



# DocuSign – Advanced Class

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## PURPOSE OF DOCUSIGN

### WELCOME – INTRO TO DOCUSIGN

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:*

If you would like to CREATE TEMPLATES, CREATE POWERFORMS, SEND ENVELOPES (Documents), please create a WORK ORDER, requesting DocuSign Permission to send forms. An SAS-IT person will create this account for you. If you already have a 'create' account with docusign, but you do not see 'SAS' on the top left, please create a work order and let us know, so we can move your account over and we can assist.

#### *NEED ASSISTANCE WITH DOCUSIGN?*

Our hope is that each person will be able to build their own forms and send out documents. If you need assistance or if you need special customization options, please create a work order. In the work order be specific that you need assistance with a DOCUSIGN FORM. We will have support available specifically for these types of customizations.

#### *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>

*FILES NEEDED FOR CLASS*

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

visit:

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

(Scroll to bottom of page for project materials)

SAVE this file docusign.zip onto local computer

Extract the file

File Contents:

- sign-doc1.docx (document with 1 signature)
- sign-doc2.docx (document with multiple signatures)
- sign-doc1.pdf (sample using a pdf)
- test-signature.jpg (sample signature)
- 2020-powerform-test.pdf (powerform pdf file for application)

## DOCUSIGN ENVIRONMENT

- We have been advised by OIT that the creation and testing of all DocuSign templates and powerforms should be done in our **demo environment**.
- The main reason for this change is that the production DocuSign environment creates legally binding documents.
- When you want to create a new DocuSign process, you should begin in the demo environment.
- Create and test your process(es) in **demo** and when you are ready to go live, you will move the template(s) to the production environment.
- The **demo** environment operates in the same fashion as production and you will have the same level of access.
- The screen colors are different, and all emails sent out from the system have a SAS logo that clearly states DEMO.
- Additionally, completed envelopes in the demo environment state that the document is a **“Demonstration Document Only”**.



Production Environment:



## CREATE DOCUMENT IN DOCUSIGN

*LOGIN TO DOCUSIGN (DEMO ENVIRONMENT)*

Visit: [demo.docusign.net](https://demo.docusign.net)

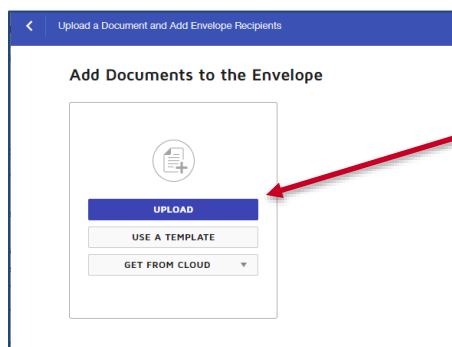
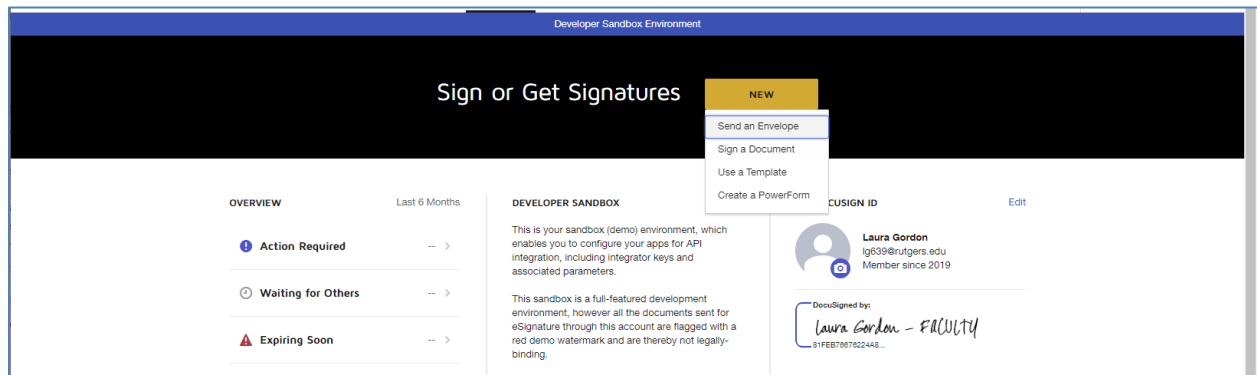
Login: [NETID@rutgers.edu](mailto:NETID@rutgers.edu)

It is important to ALWAYS login as [NETID@rutgers.edu](mailto:NETID@rutgers.edu) (do not login as [NETID@english.rutgers.edu](mailto:NETID@english.rutgers.edu), for example)

## CREATE AN ENVELOPE TO GET PEOPLE TO SIGN

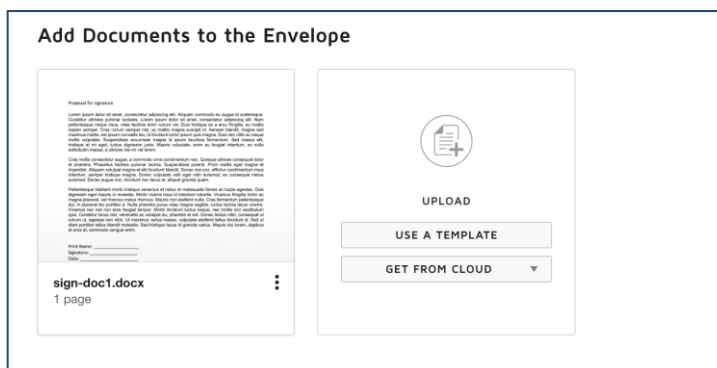
What is an envelope?

Envelopes contain recipient information, documents, document fields, and timestamps that indicate delivery progress. They also contain information about the sender, security and authentication information, and more.



1. Click 'Upload' Select sign-doc1.docx
2. DRAG doc1.docx into the 'upload' and it will upload the file
3. It's possible to upload multiple files from here.

## ADD DOCUMENTS TO THE ENVELOPE



<https://support.docusign.com/en/guides/ndse-user-guide-add-recipients>

Rutgers Recipients ([netid@rutgers.edu](mailto:netid@rutgers.edu))

- can change their profiles
- can see all documents they have signed
- can manage documents
- can change their signature

- cannot adjust their profile
- cannot manage documents they have signed
- CAN sign documents
- CAN be a part of the signing 'flow'
- Just as 'LEGAL' as Rutgers

Then you can just add details for the message to recipients...then hit 'next' button on bottom of page

Message to All Recipients

Email Subject\*

Please Double-Click sign-direct.pdf

Characters remaining: 70

Email Message

This is a note that goes to all recipients

Characters remaining: 999

Advanced Options | Edit

- Recipients can view documents more easily on mobile devices with mobile signing **NEW**
- Recipients can sign on paper
- Recipients can change document signing
- Recipients can change document signing 100 days after send date
- Recipients are warned 6 days before request expires
- Senders can use either quick send or advanced edit

SEND NOW

NEXT

Click the NEXT Button, at the bottom of the page.

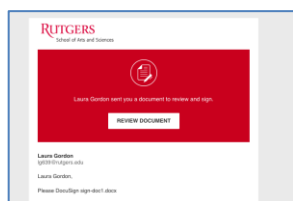
## DEFINE DOCUMENT– ADD FIELDS

Drag – Name, Signature and Date Signed into the ‘fields’ on the document

Hit SEND button on the bottom of the page

## RECEIVE MESSAGE

The receiver of the message will get this in their mailbox. They can hit ‘REVIEW DOCUMENT’.



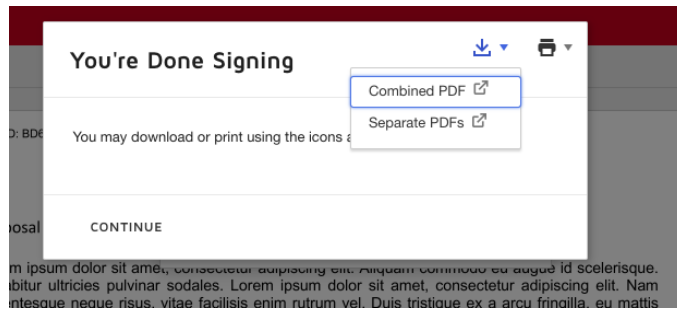
## Options for RECEIVER



If I click to SIGN, just click on the ‘signature field’ to add my signature

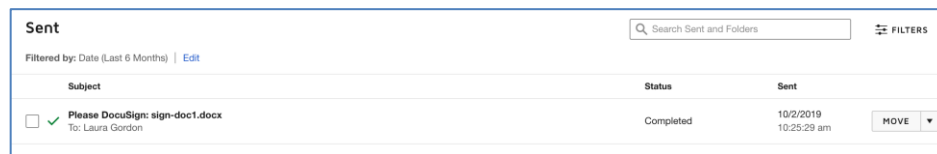


Once signing is complete, you can download the signed file / print it on this confirmation screen.



## SENDER / FILE MANAGEMENT

Once signature is complete, I can see that the person signed it on my 'sent' page Envelopes → Sent



Send new Document to [netid@rutgers.edu](mailto:netid@rutgers.edu)

If you send a document to [netid@rutgers.edu](mailto:netid@rutgers.edu), then that person can manage the document in their own docuSign account. They can change their profile, signature and manage all documents that have been sent to them.

As the SENDER the process is exactly the same.

# WORK WITH TEMPLATES

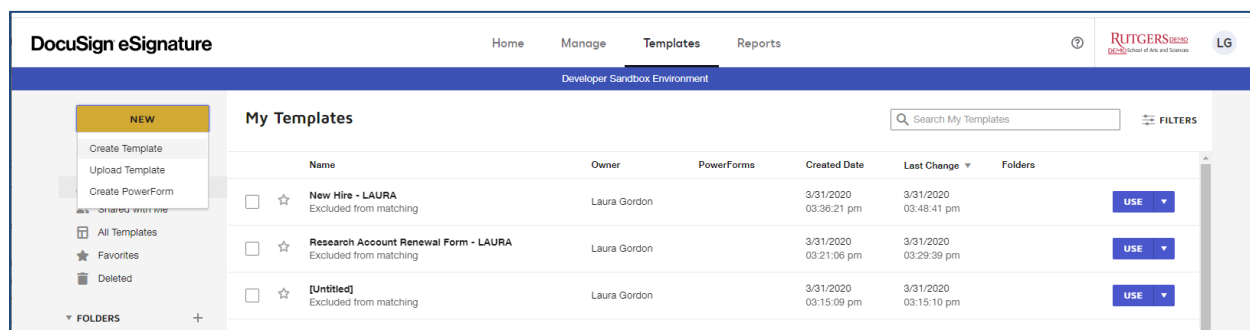
## CREATE A TEMPLATE

The key difference between creating envelopes and templates is that with templates you can add placeholder roles to your recipients list. The placeholder role represents a recipient in the envelopes created when you use the template. When you later start an envelope using your template, you fill in the actual person's information for that role. Typically, you use placeholder roles for the recipients rather than named persons, as you likely will send the template to different people every time you use it.

If your template is complete, you can save even more time. For a template to be complete, it must contain at least one of each of the following items: file, recipient, and recipient field. When you use a complete template, you have the option to simply fill in your recipient names and add the email message; if your account uses envelope custom fields, you can also enter the field values.

### Click to create a NEW Template

1. Click on TEMPLATES on the top menu
2. Click NEW – Create Template on the LEFT SIDE



Complete:

- Template Name & Description
- Add Document → sign-doc1.pdf
- Add Recipient ROLE → manager

The screenshot shows the 'Add Recipients to the Envelope' section of a document management interface. It includes fields for 'Role', 'Name', and 'Email'. A red arrow points from a text box on the right to the 'Role' field. The text box contains the instruction: 'Enter a Recipient ROLE, this way when you USE the template you can select any recipients that you want to receive this document'.

Enter a Recipient ROLE, this way when you USE the template you can select any recipients that you want to receive this document

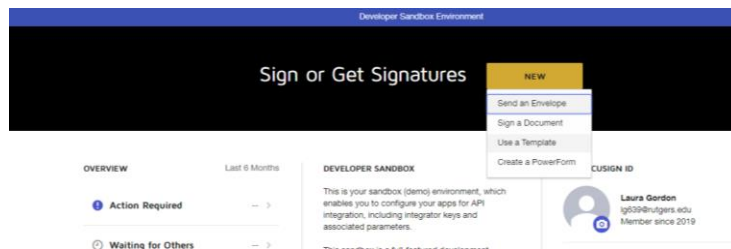
Build the document the same as what was done before...

- Add fields for 'manager'
- Drag Fields into document
- Hit Save & Close to complete

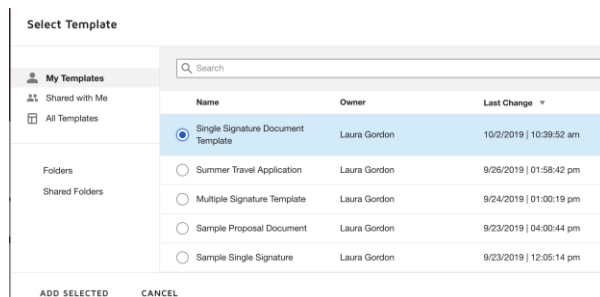
The screenshot shows the document editor interface. The 'manager' role is selected in the 'Add Recipients to the Envelope' section. The document content area displays a placeholder for a signature and date. The 'SAVE AND CLOSE' button is highlighted with a red circle.

## HOW TO USE THE TEMPLATE

Click the 'NEW' button select 'USE A TEMPLATE'



Select template to use



Select Recipients

Here you can select the recipients and customize the email that gets sent out.

Select ADVANCED EDIT to edit more details about the document / recipients.

Once on the ADVANCED EDIT, you can add more documents to the envelope, recipients and customize the message to all recipients.

**Single Signature Document Template**

**Recipients**

1

**Manager**

**Name \***

Laura

**Email \***

laura.gordon@rutgers.edu

NEEDS TO SIGN

MORE

**Message to All Recipients**

☐ Custom email and language for each recipient

**Email Subject\***

Please DocuSign: sign-doc1.docx

Characters remaining: 69

**Email Message**

Enter Message

Characters remaining: 10000

**Advanced Options** | [Edit](#)

- Recipients can sign on paper
- Recipients can change signing responsibility
- Incomplete envelopes expire 120 days after send
- Recipients are warned 0 day(s) before request expires
- Comments are enabled
- Senders can use either quick send or advanced envelope

SEND

ADVANCED EDIT

DISCARD

- Fill in names
- Hit Next
- SEND

## ADD BULK IMPORT FOR RECIPIENTS

1. Create New Envelope
2. USE Single Use Template (that was created before)

When using Bulk Import, each TEMPLATE will have a different 'bulk import file' setup, so it is important to 'redownload' each time what that format should be. The format will include ALL of the required fields in order for this process to work.

If you click to 'custom email' to recipients, the import will look different then if that is unchecked.

1. UNCHECK Message to all recipients
2. Click ADVANCED EDIT

## DETERMINE BULK LAYOUT

1. Click the INFORMATION icon to download bulk format
2. MUST BE DONE EACH TIME!
3. Click to download the sample CSV Template

Sample layout file: (if Language is needed for English use: en)

A1	A	B
1	Manager::Name	Manager::Email
2		
3		
4		

Enter data into csv, save file (keep as csv file)

	A	B	C
1	Manager::Name	Manager::Email	
2	John Smith	<a href="mailto:john.smith@gmail.com">john.smith@gmail.com</a>	
3	Mary Jones	<a href="mailto:mjones@rutgers.edu">mjones@rutgers.edu</a>	
4	Tom Cohn	<a href="mailto:tcohn@florida.edu">tcohn@florida.edu</a>	
5			
6			

## IMPORT BULK LAYOUT

**Add Recipients to the Envelope**

As the sender, you automatically receive a copy of the completed envelope.

[Import a bulk list.](#) Send copies of this envelope to many people at once.

☐ Set signing order

Manager NEEDS TO SIGN MORE

Name \*

Email \*

[ADD RECIPIENT](#)

Click Import a Bulk List link

## Bulk list preview

**Bulk List Preview**

ALL RECIPIENTS (3) ERRORS (0)

Manager::Name	Manager::Email	
John Smith	john.smith@gmail.com	X
Mary Jones	mjones@rutgers.edu	X
Tom Cohn	tcohn@florida.edu	X

[FINISH IMPORT](#) [CANCEL](#)

Click Finish Import.

## See status of signatures

☒ 1 Selected [MOVE](#) [MORE](#)

Filtered by: Date (Last 6 Months)

Subject	Status	Sent	
<input type="checkbox"/> Please DocuSign: sign-doc1.docx To: Tom Cohn	Waiting for Others	10/4/2019 11:43:36 am	<a href="#">RESEND</a>
<input type="checkbox"/> Please DocuSign: sign-doc1.docx To: John Smith	Waiting for Others	10/4/2019 11:43:35 am	<a href="#">RESEND</a>
<input type="checkbox"/> Please DocuSign: sign-doc1.docx To: Mary Jones	Waiting for Others	10/4/2019 11:43:34 am	<a href="#">RESEND</a>

## CREATE MULTIPLE SIGNATURE TEMPLATE

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 their action. **You can also have a mix of sequential and parallel routing.**

When you use a signing order, **you can route an envelope to the same person multiple times**. For example, you want to 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**.

In the example, I'm setting up a sequence in the TEMPLATE using 'roles', the actual email addresses will be used when the actual ENVELOPE is created and sent. But this sets up the SEQUENCE of signing.



TASK:

- Create NEW TEMPLATE
- Use the sign-doc2.doc
- Add Recipients (just add their 'Role')
  - o Supervisor
  - o Manager
  - o Employee
  - o Supervisor
- Check SET SIGNING ORDER

Template Name and Description

Multiple Signature Template

Template Description (optional)

Add Documents to the Envelope

sign-doc2.docx  
1 page

UPLOAD  
GET FROM CLOUD

☒ Set signing order

1 Role: Supervisor NEEDS TO SIGN MORE  
Name  
Email

2 Role: Manager NEEDS TO SIGN MORE  
Name  
Email

3 Role: Employee NEEDS TO SIGN MORE  
Name  
Email

4 Role: Supervisor NEEDS TO SIGN MORE  
Name  
Email

## DEFINE DOCUMENT FOR MULTIPLE SIGNATURES

Add Name, Signature & Date to document as fields

For each field, specify the Recipient for those fields.

You can drag 'initial' to the end of each paragraph, and set the initial to be the 'employee'.

Each field can have a 'Tooltip defined'

If you set a **DATA LABEL** to be the SAME for multiple field types, then when data is entered in a field, it will be 're-used' in other fields, so it doesn't have to be re-entered.

Proposal for signature

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam commodo eu augue id scelerisque. Curabitur ultricies pulvinar sodales. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam pellentesque neque risus, vitae facilisis enim rutrum vel. Duis tristique ex a arcu fringilla, eu mattis sapien semper. Cras rutrum semper nisi, ac mattis magna suscipit id. Aenean blandit, magna sed maximus mattis, est ipsum convallis leo, id tincidunt tortor ipsum quis magna. Duis nec nibh ac neque mollis vulputate. Suspendisse accumsan magna id ipsum faucibus fermentum. Sed massa elit, tristique at mi eget, luctus dignissim justo. Mauris vulputate, enim eu feugiat interdum, ex nulla sollicitudin massa, a ultrices nisi mi vel lorem.

Cras mollis consectetur augue, a commodo urna condimentum nec. Quisque ultrices consequat dolor et pharetra. Phasellus facilisis pulvinar lacinia. Suspendisse potenti. Proin mattis eget magna et imperdiet. Aliquam volutpat magna et elit tincidunt blandit. Donec nisi orci, efficitur condimentum risus interdum, semper tristique magna. Donec vulputate velit eget nibh euismod, eu consequat metus euismod. Donec augue orci, tincidunt nec lacus at, aliquet gravida quam.

Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Duis dignissim eget mauris in molestie. Morbi viverra risus id interdum lobortis. Vivamus fringilla tortor ac magna placerat, vel rhoncus metus rhoncus. Mauris non eleifend nulla. Cras fermentum pellentesque dui, in placerat leo porttitor a. Nulla pharetra purus vitae magna sagittis, luctus lacinia lacus viverra. Vivamus nec nisi non eros feugiat tempor. Morbi tincidunt luctus neque, nec mollis orci vestibulum quis. Curabitur lacus nisi, venenatis ac volutpat eu, pharetra at est. Donec lectus nibh, consequat ut rutrum ut, egestas non nibh. Ut maximus varius massa, vulputate eleifend tellus tincidunt id. Sed ut diam porttitor tellus blandit molestie. Sed tristique lacus id gravida varius. Mauris dui lorem, dapibus et eros et, commodo congue enim.

Recipient

Supervisor

Full Name

Formatting

Data Label

Tooltip

Location

Field Order

Sender Permissions

Print Name:

Full Name

Signature:

Sign

Date:

Date Signed

Print Name 2:

Full Name

Signature 2:

Sign

Date 2:

Date Signed

Print Name 3:

Full Name

Signature 3:

Sign

Date 3:

Date Signed

Final Approval:

Full Name

Print Name Final:

Full Name

Signature Final:

Sign

Date Final:

Date Signed

## CREATE ENVELOPE WITH SIGNING ORDER

New → Envelope


Select to USE A TEMPLATE

Select the template (that has multiple signatures)


Add Recipients to Envelope

Note: when Supervisor is entered, it will automatically fill that name in for position 4 as well (same person)

### Add Documents to the Envelope



sign-doc1.docx  
1 page  
1 Template Applied



UPLOAD  
USE A TEMPLATE  
GET FROM CLOUD

### Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

☒ Set signing order

1

Supervisor

Name \*

Email \*

NEEDS TO SIGN MORE

2

Manager

Name \*

Email \*

NEEDS TO SIGN MORE

3

Staff

Name \*

Email \*

NEEDS TO SIGN MORE

4

Supervisor

Name \*

Email \*

NEEDS TO SIGN MORE

Send it out

# CREATE POWER FORM

A PowerForm is a template that allows you to create self-service documents for signature without writing any code. A PowerForm is initiated from a unique, secure URL that you make available for signers to complete. These forms can include confidential data, since DocuSign is secure.

## CREATE A TEMPLATE

- Create a template that will be used for your power form
- Title: Summer Travel Application
- Upload the file: 2020-powerform-test.pdf
  - This is a sample 'registration form'
- Role: Participant

The screenshot shows the 'Create Template' interface in DocuSign. It is divided into three main sections: 'Template Name and Description', 'Add Documents to the Envelope', and 'Add Recipients to the Envelope'. In the first section, the title 'Summer Travel Application' is entered, and a description 'Application for our summer Travel Program' is provided. The second section shows a preview of the uploaded PDF '2020-powerform-test.pdf' (1 page) and an 'UPLOAD' button. The third section is for adding recipients, with a checkbox for 'Set signing order' and a table for recipient details. The table has columns for 'Role', 'Name', and 'Email'. The role 'Participant' is selected, and there are buttons for 'NEEDS TO SIGN' and 'MORE'.


## KEEP FORM FIELD DATA

Since this was a pdf form, DocuSign will 'convert' the form data and assign to a role, select PARTICIPANT

The screenshot shows a 'Manage PDF form field data' dialog box. It asks 'What would you like to do?' and has three options: 'Assign to:', 'Keep PDF form data', and 'Delete data'. The 'Assign to:' option is selected, and a dropdown menu shows 'Participant'. Below the options, there is a note: 'Convert the form fields and their data to DocuSign fields and assign them to a recipient to edit and complete.' and a 'Learn More' link. At the bottom, there is a 'CONFIRM' button.

## DATA FIELDS

- The data fields in the form, contain the proper Data Label from the original pdf form.
- To delete any un-needed data fields, right click on the field then hit 'cut'
- Add TEXT Field with text: Upload Recommendation Letter
- Add ATTACHMENT Field: Adjust Data Label – Recommendation Letter, adjust tooltip
- Save and Close



School of Arts and Sciences  
Rutgers, The State University of New Jersey  
New Brunswick, New Jersey 08901-1414

# SAMPLE FORM

## Rutgers Summer in Program

### Application for Admission

Your file is activated by submission of the application, but your file cannot be considered for admission until all of the necessary documents have been received by the Department. Please return the application and forms to the address above.

*\*An official academic transcript is required for non-Rutgers students only\**

**Please Print Legibly**

Name:  Cell phone:

Student e-mail:  Home phone:

Home Address:

\*Alternate Address:

Date of Birth:  \*\*Country of Citizenship:


RU ID:  Douglas Residential Student: ☐ Yes ☐ No

*\* Address (if different from home) where you would like your mail to be sent to during school*

**School History**

Schools attended (secondary, college and university) with school most recently attended listed first:

Institution	Location	Dates of Attendance
<input type="text"/>	<input type="text"/>	<input type="text"/>

Upload Recommendation Letter 

Course Title & Description	Semester Taken	Grade Received
<input type="text"/>	<input type="text"/>	<input type="text"/>

☒ Required Field

**Data Label** ^

Recommendation Letter

**Tooltip** ^

Recommendation Letter upload

**Location** ^

226 Pixels from Left

561 Pixels from Top

AutoPlace

Set Up

**Field Order** ^

**Sender Permissions** ^

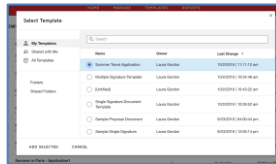
☐ Restrict changes

☐ Mandatory

Save As Custom Field

## CREATE POWERFORM

- Click New Powerform
- Select Template → Summer Travel Application
- Complete requirements to create form
- Copy URL for the PowerForm, paste it into a browser



**Create PowerForm**

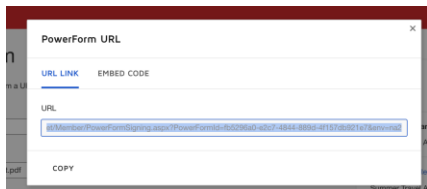
A PowerForm is an envelope initiated from a URL that you make available for signers to complete.

**Notes:**  
Summer Travel Application

**Send Request:**  
Please Download 2020 PowerForm test.pdf

**Instructions for Host Application:**  
If you are using an external web application to host the PowerForm, you will receive an email notifying them to sign the document.

**CREATE**



What user sees when they 'ENTER' the URL

**PowerForm Signer Information**

Please enter your name and email for the signing process.

**Participant:**

Your Name:

Your Email:

**Sign**

First you must check off that you understand that you are using docuSign...

Complete Form:

START

Download: Download ID: 4120786730-4030-9038-F4427378444

**RUTGERS**  
UNIVERSITY OF NEW JERSEY

School of Arts and Sciences  
Rutgers, The State University of New Jersey  
New Brunswick, New Jersey 08901-8500

**SAMPLE FORM**  
**Rutgers Summer in \_\_\_\_\_ Program**

**Application for Admission**

Your file is activated by submission of the application, but your file cannot be considered for admission until all of the necessary documents have been received by the Department. Please return the application and forms to the address above.  
\*An official academic transcript is required for non-Rutgers students only.\*

**Please Print Legibly**


Name: \_\_\_\_\_ Cell phone: \_\_\_\_\_  
Student e-mail: \_\_\_\_\_ Home phone: \_\_\_\_\_  
Home address: \_\_\_\_\_  
\*Alternate address: \_\_\_\_\_

Date of birth: \_\_\_\_\_ \*\*Country of Citizenship: \_\_\_\_\_  
Res ID: \_\_\_\_\_ Double Residential Student: ☐ Yes ☐ No

\* Address (if different from home) where you would like your mail to be sent to during school: \_\_\_\_\_

**School History**  
Schools attended (secondary, college and university) with school most recently attended listed first:

Institution	Location	Status of Attendance
_____	_____	_____

**Upload Recommendation Letter** 

Course Title & Description	Semester Taken	Grade Received
_____	_____	_____

2020-powerforms.html.pdf 1 of 1

It's possible to COPY url from the PowerForms Listing and either embed or copy the url link

## REVIEW POWERFORM RESULTS

Click on the 'number of responses'

Here I can see the people that completed the form

<input type="checkbox"/>	Summer Travel Application Summer Travel Application	1	● Active	Laura Gordon	DOWNLOAD ▾
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Click on DOWNLOAD to get a .csv of the results

This will include all of the fields that were completed.

Click on the 'NUMBER' to get to the 'envelopes' that were completed

Filtered by: Date (Last 6 Months)   <a href="#">Edit</a>			
Subject		Status	Last change
<input type="checkbox"/>	✓ Please DocuSign: 2020-powerform-test.pdf To: Laura	Completed	10/2/2019 11:17:05 am
Looking for more?   <a href="#">Edit your filters</a>			

Click on the 'ENVELOPE'

To get the ATTACHMENT PDF that was uploaded...

**Please DocuSign: 2020-powerform-test.pdf** ⓘ

Last change on 10/2/2019 | 11:17:05 am  
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**Recipients**

✓ **Laura**  
laura.gordon@rutgers.edu

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**Message**  
No message has been entered.

zozo-powerform-...

Pages: 1

1

sign-doc1.pdf  
Pages: 1

1. Click on DOWNLOAD on the top RIGHT
2. OR, see the attachment on the RIGHT SIDE (sign-doc1.pdf) was the pdf that I uploaded when I completed the form.