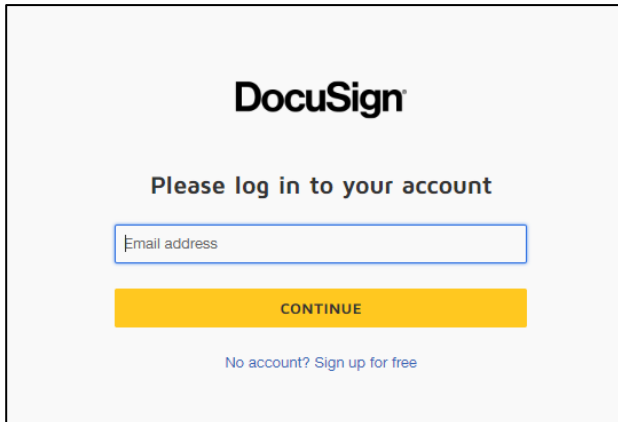


## DocuSign – First Steps

DocuSign is a platform that provides electronic signature technology and digital transaction management services for facilitating electronic exchanges of contracts and signed documents.

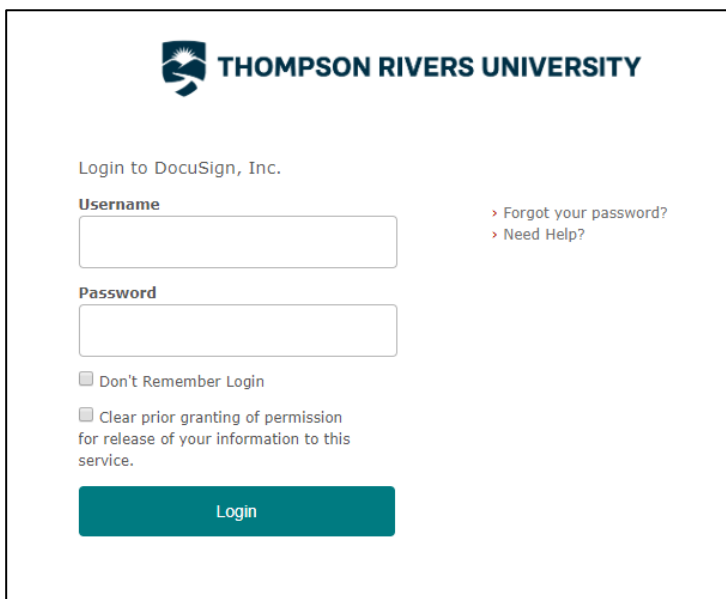
Before creating your first envelope, use the following checklist to ensure you have all the resources that you will need.

1. Sign into DocuSign <https://account.docusign.com/#/username>
  - a. using your TRU email address and click continue



The image shows the DocuSign login page. At the top, the DocuSign logo is displayed. Below it, the text "Please log in to your account" is centered. There is a text input field labeled "Email address". Below the input field is a yellow button labeled "CONTINUE". At the bottom, there is a link that says "No account? Sign up for free".

- b. Using your TRU logon and password



The image shows the Thompson Rivers University DocuSign login page. At the top, the TRU logo and "THOMPSON RIVERS UNIVERSITY" are displayed. Below that, the text "Login to DocuSign, Inc." is shown. There are two input fields: "Username" and "Password". To the right of the "Username" field, there are two links: "> Forgot your password?" and "> Need Help?". Below the "Password" field, there are two checkboxes: "Don't Remember Login" and "Clear prior granting of permission for release of your information to this service.". At the bottom, there is a teal button labeled "Login".

**NOTE:** Never give anyone your login information to sign on your behalf. It is a breach of TRU's Responsible Use of Information Technology Facilities and Services Policy (see section I (2)) to share login credentials. [\[https://tru.teamdynamix.com/TDClient/84/Portal/KB/ArticleDet?ID=1256\]](https://tru.teamdynamix.com/TDClient/84/Portal/KB/ArticleDet?ID=1256)

2. Get to know DocuSign (Page 14): <https://docs.docusign.com/supportdocs/pdf/ndse-user-guide.pdf>
3. Ensure that you have the correct permission settings (submit ASAR to change permission setting)
  - a. Viewer
  - b. Sender – can **see and use** templates
  - c. Super User – can **create** templates
  - d. Admin
4. Set up an account with DocuSign University: <https://dsu.docebosaa.com/customers/learn>
5. DocuSign support: <https://support.docusign.com/en/home>
6. Get familiar with the DocuSign SharePoint page, it contains release notes, documentation, announcements: <https://onetru.sharepoint.com/sites/DocuSign-O365>