DocuSign

For Designers

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Purpose
This training material highlights how to access, send, and sign documents for signatures in DocuSign.

Audience
University of Memphis faculty and staff that will be receiving and sending documents for signatures in DocuSign. Note: To be a designer you must submit an online service request to be granted designer status.
Sign into DocuSign

To be a designer you must submit an online service request to be granted designer status. To sign into DocuSign, go to myMemphis and use your University of Memphis Universal User Identification (UUID) and password. Authenticate using DUO.

*Note: The myMemphis Portal has a time-out of one hour. After one hour of inactivity, the myMemphis Portal will log you out. This is a security feature.*

1. Go to: my.memphis.edu and enter your UUID and password. Next, Authenticate with DUO
   *Note: Your Username will be the first part of your UofM email address and your Password will be the same as the log in for myMemphis.*

2. Click Login. The myMemphis Portal Home page will display.
   *Note: The myMemphis Portal UUID and password are case sensitive. If you have trouble visit the self-service portal.*
3. Click on the Employee tab.

4. Scroll down to the Electronic Forms Portlet in the middle toward the bottom of the page. Click on Access DocuSign; you will be taken to the home page.

5. Log into your account. This will be your UofM email address. Click Continue.

6. You are now in DocuSign.
DocuSign Home Page

The Home page is divided into three sections:

A) Overview - Tells you the stages your documents are in.
B) What’s New - Messages from the vendor about new features.
C) My DocuSign ID - Where you can personalize your information for DocuSign.
Editing Personal Information in DocuSign

1. Under My Document ID, click **Edit**.

2. From here you can add **Personal Information**. Enter information and click **Save**.
3. You can also edit your photo from here. To edit your photo, click **Edit Photo**.

![Edit Photo button](image)

4. Drag and Drop or browse your computer to find a photo to add. Click **Done**.

![Drag & drop profile photo](image)
Creating a Signature in DocuSign

Method 1 - Choose Graphical Signature
1. Under My DocuSign ID, click on Create Your Signature.

2. A) Enter your Name and Initials.
   B) Choose from the graphical built-in signatures and initials
   C) Click Create.
Method 2 - Choose Draw Signature

A) Enter your name and initials.
B) Draw your signature and initials on the lines.
   Note: It is best to do this with a stylus if possible.
C) Click Create.
Method 3 - Scan in your own Signature

1. Scan in your own signature and initial, save as a JPEG file.

*Note: Acceptable File Formats GIF, JPEG, PNG, BMP, (MAX Size 200KB)*
2. A) Enter your name and initials.
   B) Upload your signature and initials
   C) Click Create.
Creating Multiple Signatures

1. To create multiple signatures, click **Edit** beside My DocuSign ID.

2. At the bottom of the page, click **+ Add New**.

3. Repeat steps from Methods 1, 2, or 3.
Signing a DocuSign Document

1. You will receive a message in your email which includes a link to review and sign.

2. Click Review Document.

3. Depending which browser you use, you may be asked permission to allow your location. Click Allow.
4. A message at the top of the screen will tell you who the requester is and what they are asking for. Click Continue.

5. Scroll through and review the document.

6. If you go to Other Actions you can review information about the document.

7. Look for the Sign flag. A signature will be required to complete the signing process. Click on the Sign flag and select the signature you would like to use. This should contain your full name and/or initials. This will place the graphic on the signature line—make sure they are correct.
8. Once you have double checked and no other fields are required, click Finish.

![Finish button]

9. You will receive a message saying “You’re Done Signing”.

![You’re Done Signing dialog]

10. This will place a copy of the signed document in your DocuSign account belonging to the requester.

11. At the top right of menu, you will have an option to download or print the document.

   *Note: You must select one before continuing if you want to print or download a PDF of the signed document.*
To print, click on the **Printer Icon** to reveal the drop-down menu. Click **Print**.

To download a PDF, click on the **Download Icon** to reveal the drop-down menu to download PDF in combined or Separate PDFs.

12. When you have finished downloading or printing the PDF, click **Continue**.
13. When document is complete, the sender will receive an email. In the email is a link to view the completed document.
Manage Tab

The Manage tab is where you can create new envelopes and view the process and stage each envelope is in. This part of DocuSign functions much like an email application having an inbox, sent, drafts, and deleted folders.
Envelopes

You can create a new envelope. An envelope is where you upload a document, add signature, initial, and date fields, and then send it out for digital signatures. You can also view shared envelopes from here.

Just below new and shared envelopes you will see active envelopes and the stages they are in. This part of DocuSign functions much like an email application having an Inbox, Sent, Drafts, and Deleted folders and a link to PowerForms (pre-loaded forms that are commonly used).
Creating a New Envelope

1. To create a new envelope, click New then click Send an Envelope.

2. Click Upload to upload a PDF to send for signatures.
3. Browse your computer to upload the PDF. Click Open.

4. A) From here you can View the document. B) Click on the three dots to reveal more options.
You will see the following options when clicking on the three dots:

- Apply Templates
- Replace
- Download Document
- Rename Document
- Delete Document
- View Document

Your Document is now ready to add recipients.
Adding Recipients

As the sender, you automatically receive a copy of the completed envelope. From the Adding Recipients to the Envelope section, you can:

- **A)** Import a Bulk List,
- **B)** Choose whether or not to Set Signing order (checking or unchecking),
- **C)** Enter a Recipient,
- **D)** Add additional Recipients,
- **E)** Select who needs to sign,
- **F)** Select more options,
- **G)** Add from Contacts, and
- **H)** Set Signing Order.

**Import a Bulk List - Bulk send from a template**

1. Click on the button.
2. Click **Download the sample CSV template**.
3. This will provide you with an Excel spreadsheet to use as a CSV Template. Manually enter the necessary information (name, email, etc.) and save the file. 
   **Note: No fields are required.**
4. Click Import Bulk List.

5. Browse to your CSV Template. Click to upload.

6. Click Finish Import.
   Note: This will also tell you the number of recipients as well as number of errors in the Bulk List CSV Template upload.

   Note About Limits: Your bulk list can contain up to 1000 rows of data: one row for the header and up to 999 recipient rows.
Adding Recipients to an Envelope (Individually)
Now select who will sign the document. This can be your signature and/or someone else’s.

1. Add recipients:

A) Click on add recipients. Enter the email and name for recipient. From the drop-down menu, select who needs to sign
B) Select the order in which the signatures should be signed by clicking Set Signing Order.
2. You may also add from your contacts. Place a check by all the recipients you wish to send to from your contacts within the DocuSign System.
3. Under **Needs to Sign** there is a drop-down menu. From here you can choose how a person is to sign the document.

Under **More** there is an additional drop-down menu. From here you can add User Authentication and/or a private message.
Sending Message to Recipients

1. Just below **Add Recipients to the Envelope**, you will see **Message to All Recipients**. Enter your personalized message.

2. Click **Edit** by Advanced Options to view the advanced options.

3. You will see the following options under **Advanced Options**. You can give **Recipient Privileges**, **Set Reminders**, and **Set the Expiration Date**. Once you have decided the options, click **Save**.
4. At the top of the window you can choose what A) Actions to take from the drop-down menu or B) click **Next** to continue.

Setting Signatures for Your Envelope/Document

1. Once you have clicked **Next**, you will see your document with the options available for adding to your envelope.

2. In this example we will be adding the Initial, Signature, and Date Signed fields to the envelope.
Note: Each separate person you add to the envelope will appear as a different color.

3. Once all the signature fields have been set, from the Actions menu make a selection. From here you can Save and Close, Discard, Edit the Message, Edit Recipients, Edit Documents, or go to Advanced Options.

4. Once everything is ready to send, click Next.
5. If you are on the Signature list, a window will pop up asking “Do you want to sign this document now?”. Choose to **Sign Now** or **Sign Later**.

![Sign Now and Sign Later options](image)

6. If you select Sign Now, you will receive an email telling you that a document needs your signature.

![Email example](image)

7. To sign, click the link in your email and it will take you to DocuSign. Look at your inbox, **A)** select the file you would like to sign, then **B)** click **Sign**.

![Email inbox example](image)
8. A message will tell you to review the documents, click **Continue**.

9. Next you will see your document with **A** fields to sign. **B** Click **Start**.

10. The **Start** icon will move to the space on the page you need to sign and will mark it with a yellow flag.
11. Click on the Sign flag. A) Once you have done so you will see your signature. B) Click Finish.
Quick Views

Just below Envelopes is the Quick Views section. In this section you can check the various stages of the envelopes sent: Action Required, Waiting for Others, Expiring Soon, and Completed.

Action Required - Means that there is an action required on your part of the signature procedure.

Waiting for Others - Means that you are waiting on others to sign your document.

Expiring Soon - Lets you know that an envelope you have sent will soon expire.

Completed - Lets you know when all of the required signatures for the document have been recorded.
Templates Tab

From the Templates tab, you can make your own template for an envelope you may use regularly. The Shared with Me section contains templates available for use in the DocuSign system. To use a template, check the box beside it then check Use.

Reports Tab

The Reports tab gives you a statistical outlook at how many documents you have and what stage of the process each document is in.
Locating Help Resources

umTech offers support to faculty, staff, and students. Upon completing the training covered in this course, faculty, staff, and students can receive additional training help and resources. Such help can be located as follows:

Service Desk Request

Submitting a Ticket

- Login URL:
  - Here is a link to our service desk ticketing system
  - After logging in, choose the link Request Help or Services.
  - Choose Request Help or Services.

Call the ITS Service Desk (901.678.8888) any day of the week! (Excluding Some Holidays)

- The ITS Service Desk hours will be as follows:
  - Monday - Friday 8:00 am - 8:00 pm
  - Saturday 10:00 am - 2:00 pm
  - Sunday 1:00 pm - 5:00 pm

- You can contact the Service Desk for assistance with technical login problems or issues. Incoming calls after hours will be handled by voicemail services. If you require assistance after 8:00 p.m., please leave a message or submit a service request.

- Messages will be checked regularly and receive priority response the following business day. You may also email umTech, umtech@memphis.edu (using this email will automatically generate a help desk ticket).

Important Links

- Explore the umTech Website
- Search Our Solutions Page