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)

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

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

```
<table>
<thead>
<tr>
<th>Subject</th>
<th>Status</th>
<th>Last change</th>
<th>Folder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please DocuSign sign.doc1.doc</td>
<td>Need to Sign</td>
<td>10/1/2019 03:07:37 pm</td>
<td></td>
</tr>
</tbody>
</table>
```

2. Click on SIGN
3. Sign Document
4. Click on signature can CHANGE your style (since you are LOGGED IN), hit DRAW, and ‘using mouse’ draw signature to use

5. Select change your style

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

CHANGE MY PROFILE

- 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
  o Here you can a select your signature / Initials from a variety of fonts

- Draw
  o You can ‘create’ your signature using your mouse or if you have a touch screen your finger/stylus

- Upload
  o Upload your signature from a file which exists on your computer
  o For this class, you have downloaded a file, docusign.zip
  o Extract this file, you will see a document: t
    ▪ test-signature.jpg
    ▪ test-initials.jpg
  o Upload both files to your profile
  o 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. Scroll to bottom, click Optimize your image, click RESIZE Image Button, verify the New Image size is less than 200k

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