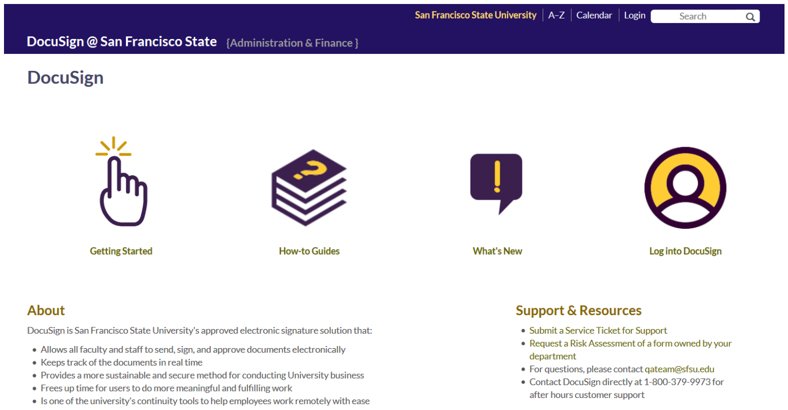
DocuSign Fundamentals Training Guide

DocuSign @ San Francisco State (http://docusign.sfsu.edu/)



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.

Navigating your DocuSign Homepage

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

Finding and Using a Template

From your DocuSign homepage, select **NEW** and **Use a Template**. Then click on the **Shared Folders** to expand the folders that are available to you. The folders are sorted by alphabetically by department.

Once you have found the form you are looking form, click on **ADD SELECTED** to add the template to your envelope.

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.

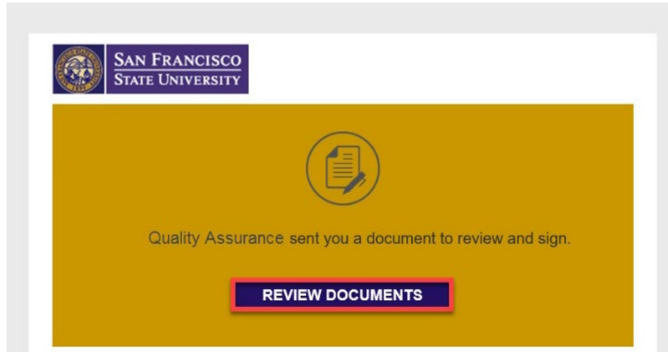
Adding or Removing Recipients

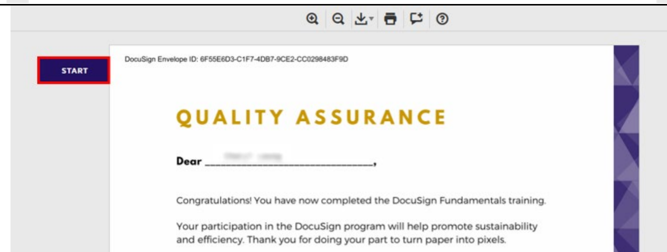
- To add or remove recipients to the routing, click on **ADVANCED EDIT**.
- To **remove a recipient**, hover to the right of the recipient and click on the **X** that appears.
- To **add a recipient**, click on **ADD RECIPIENT**, enter the name and email of the individual. Move the new recipient to where they belong on the routing. Click on **NEXT** to add a field for the new recipient.

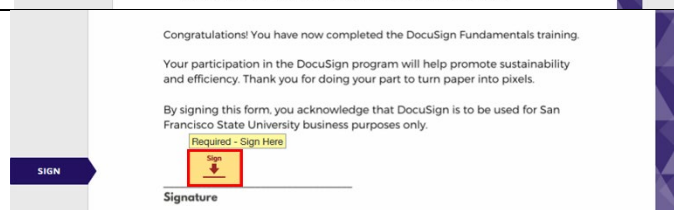
Live Demo: How to send and sign a document

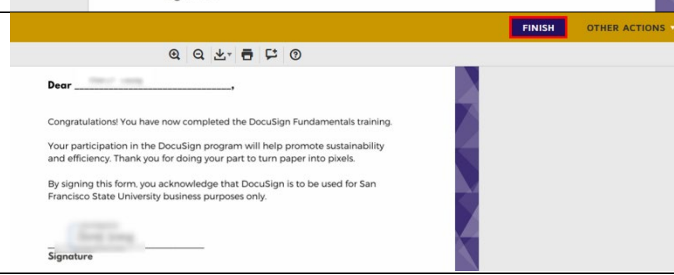
1. Start an envelope
   - On the DocuSign home page, click on the New button and select **Send an Envelope**
2. Add documents
   - Upload the Training Memo
3. Add recipients
   - Enter the **Recipients** who will complete, sign, or receive a copy the document
   - Specify what action(s) each recipient will need to take
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. 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**
8. Access the completed document
   - Once the transaction is completed, all recipients will receive an email notification, along with the completed document.
   - Recipients may also access the completed document and the associated **Certificate of Completion** in DocuSign.
     i. On the DocuSign home page, click **Completed**
     ii. Select the subject title of the completed transaction to view the completed documents, attachment(s), and the Certificate of Completion

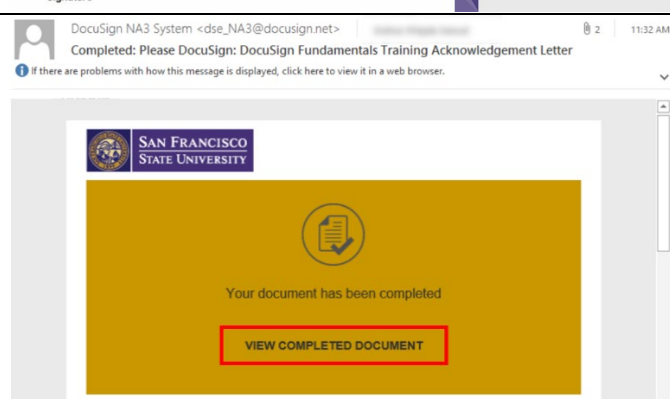
Hands-on Exercise: DocuSign Acknowledgment and Certificate

<table>
<tr><th>Step</th><th>Example</th></tr>
<tr><td>1. To access the DocuSign acknowledgement letter, open the DocuSign email and select REVIEW DOCUMENTS.</td><td>


</td></tr>
<tr><td>2. Enter your San Francisco State ID number and password to log in. Select START to begin reviewing and filling out the document.</td><td>


</td></tr>
<tr><td>3. Once you have finished reviewing the document, click on Sign to add your signature.</td><td>


</td></tr>
<tr><td>4. Click FINISH at the top right to complete your review of the document.</td><td>


</td></tr>
<tr><td>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.</td><td>


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If you have any further questions or concerns, please contact the Quality Assurance team at qateam@sfsu.edu.