

Wisconsin eSignature: DocuSign User Guide

(SSO Version)

Updated 06/05/2019

This document is edited for the UWSP environment in cooperation with the DOA



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Key Terms

Envelope: An envelope can be thought of as one complete DocuSign transaction. A single envelope may contain multiple documents and can require signatures from several different people.

Tags: Items placed on a document in DocuSign that requires the signer (recipient) to perform an action. Tags can require signatures and dates, a person's title or organization, or any number of other customizable options.

Templates: Templates can streamline the sending process by allowing users to automatically place tags on frequently sent documents or by pre-addressing envelopes that are sent to the same groups of people.

Roles & Permission Sets

The following are common roles within DocuSign. Admins in each agency and campus will have the ability to create or adjust permission sets as needed. Check with your DocuSign Admin for more agency- or campus-specific roles.

Signer: A Signer can only receive envelopes and sign documents. They don't require DocuSign accounts and cannot login to DocuSign or send envelopes.

Viewer: Viewers can login to DocuSign and view the envelopes they've received, but are not able to send envelopes.

Sender: Most active users are assigned to this role. They can login to DocuSign and are able to send envelopes. They can use templates, but cannot create or share them.

Template Builder: These users have all the rights of a Sender, plus they can create and share templates, create and share PowerForms, send to bulk lists, and have access to more detailed reports.

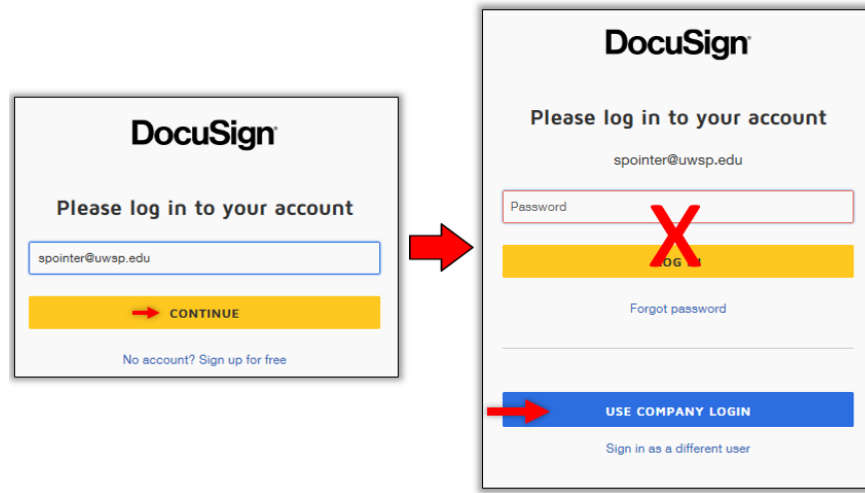
Admin Lite: These users have all of the rights of a Template Builder, plus they can transfer/share envelopes from one user to another (which may be used when a Sender goes on leave) and can create signing groups (which may be used when a document may be signed by more than one person). These users have most of the same privileges as Admins, except for the abilities to change account and security settings.

Admins: These users have full rights within DocuSign. Each agency and campus has one or more Admins.

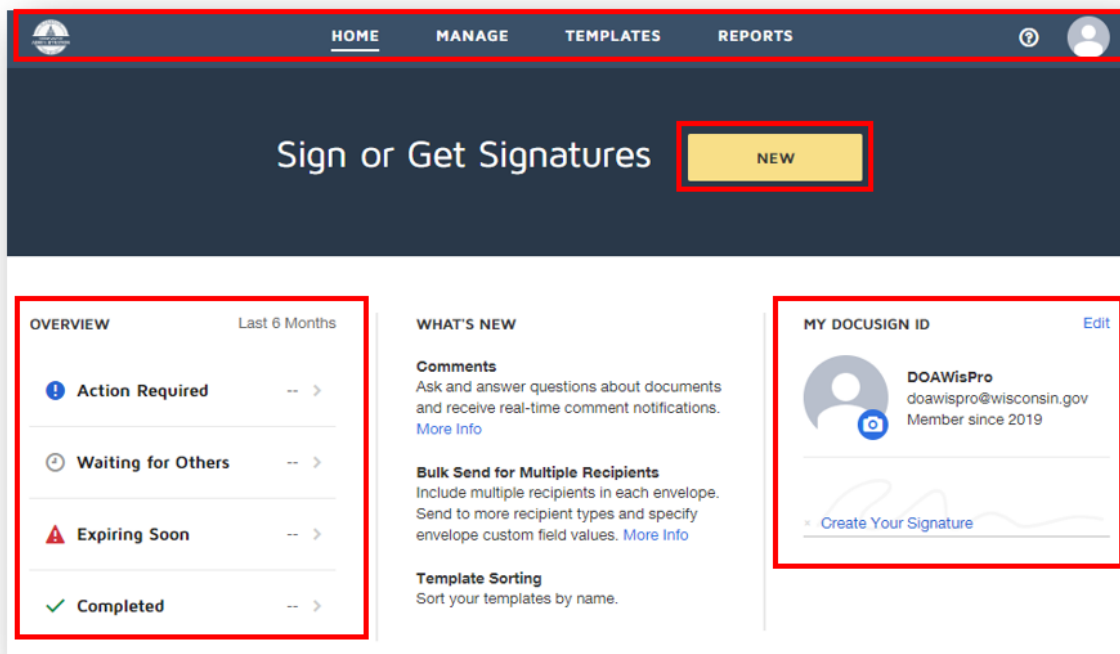
Organizational Admins: The Knowledge Management, Improvement and Training (KIT) section of the State Bureau of Procurement (SBOP) serves as the Organizational Admins for DocuSign. These users have full Admin rights for all accounts and subaccounts under the procurement umbrella.

Logging in to DocuSign with SSO

The DocuSign login page can be found at docusign.uwsp.edu. To login, enter your campus username and click **Continue**. On the next screen, click **Use Company Logon**.



DocuSign Homepage



When you login to DocuSign, you'll be taken to the DocuSign homepage. Since each campus and agency is able to apply an account-wide branding, the background colors, button colors, and logos may look different than the pictures in this guide, which show the Department of Administration's brand.

There are four main sections of the DocuSign homepage (outlined in red in the picture above): the Top Menu, the New Button, the Overview section, and the My DocuSign ID section.

Top Menu

This section allows users to quickly navigate the DocuSign website.

Home: This tab will return you to the DocuSign Homepage.

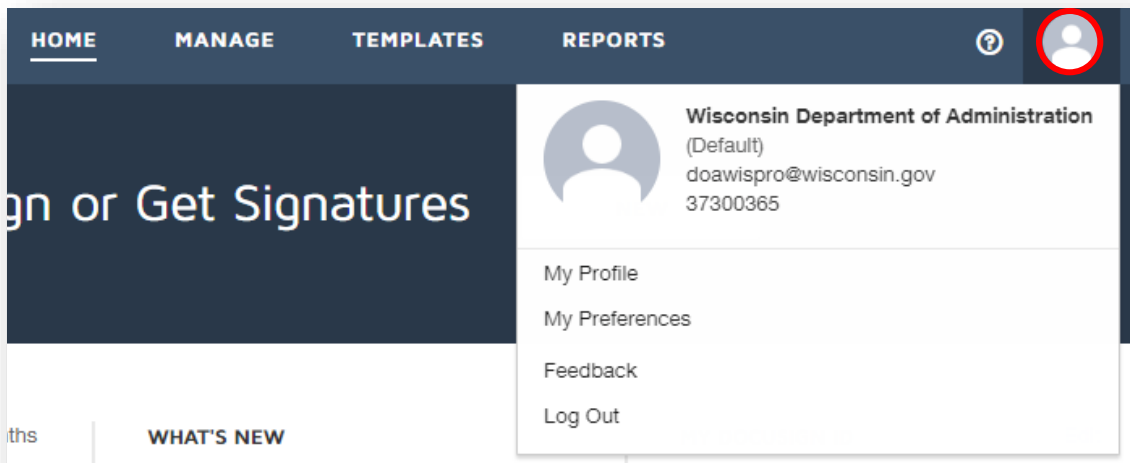
Manage: Through this tab, you can interact with your envelopes, check the status of any envelope you've received or sent, create a new envelope, sign a document, or use a template.

Templates: This tab allows you to interact with the templates you have access to. Users with the ability to create templates can also do so from this page.

Reports: This tab will allow you to view a variety of reports. Unless you have additional security privileges, the reports will only include information from your activities within DocuSign.

Question Mark Icon: Clicking this icon will take you to the DocuSign Support page. You can access a variety of help topics or view the full DocuSign User Manual.

Profile Icon: Clicking the profile icon (outlined in red below) will open a dropdown menu where you can access your profile, change your preferences, and log out of DocuSign. If you add a picture to your profile, it will display in place of this icon.



New Button

Clicking this button will open a dropdown menu allowing you to quickly send an envelope, sign a document, or use a template. You can also perform these actions using the **Top Menu**.

Overview Section

This section allows you to quickly see the status of your current envelopes. The information shown here will default to the last six months. You can filter your results or get more detailed information through the **Manage** tab.

Action Required: Shows the number of envelopes that require you to sign.

Waiting for Others: Shows the number of envelopes you've sent that still require other people to act on.

Expiring Soon: Shows the number of incomplete envelopes that will expire within six days.

Completed: Shows the number of envelopes you've sent or received that have been completed.

My DocuSign ID Section

This section allows you to view or add a signature, edit your personal settings, and view your DocuSign information. Clicking **Edit** in this section will take you to **My Preferences**.

Getting Started: My Preferences

On the **My Preferences** page, you can update your personal information, add a signature, access your contact list and change your notification settings. To access **My Preferences**, click the **Profile Icon** and select **My Preferences**. You can also click **Edit** in the **My DocuSign ID Section**.

Add, Edit, or Delete a Signature

Before you can sign documents, you will need to add a signature. From **My Preferences**, select the **Signatures** tab and click **+ Add New**. Review your full name and initials at the top of the window and edit them if needed, select one of the preformatted styles or draw your own, then click **Create**. This will return you to the **My Preferences** page and you will now have the option to edit or delete your signature as well.

Change Notification Settings

You can change your notifications through **My Preferences**. To access this section, click **Edit** in the **My DocuSign ID Section** or click the **Profile Icon**. The **Notification** tab can be found at the bottom of the list on the left. By default, all user notifications are turned on. If you find that you are receiving too many notifications, you can change any of the settings that you like. Click **Save** before leaving the page.

Add Contacts to Your Address Book

You can view your address book through the **Contacts** tab in **My Preferences**. Your address book is not linked to your contact list in Outlook. Adding commonly used contacts to your DocuSign address book will allow you to send envelopes to recipients quicker and without worrying that you might mistype a name or email address. To add a contact, click **Add Contact** and enter the person's full name and email address, then click **Save**.

Sending an Envelope

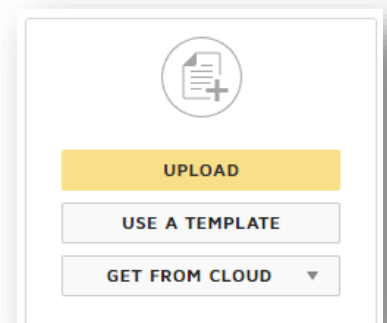
From the DocuSign homepage, click the **New Button** and select **Send an Envelope**.

Upload a Document

Click **Upload**, locate the file you would like to upload, and click **Open**. You may upload as many documents to a single envelope as you like; there are no limits to the number of documents allowed.

File Size Limitations

For best performance, DocuSign recommends limiting each file to 5 MB, but will accept a maximum file size of 25 MB and 2,000 pages. There is no envelope size limit.



Supported Document Types

DocuSign supports many commonly used file types, including .doc, .docx, .pdf, .msg, .ppt, .pptx., .csv, .xls, .xlsx, .jpg, .png, and .gif. For a complete listing of supported file formats, visit [DocuSign's Support page](#). Note that DocuSign doesn't support files with password security enabled (you must remove the security setting before uploading the file).

Add Recipients to the Envelope

Add Recipients to the Envelope

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

ADD FROM CONTACTS
SIGNING ORDER

Set signing order

1 **NEEDS TO SIGN** **MORE**

2 **MORE**

ADD RECIPIENT

- Needs to Sign
- Receives a Copy
- Specify Recipients
- Signs with Notary

Next, you will need to add recipients to the envelope. To add additional recipients, click the **Add Recipient** button at the bottom of the section. Enter each recipient's name and email address. If you've added contacts to your address book, the name and email address fields will auto-complete as you type.

Select the action you need each recipient to take. By default, **Needs to Sign** will be selected for each person, however you can change this selection by clicking **Needs to Sign** to reveal the dropdown menu.

Needs to Sign: This option will require the recipient to perform an action to a tag (e.g., sign, initial, enter their name) on one or more documents in the envelope.

Receives a Copy: This option will allow a recipient to receive a copy, but does not require them to sign or perform an action. Note that the Sender will automatically receive a copy of a completed document at the end once all actions with the envelope have been completed.

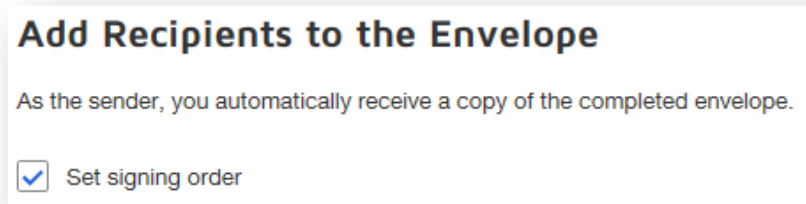
Specify Recipients: This option will allow the recipient you identified to enter the name and email address of any recipients identified by Role at their same position or later in the signing order. The Role field will appear once Specify Recipients has been selected.

Signs with Notary: This option allows you to require that the recipient sign electronically with a notary present. You will need to indicate both the signer's name and email address, as well as the notary's name and email address. In addition, the notary must have an active DocuSign Notary Profile enabled. For more information, visit [DocuSign's Support Page](#).

Additional options, including adding access authentication or a private message, may be found by clicking **More**.

Set Signing Order

Once all recipients have been added, you should determine whether you need to set a signing order or if all recipients should be able to sign at the same time.

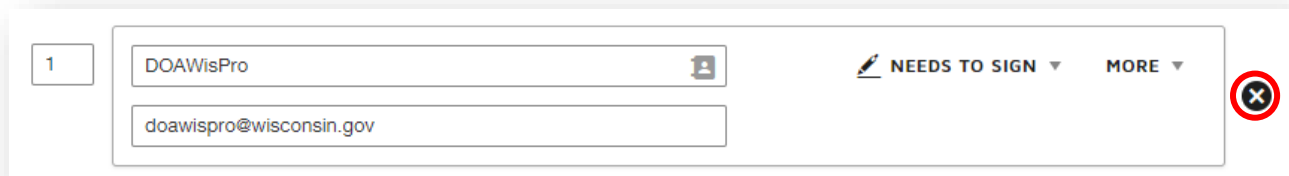


If you check the **Set Signing Order Box**, your envelope will be sent to the first recipient, who must complete their required actions, before it will be sent to the next recipient. You will need to identify the signing order by either dragging the entire recipient box to a new location, or by changing the numbers in the boxes to the left of the recipient information. You may assign the same signing number to multiple recipients if you would like those recipients to receive the envelope and sign at the same time.

If the **Set Signing Order Box** is not checked, all recipients will receive the envelope at the same time and do not need to wait for others before completing their actions. The order the recipients are listed will have no effect on the way the envelope is sent.

Remove a Recipient

Moving your mouse over the box with the recipient's information will make an X appear (outlined in red below). To remove the recipient, click the **X**.



Edit Subject Line and Message to All Recipients

When the envelope is sent to the recipients, the default subject line of the email will be "Please DocuSign: (name of the document)". If you would like to change the subject line for all recipients, you may do so at the bottom of this page. If you regularly have recipients sign documents with similar names, it's a good idea to change the Email Subject so that it is easier to find in the Manage tab.

Advanced Options: Recipient Privileges, Reminders, and Expiration

To view the advanced options, click **Edit** to the right of Advanced Options. This will open a popup window with the following options:

Recipient Privileges: You can choose to allow recipients to change signing responsibility and whether recipients must be signers to view signed documents.

Reminders: You can send automatic reminders and can set the number of days before the first reminder is sent and the number of days between reminders.

Expiration: You can set the number of days before the request expires and the number of days before the expiration the signers will be sent a warning.

Go to Tag Assignment Page

Once you've added recipients, determined your signing order needs, and made any desired adjustments to the message and settings, click **Next** to go to the Tag Assignment page. On this page, there are three main sections: the left, the middle, and the right.

The screenshot shows the DocuSign interface for a routing slip. The top bar includes a back arrow, the document name "Please DocuSign: Routing Slip Sample.docx, Statement of Work Template.doc", a help icon, "ACTIONS", and a "SEND" button. Below the top bar is a search field and a "DOAWisPro" dropdown. The left sidebar is titled "Standard Fields" and lists various tags: Signature, Initial, Date Signed, Name, Email, Company, Title, Text, Checkbox, and Dropdown. The central document preview shows the "State Bureau of Procurement" logo and a "Routing Slip" table. The table has columns for Title, Name, Signature, and Date Signed. The right sidebar shows document thumbnails for "Routing Slip Sampl..." and "Statement of Work...".

Title	Name	Signature	Date Signed
Procurement Manager:	Full Name	Sign	Date Signed
Section Chief:	Full Name	Sign	Date Signed
Bureau Director:	Full Name	Sign	Date Signed
Division Administrator:	Full Name	Sign	Date Signed

Comments: Please review the attached Statement of Work.

Left Section: On the left side, you will see a list of all available tags that you can place on your documents. When you first open the page, the **Standard Fields** tab will be open, as it is in the picture above. You can click on the other tabs, which include **Custom Fields** and **Notary Fields**, if needed. Above the list of tags, you will find a dropdown menu that will allow you to switch between different signers and will indicate which color of tags has been assigned to each signer.

Middle Section: In the middle will be the documents you have uploaded. This is where you will drag the tags to indicate where the actions will be placed. Above the documents is a toolbar that will allow you to **Undo, Redo, Copy, Paste**, and adjust the level of **Zoom**. Note that standard keyboard shortcuts will also allow you to undo, redo, copy, and paste as well.

Right Section: The right section will change depending on what you have selected:

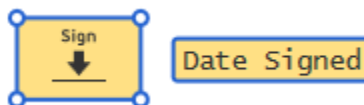
- **Document Thumbnails:** When you first navigate to the page, or when nothing is selected, you will see **Document Thumbnails**. When you have multiple documents, only the first will be shown by default. To view the others, click the name of the document and the thumbnails will expand. You have the ability to rotate or delete individual pages, or quickly navigate to a desired page. Once you have placed tags on your document, icons will be shown on each page with tags.
- **Tag Options Menu:** Once a tag has been placed, clicking the tag again will show the **Tag Options Menu** in the section on the right. From here, you can change the signer assigned to the tag, modify the information the tag requests (e.g., full name, first name, last name), change the formatting, and add options for the tag (e.g., when using a dropdown tag), among many other options. If you select multiple tags at the same time (by using your mouse to draw a box around the desired tags), you will have the ability align tags and change the signer assigned to the tags.

Add Tags to a Document

When a signer receives an envelope, they are directed to perform actions based on the tags that you add to the documents you've uploaded. To add a tag, first locate the page of your document where you want the signer to take an action and make sure it's visible in the center portion of the page. Drag the **Tag** from the left side of the page to the place in the document where it should be placed.

Resize Tags

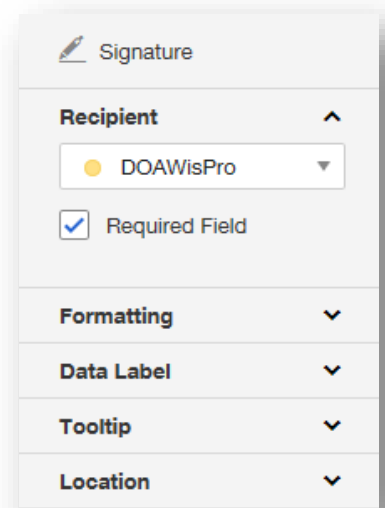
Some tags are able to be resized, like signature and text tags, while others are not. If a tag is able to be resized, you will see white circles on the corners of the tag when you click it, like the Signature tag below. To resize this type of tag, click one of the white circles and drag it. If a tag is not able to be resized, there will be no white circles on the corners (like the Date Signed tag below).



Assign Tags to a Signer

Once a tag has been placed, click the tag to open the **Tag Options Menu** on the right side of the page. Under the **Recipient** tab, clicking the recipient's name will open a dropdown menu that allows you to select a different signer/recipient. Each recipient is assigned a different color of tag, making it easy for you to see tell who you have assigned to which tags.

Another option would be to click the dropdown menu on the left side of the page (above the available tags) and select your signer before placing a tag in your document.

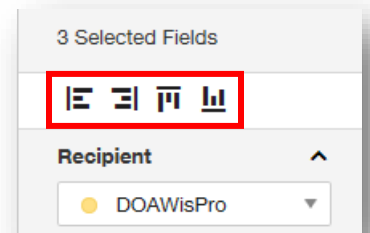


Required & Optional Tags

You have the ability to make some tags, like Signature, required or optional for each signer. Once you've placed the tag, click it to bring up the **Tag Options Menu**. Under the **Recipient** tab, the **Required Field checkbox** will be checked by default. To make the tag optional, uncheck this box.

Align Tags

To align tags, use your mouse to draw a box around the desired tags, then click the **Alignment Icons** from the **Tag Options Menu** on the right side of the page (highlighted in red in the image on the right).



Delete Tags

To delete a tag, click the tag and press **Delete** on your keyboard or click the **Delete** button at the bottom of the **Tag Options Menu** on the right side of the page.

Recipient Preview

If you would like to see how the document will display to each of the signers, you can click the **Recipient Preview** button at the top of the screen. This will open a new window where you can view the document with all of the tags assigned to a signer. Each tag may be interacted with, allowing you to see how it will look once it has been completed (e.g., a Signature tag may be clicked to add a placeholder signature or an option may be selected from a dropdown menu). You may select a different recipient by clicking the **Viewing As** dropdown menu at the top of the window. In addition, you have the option of viewing it as if you were using a desktop computer (the default view), a tablet, or a mobile device by clicking the corresponding icons at the top of the window. Click the **X** at the top of the window to exit the preview.

Send the Envelope

Once you've added all necessary tags and have assigned them to the appropriate signers, you can send the envelope by clicking **Send** at the top of the page. Once it has been sent, you can view the status of the envelope in the **Manage** tab's **Sent** folder or **Quick Views**.

Send an Envelope Using a Template

From the DocuSign homepage, click the **New Button** and select **Use a Template**, or go to the **Templates** tab.

Select a Template

Select one of the templates you have access to (which may require you to click the various folders on the left) and click **Use**. When the popup window opens, scroll to the bottom and click **Advanced Edit**. This will open a page similar to the one you use when you create a new envelope.

Replace Document

Templates are typically created with sample documents that are often not filled out completely, or have sample language in them. You will need to replace the document from the template with a completed document from your computer. To do this, click the **Menu Dots** next to the file name (highlighted in red in the image to the right) and select **Replace**, then locate the file you'd like to upload, and click **Open**. If a popup warning appears letting you know that the document you're changing has a template applied, ignore it and click **Continue**.

Upload Additional Documents

If needed, upload additional documents by clicking **Upload**. (Complete instructions can be found in the **Sending an Envelope** section.)

Add Recipients to the Envelope

Enter the name and email address for the recipients. Notice that each recipient has a role associated with it now (depending on how the template was created). Since the template will have signatures placed for you, it's important to pay attention to these roles. Double check the actions, options, and signing order needed for your envelope, though these will often already be set up correctly for you.

Edit Subject Line and Message to All Recipients

As before, you may change the subject line for all recipients by editing it at the bottom of this page. If you regularly have recipients sign documents with similar names, it's a good idea to change the Email Subject so that it is easier to find in the Manage tab.

Advanced Options: Recipient Privileges, Reminders, and Expiration

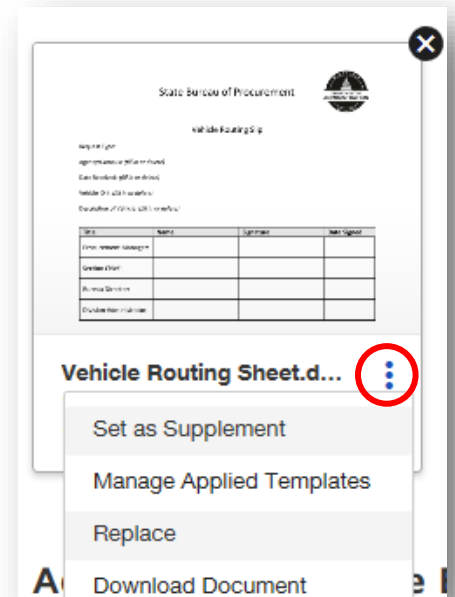
Review the advanced options by clicking **Edit** to the right of Advanced Options. For detailed information, review this information in the **Sending an Envelope** section.

Go to Tag Assignment Page

Once you've added recipients, determined your signing order needs, and made any desired adjustments to the message and settings, click **Next** to go to the Tag Assignment page.

Review Tags in the Document

The template will already have tags placed in your document. Sometimes, templates use auto-tags that allow a tag to be placed in a correct spot, even if the document you uploaded contains different, longer text than the original, causing the signature to appear in a different location or on a different page. While auto-tags are very helpful and can save time, they work by searching your document for a specific word or phrase and adding a tag near it. If the new document happens to have that word or phrase in a different location, includes it multiple times, or doesn't include it at all, the auto-tags may not work the way they were intended. When using a template, closely review all tags to ensure they're in the appropriate places. If needed, follow the instructions in the **Sending an Envelope** section to add or remove tags.



Helpful Note:

Some templates have been created by the State Bureau of Procurement and have been shared to all accounts in the **DOA Forms** folder of the **Templates** tab. These include templates for commonly used, enterprise-wide forms, such as *DOA-3046*, *DOA-3049*, *DOA-3051*, *DOA-3310*, and *Contract Template for Commodities*. When these templates were created, the phrases used with the auto-tags were included in the template's description. You can view this information by going to the **Templates** tab, clicking the name of the template, and looking at the description above the **Use** button. Using this information, you can perform a search in your document for the provided phrases (outside of DocuSign) to see if these phrases are present in more than one place, and if so, you can have a change to update your document. If the phrases only appear once, then you can expect the auto-tags to be placed correctly when using the template in DocuSign.

Send the Envelope

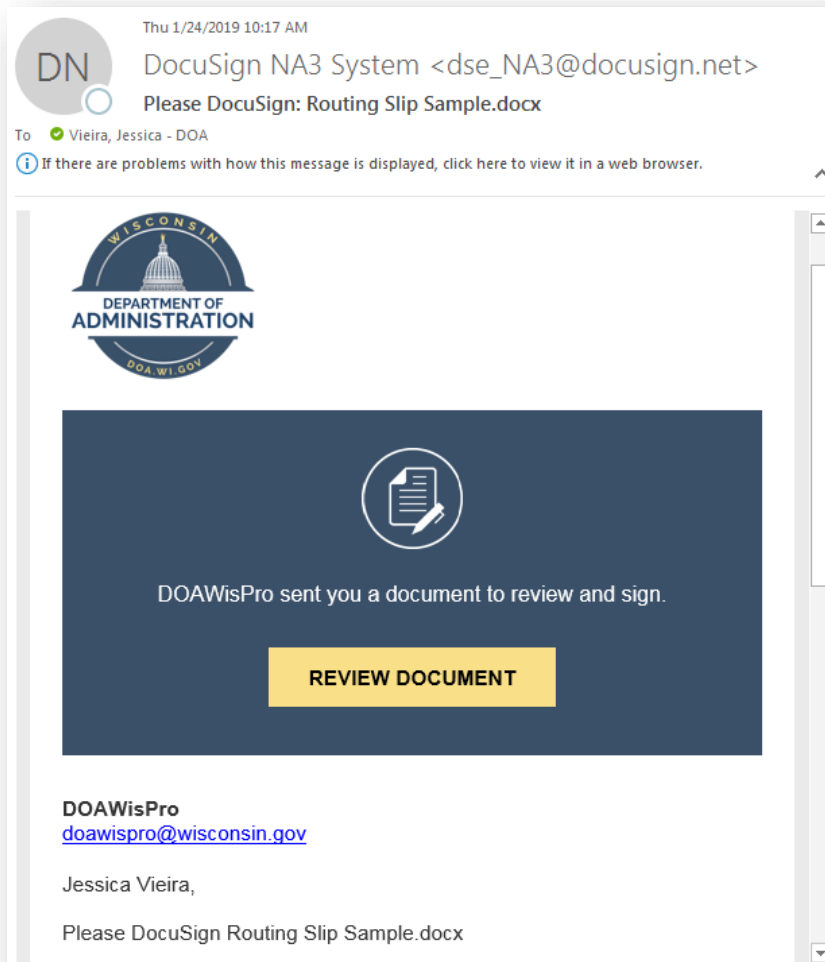
Once you've reviewed all tags and made any necessary changes, you can send the envelope by clicking **Send** at the top of the page. Once it has been sent, you can view the status of the envelope in the **Manage** tab's **Sent** folder or **Quick Views**.

Signing a Document

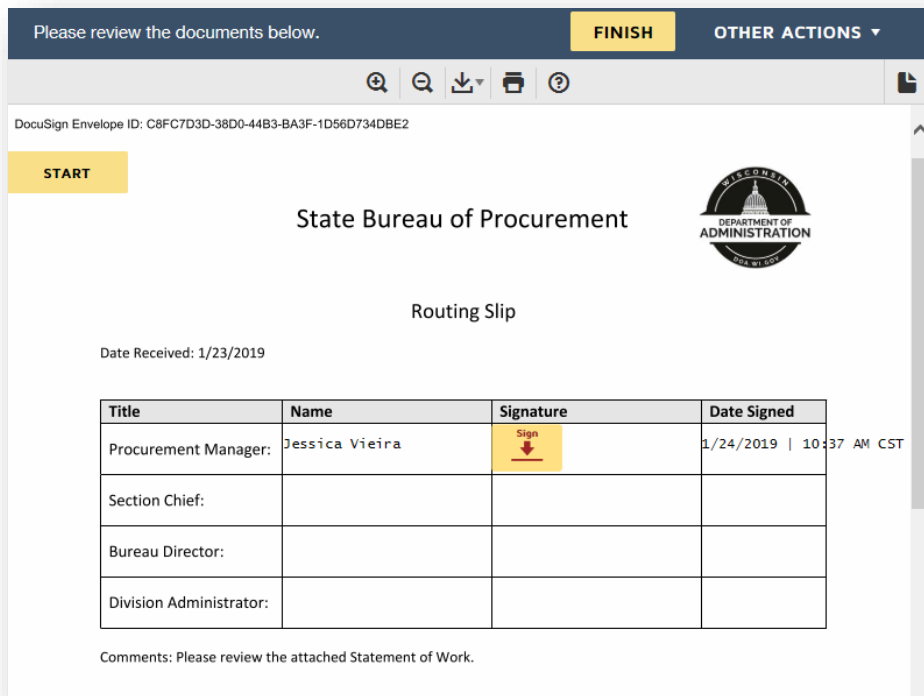
Once you've sent an envelope, the first Signer will receive an email from DocuSign (@docusign.net) similar to the one shown on the next page. In addition to any message you included, the email will include a **Review Document** button they will need to click to view and sign the document.

When they click the button, a web page will open and they may be asked to check a box indicating that they agree to sign electronically and will then need to click the **Continue** button to begin signing the document. They may also click the **Other Actions** dropdown menu, which will allow them to finish signing later, assign to someone else (if you've allowed this option), or decline to sign (as seen below). If any of these options are selected, you will be notified by email, unless you've turned the notifications off in the **Notification** tab of **My Settings**.

Sample email received by a signer:

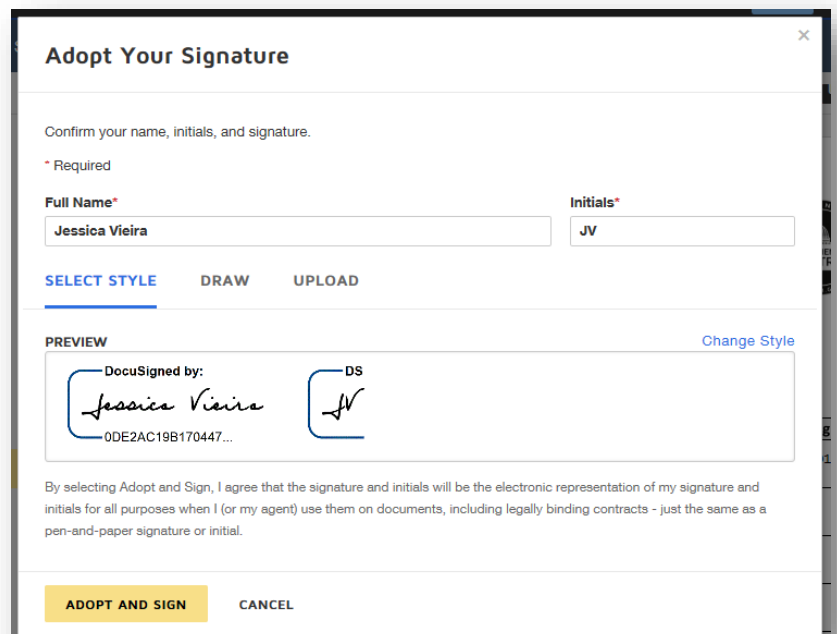


Next, the Signer can manually scroll through the document to find each of the places they need to perform an action, or they can click the **Start** button on the top left corner to be taken to each tag automatically.



When they click the first **Sign** tag, a popup window will open and they will be asked to enter their full name and initials and will see a preview of their signature. They can change the look of their signature by clicking the **Change Style** link on the right. Once they click the **Adopt and Sign** button at the bottom, they will return to the document and will see their signature in the location where the tag had been. For each additional **Sign** tag, their signature will be placed as soon as they click the tag.

When they are finished signing the document, they will click the **Finish** button at the top of the page. Alternatively, they can leave the page or click one of the options in the **Other Actions** dropdown menu to decline to sign or finish signing at a later time. Once they have clicked **Finish**, they will have the option to download or print the document.



Tracking Envelope Progress

DocuSign allows you to track the progress of your envelopes in a variety of ways, in addition to receiving notifications when actions are completed.

View Progress from the Sent Folder

Once you have sent an envelope, you can check on its progress by going to your **Sent** folder in the **Manage** tab. Click the **Subject Line** of the envelope to want to view to see detailed information, including the list of recipients, their current status in relation to the envelope, and the date and time they have signed (if completed). There are three possible statuses shown on this page:

Completed: The Signer has completed all required tasks for the envelope.

Current: The Signer has been sent the envelope, but has not completed signing all required tags.

Waiting: The Signer has not been sent the envelope yet.

View Reports

You have a number of reports available to you through the **Reports** tab. To view information about individual recipients of a specific envelope, click the **Envelope** folder on the left of the **Reports** page and select **Envelope Recipient Report**. You can filter the results by clicking **Edit Filters** and can view additional information by clicking **Edit Columns**.

Download or Print the Completed Document

When all signatures have been completed, you will receive an email notification and the envelope will appear in the **Completed** folder, available under **Quick Views** in the **Manage** tab. You can download or print the completed document by clicking the **Subject Line** of the envelope and clicking the **Download Icon** or **Print Icon**.

Addressing Common Issues

There are a few common issues you may need to address.

Resend an Envelope

At times, you may need to resend an envelope to a Signer (for example, if they delete the email accidentally). To accomplish this, locate the envelope in your **Sent** folder of the **Manage** tab and click on the envelope's **Subject Line**, then click **Resend** at the top of the page. This will resend the envelope to any Current Signer, but not to anyone listed as Waiting.

Correct an Envelope

You may also need to correct an envelope by updating an incorrect email address or adding an additional tag. To do this, locate the envelope in your **Sent** folder of the **Manage** tab and click on the envelope's **Subject Line**, then click **Correct** at the top of the page. This will open a page where you can change any recipient who has not finished signing the document and will display a Correcting banner at the top of the page so you're aware you're altering an envelope that has already been sent. Click **Next** after making any necessary changes to proceed to the page where you can correct tags. Once completed, click **Correct** and the updated envelope will be sent to the current Signer.

Additional Support

If you need additional support, DocuSign, you can click the **Question Mark Icon** near your profile picture to access DocuSign's Support Center. You may also reach out to your agency or campus DocuSign Admin, or you may contact the Organizational Admins by email at doawispro@wisconsin.gov or by phone at (608) 264-7897.