RUTGERS
School of Arts and Sciences

Docusign – Advanced Class

Laura Gordon

SASIT – Web Development

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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

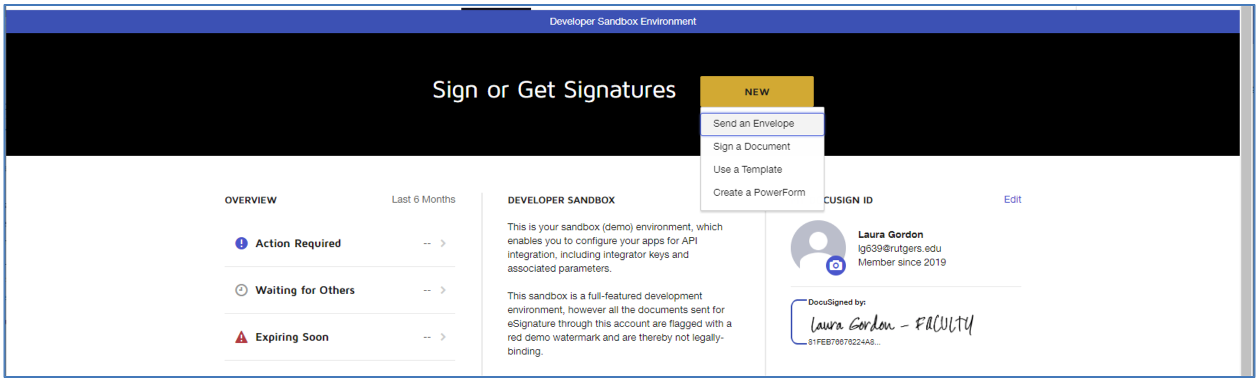
Login: NETID@rutgers.edu

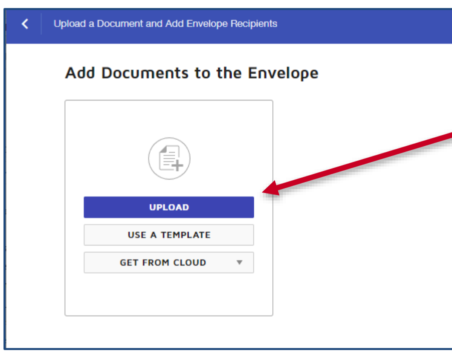
It is important to ALWAYS login as NETID@rutgers.edu (do not login as NETID@english.rutgers.edu, for example)

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

Add Recipients to the Envelope

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

Recipients can be RUTGERS or NOT Rutgers

Rutgers Recipients (netid@rutgers.edu)

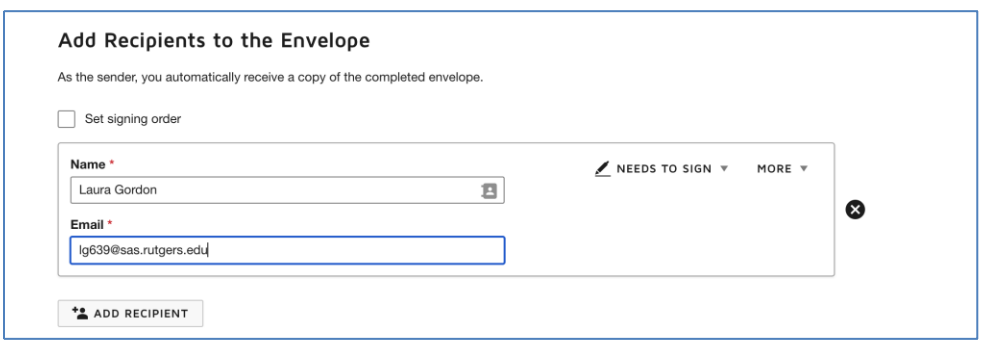
- can change their profiles
- can see all documents they have signed
- can manage documents
- can change their signature

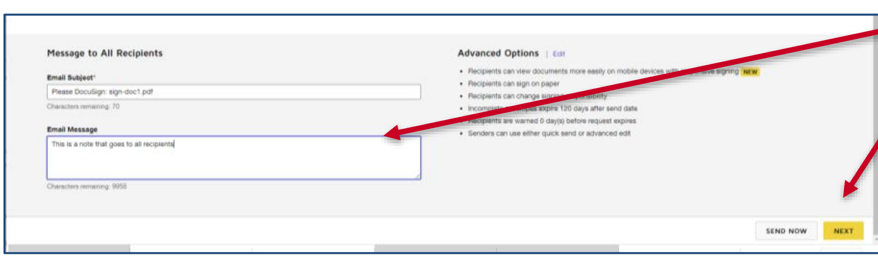
Non-Rutgers recipients

- 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

Add recipient that is NOT Rutgers (just for testing purposes), use your email address. It can be a Rutgers email, just not netid@rutgers.edu

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

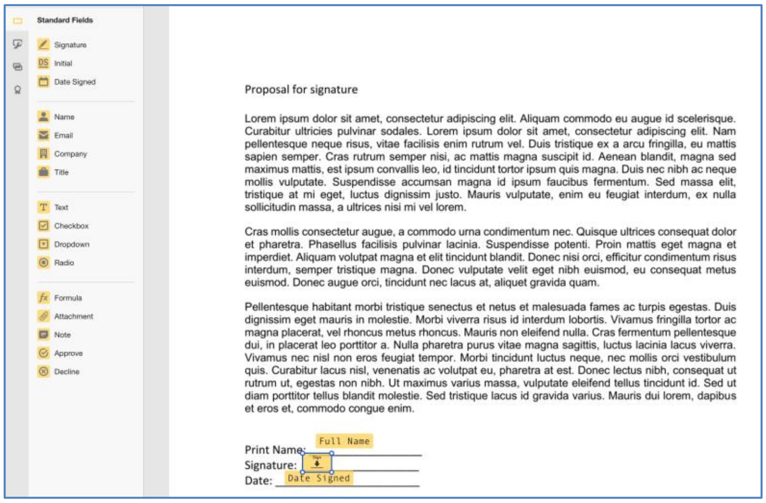




Add a message to all recipients.

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

Define Document– add fields

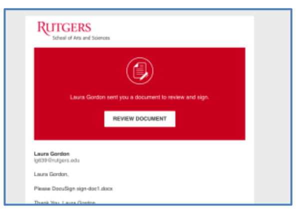


Drag – Name, Signature and Date Signed into the 'fields' on the document

Hit SEND button on the bottom of the page

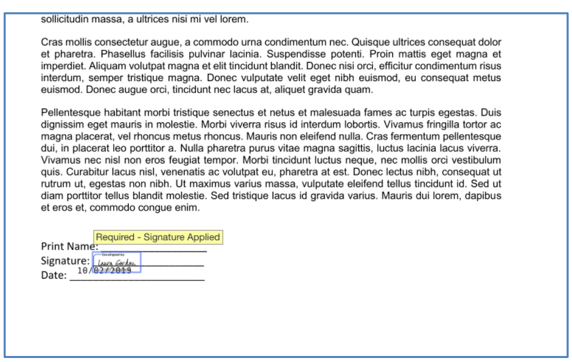
Receive Message

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

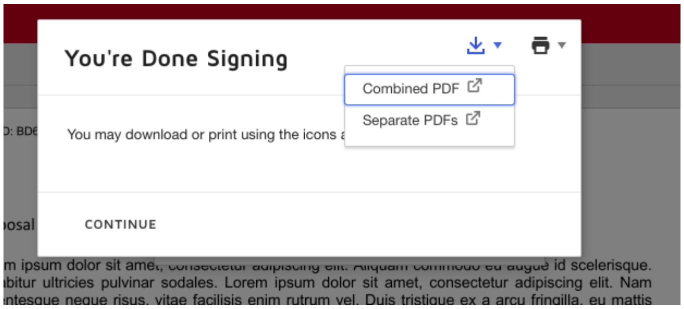


Options for RECEIVER

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

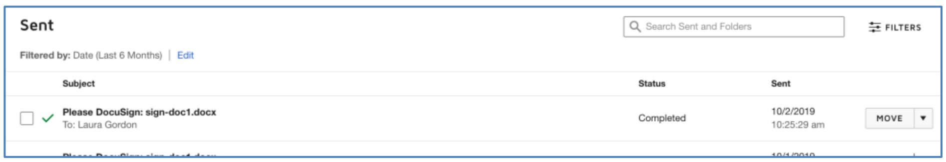


Once signing is complete, you can download the signed file / print it on this confirmation screen.



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

If you send a document to 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

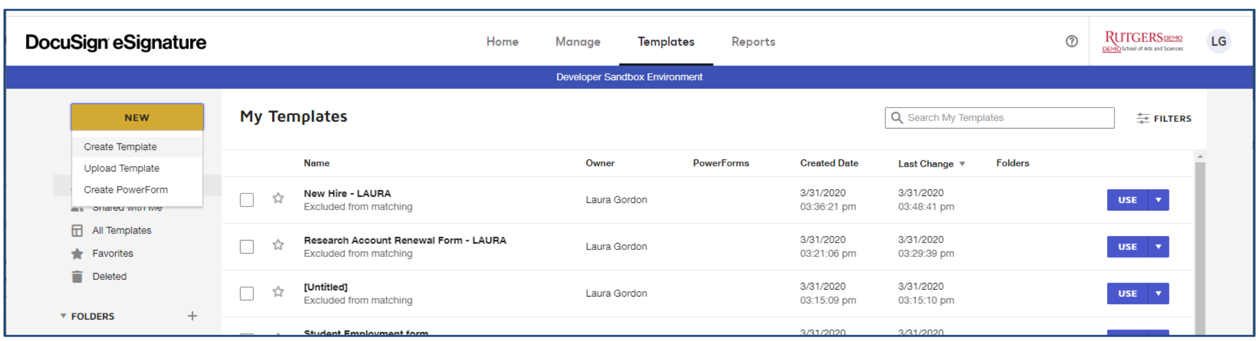
CREATE A TEMPLATE

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.

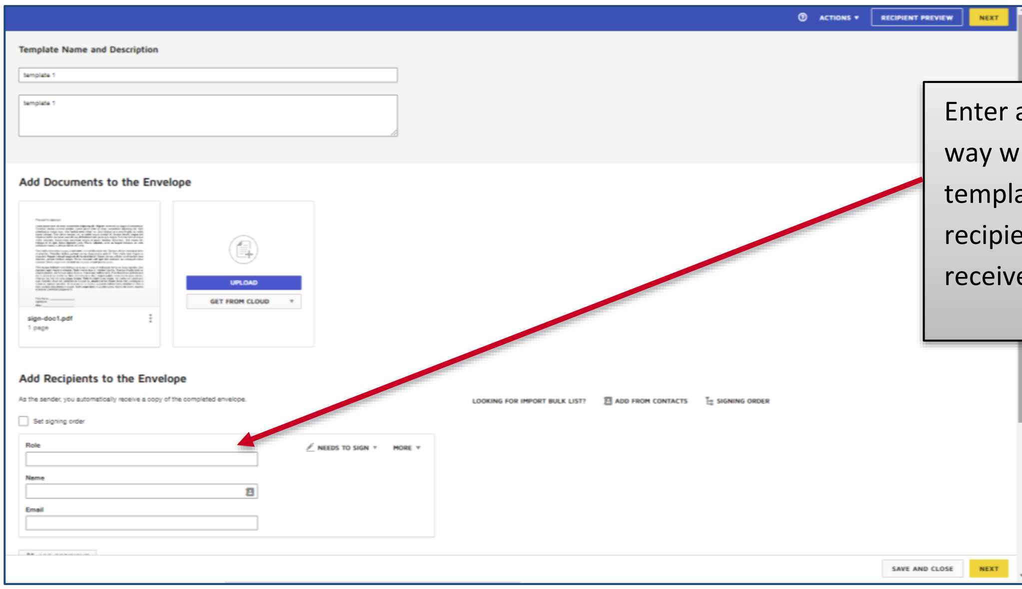
Click to create a NEW Template

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



Complete:

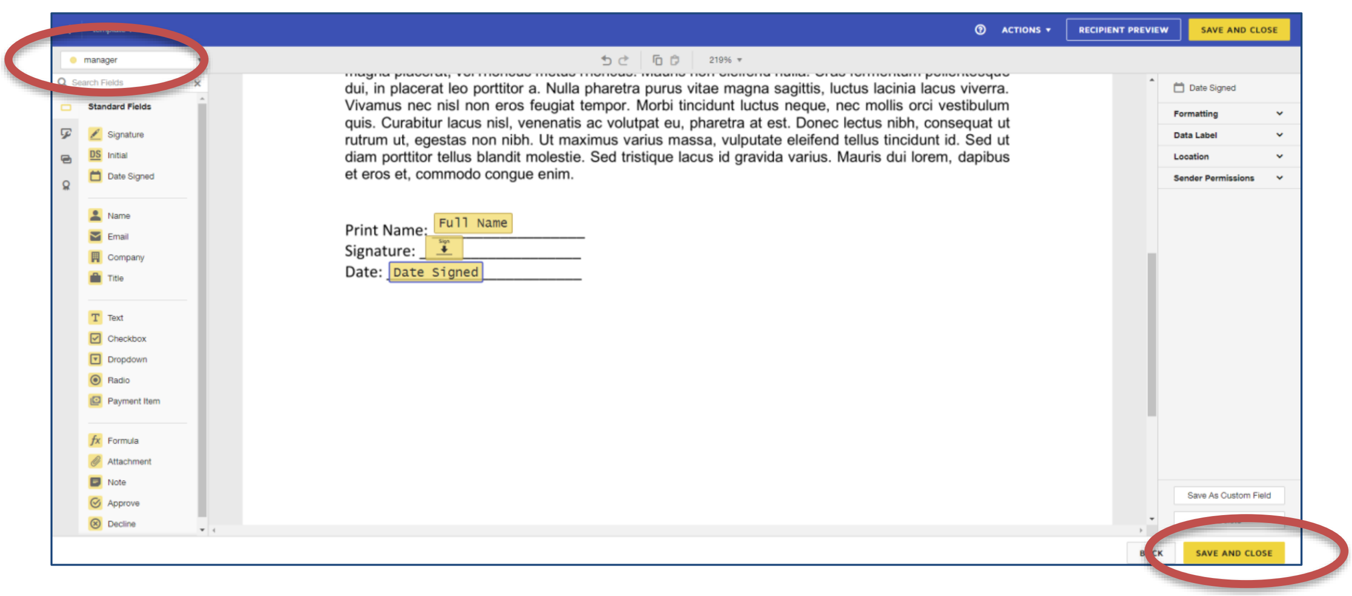
- Template Name & Description
- Add Document →sign-doc1.pdf
- Add Recipient ROLE → manager



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

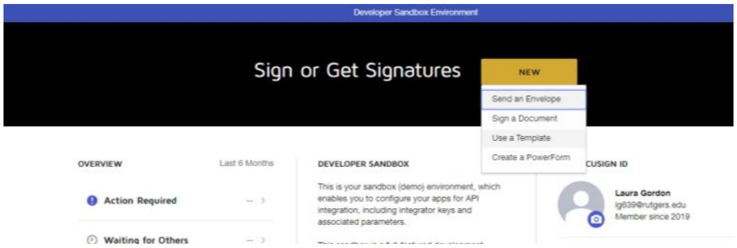
Build the document the same as what was done before…

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

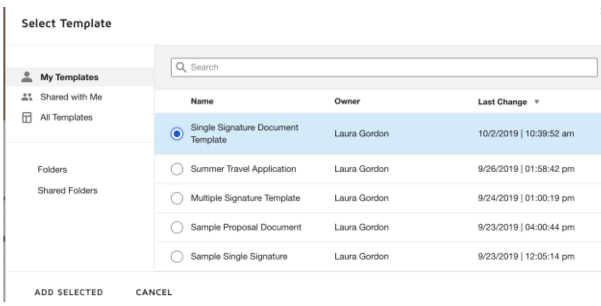


How to USE the template

Click the ‘NEW’ button select ‘USE A TEMPLATE’

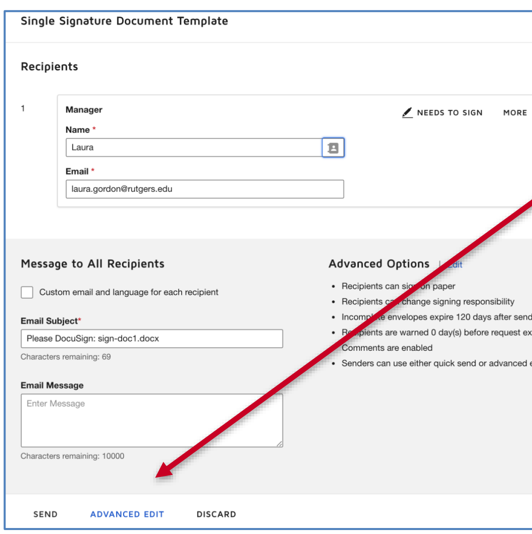


Select template to use



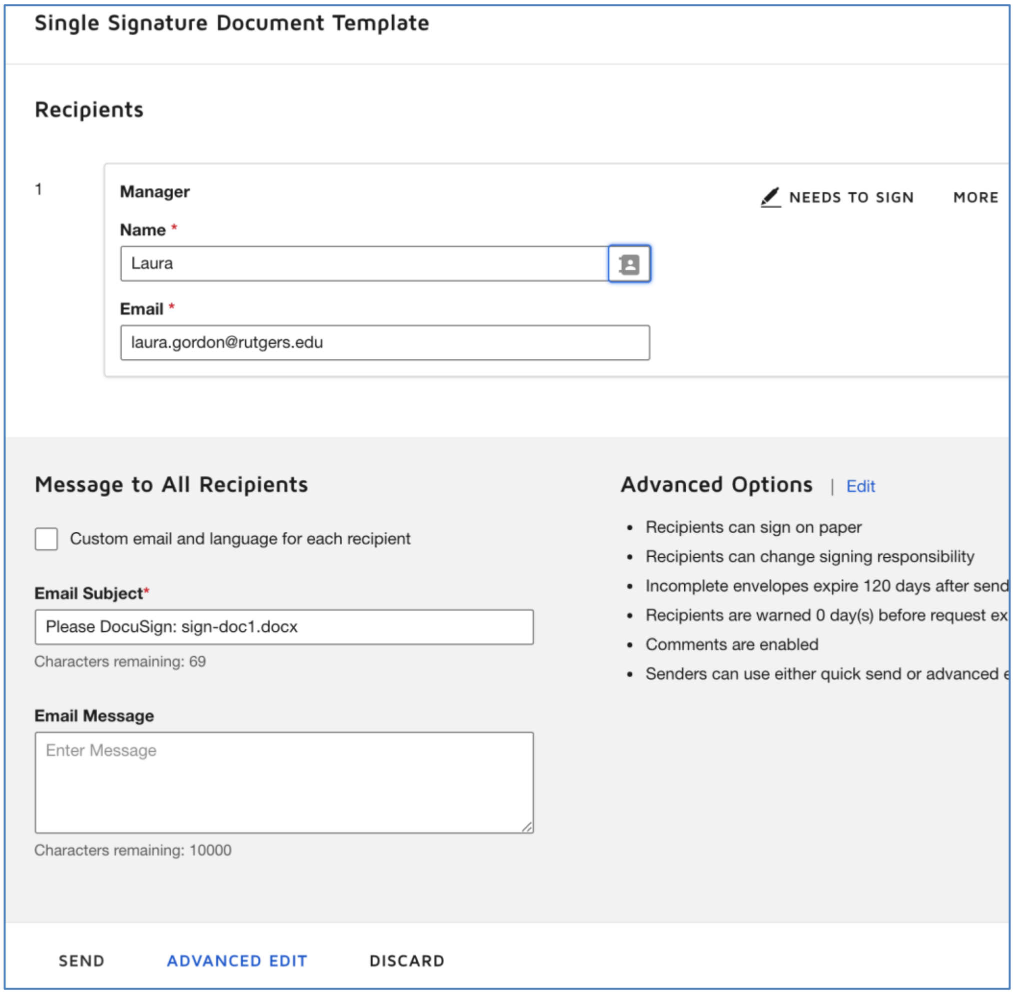
Select Recipients

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.



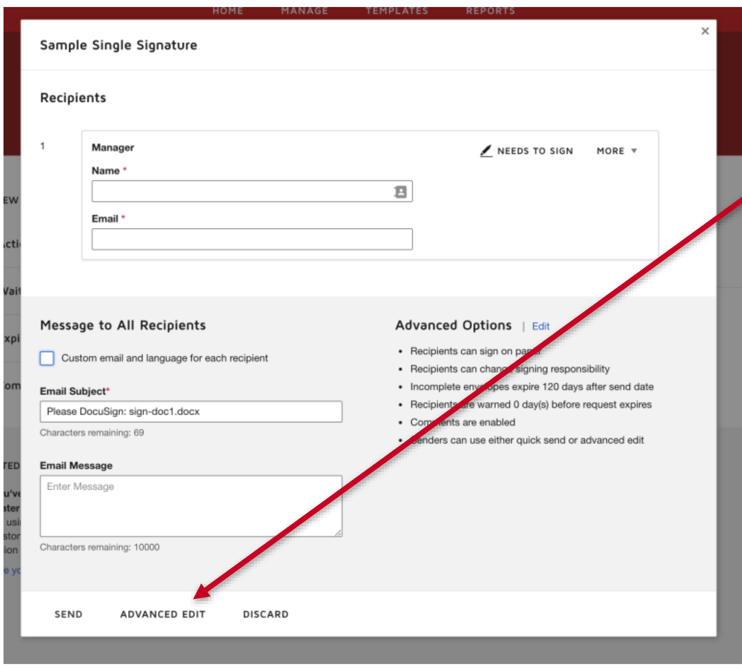
- Fill in names
- Hit Next
- SEND

Add Bulk Import for Recipients

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

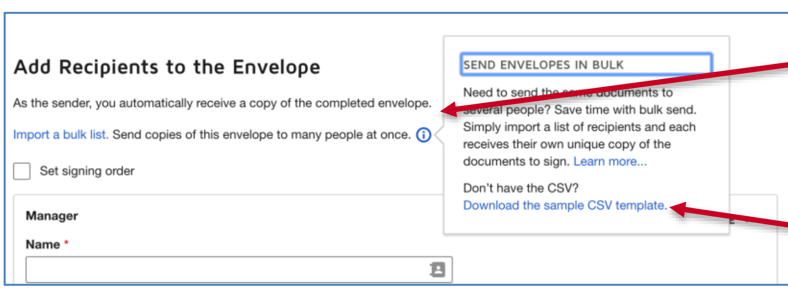
When using Bulk Import, each TEMPLATE will have a different 'bulk import file' setup, so it is important to 'redownload' each time what that format should be. The format will include ALL of the required fields in order for this process to work.

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



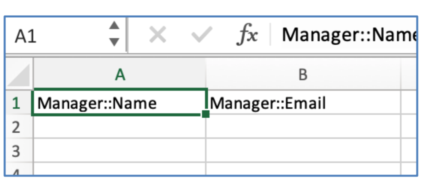
1. UNCHECK Message to all recipients
2. Click ADVANCED EDIT

Determine Bulk Layout

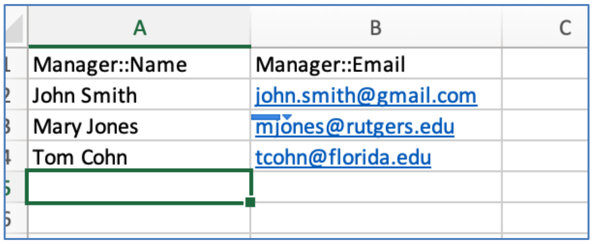


1. Click the INFORMATION icon to download bulk format
2. MUST BE DONE EACH TIME!
3. Click to download the sample CSV Template

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



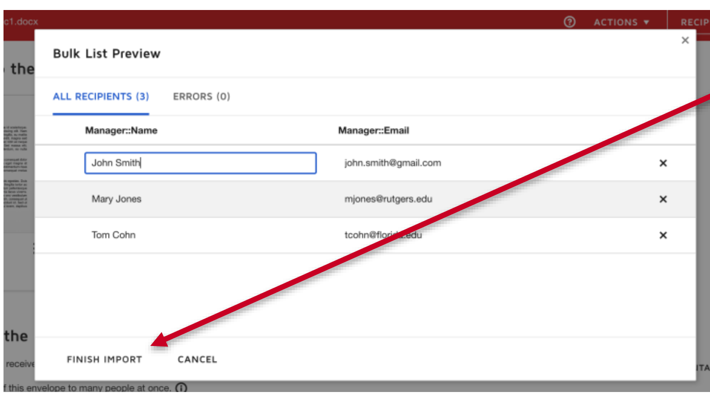
Enter data into csv, save file (keep as csv file)



Import Bulk Layout

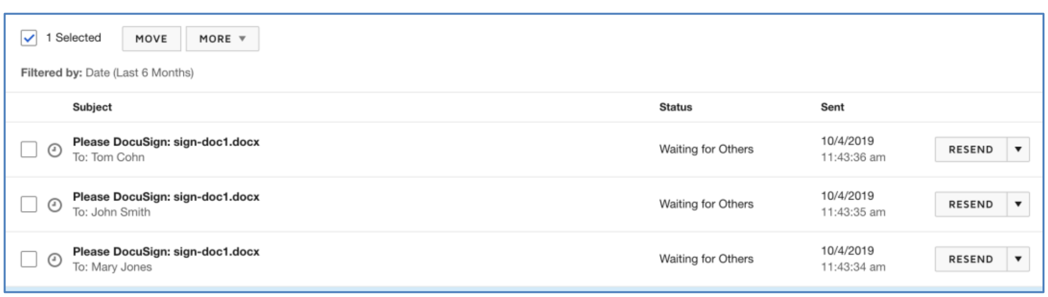
Click Import a Bulk List link

Bulk list preview



Click Finish Import.

See status of signatures



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**.

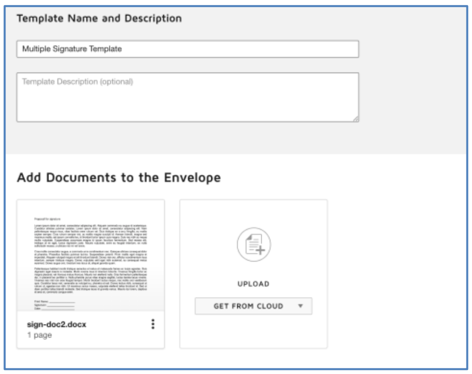
When you use a signing order, **you can route an envelope to the same person multiple times.** For example, you want to send a purchase order to your manager to approve, then send it on to purchasing to sign, and finally send a copy to your manager again.

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’)
    - Supervisor
    - Manager
    - Employee
    - Supervisor
- Check SET SIGNING ORDER



Define Document for Multiple Signatures

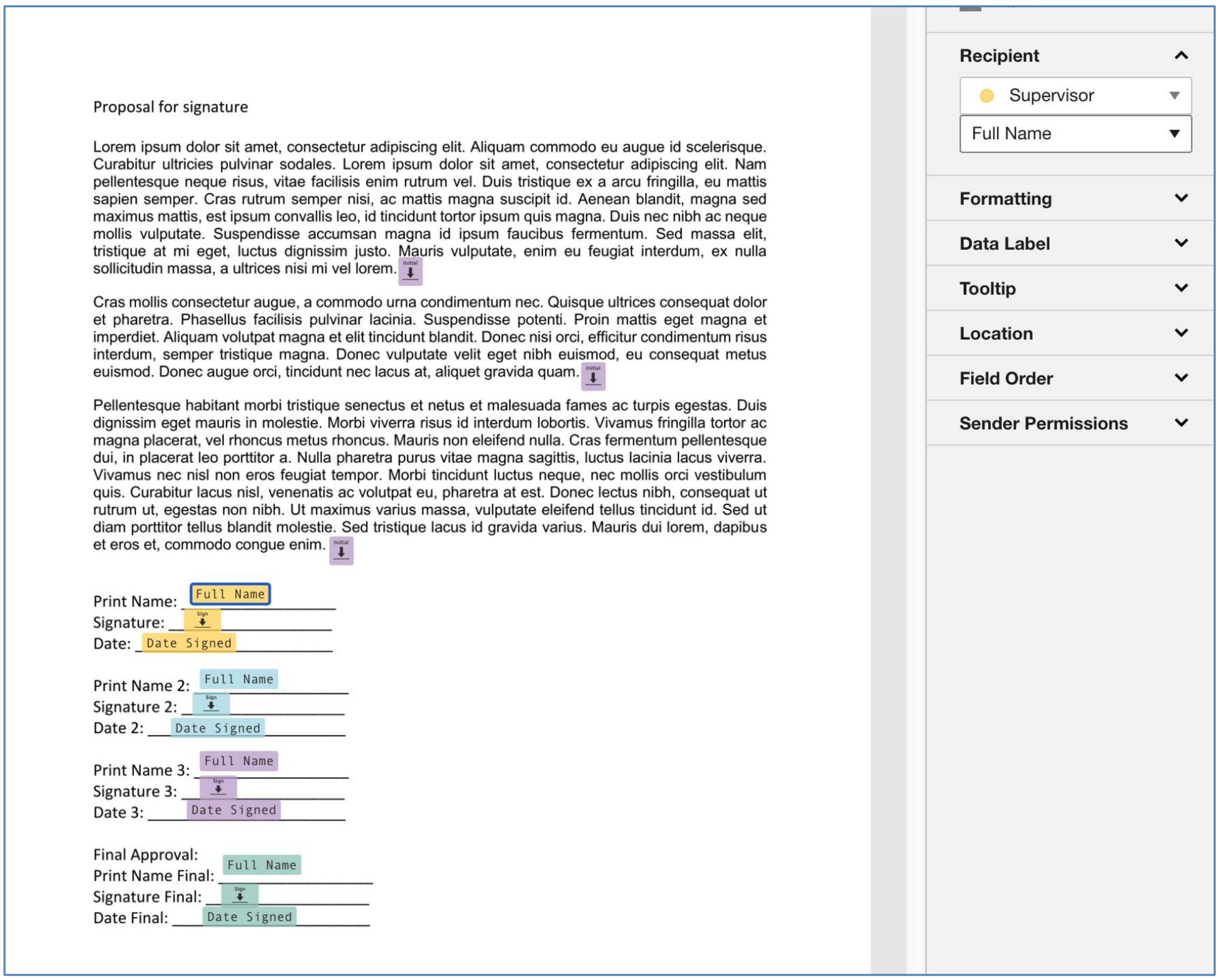
Add Name, Signature & Date to document as fields

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.



Create Envelope with Signing Order

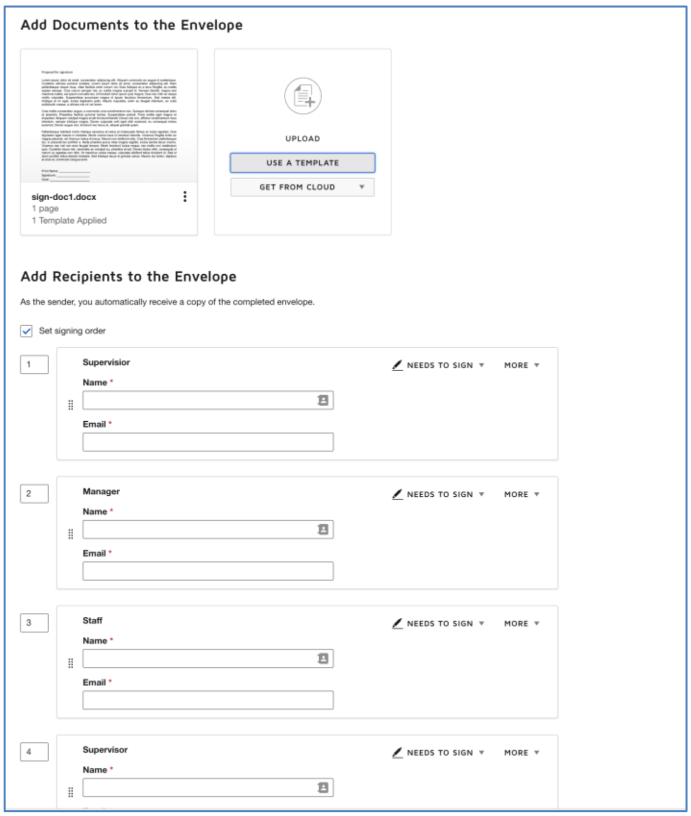
New → Envelope

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)



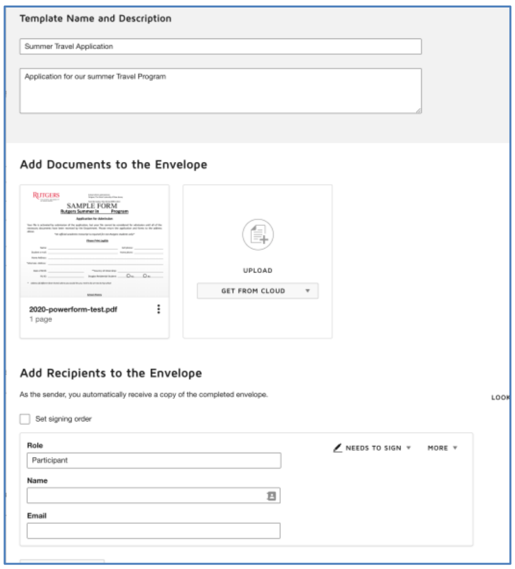
Send it out

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.

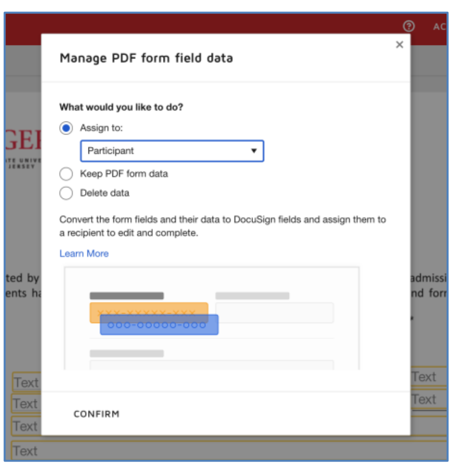
Create a Template

- 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



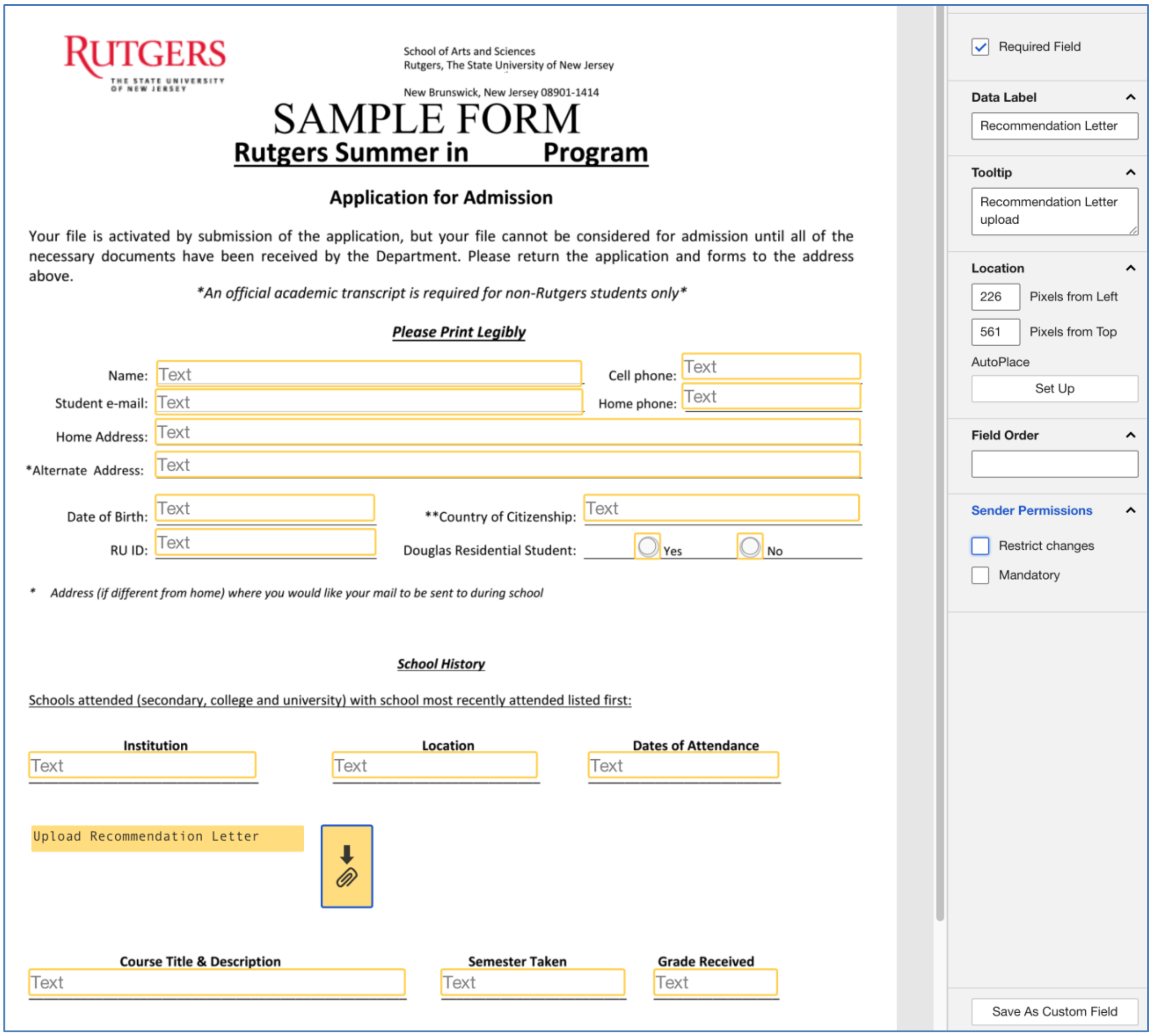
Keep Form Field Data

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



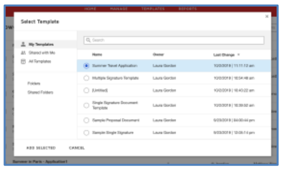
DATA FIELDS

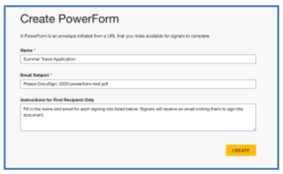
- The data fields in the form, contain the proper Data Label from the original pdf form.
- To delete any un-needed data fields, right click on the field then hit 'cut'
- Add TEXT Field with text: Upload Recommendation Letter
- Add ATTACHMENT Field: Adjust Data Label – Recommendation Letter, adjust tooltip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

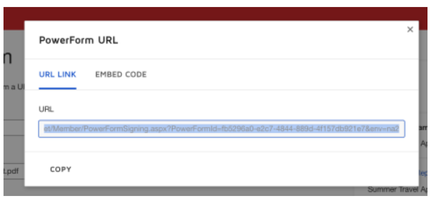


Create PowerForm

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



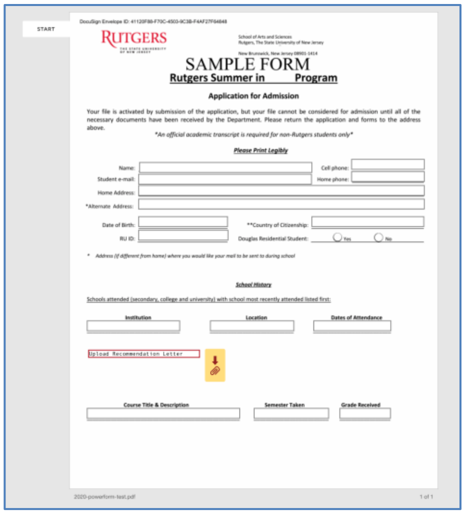




What user sees when they 'ENTER' the URL

First you must check off that you understand that you are using docusign…

Complete Form:


START

DocuSign Envelope ID: 41120F80-F70C-4503-9C3B-F4AF27F84848

RUTGERS
THE STATE UNIVERSITY OF NEW JERSEY

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

Upload Recommendation Letter

Course Title & Description	Semester Taken	Grade Received

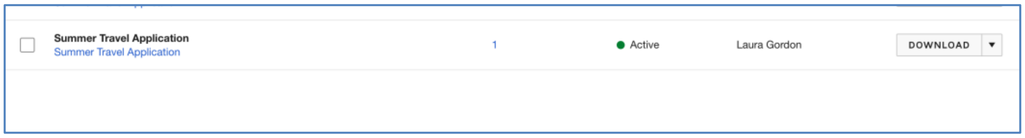
2020-powerform-test.pdf 1 of 1

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’

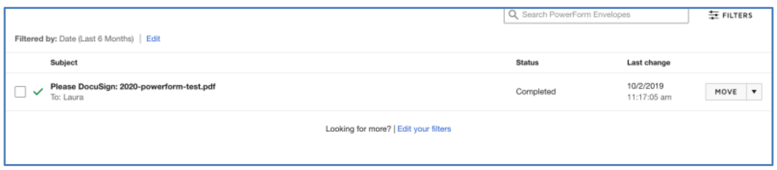
Here I can see the people that completed the form



Click on DOWNLOAD to get a .csv of the results

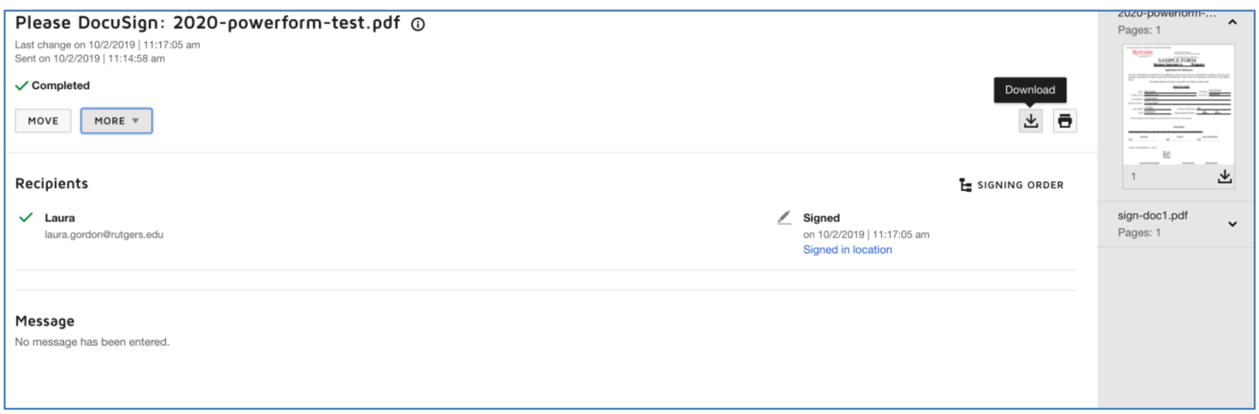
This will include all of the fields that were completed.

Click on the ‘NUMBER’ to get to the ‘envelopes’ that were completed



Click on the ‘ENVELOPE’

To get the ATTACHMENT PDF that was uploaded…



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.