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:

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)

FILES NEEDED FOR CLASS

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

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)

CREATE DOCUMENT IN DOCUSIGN

LOGIN TO DOCUSIGN

Visit: docusign.com

Login: NETID@rutgers.edu
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.

ADD DOCUMENTS TO THE ENVELOPE

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 RECIPIENTS TO THE ENVELOPE

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
**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
Complete:

- Template Name & Description
- Add Document
- Add Recipients

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...
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.
**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:

![Sample Form Image]

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.