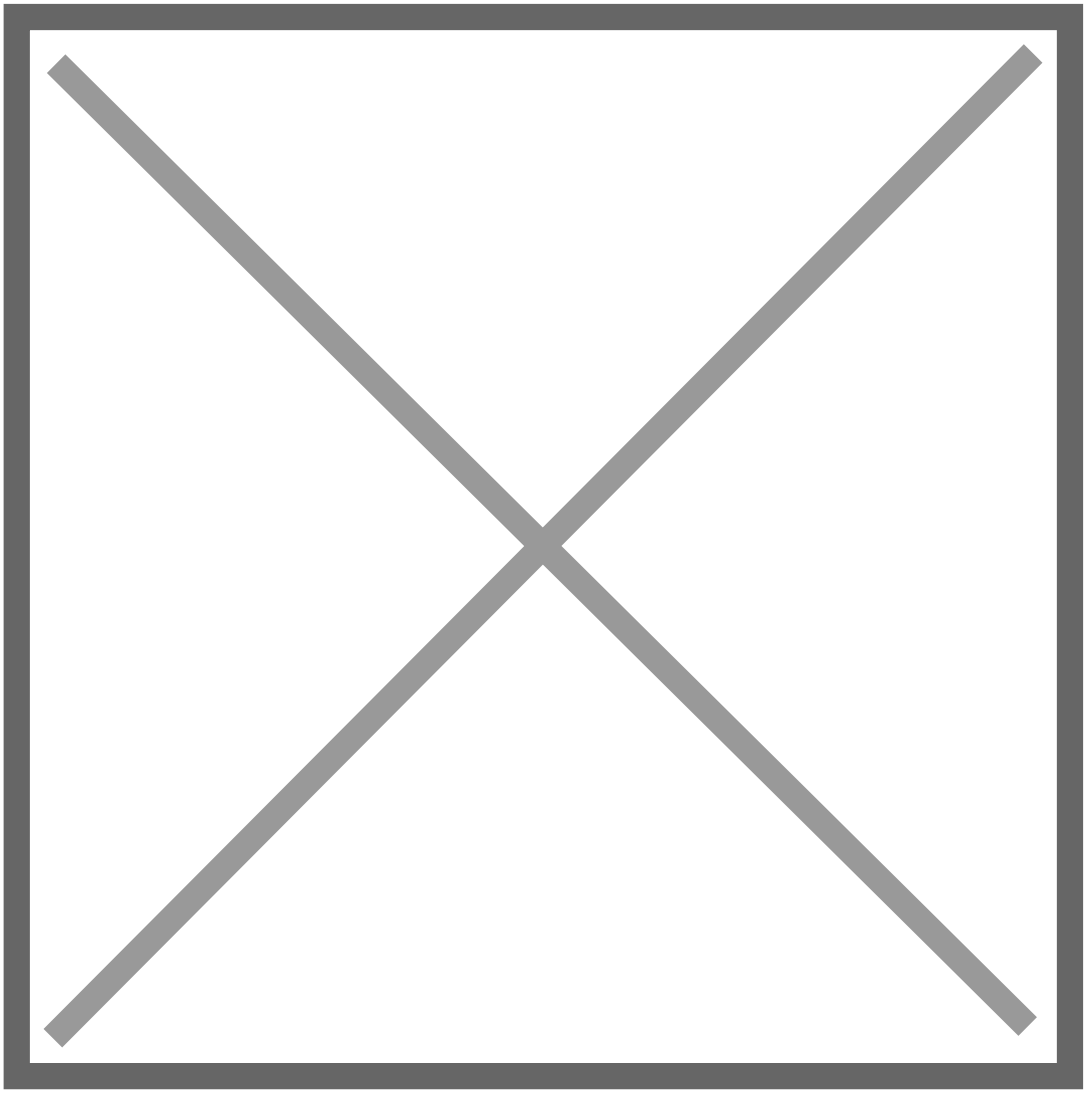


12. You may also manually enter an email address.

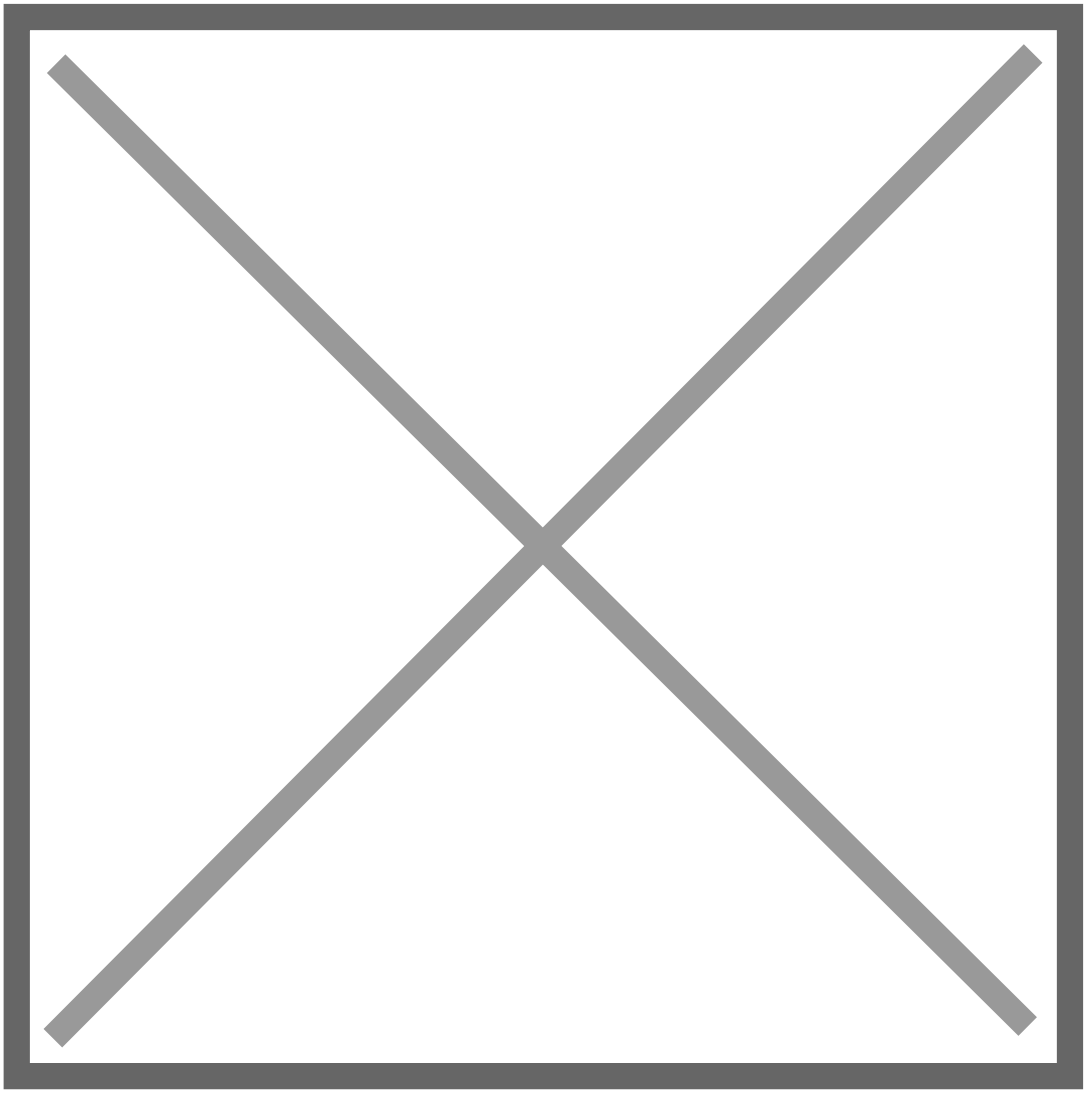


Email Message Settings

13. Tip: In the from name field, use "Arkansas State University" to circumvent people thinking it is spam. Leave reply-to email address blank

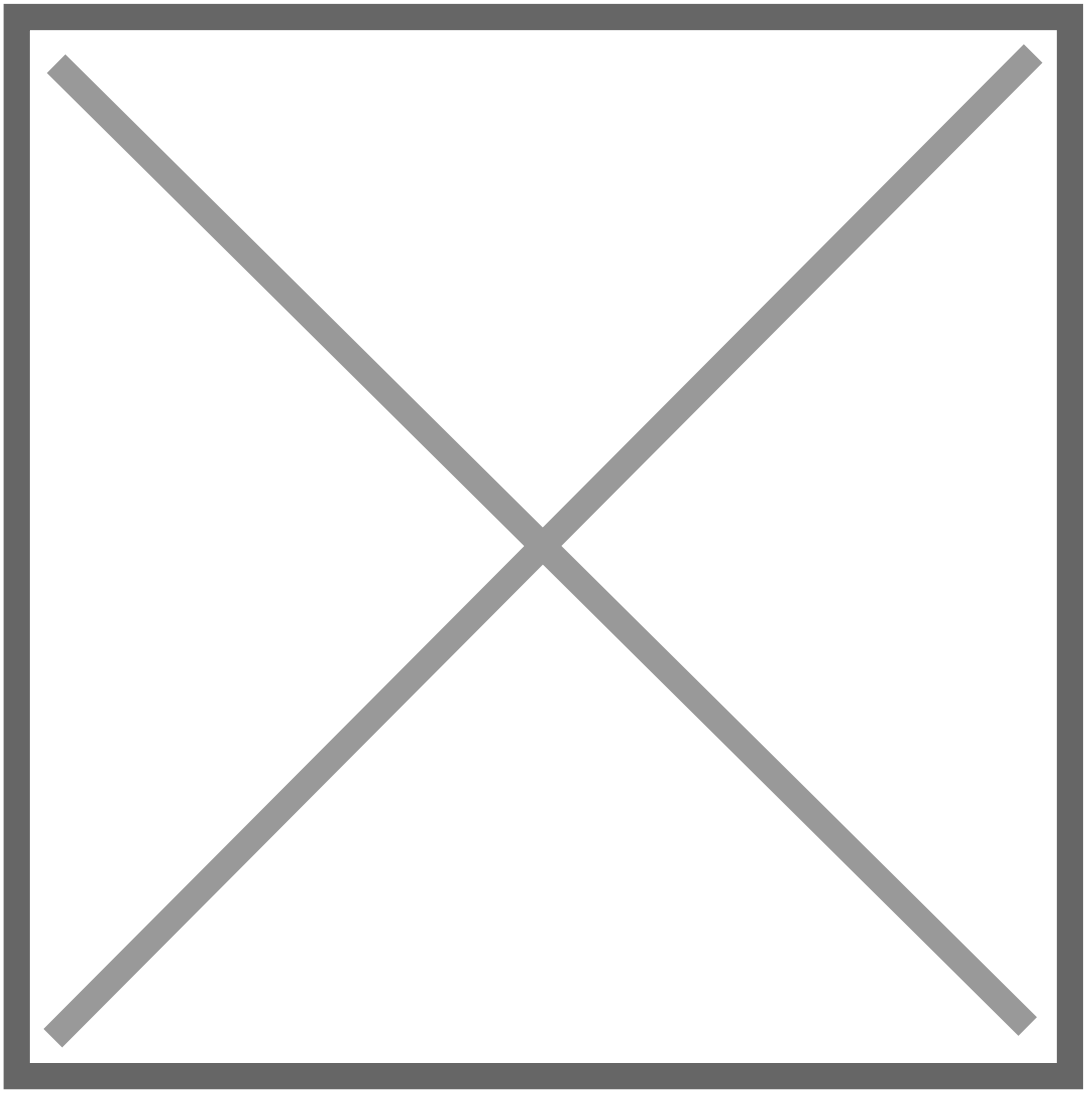


14. You may fill in the subject and message while pulling data sources from the left column into the fields.



15. Click the Add expiration checkbox.
This should be DESELECTED.

If you would like to set an expiration, do so with caution. If the expiration date has passed, the person will not be able to access the workflow assignment anymore.



16. Click Close to exit the Signatures settings. Streamline automatically saves progress.

