

DocuSign – Part 1

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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

DEMO 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:



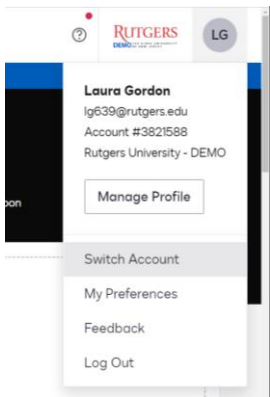
SWITCH ENVIRONMENTS

For the purpose of creating templates and powerforms it is important that you are logged into the School of Arts and Sciences docuSign account. If you do not see 'create new template', then chances are you are logged into the wrong account.

Rutgers Account (top right of screen)

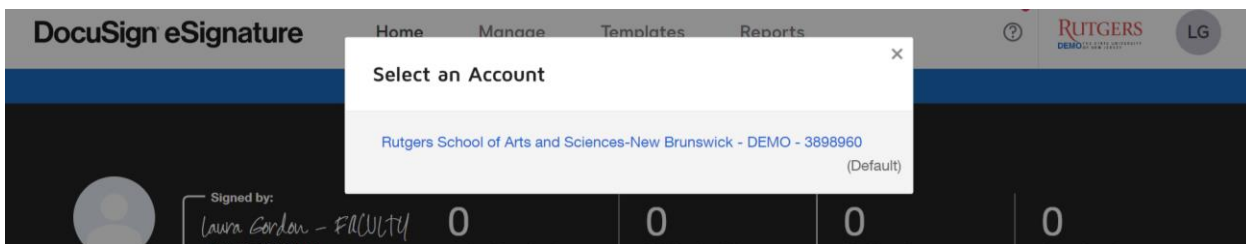


To SWITCH, click on your initials and select: SWITCH ACCOUNT



Select School of Arts and Sciences Account

If the option is available select DEFAULT ACCOUNT



CREATE DOCUMENT IN DOCUSIGN

LOGIN TO DOCUSIGN (DEMO ENVIRONMENT)

Visit: demo.docusign.net

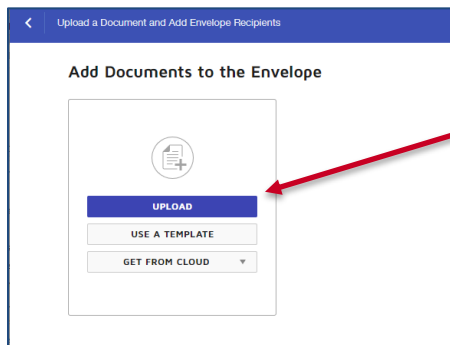
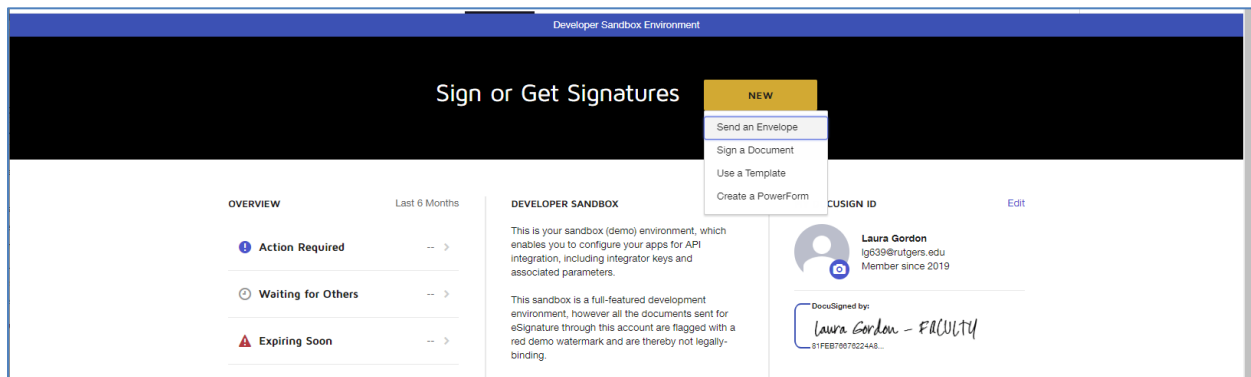
Login: NETID@rutgers.edu

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

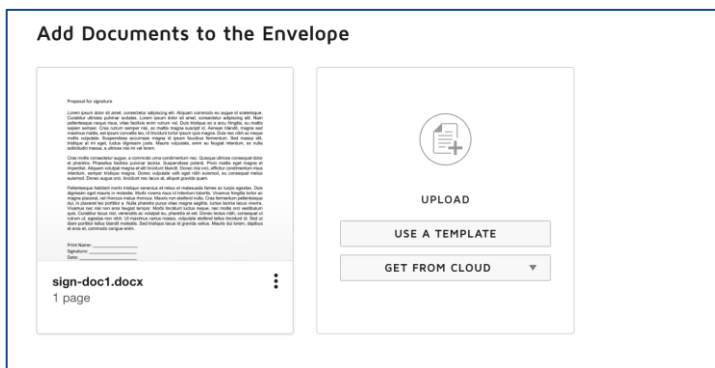
What is an envelope?

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

☐ Set signing order

Name *
Laura Gordon

Email *
lg639@sas.rutgers.edu

NEEDS TO SIGN MORE

ADD RECIPIENT

Message to All Recipients

Email Subject:
Please DocuSign: sign-doc1.pdf
Characters remaining: 70

Email Message:
This is a note that goes to all recipients
Characters remaining: 999

Advanced Options

- Recipients can view documents more easily on mobile devices with mobile signing
- Recipients can sign on paper
- Recipients can change their signature
- Recipients are warned 120 days after send date
- Recipients are warned 5 days before required expires
- Senders can use either quick send or advanced edit

SEND NOW NEXT

Add a message to all recipients.

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

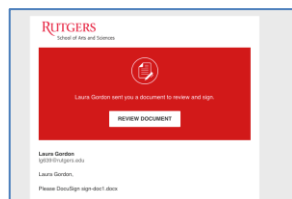
DEFINE DOCUMENT— ADD FIELDS

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’.

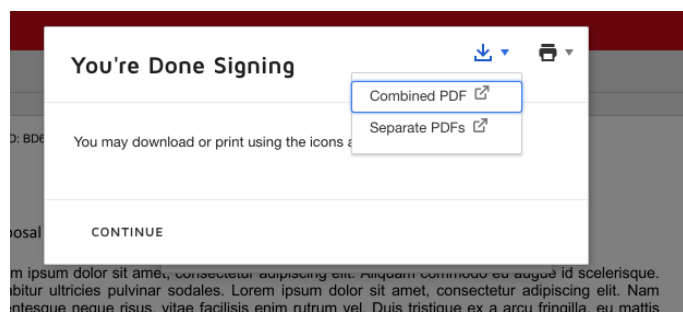


Options for RECEIVER



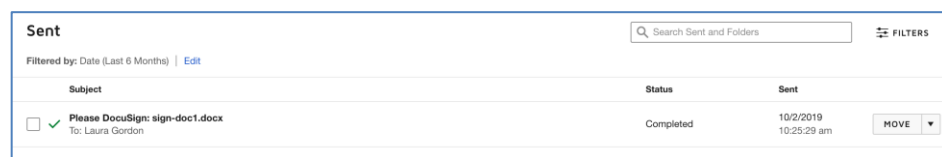
If I click to SIGN, just click on the ‘signature field’ to add my signature

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

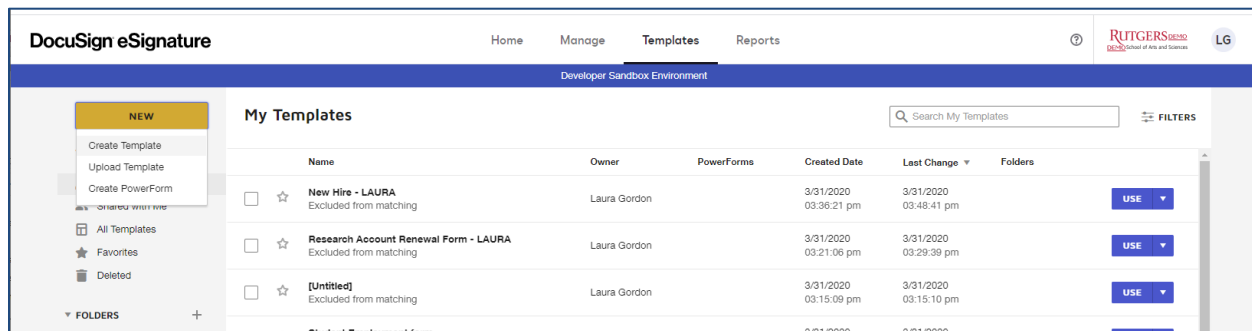
CREATE A TEMPLATE

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

Template Name and Description

template 1

template 1

Add Documents to the Envelope

sign-dict.pdf

1 page

UPLOAD

GET FROM CLOUD

Add Recipients to the Envelope

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

LOOKING FOR IMPORT BULK LIST?

ADD FROM CONTACTS

SIGNING ORDER

Set signing order

Role

Name

Email

NEEDS TO SIGN

MORE

Enter any way w
templ
recipie
receiv

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

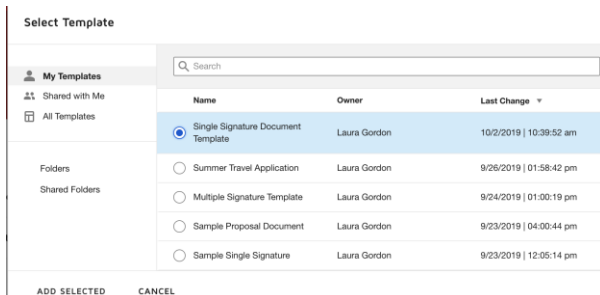
The screenshot shows the Microsoft Dynamics 365 Recipient Preview interface. On the left, the 'manager' field is selected in the 'Standard Fields' section. The main area displays a preview of an email with a placeholder for the recipient's name and signature. The right sidebar shows the 'Date Signed' field selected in the 'Formatting' section. The bottom right corner shows the 'SAVE AND CLOSE' button.

HOW TO USE THE TEMPLATE

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

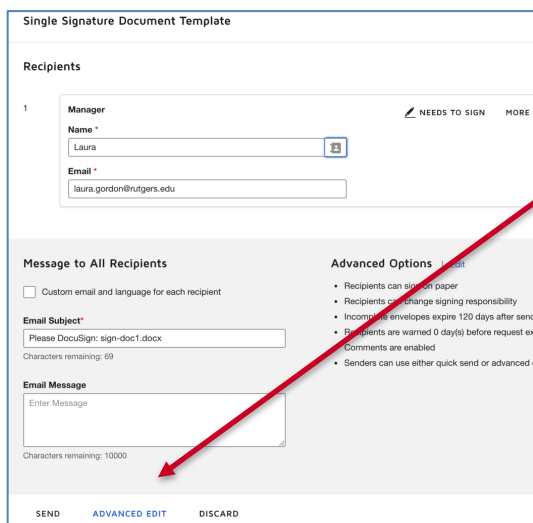


Select template to use



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 e

SEND

ADVANCED EDIT

DISCARD

- Fill in names
- Hit Next
- SEND

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:

Print Name Final: Full Name

Signature Final: Sign

Date Final: Date Signed

CUSTOMIZE THE SUBJECT OF THE EMAIL THAT IS SENT

- Scroll to bottom of Add recipients page → Add message
- Click on the 'arrow / box' on the right of Email Subject

It is possible to add to the Email Subject the NAME of any of the people that are signing this template. For example if you are sending this template to a student, then the student's email will appear in the subject of the email, so you will know which email is from which signer.

The screenshot shows the 'Add recipients' page in DocuSign. It lists two recipients: 'Administrator' and 'Student'. Below the recipients, there is an 'Add message' section. In the 'Email Subject' field, the text 'Complete with DocuSign: new-hire-form.pdf' is entered. A dropdown menu is open next to the field, showing options to 'Insert Administrator's Name', 'Insert Administrator's Email Address', 'Insert Student's Name', and 'Insert Student's Email Address'.

After selecting:

The screenshot shows the 'Add message' section. The 'Email Subject' field now contains the text 'Complete with DocuSign: new-hire-form.pdf [[Student_Username]]'. The 'Email Message' field is empty and has a character count of 10000.

USE OF GROUP SIGNING OPTIONS

What if you want EITHER one person or another to sign a document. Perhaps you have 2 directors and it doesn't matter which director actually signs the document.

Things to think about:

1. Once ONE of these people sign the document the other cannot sign or open the document
2. If you want BOTH to be able to 'view the signed document', then also add both as 'CC' on the template (but set it as not as a signer)

How to setup

Create a TICKET, request – need assistance for DocuSign, assign to Matt W.

- Ask for Group Signers
- Include what email addresses will be in this group for this particular document
- When you set it up, instead of using a 'specific' email, you will select the 'group'.

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)

The screenshot shows the DocuSign 'Add Documents to the Envelope' interface. At the top, there's a document preview and an 'UPLOAD' button. Below this is the 'Add Recipients to the Envelope' section. It includes a checkbox for 'Set signing order' and four recipient slots. Each slot has a role (Supervisor, Manager, Staff, Supervisor), a name field, and an email field. The first and last slots are labeled 'NEEDS TO SIGN'.

Send it out

POWER FORMS

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 a Template' interface in DocuSign. It has three main sections: 1. 'Template Name and Description' with input fields for 'Summer Travel Application' and 'Application for our summer Travel Program'. 2. 'Add Documents to the Envelope' showing a preview of the '2020-powerform-test.pdf' (1 page) and an 'UPLOAD' button with a 'GET FROM CLOUD' dropdown. 3. 'Add Recipients to the Envelope' with a checkbox for 'Set signing order' and a table for adding recipients. The table has columns for 'Role' (set to 'Participant'), 'Name', and 'Email'. A 'NEEDS TO SIGN' button is visible next to the role field.


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?' with three radio button options: 'Assign to:' (selected), 'Keep PDF form data', and 'Delete data'. The 'Assign to:' option has a dropdown menu showing 'Participant'. Below the options, there is explanatory text: '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. The background shows a blurred view of a document with various form fields.

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 ^

Tooltip ^

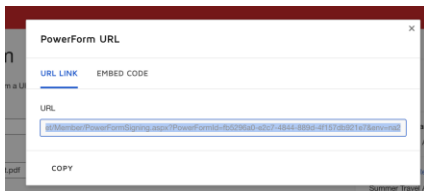
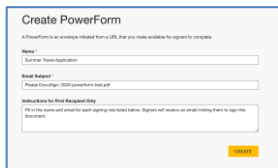
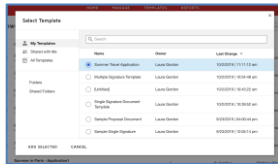
Location ^
 Pixels from Left
 Pixels from Top
AutoPlace

Field Order ^

Sender Permissions ^
☐ Restrict changes
☐ Mandatory

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

Download Envelope ID: A123F8B7-F5C2-4638-B487-F437F2368048

School of Arts and Sciences
Rutgers, The State University of New Jersey
New Brunswick, New Jersey 08901-0214

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	<input type="text"/>	Cell phone	<input type="text"/>
Student e-mail	<input type="text"/>	Home phone	<input type="text"/>
Home Address	<input type="text"/>		
<input type="text"/>			
*Alternate Address	<input type="text"/>		
<input type="text"/>			
Date of Birth	<input type="text"/>	**Country of Citizenship	<input type="text"/>
R# ID	<input type="text"/>	Douglas Residential Student	<input type="radio"/> Yes <input type="radio"/> 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"/>

Related Recommendations Letter

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

2020 powerforms test.pdf

1 of 1

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

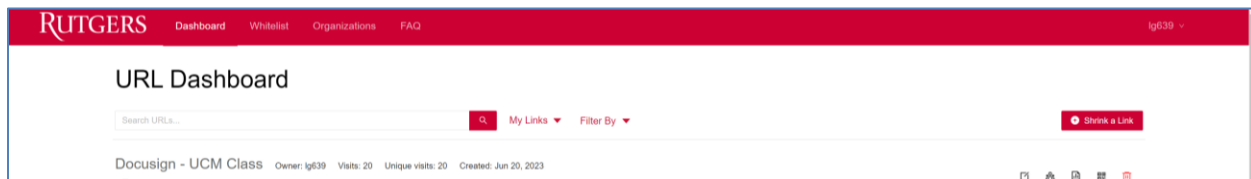
CREATE SHORT CUT LINK

CREATE SHORT CUT LINK – DEFAULT ALIAS

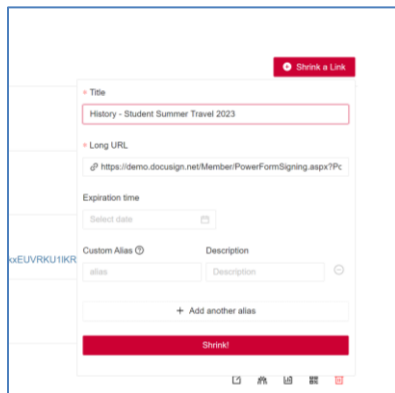
To make the forms easier to access, it is possible to create a shortcut link

<https://Go.rutgers.edu>

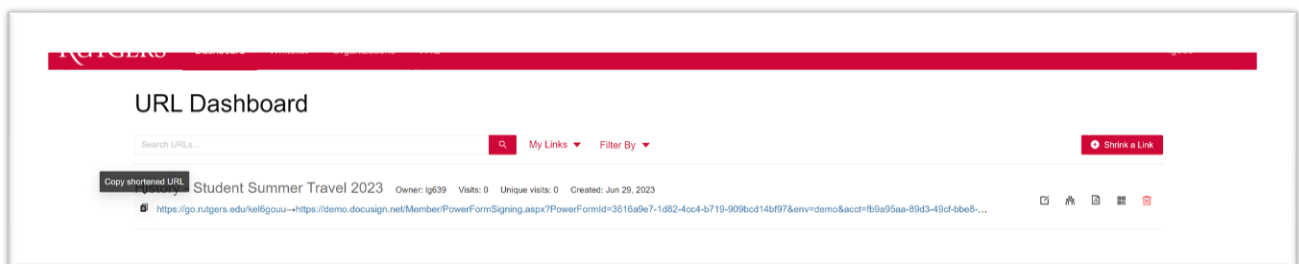
- Get your POWERFORM URL LINK (from docuSign), <ctrl c> so it's in clipboard
- Login with CAS
- Click on → Shrink a link



- Type the TITLE
- Paste the URL
- Hit SHRINK



- Copy the new Shortcut link



CREATE SHORT CUT LINK – CUSTOM ALIAS

It is also possible to create your OWN alias.

Advantages:

- You can easily change the long URL to another link, and the shortcut stays the same
- The shortened link will make more sense to the user
- You can have multiple aliases for the same link

How:

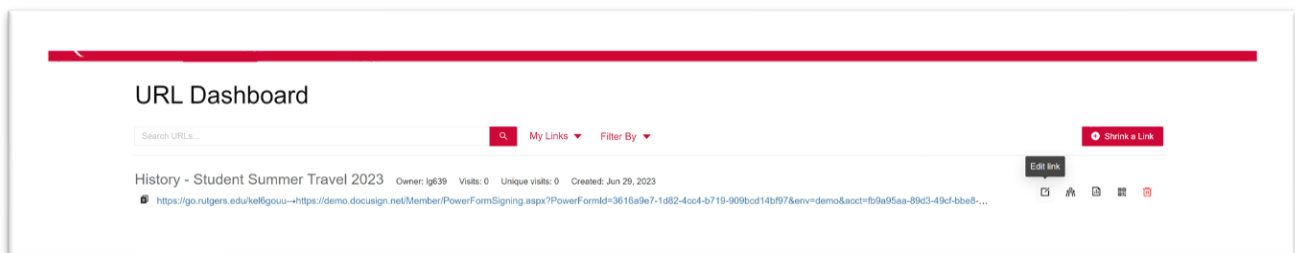
From the go.rutgers.edu Website:

Can I choose the URL my link will be shortened to?

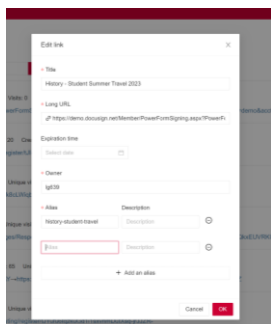
To create a custom short URL, you must have the “power user” role. This role is available only to faculty and staff members. **To request to be added to this role, please email oss@oss.rutgers.edu along with your NetID.**

Once you have Power User Status, it is easy to add an alias to your shortcut URL

- Create new link / or Edit link



- Add an alias



REVIEW POWERFORM RESULTS

- Note: Only the OWNER OF THE POWERFORM can view the results in this way.
- Click on the 'number of responses'
- Here I can see the people that completed the form

	Subject		Status	Owner	Actions
<input type="checkbox"/>	Summer Travel Application Summer Travel Application	1	Active	Laura Gordon	DOWNLOAD

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

	Subject	Status	Last change	Actions
<input type="checkbox"/>	Please DocuSign: 2020-powerform-test.pdf To: Laura	Completed	10/2/2019 11:17:05 am	MOVE

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
Sent on 10/2/2019 | 11:14:58 am

✓ Completed

MOVE MORE

Recipients

✓ Laura
laura.gordon@rutgers.edu

Signed
on 10/2/2019 | 11:17:05 am
Signed in location

Message
No message has been entered.

Download

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.

MORE WORK WITH TEMPLATES

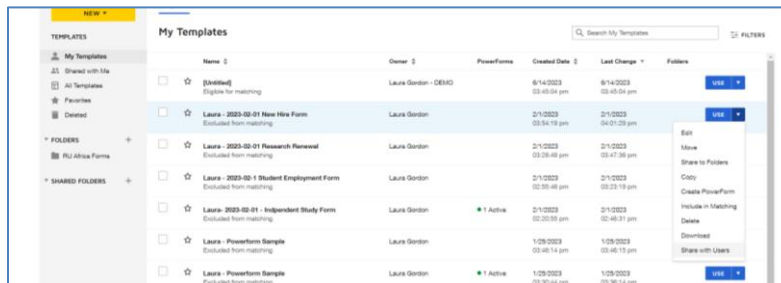
SHARE TEMPLATE WITH GROUP

If you want multiple people in your department to be able to EDIT a template, this is possible with group sharing.

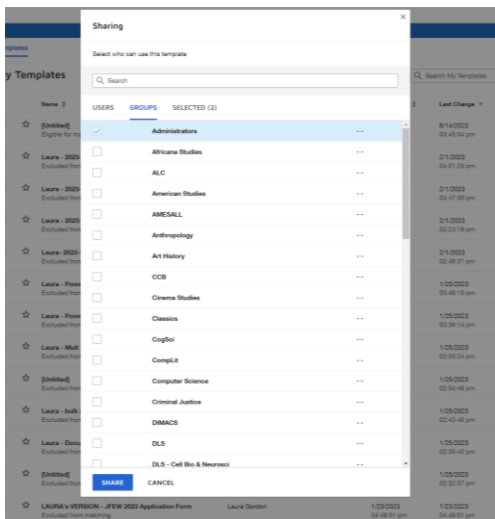
Important Note:

The INDIVIDUAL that OWNS the template is the only one that can see the POWERFORM RESULTS. Meaning if someone completes the powerform only the owner of the POWERFORM can see it, this isn't done at the group level.

Advantage: This is to share the TEMPLATE with the department.



1. Click the RIGHT TRIANGLE NEXT TO USE
2. Select SHARE WITH USERS



3. Click the GROUPS TAB, select the 'group' that you want to be able to use your template
4. A group has been created for each department in SAS
5. If your group is not listed, please create a help desk ticket

ADD PASSWORD TO TEMPLATE

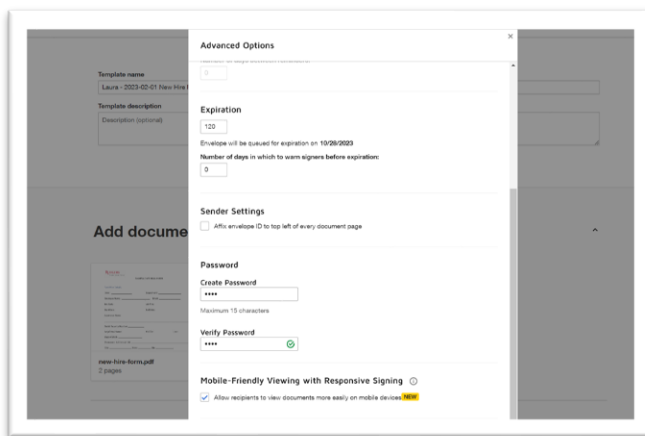
When a template is shared, if you want to limit who can EDIT the template, a base password can be added to the template.

- Click to EDIT template
- Click on ADVANCED OPTIONS (top right corner)



The screenshot shows the top of the DocuSign template editor interface. On the left, there's a tab labeled 'Laura - 2023-02-01 New Hire Form'. On the right, there's a button labeled 'ADVANCED OPTIONS'.

- Enter the Password for the template



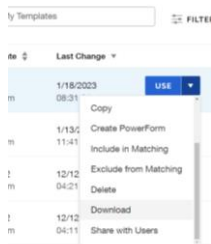
The screenshot shows the 'Advanced Options' dialog box. The 'Password' section is highlighted, showing fields for 'Create Password' and 'Verify Password'. The 'Create Password' field has a strength indicator (four dots) and a note 'Maximum 15 characters'. The 'Verify Password' field has a green checkmark icon. Other sections visible include 'Expiration' (with a date picker set to 1/20), 'Sender Settings' (with a checkbox for 'Add envelope ID to top left of every document page'), and 'Mobile-Friendly Viewing with Responsive Signing' (with a checked checkbox for 'Allow recipients to view documents more easily on mobile devices').

IMPORT / EXPORT TEMPLATES

If someone else creates a template for you, they can export the template then send you the .zip file, and you can import the template. Another option is if you created a template in the DEMO environment and you need to bring it into the production environment.

Export Template

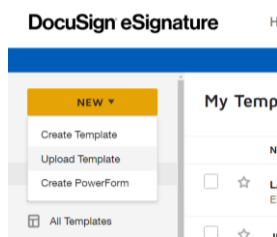
- Go to my Templates
- Click on the arrow to the right of the USE Button next to the template
- Select DOWNLOAD



- Verify where the file is saved on your computer, it will be saved as a .zip file

Import Template

- Go to Templates
- Under NEW, click the right arrow, select UPLOAD TEMPLATE



- Select your zip file and the template will be uploaded to your environment

SHARE YOUR TEMPLATE WITH OTHER USERS

- Templates
- Click on the RIGHT arrow in the USE Button
- Select SHARE with users

