RUTGERS
School of Arts and Sciences

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".**

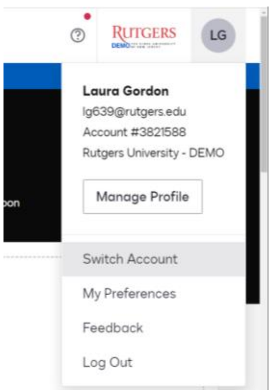
Production Environment:

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.

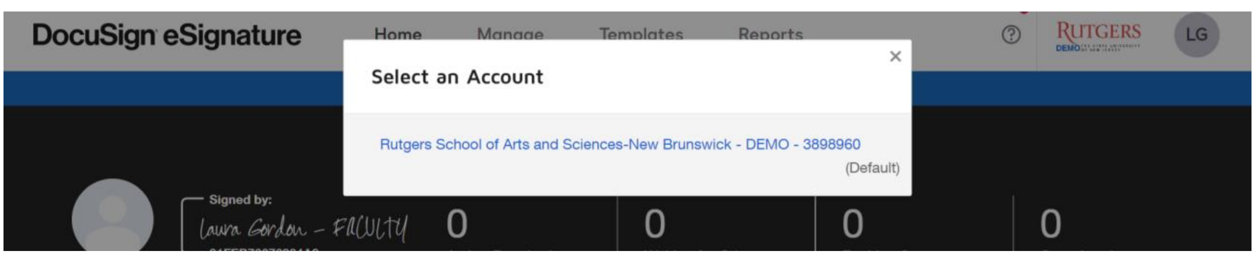
Rutgers Account (top right of screen)

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

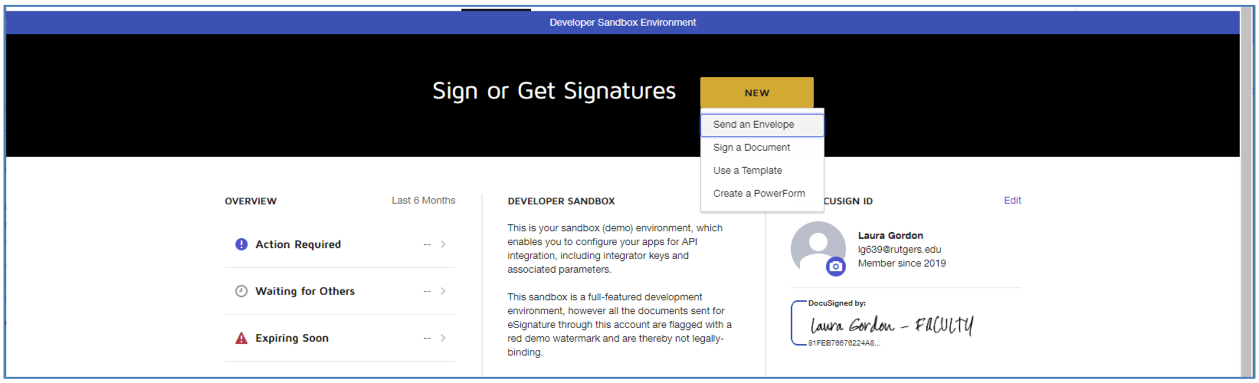
Login: NETID@rutgers.edu

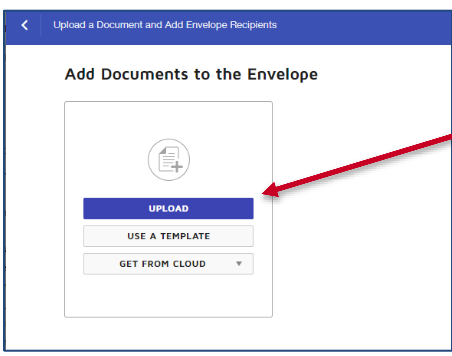
It is important to ALWAYS login as NETID@rutgers.edu (do not login as NETID@english.rutgers.edu, for example)

Create an ENVELOPE to get people to sign

What is an envelope?

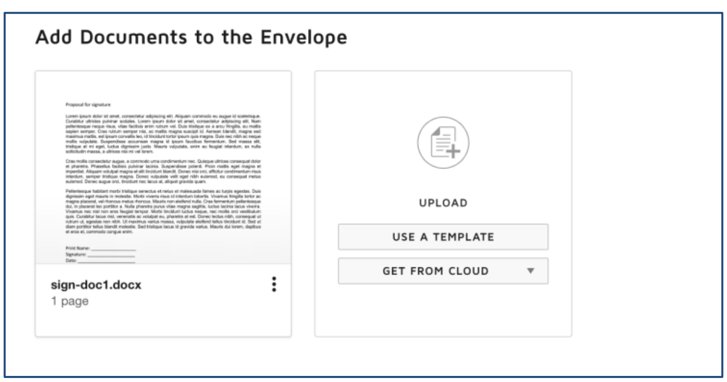
Envelopes contain recipient information, documents, document fields, and timestamps that indicate delivery progress. They also contain information about the sender, security and authentication information, and more.





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)

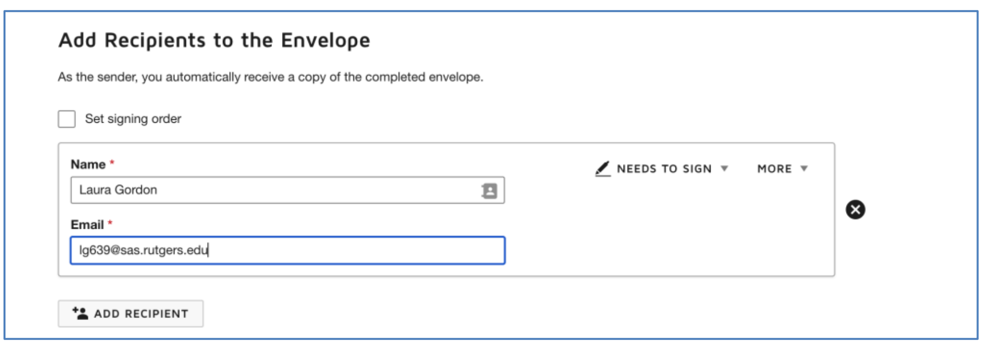
- can change their profiles
- can see all documents they have signed
- can manage documents
- can change their signature

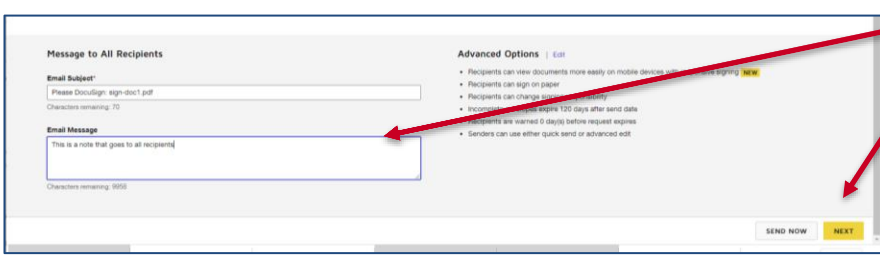
Non-Rutgers recipients

- 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

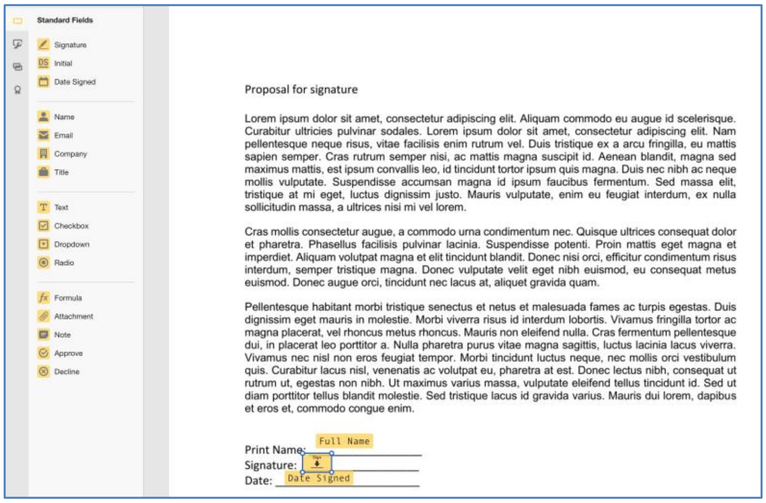




Add a message to all recipients.

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

Define Document– add fields

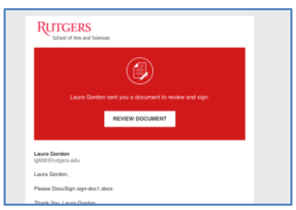


Drag – Name, Signature and Date Signed into the 'fields' on the document

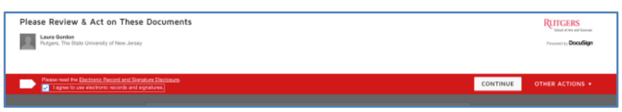
Hit SEND button on the bottom of the page

Receive Message

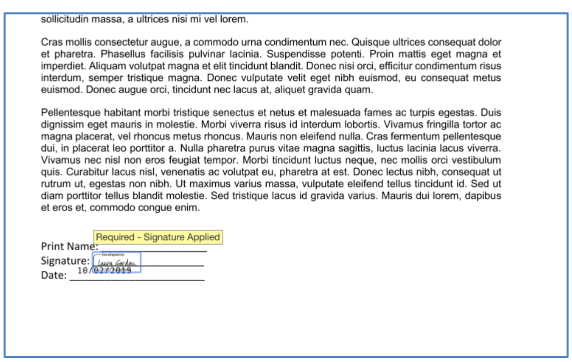
The receiver of the message will get this in their mailbox. They can hit 'REVIEW DOCUMENT'.



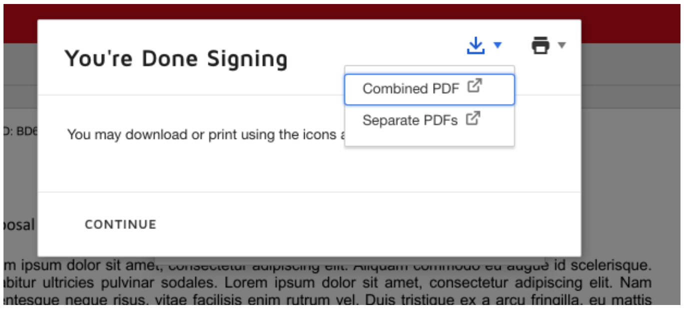
Options for RECEIVER



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

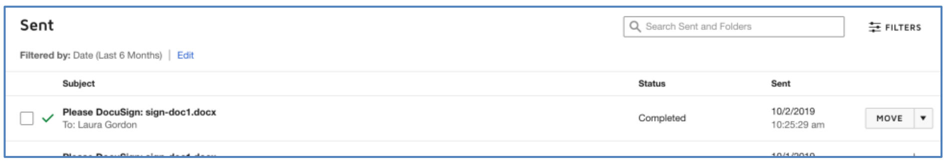


Once signing is complete, you can download the signed file / print it on this confirmation screen.



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

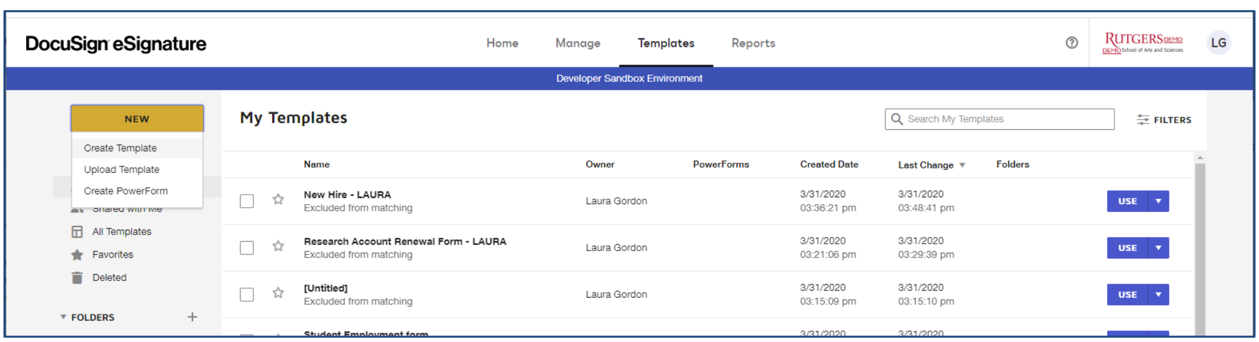
Create a Template

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.

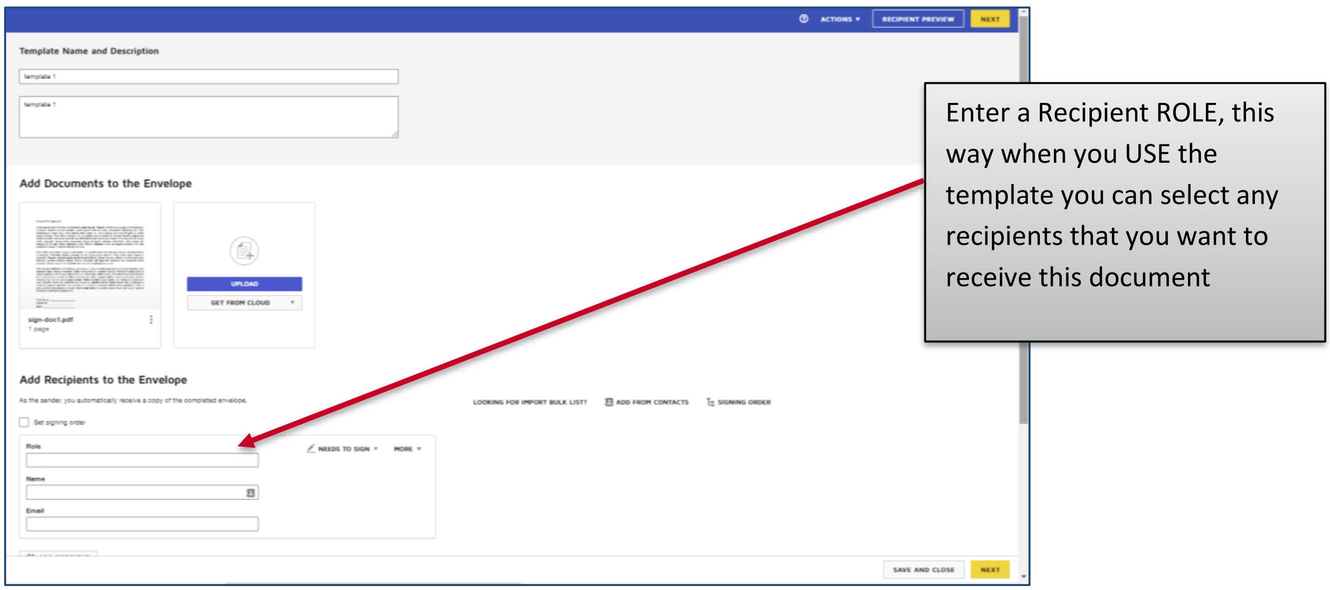
Click to create a NEW Template

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



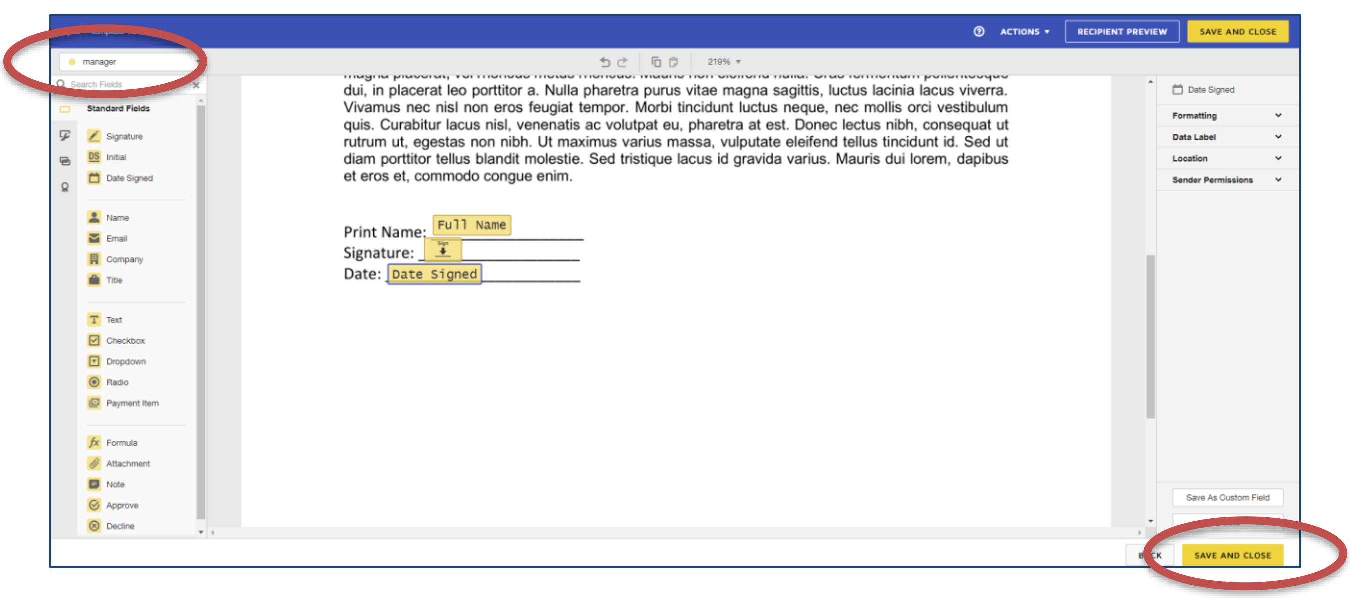
Complete:

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



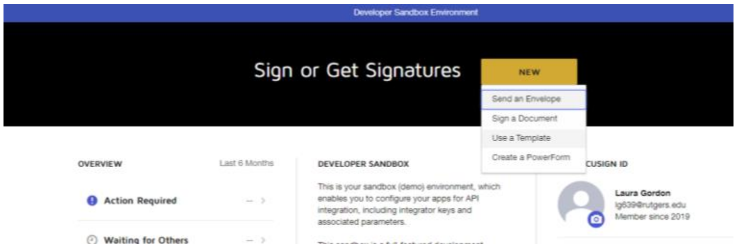
Build the document the same as what was done before…

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

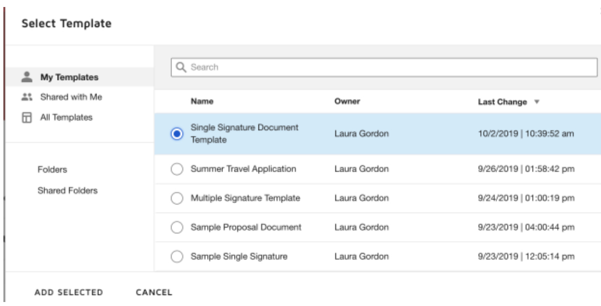


HOW TO USE THE TEMPLATE

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

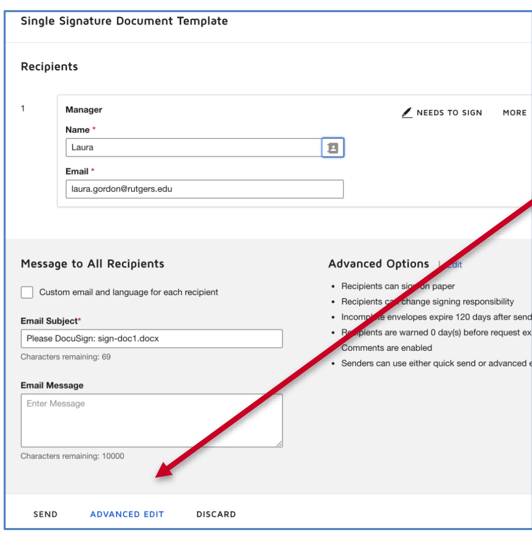


Select template to use



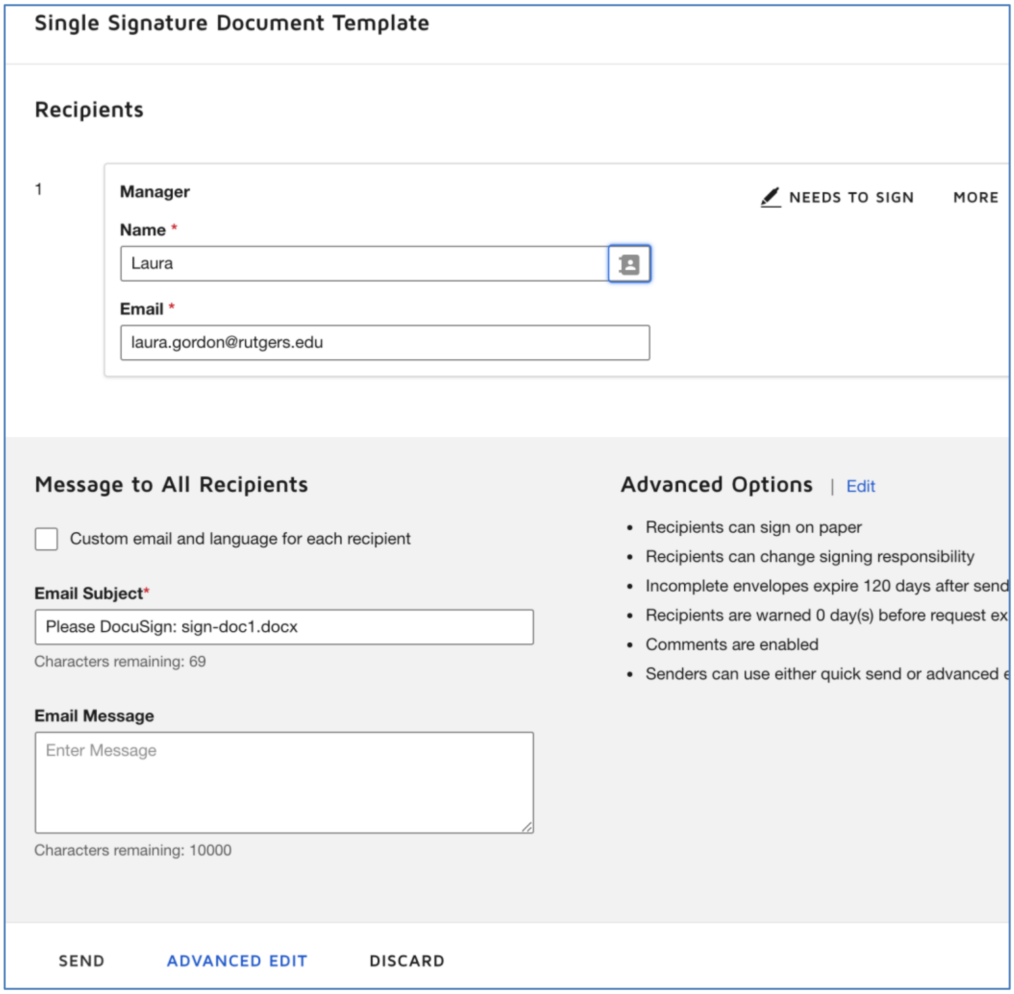
Select Recipients

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

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**.

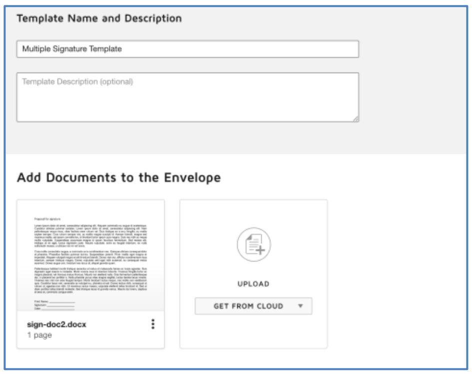
When you use a signing order, **you can route an envelope to the same person multiple times.** For example, you want to send a purchase order to your manager to approve, then send it on to purchasing to sign, and finally send a copy to your manager again.

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

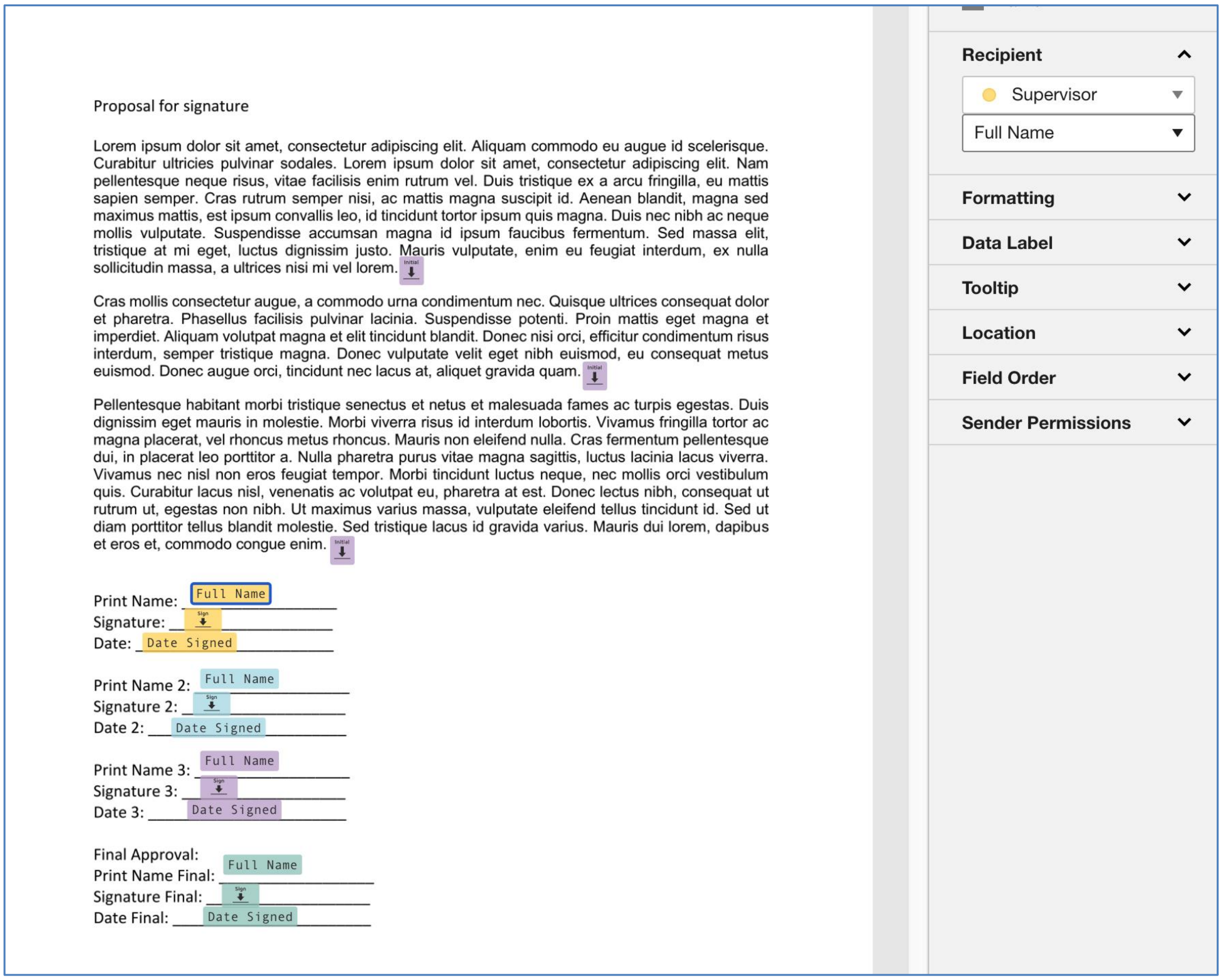
Add Name, Signature & Date to document as fields

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’

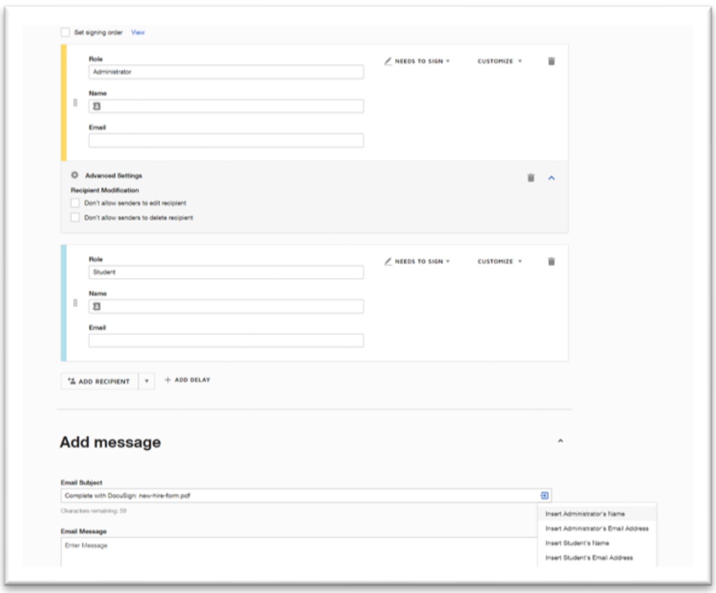
If you set a **DATA LABEL** to be the SAME for multiple field types, then when data is entered in a field, it will be ‘re-used’ in other fields, so it doesn’t have to be re-entered.



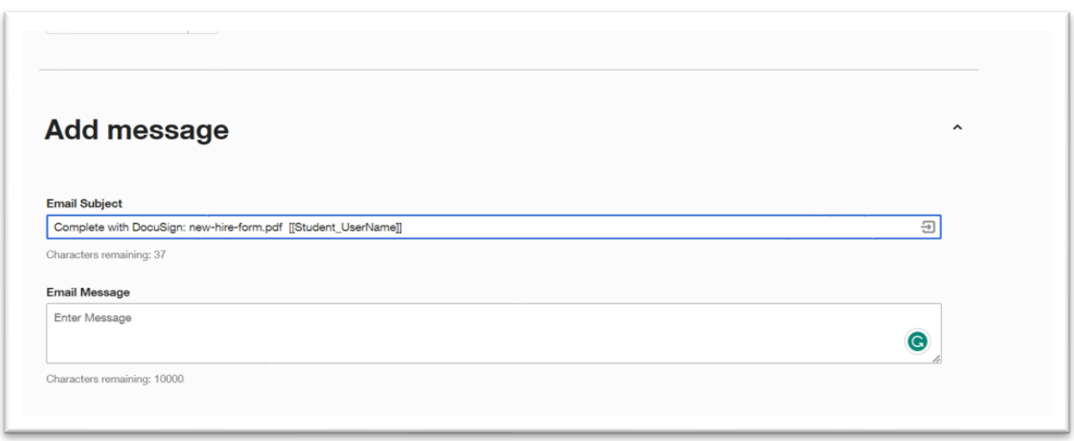
CUSTOMIZE THE SUBJECT OF THE EMAIL THAT IS SENT

- 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.



After selecting:



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'.

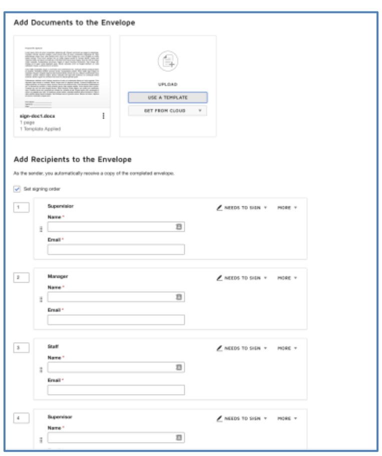
Create Envelope with Signing Order

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)



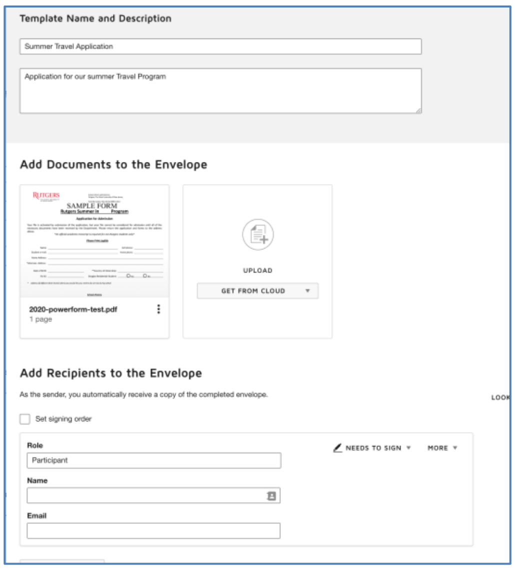
Send it out

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.

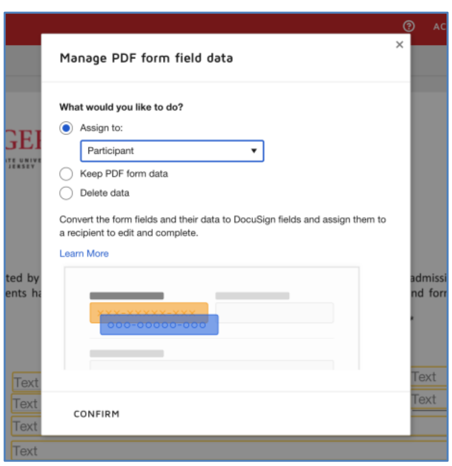
Create a Template

- 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



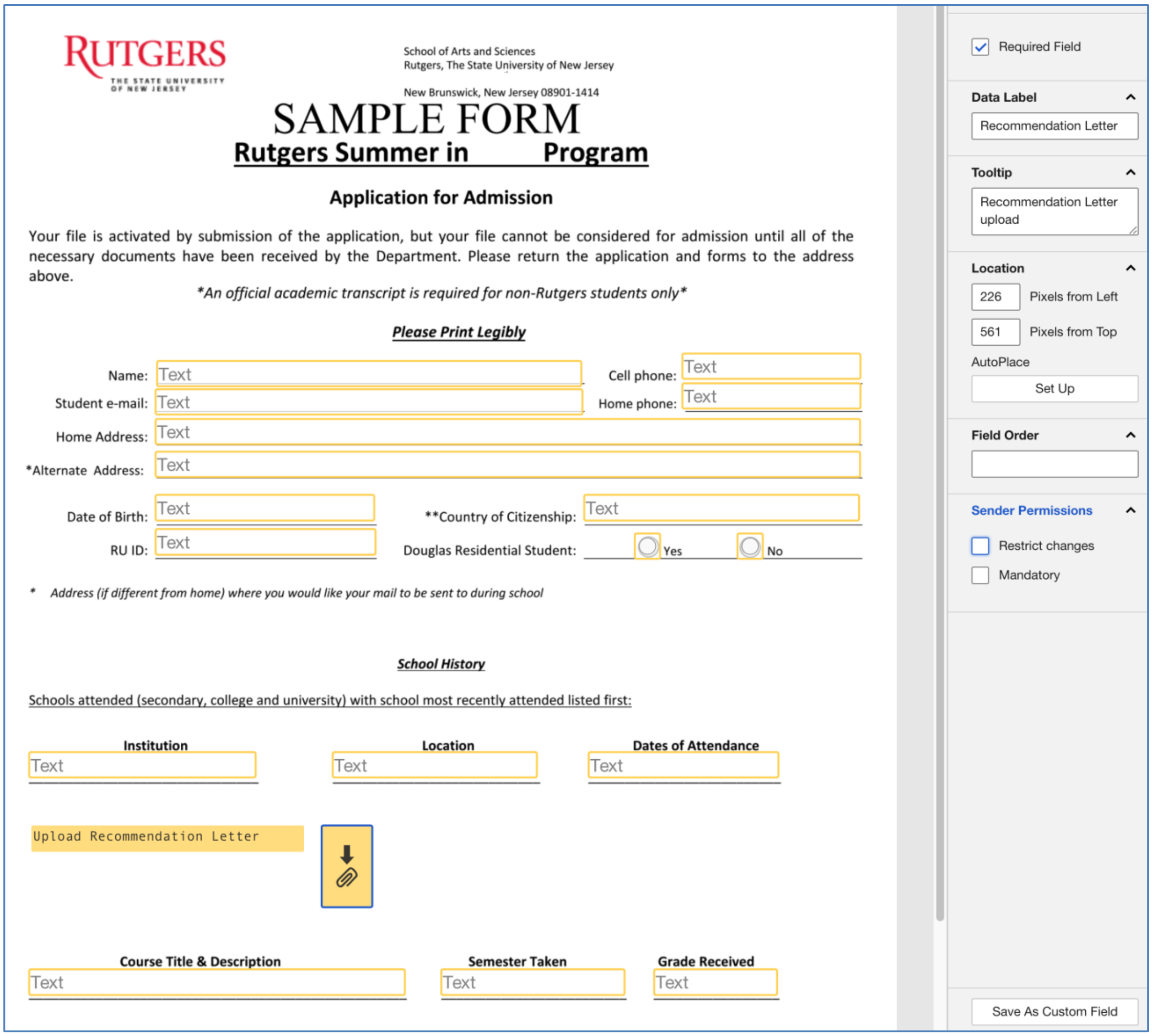
Keep Form Field Data

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



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: Text Cell phone: Text
Student e-mail: Text Home phone: Text
Home Address: Text
*Alternate Address: Text
Date of Birth: Text **Country of Citizenship: Text
RU ID: Text 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: Text Location: Text Dates of Attendance: Text

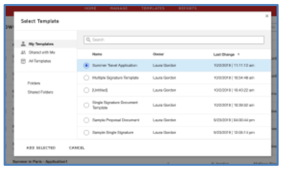
Upload Recommendation Letter

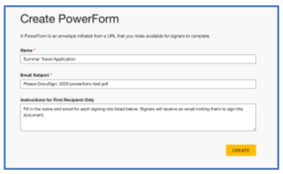
Course Title & Description: Text Semester Taken: Text Grade Received: Text

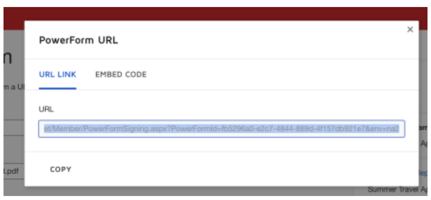
Required Field
Data Label
Recommendation Letter
Tooltip
Recommendation Letter upload
Location
226 Pixels from Left
561 Pixels from Top
AutoPlace
Set Up
Field Order
Sender Permissions
Restrict changes
Mandatory
Save As Custom Field

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



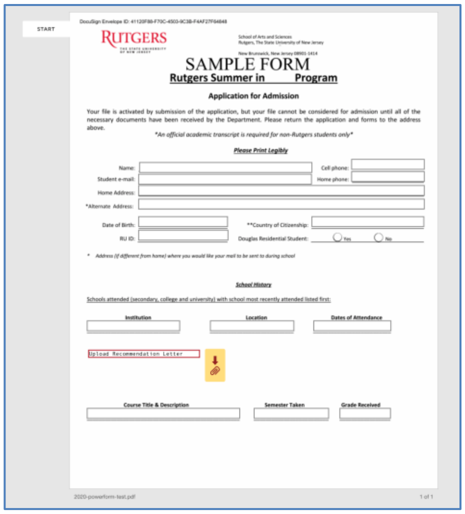




What user sees when they 'ENTER' the URL

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

Complete Form:


START

DocuSign Envelope ID: 41120F88-F70C-4503-9C3B-F4AF27F64848

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

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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

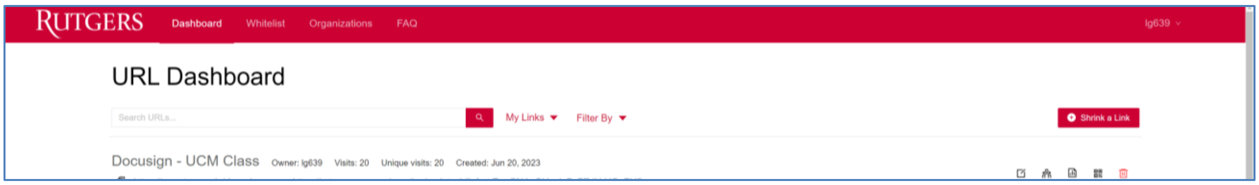
CREATE SHORT CUT LINK

CREATE SHORT CUT LINK – DEFAULT ALIAS

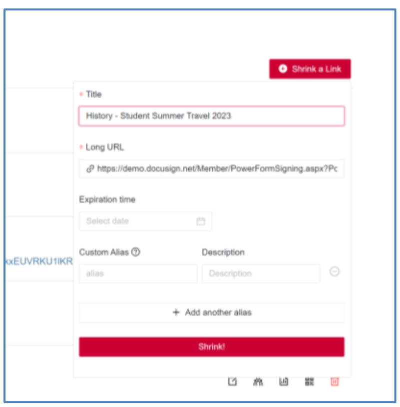
To make the forms easier to access, it is possible to create a shortcut link

https://Go.rutgers.edu

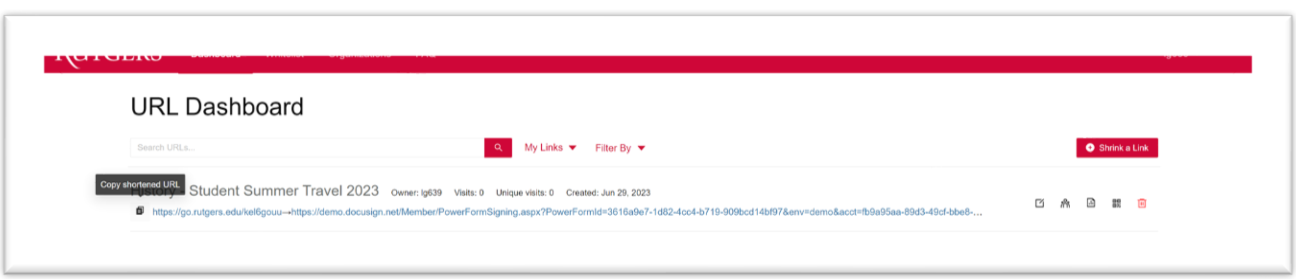
- Get your POWERFORM URL LINK (from docusign), <ctrl c> so it's in clipboard
- Login with CAS
- Click on → Shrink a link



- 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:

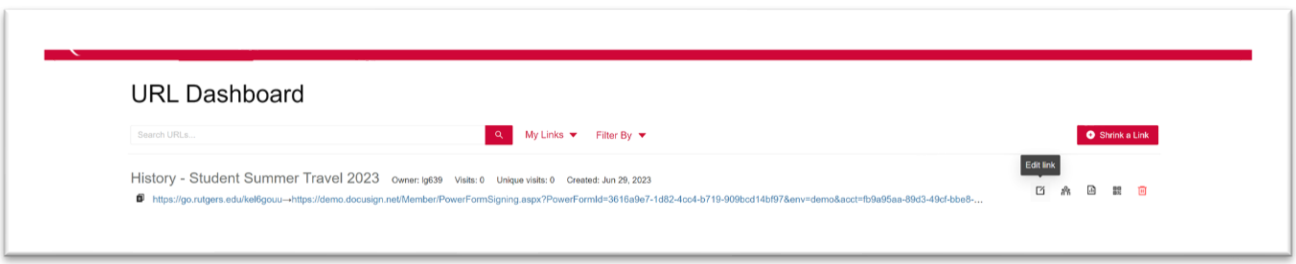
From the go.rutgers.edu Website:

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

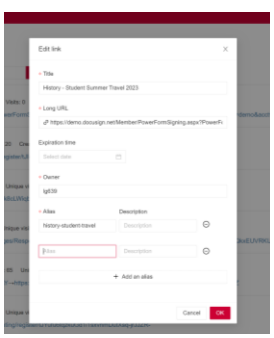
To create a custom short URL, you must have the “power user” role. This role is available only to faculty and staff members. **To request to be added to this role**, please **email oss@oss.rutgers.edu along with your NetID.**

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

- Create new link / or Edit link

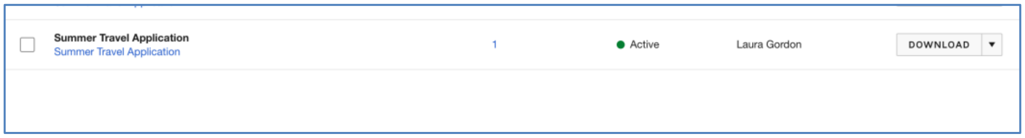


- Add an alias



Review PowerForm Results

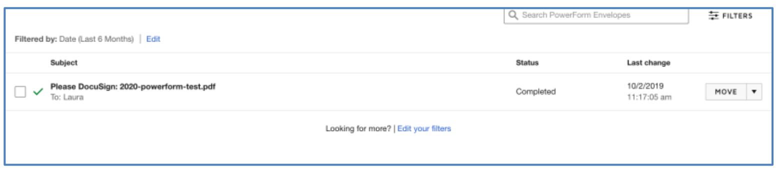
- Note: Only the OWNER OF THE POWERFORM can view the results in this way.
- Click on the ‘number of responses’
- Here I can see the people that completed the form



Click on DOWNLOAD to get a .csv of the results

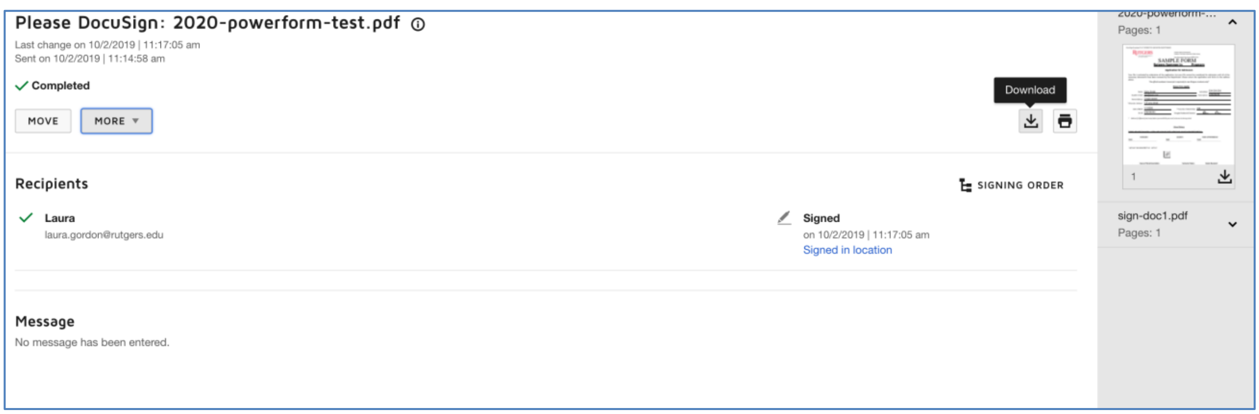
This will include all of the fields that were completed.

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.

More work with Templates

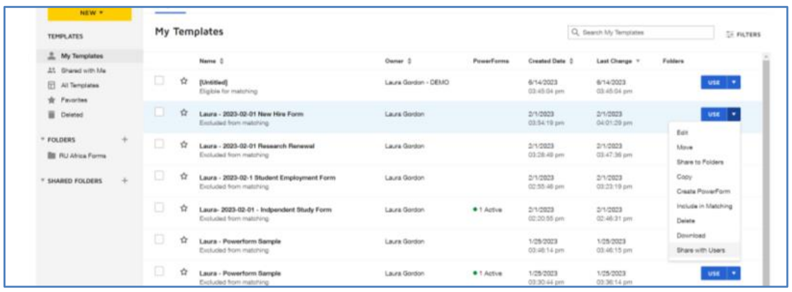
Share Template with Group

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

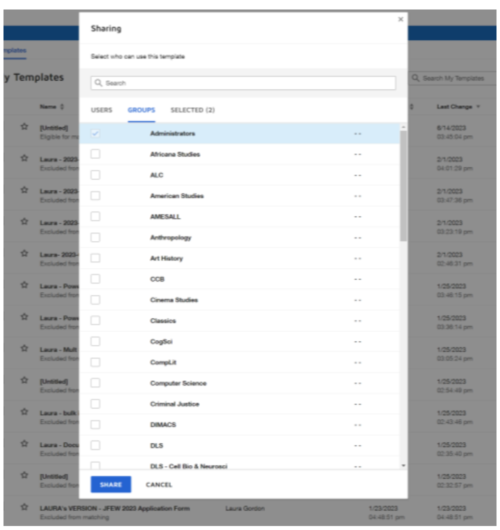
Important Note:

The INDIVIDUAL that OWNS the template is the only one that can see the POWERFORM RESULTS. Meaning if someone completes the powerform only the owern 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



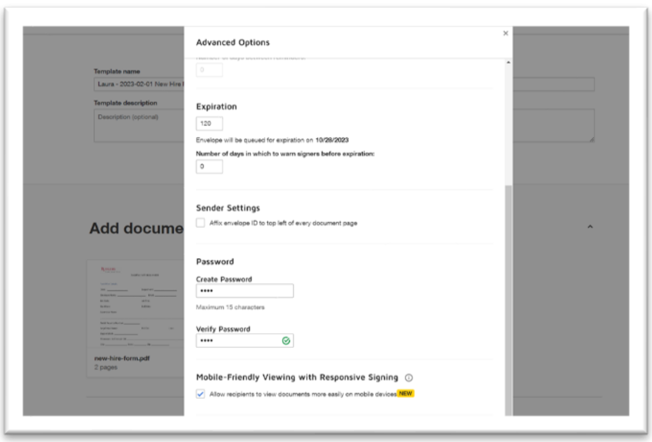
3. Click the GROUPS TAB, select the ‘group’ that you want to be able to use your template
4. A group has been created for each department in SAS
5. If your group is not listed, please create a help desk ticket

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

- Enter the Password for the template

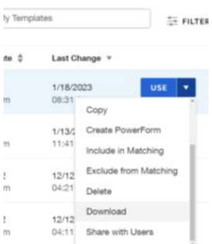


Import / Export Templates

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

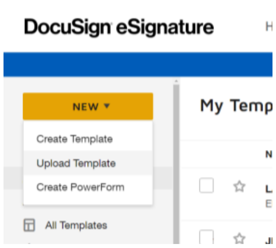
- Go to my Templates
- Click on the arrow to the right of the USE Button next to the template
- Select DOWNLOAD



- 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