

DocuSign – Basic Class

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SASIT – Web Development

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PURPOSE OF DOCUSIGN

WELCOME

School of Arts & Sciences, Web Development

WHAT IS DOCUSIGN?

<https://it.rutgers.edu/docusign/>

DocuSign is Rutgers' electronic signature platform provided by the Office of Information Technology and locally administered by department staff who complete DocuSign training.

With DocuSign, the university has moved to replace paper-intensive processes with an online tool accessible from phones, tablets, and computers. Rutgers departments and units now have access to a secure e-signature tool to verify, route, track, and store documents requiring signatures

- It is a legally defensible signature
- Do NOT need an official account to use
- Can be set to outside of Rutgers
- Official documents
- Anything needing a 'signature'
- Offer letter
- ntt, ptl (we created an app to do this and work with docusign)

Request Docusign Services:

<https://na2.docusign.net/Member/PowerFormSigning.aspx?PowerFormId=a831512b-3167-462b-a8f5-4654bf8814a2%20>

ADDITIONAL TRAINING / DOCUMENTATION

<https://it.rutgers.edu/docusign/>

Login to LinkedIn Learning (using your netid)

<https://www.linkedin.com/learning/search?keywords=docusign&software=DocuSign&u=76115650>

DOWNLOAD FILES FOR CLASS

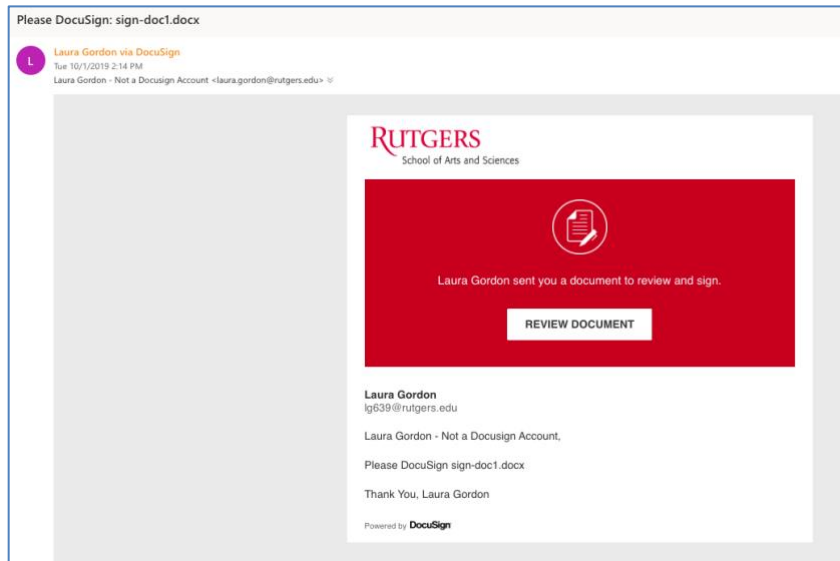
<https://www.sas.rutgers.edu/cms/training/images/docusign.zip>

SAVE file onto local computer, extract file

RECEIVE DOCUMENT TO SIGN – NON DOCUSIGN USER

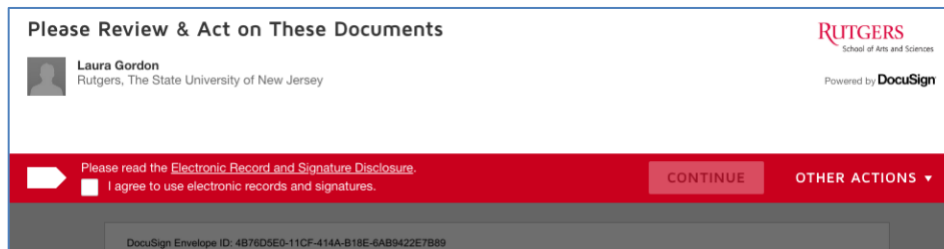
- Receive document as a NON DocuSign User
- A docuSign user would be NETID@rutgers.edu
- If you use any other address that person is NOT a docuSign user.

RECEIVE DOCUMENT VIA EMAIL



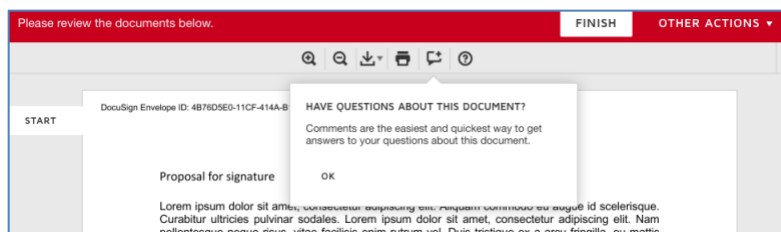
REVIEW DOCUMENT

- Must click on 'agree to use electronic records and signatures'



ADD COMMENT TO DOCUMENT

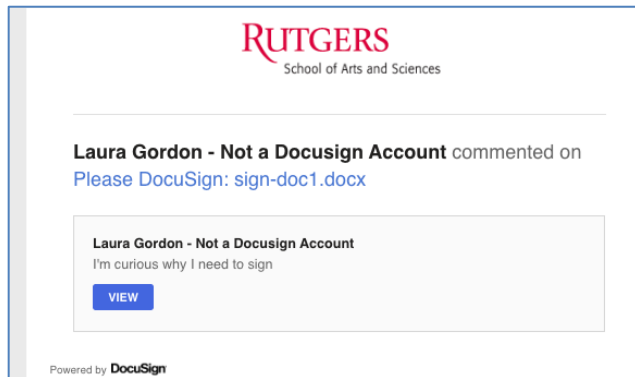
1. Add a comment about the document



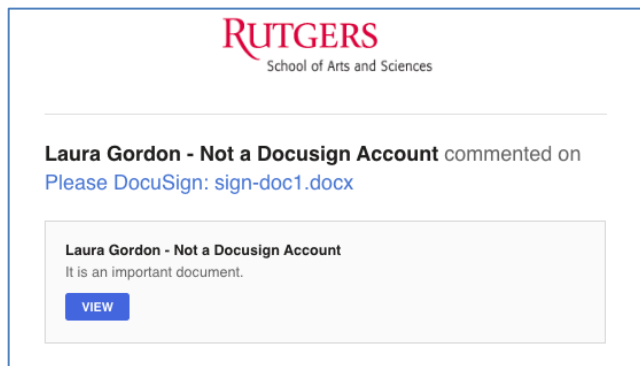
2. Enter comment, and have it sent to the 'sender' (Laura Gordon)



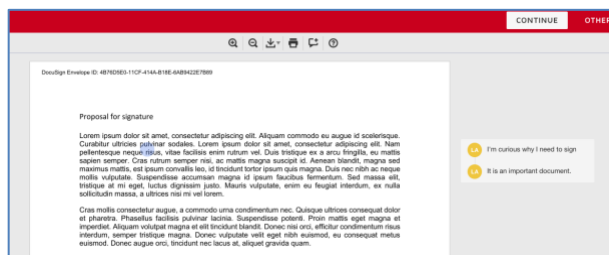
3. As the 'SENDER' of the document the SENDER will receive an email such as



4. Then the recipient will receive the SENDERs response



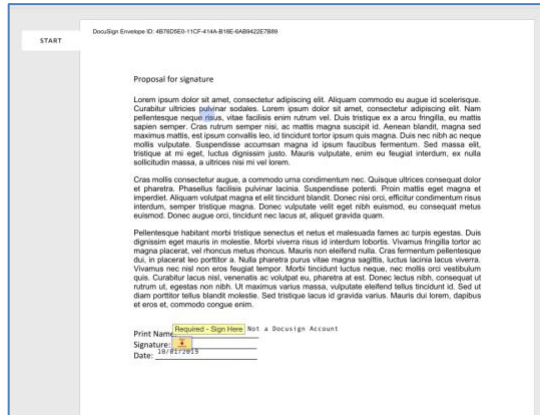
5. Can see all comments made



SIGN DOCUMENT

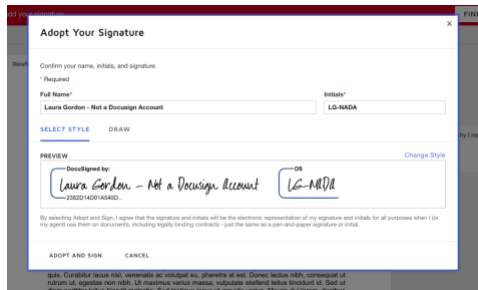
If comments were made, hit Continue to proceed with signing the document

View document, click on. Signature to add signature



SELECT A SIGNATURE TO USE

Since this is being done by a NON-Docusign account, it is not possible to adjust the signature or your profile. Click ADOPT and SIGN to complete the document



Then click the FINISH button on the top right of the page

Once complete, you may. DOWNLOAD or PRINT the signed copy (but you do not need to)

WHAT THE SENDER SEES AFTER SIGNATURE

The sender, will see that you have approved / signed the document

Sent

Search Sent and Folders

FILTERS

Filtered by: Date (Last 6 Months) | Edit

Subject	Status	Sent	
<div><div><input type="checkbox"/></div><div><div>✓</div><div>Please DocuSign: sign-doc1.docx</div><div>To: Laura Gordon - Not a DocuSign Account</div></div></div>	Completed	10/1/2019 02:38:27 pm	<div><div>MOVE</div><div>▼</div></div>

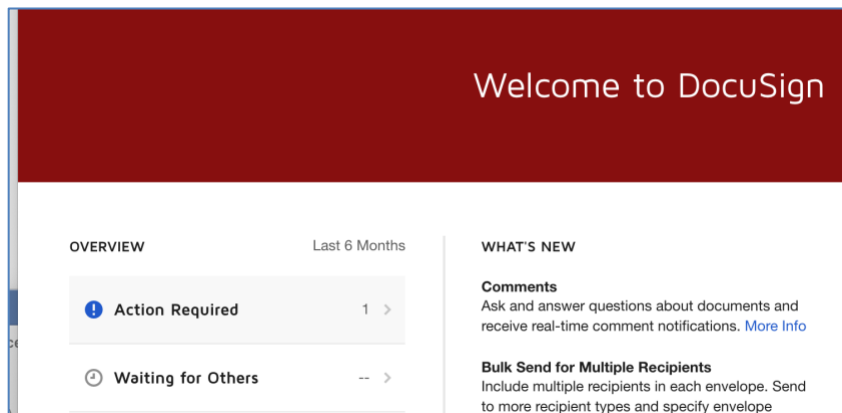
The sender will also receive an email that the document has been completed.

RECEIVE AS A DOCUSIGN USER

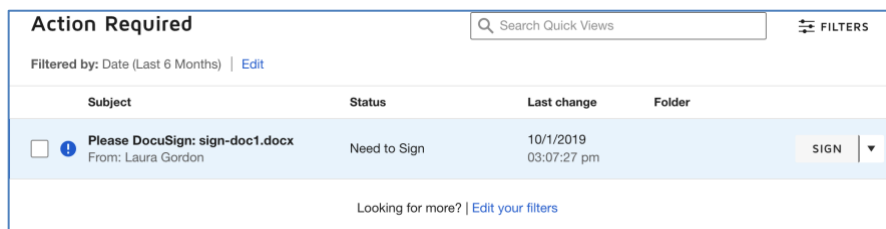
RECEIVE AN EMAIL AND SIGN DOCUMENT

- Same options as the prior example

LOGIN TO DOCUSIGN

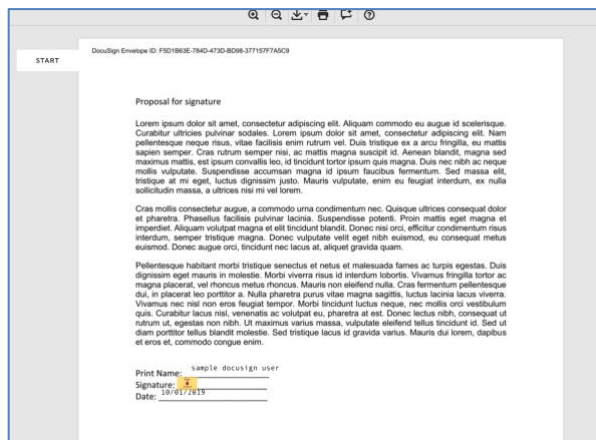


1. Click on Action Required



2. Click on SIGN

3. Sign Document



sign field to create and add your signature

Adopt Your Signature X

Confirm your name, initials, and signature.

* Required

Full Name* sample docusign user **Initials*** SDU

SELECT STYLE DRAW

PREVIEW [Change Style](#)

DocuSigned by: sample docusign user 426F142418274EC... DS SDU

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN **CANCEL**

10/01/2019

- Click on signature can CHANGE your style (since you are LOGGED IN), hit DRAW, and 'using mouse' draw signature to use

sign field to create and add your signature

Adopt Your Signature X

Confirm your name, initials, and signature.

* Required

Full Name* sample docusign user **Initials*** SDU

SELECT STYLE **DRAW**

DRAW YOUR SIGNATURE [Clear](#)

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN **CANCEL**

10/01/2019

- Select change your style

Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name* sample docusign user

SELECT STYLE DRAW

PREVIEW

DocuSigned by: sample docusign user 426F142418274EC... DS SDU

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN **CANCEL**

DocuSigned by: sample docusign user 426F142418274EC... DS SDU

DocuSigned by: sample docusign user 426F142418274EC... DS SDU

DocuSigned by: sample docusign user 426F142418274EC... DS SDU

DocuSigned by: sample docusign user 426F142418274EC... DS SDU

After select signature, select to 'Finish and Sign'

CHANGE YOUR DOCUSIGN PROFILE/PREFERENCES

- Login to docusign
 - a. Docusign.com
 - b. Login as: netid@rutgers.edu
 - c. Login using CAS (Netid and Netid password)

CHANGE PREFERENCES

This sets your address, photo, position

The screenshot shows the 'Personal Information' section of a Docusign profile. At the top, there's a header with 'Personal Information' and a link to 'Privacy & Security'. Below this is a 'SAVE' button and a 'CANCEL' button. A blue notification bar states: 'You can now manage information on your new DocuSign Profile. Click the menu above and choose "My Profile".' The main content area features a profile card with a placeholder photo, the text 'SAS DocuSign Edit', the email 'docusign1@sas.rutgers.edu Edit', and the account name 'Account: Rutgers School of Arts and Sciences Default Account'. Below the card is an 'UPLOAD PHOTO' button. The form is divided into sections: 'Company and Job Title' with fields for 'Company' (filled with 'Rutgers School of Arts and Sciences') and 'Job Title'; 'Address and Phone' with fields for 'Address', 'City', 'Region/Province', and 'Postal Code', and an 'optional' field for phone information.

CHANGE MY PROFILE

The screenshot shows the Docusign user interface with a red navigation bar at the top containing 'HOME', 'MANAGE', and 'REPORTS'. On the left, the 'Personal Information' section is visible, including a 'CANCEL' button and a notification bar. On the right, a user profile card for 'Rutgers School of Arts and Sciences' is shown, displaying the email 'docusign1@sas.rutgers.edu' and the phone number '73297000'. A dropdown menu is open from the profile card, showing three options: 'My Profile' (highlighted), 'My Preferences', and 'Log Out'.

- Profile Settings allows you to adjust, Signature, Privacy, Apps, Language & Region:

CHANGE SIGNATURE

Click on Signatures in profile settings

- Add New Signature – click CREATE

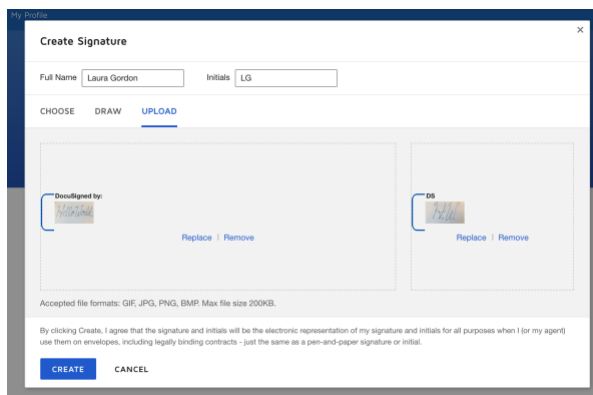
Options: Choose, Draw, Upload

- Choose
 - Here you can select your signature / Initials from a variety of fonts
- Draw
 - You can 'create' your signature using your mouse or if you have a touch screen your finger/stylus
- Upload
 - Upload your signature from a file which exists on your computer
 - For this class, you have downloaded a file, docusign.zip
 - Extract this file, you will see a document: t
 - test-signature.jpg
 - test-initials.jpg
 - Upload both files to your profile
 - Click CREATE Button

- You will be asked to LOGIN again into your account (remember to login as netid@rutgers.edu)

SIGNATURE REQUIREMENTS

1. Must be less than 200k
2. Steps
 - Solid White Sheet of paper
 - Use Marker to create SIGNATURE
 - Use Marker to create INITIALS
 - Take PHOTO of both files or SCAN using RICOH
 - Save scan onto computer
 - Resize image / rotate image if needed
3. To reduce size can use online tool: resizeimage.net
4. Resize on local computer by 'exporting' to a smaller size
5. Must create BOTH Signature AND Initials



SIGN DOCUMENT WITH SIGNATURES

When you are signing the document, by default it will use the signature as selected in your profile. If you CLICK on the signature option, you will have an option to EDIT the signature format.

When SIGNING a document you cannot 'upload' a new signature file. This must be done via the docuSign application.



WORK WITH SIGNATURE FILES

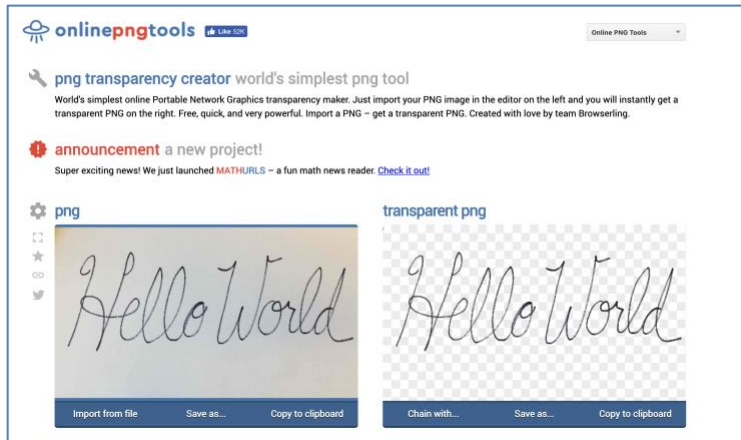
1. Sign your name with a marker on a white sheet of paper
2. Take Image with your cell phone or scan via printer
3. Send the file to yourself, so you can store it on your local computer (either via scan or photo image)

CREATE TRANSPARENT .PNG FROM .JPG

A regular 'jpg' file keeps the 'white background' on the back of the paper, to remove this background, your goal is to create a transparent .png file

<https://onlinepngtools.com/create-transparent-png>

1. Upload test-signature.jpg (from zip file), or use your own signature pg



2. Press Save As...
3. Press DOWNLOAD
4. Name file and store on local computer

RESIZE IMAGE

For an image to be uploaded to docuSign, the image must be less than 200k

<https://resizeimage.net/>

1. Upload an image, select the transparent .png file
2. Scroll down to RESIZE Image, if an image was taken on phone, try to resize 30%
3. Select Transparent PNG & GIF option

4. Resize your image

Resize the image by percentage, or resize it to be exactly the size you specified, for example: 1366x768 pixels.

% x px ☒ Keep Aspect Ratio

Fill in the background with a solid color if the proportion of image changed:

☐ Auto Mode ☐ No Fill(will cause image distortion) ☐ White ☐ Black ☒ Transparent(PNG & GIF) ☐ Custom Color

4. Scroll to bottom, click Optimize your image, click RESIZE Image Button, verify the New Image size is less than 200k

7. Optimize your image(optional):

Optimization options:

☒ Default compression ☐ Lossless compression ☐ Lossy compression

Resize Image

Compress Image

Compress JPEG

Webp to JPG

PDF to JPG

HEIC to JPG

Old Image: 768x432 pixels(**123 KB**)
New Image: 230x129 pixels(**17.5 KB**)
[View Image](#), [Download Image](#), [Show QR Code](#), [Resize Another Image](#)

5. Click Download Image Link to SAVE IMAGE to your local computer