



Use Guide for *Sending* Documents with
DocuSign®

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Welcome to DocuSign for *Senders*

Imagine doing business with any campus department or employee, *anywhere* and at *any time*, without the need to print, sign, or email back and forth multiple times. Now imagine the number of resources that can be saved by doing business electronically.

Introducing DocuSign at UCSC!

DocuSign is a self-service tool that allows members of the campus to create and route electronic documents for signatures.

The Benefits of Using DocuSign

- Provides a complete audit trail of signatures.
- No faxing, scanning, or copies needed.
- Reduces paperwork error rates and rework.
- Saves time, money, and resources.
- Use it from any smartphone or device, anywhere, anytime.
- Sign, send, and receive documents in minutes. Drag and drop your own signature into documents with a few clicks or swipes.



DocuSign Guiding Principles



- **Contracts:** All contract signatures at UCSC are subject to the University's policies. Please ensure that people added as signers to the routing are operating within their designated signatory authorization for contracts and agreements.
- **Form Ownership:** Each campus form (and associated process) is managed by a campus office. All staff, faculty, and students have the ability to sign documents through DocuSign using University credentials to access Single-Sign-On service.
- DocuSign has been approved for internal routing and legally-binding electronic signature collection.
- Access to UCSC's DocuSign account is made through the University's Single Sign-On (SSO) service. Use of the University's DocuSign tool should be limited to University business and operations.
- Individual's personal business and matters should not be conducted utilizing the University DocuSign account.

- Any employee who is authorized to sign an agreement on behalf of the University and signs via DocuSign must sign the agreement using their CruzID @ucsc email address and have their signature authenticated into the system. An employee signature that does not employ this method at the time of signature may not be binding. Email aliases are not supported. Signers are requested to notify senders of their primary UCSC email address.
- An employee signer is prohibited from delegating signing authority via DocuSign to those who are not otherwise authorized delegated signatories.
- Employees, including student employees, are required to sign with DocuSign when sent documents for electronic signature transactions to conduct University business.
- Individuals, including students, and external parties not affiliated with or employed by the University, are asked to utilize DocuSign for electronic signature transactions when sent documents to conduct business with the University through DocuSign, unless the University or the external party opts out of conducting such transaction electronically. See opt-out procedures below.
- All employee signers are required to read the ELECTRONIC RECORD AND SIGNATURE DISCLOSURE found in the DocuSign account under “PREFERENCES” or under the “MORE” tab prior to signing.

It is important to remember that DocuSign is not a system of record retention. All documents are purged every 90 days. An employee executing a document via DocuSign is responsible for maintaining the fully-executed document, including all attachments, and the certificate of completion (CoC), in a manner consistent with the University’s Record Retention Policy and their own departmental requirements.

For the review of Acceptable Uses and Guiding Principles of DocuSign, please visit:

[Acceptable Uses and Guiding Principles](#)

DocuSign Terminology



Envelope

- Envelope is a DocuSign transaction that is comprised of the documents you send for signature, and the recipient and other information that you associate with it.

Initiator

- Initiator is the individual who initiates and sets up the DocuSign transaction.

Locate Template

- **Action Required:** envelopes awaiting your actions, which you need to either sign or view.
- **Waiting for Others:** envelopes sent by you that are waiting for others to act on, wither to sign or to view.
- **Expiring Soon:** in process envelopes that are due to expire within six days.
- **Completed:** envelopes with the status Completed, either sent or received.

Recipient

- Recipient is an individual who will receive and / or sign the document.

Recipient Actions Options

- **Needs to Sign:** recipient must complete the required fields assigned to them, such as signature, initial, date.
- **Receives a Copy:** recipient receives a copy with no further action needed.
- **Needs to view:** recipient must open and view document.

Signing Order

- **Signing Order:** allows sender to control the order in which recipients receive and sign documents.
- **Sequential Routing Order:** each recipient receives the email notification once the previous recipient has completed their action.
- **Parallel Routing Order:** when Set Signing Order feature is disabled.

Template

- **Template** is a commonly used document that is ready to send out using DocuSign.

Email Phishing



An important reminder regarding phishing emails:

We all do our best to be up-to-date on phishing scams. Since the process of DocuSign is for recipients to open an envelope from an email request, please remember that they may not initially recognize the request and delete the envelope.

If this happens, we'll show you how to quickly recreate the request to be sent to the recipient again.



Sending DocuSign Envelopes

All transactions, including signing, sending, and using Power Forms, will require either you or the system to use an envelope. Think in terms of how you'd send a real envelope, only now we're able to save on resources using DocuSign.

As we review the details of sending an envelope, we'll be reviewing basic sending steps. As we move through the training, we'll also review how to create and use templates.

Basic Sending Steps

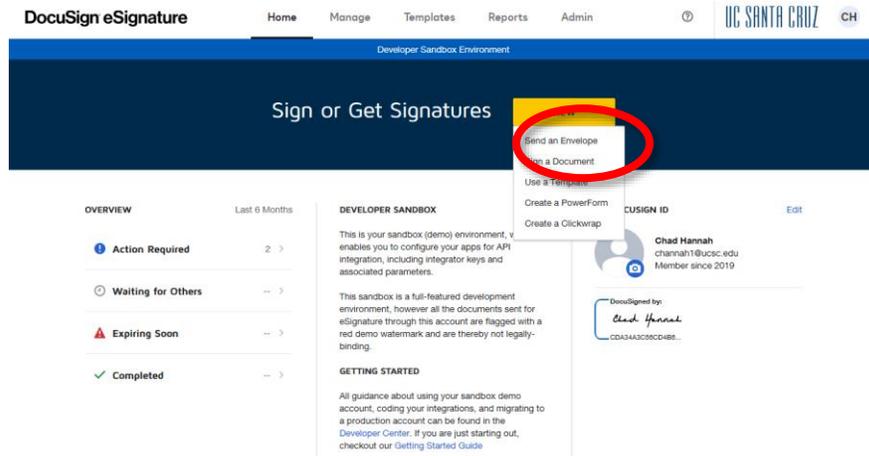
The basic steps for creating and sending a document for signatures include:

- **Send an envelope:** You can start with a new envelope, use a template stored in DocuSign eSignature, or finish a previously saved draft.
- **Add your documents:** DocuSign eSignature supports a broad variety of file formats.
- **Add recipients:** Specify who receives your envelope and what action you want them to take. As a reminder, documents cannot be sent to an alias address.
- **Add messages:** Enter the email subject and message details for your recipients.
- **Advanced Options:** Set special recipient privileges, reminder settings, and expiration options.
- **Add fields:** For each recipient, add fields to your documents to gather the desired electronic signatures and other information, such as title, date signed, and more.
- **Preview and send:** Review your field setup and send the envelope to your recipients.



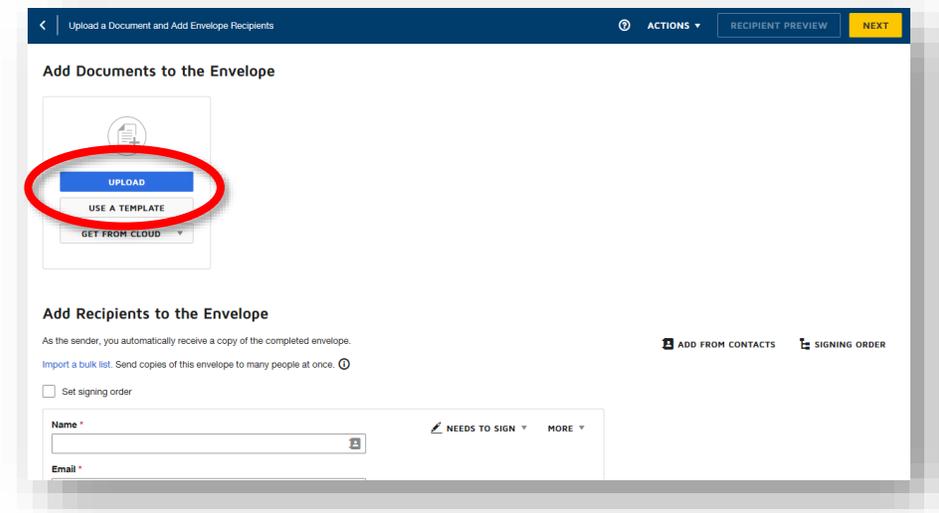
Step 1: Send an Envelope

From your DocuSign Account, click **NEW**, then click **Send an Envelope**.



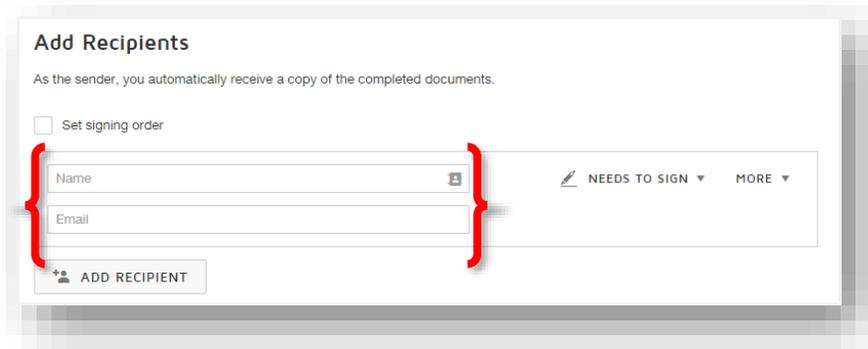
Step 2: Upload your document

Click **UPLOAD A FILE** to upload a document from your computer. Locate the document you want to upload and click **Open**.

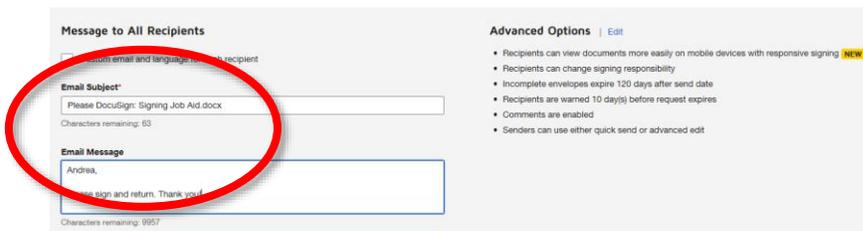


Step 3: Add the recipient

In the **RECIPIENTS** field, enter the recipient's name and email address. Click the drop-down **NEEDS TO SIGN** option to identify the action you want the recipient to take.

Step 4: Add the email subject and message



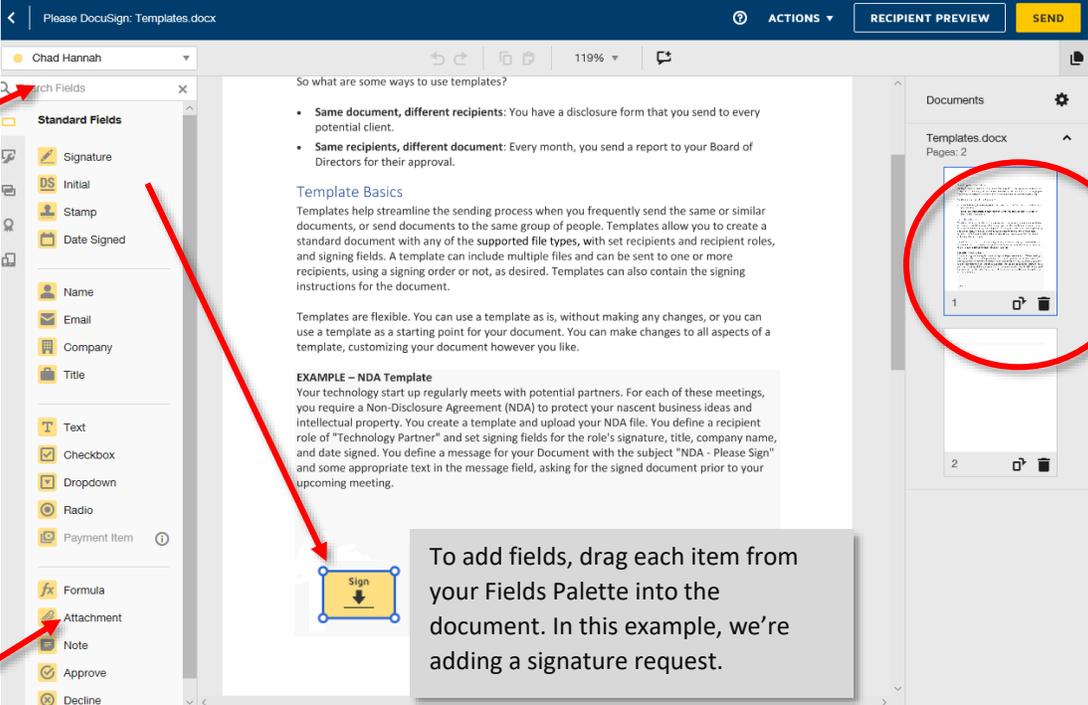
DocuSign automatically adds an email subject when you upload a document.

You can edit this subject and add a message to the recipient by filling in the **MESSAGE** fields. Click **NEXT**.

Step 5: Add signing fields

The Fields Palette containing the tags and your document will appear. The recipient name is displayed in the Recipients List. To assign a signature or other tag for the recipient, click and drag a tag from the Fields Palette and place it on the document. You can click on the pages to the right to change the page displayed.

In this scenario, we have two pages in the document, and we're looking for one signature on the first page.



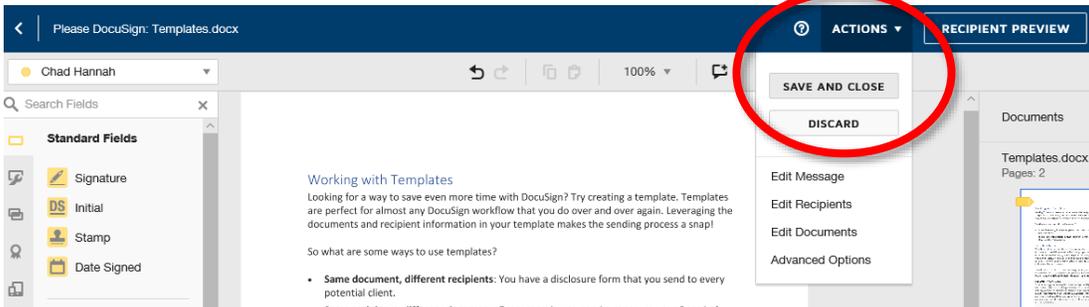
Recipient name

Tags

To add fields, drag each item from your Fields Palette into the document. In this example, we're adding a signature request.

Step 6: Preview and send your document

When you have finished adding documents, recipients, messages, and signing fields, you are



ready to preview your work, and send your

envelope.

From the Add Fields view, the top navigation bar presents options to send, preview, save, or discard the envelope.

- To save a draft without sending, click **ACTIONS** and select **SAVE AND CLOSE**.
- To cancel the envelope preparation and return to your Manage page, click **ACTIONS** and select **DISCARD**.
- To preview your recipients' experience, click **RECIPIENT PREVIEW**.
- To send your envelope, click **SEND**.

When you send your envelope, your recipients receive an email notification asking them to review and sign. If you included yourself as a signer, you can start the signing process from within your account.

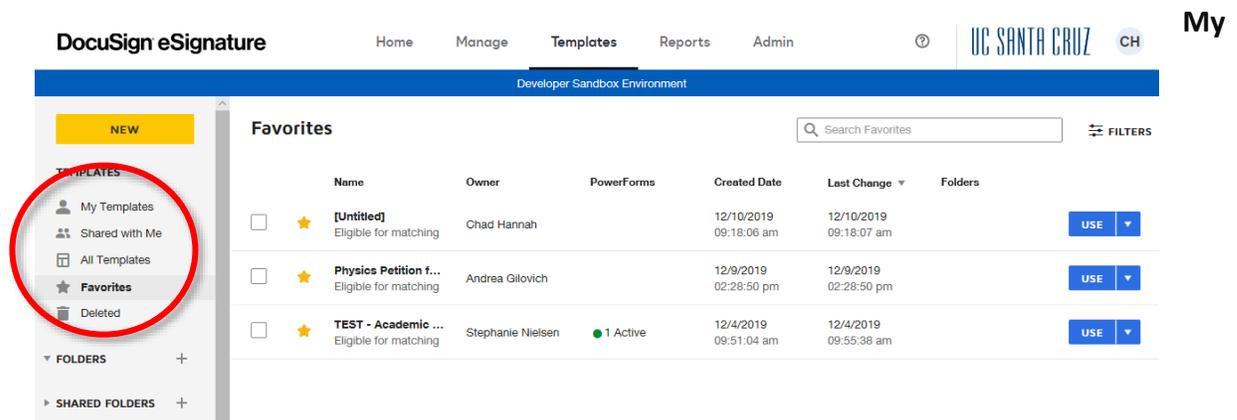
For additional information on resending envelopes to one or to all recipients, click [here](#).



Using a Template



Step 1: Navigate to the **Templates** page. Select the template collection you want to select from.



The screenshot shows the DocuSign eSignature interface. The top navigation bar includes 'Home', 'Manage', 'Templates', 'Reports', and 'Admin'. The 'Templates' page is active, displaying a 'Favorites' table. The left sidebar shows a 'TEMPLATES' menu with 'My Templates', 'Shared with Me', 'All Templates', 'Favorites', and 'Deleted' options. The 'Favorites' table lists three templates:

	Name	Owner	PowerForms	Created Date	Last Change	Folders	
<input type="checkbox"/>	★ [Untitled] Eligible for matching	Chad Hannah		12/10/2019 09:18:06 am	12/10/2019 09:18:07 am		USE ▼
<input type="checkbox"/>	★ Physics Petition f... Eligible for matching	Andrea Gilovich		12/9/2019 02:28:50 pm	12/9/2019 02:28:50 pm		USE ▼
<input type="checkbox"/>	★ TEST - Academic ... Eligible for matching	Stephanie Nielsen	● 1 Active	12/4/2019 09:51:04 am	12/4/2019 09:55:38 am		USE ▼

Templates: Contains all of the templates you created or were transferred to your ownership.

Shared with Me: Contains all the templates that are shared with you, either directly or through a shared folder. If you are an account admin, Shared with Me will include all templates on the account that you do not own.

All Templates: Contains all templates to which you have access. This collection includes your own templates and those shared with you.

Favorites: Contains all templates you mark as a favorite. You can have up to 50 favorite templates.

Deleted: Contains all templates you have recently deleted. Locate the template you want to use by searching, filtering, or simply scanning the list. To use the template to start a new document, click **USE**.

A new envelope will open with your template settings loaded.

TEST - Academic Plan December 2019

Recipients

1

Sender NEEDS TO SIGN MORE

Name *
Chad Hannah

Email *
channah1@ucsc.edu

Message to All Recipients

Custom email and language for each recipient

Email Subject *
Please DocuSign: academic-planning form (1).pdf
Characters remaining: 50

Email Message
Enter Message
Characters remaining: 10000

Advanced Options | **OFF**

- Recipients can view documents more easily on mobile devices with responsive signing **NEW**
- Recipients can change signing responsibility
- Incomplete envelopes expire 120 days after send date
- Recipients are warned 10 days before request expires
- Comments are enabled
- Senders can use either quick send or advanced edit

SEND **ADVANCED EDIT** **DISCARD**

Step 2: Enter your Message to All Recipients subject and text. If your template includes a message subject and text, that information is added to your envelope. You can use the template message as is, or modify it.

TIP: If you send the same envelope over and over, enter a custom subject line. If you use the default subject as is, the envelopes will all be titled the same, making it hard to identify a particular one.

- To review the recipient fields, click **NEXT**.
- To send your envelope click **SEND**.

Add a Template to an Envelope

If you start an envelope, you can add one or more templates to the envelope. You can add other documents, recipients, and fields to the envelope separate from the templates you add.

Step 1: From the Home or Manage page, start a new envelope from **NEW > SEND AN**

Upload a Document and Add Envelope Recipients ACTIONS RECIPIENT PREVIEW NEXT

Add Documents to the Envelope

Add Recipients to the Envelope

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

Add a bulk list. Send copies of this envelope to many people at once.

Get signing order

Name * NEEDS TO SIGN MORE

Email *

ENVELOPE. Or from the Prepare view, under Add Documents to the Envelope, click **USE A TEMPLATE**.

Step 2: In the **Select Templates** dialog, browse or search through the template collections at left and select one or more templates to use.

Select Template

My Templates

Shared with Me

All Templates

Favorites

Folders

2016

Name	Owner	Last Change
<input type="radio"/> Purchase Orders	Melanie E. Deschutes	26-Sep-19 14:18
<input type="radio"/> Purchase Orders - Southern Region	Melanie E. Deschutes	11-Jun-18 15:56
<input checked="" type="radio"/> Purchase Order Form - < \$1,000	Melanie E. Deschutes	09-Oct-17 17:16

Revised

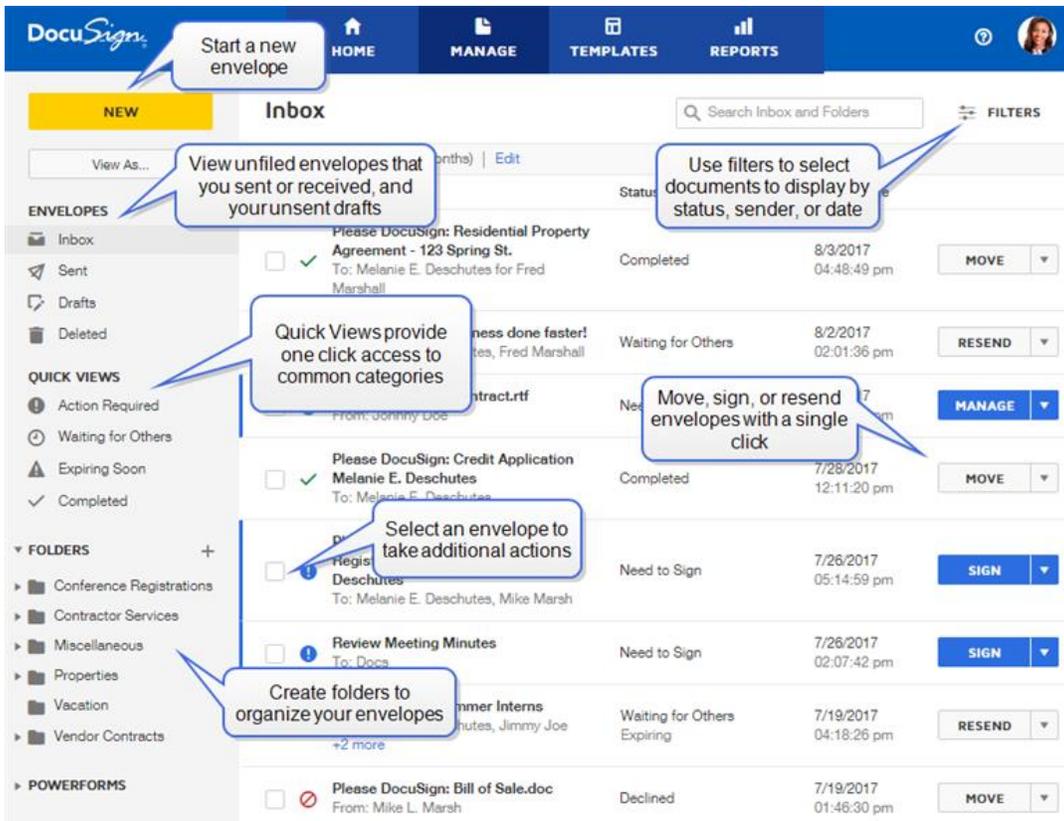
Step 3: Click **ADD SELECTED**. The documents, recipients, messages, and recipient fields are added to your document.



The Manage Page

The Manage page provides a convenient workspace for all of your envelope management activities:

- Access all details of your sent, received, and in process envelopes
- Use the convenient filters to find envelopes by status, sender, or date quickly and easily
- Create custom folders to file and organize your envelopes
- Resume preparing your draft envelopes with a single click
- Start a new envelope
- Take further action, such as sign, correct, create a copy, void, delete, or remind your recipients to sign.



The screenshot shows the DocuSign Manage page interface. The top navigation bar includes 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. The main content area is titled 'Inbox' and displays a list of envelopes with columns for status, date, and time. The left sidebar contains 'ENVELOPES' (Inbox, Sent, Drafts, Deleted), 'QUICK VIEWS' (Action Required, Waiting for Others, Expiring Soon, Completed), 'FOLDERS' (Conference Registrations, Contractor Services, Miscellaneous, Properties, Vacation, Vendor Contracts), and 'POWERFORMS'. Callouts highlight the following features:

- Start a new envelope:** A button labeled 'NEW' in the top left.
- View unfiled envelopes that you sent or received, and your unsent drafts:** A callout pointing to the 'Inbox' folder in the sidebar.
- Use filters to select documents to display by status, sender, or date:** A callout pointing to the 'FILTERS' button in the top right.
- Quick Views provide one click access to common categories:** A callout pointing to the 'QUICK VIEWS' section in the sidebar.
- Move, sign, or resend envelopes with a single click:** A callout pointing to the 'MANAGE' button for an envelope.
- Select an envelope to take additional actions:** A callout pointing to the 'SIGN' button for an envelope.
- Create folders to organize your envelopes:** A callout pointing to the 'FOLDERS' section in the sidebar.

DocuSign Support



If you are having issues logging in, downloading, sending or signing a document; one quick solution is to try and clear the cache and cookies in your browser. This can be a quick fix for your issue. If you have cleared your cache and cookies and are still having issues, there are three options for you to use:

1. Visit the DocuSign Support Center at <https://support.docusign.com>. You can open a ticket with DocuSign directly.
2. Open a ticket with ITS (website).
3. Third option listed here.

DocuSign is supported in the browsers listed below:

- Chrome
- Firefox
- Microsoft Edge
- Internet Explorer 9+
- Opera
- Safari

Mobile Browsers

- Android
- iOS/Apple

Clearing Browsers



Chrome

1. Open `chrome://history/` in a new tab.
2. Click on Clear Browsing Data.
3. Check Cookies and other site and plug-in data.
4. Check Cached images and files.
5. From the Obliterate drop-down menu, you can choose the period of time for which you want to clear cached information. To clear your entire cache, select the beginning of time.
6. Click Clear browsing data.
7. Exit/close all browser windows and re-open the browser.



Firefox

1. From the History menu, select Clear Recent History.
2. If the menu bar is hidden, press Alt to make it visible.
3. From the Time range to clear drop-down menu, select the desired range; to clear your entire cache, select Everything.
4. Next to "Details", click the down arrow to choose which elements of the history to clear; to clear your entire cache, select all items.
5. Click Clear Now.
6. Exit/close all browser windows and re-open the browser.



Microsoft Edge

In the top right, click the Hub icon (looks like three horizontal lines).

Click the History icon, and then select Clear all history.

1. Select Browsing history, then Cookies and saved website data, and then Cached data and files. Click Clear.
2. After the "All Clear!" message appears, exit/close all browser windows and re-open the browser.



Safari 8

1. From the Safari menu, select Clear History and Website Data
2. Select the desired time range, and then click Clear History.
3. Go to Safari > Close Safari or press Command-Q to exit the browser completely.