

DocuSign Fundamentals Training Guide for Employee

DocuSign is the approved electronic signature solution at San Francisco State University. This guide is served as a self-learning tool of the monthly virtual training. SF State DocuSign users will learn how to use DocuSign for SF State transactions, including sending; approving; and tracking a document in DocuSign.

If you have any DocuSign questions or experience problems, please submit a [service ticket](#) or email [Quality Assurance](#).

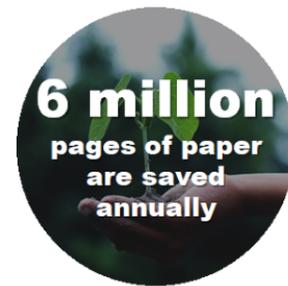
DocuSign @ San Francisco State (<https://docusign.sfsu.edu/>)

DocuSign is available to current SF State students, faculty and staff for signing documents electronically and completing official university forms. In accordance to [Electronic Signatures Policy](#), only risk assessed and approved university processes may be used in DocuSign. Currently, DocuSign is approved for use with Level 1 data and Personally Identifiable Information; it is not approved for use with PCI data (credit card information) or HIPAA data (medical records) at this time.

DocuSign

DocuSign is San Francisco State University's approved electronic signature solution that allows students, faculty, and staff to complete and submit University business-related documents electronically. This solution has enhanced campus operations and boosted productivity by providing a faster method for obtaining information and required signatures. DocuSign is a sustainable alternative to paper forms, and is more secure, trackable, and legally binding.

Program Highlights



DocuSign only works with a [@mail.sfsu.edu](#) or [@sfsu.edu](#) email address. To access your account, log in on the [DocuSign main page](#) and enter your SF State credential.

If you are interested in learning about commonly used DocuSign features, please view the [full list of DocuSign how-to guides](#).

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.

Recipient

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

Template

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

Locate Envelope

- **Action Required:** envelopes awaiting your action, which you need to either sign or view
- **Waiting for Others:** envelopes sent by you that are waiting for others to act on, either 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

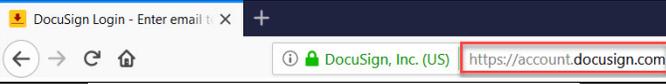
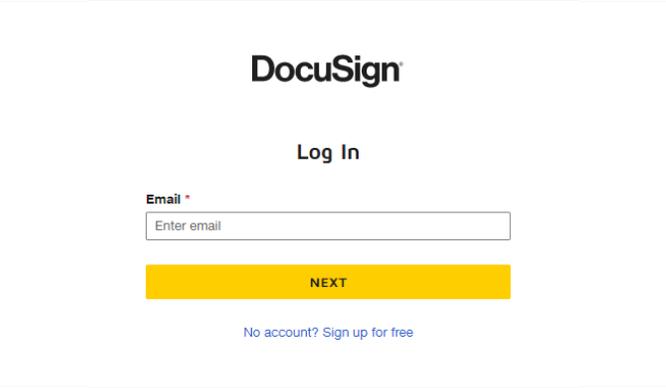
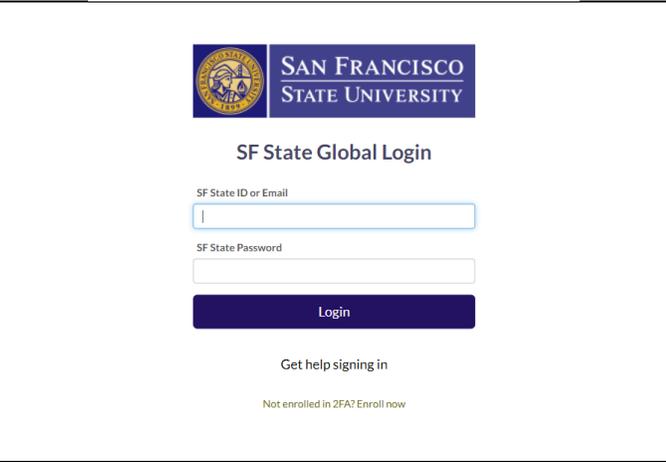
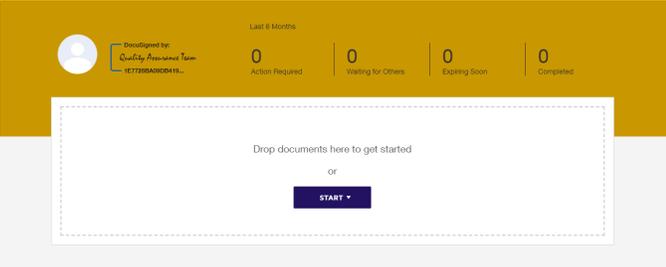
Recipient Action Options

- **Needs to Sign:** recipient must complete the required fields assigned to them, such as signature, initial and date.
- **Receives a Copy:** recipient receives a copy, with no further action required.
- **Needs to View:** recipient must open and view the document.
- **Allow to Edit:** recipient can review and make edits to the routing.

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
- **Signing order diagram** is a visual representation of how your envelope will be distributed to the recipients.

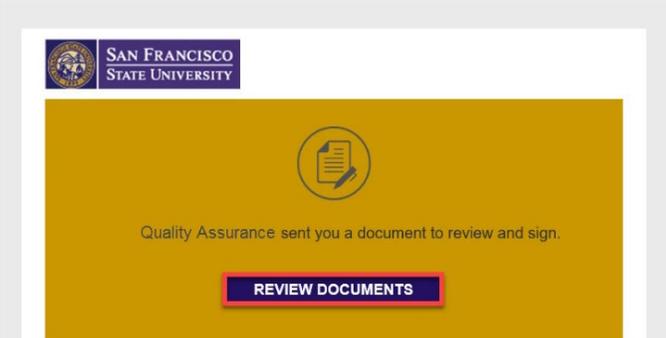
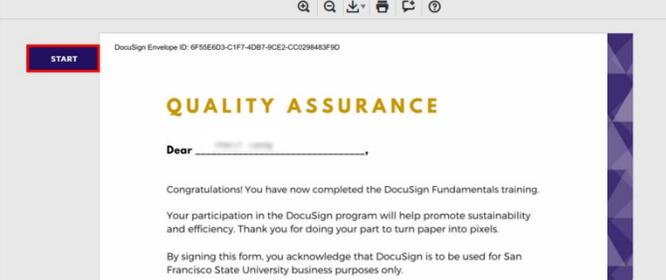
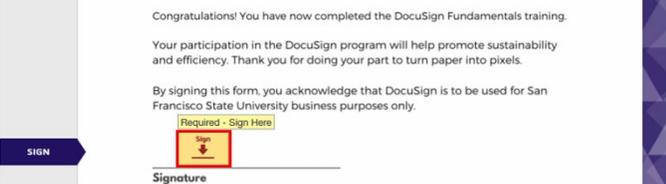
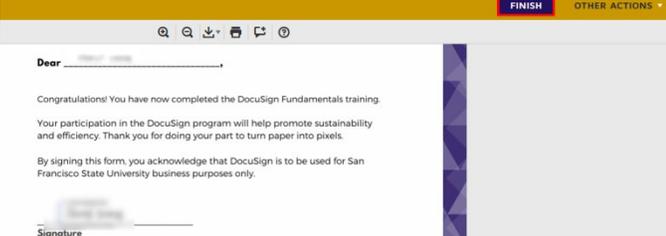
Activate Your DocuSign Account

Step	Screenshot
1. Log in on the DocuSign main page .	
2. Enter your San Francisco State email address and select CONTINUE .	
3. Enter your SF State credentials to access your DocuSign account.	
4. You will be directed to your DocuSign homepage.	

Live Demo: How to send and sign a document

1. Start an envelope
 - On the DocuSign homepage, click on the **Start** button and select **Send an Envelope**
2. Add documents
 - Upload the Demo Training Memo
3. Add recipients
 - Enter the **Recipients** who will complete, sign, or receive a copy the document
 - Specify what action(s) each recipient will need to take
 - Set the **Signing Order**
4. Add messages
 - Enter the email subject and message details to each recipient
5. Add fields
 - Add and assign fields for each recipient to gather the desired information and electronic signatures
6. Preview and send
 - Review the field setup
 - Click **Send** to send the envelope to the recipients
7. Fill out the document
 - Open DocuSign email and review the message
 - Click **Review Document** to begin
 - Complete the assigned actions
 - Select **Finish**
8. Sign the document
 - Open the DocuSign email and review the message
 - Click **Review Document** to begin the signing process
 - Review and verify the document content
 - Click the **Sign** tag to enter the signature
 - Select **Finish**
9. Access the completed document
 - Once the transaction is completed, all recipients will receive an email notification.
 - Recipients may also access the completed document and the associated **Certificate of Completion** in DocuSign.

Hands-on Exercise: DocuSign Acknowledgment and Certificate of Completion

Step	Screenshot
<p>1. To access the DocuSign acknowledgement letter, open the DocuSign email and select REVIEW DOCUMENTS.</p>	
<p>2. Enter your San Francisco State ID number and password to log in. Select START to begin reviewing and filling out the document.</p>	
<p>3. Once you have finished reviewing the document, click on Sign to add your signature.</p>	
<p>4. Click FINISH at the top right to complete your review of the document.</p>	
<p>5. When the transaction is completed, you will receive a DocuSign email notification. You may access the signed document in your DocuSign account by selecting VIEW COMPLETED DOCUMENT.</p>	