



# DOCUSIGN

## Basic User Guide

### Abstract

This is a basic user guide to help new users navigate the DocuSign tool. It contains links to training material and references TRU policies.

If you need further information regarding DocuSign, please contact the DocuSign administrators referenced in this document.

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# DocuSign Basic User Guide

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## 1 Notes

Where possible documents have been downloaded to O:\TRU Share\DocuSign

As a sender, you can easily locate information on features by using the contextual "help" icon in the upper right-hand corner of the screen.

## 2 Glossary

**Access Code** - Gives an extra level of security to your documents. You add a code when you add recipients to an envelope, and then communicate the code to the recipient separately.

**Document** – An individual file that has content which needs to be reviewed and/or signed by a recipient.

**Envelope** – is the container used in DocuSign transactions. It can contain multiple documents and senders. Envelopes have recipient information, statuses, timestamps, and the progress of the delivery.

**Fields** – indicate where a signer needs to take action on a document.

**Recipient / Signer** – The person who receives the Envelope and is required to take action on an envelope.

**Sender** – users that can create, send, and manage DocuSign envelopes

**Template** - are pre-set documents that can be used as a blueprint to create one or more envelopes using its stored information. For more information on templates see <https://developers.docusign.com/esign-rest-api/guides/concepts/templates>

A full description of these terms and others can be found in the DocuSign Guide: <https://developers.docusign.com/esign-rest-api/guides/common-terms>

## 3 Document Specifications

DocuSign Envelope & Document Size Limitations: <https://support.docusign.com/en/articles/DocuSign-Document-and-Envelope-File-Size-Limitations>

DocuSign supported file types: <https://support.docusign.com/en/guides/ndse-user-guide-supported-file-formats>

## 4 DocuSign Overview

### 4.1 What is DocuSign?

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

#### 4.1.1. Points of Contact

Any support requests please contact the IT Service Desk on **250-852-6800** or **email: itservicedesk@tru.ca**

Name	Role	Notes
Andrew Adamczyk	DocuSign Administrator	Technical contact
Chance Binder	DocuSign Administrator	Primary contact

#### 4.1.2. Training Modules

There are a variety of resources available for training, if you are unable to find the answer to a question in the following web help pages, contact one of the DocuSign Administrators listed above.

- DocuSign User Guide: <https://docs.docusign.com/supportdocs/pdf/ndse-user-guide.pdf>
- DocuSign Community Forum: <https://support.docusign.com/s/>
- Contact Support:  
<https://support.docusign.com/en/contactSupport?Channels=1#CSStillNeedHelp>
- DocuSign University: <https://dsu.docebosaa.com/customers/pages/7/my-dashboard>
- TRU Training Sessions on DocuSign on SharePoint:  
<https://onetru.sharepoint.com/sites/DocuSign-O365>

## 4.2 Security:

### 4.2.1. Login Credentials

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)

### 4.2.2. Access Code Authentication

Documents that contain sensitive personal information need to set up two-factor authentication to all envelopes by adding access code(s) agreed with the recipient(s) prior to sending.

### 4.2.3. Phishing

#### 4.2.3.1. IT SERVICES

If you believe you may have provided confidential information in response to a phishing e-mail, call IT Services immediately:

- IT Service Desk - 250-852-6800 or email: [itservicedesk@tru.ca](mailto:itservicedesk@tru.ca)
- Information Security Office - 250-852-6351 or email: [infosecurity@tru.ca](mailto:infosecurity@tru.ca)

For more information on recognizing phishing emails, follow the link below:

<https://www.tru.ca/its/infosecurity/tipsforsafecomputing/Phishing/recognizingphishingemails.html>

#### 4.2.3.2. DOCUSIGN

Recognizing phishing emails is a big concern to many users. First and foremost, if you don't recognize the sender of a DocuSign envelope and you're uncertain of the email's authenticity, look for the unique security code included in all DocuSign envelopes at the bottom of the notification email. If you don't see this code, don't click on any links, or open any attachments within the email.

From the DocuSign Security website, here are the Signs of fraudulent emails and websites

##### 1. Fake links

Avoid fake links by accessing your documents directly from <https://www.docusign.com> using the unique security code found at the bottom of the DocuSign notification email.

**Always check where a link goes before you click on it by hovering your mouse over the link to look at the URL in your browser or email status bar** (they should be hosted on [docusign.com](https://www.docusign.com) or [docusign.net](https://www.docusign.net)).

A fraudulent link is dangerous and can:

- Direct you to a fake website that tries to collect your personal data
- Install spyware on your system (spyware is an application that can enable a hacker to monitor your actions and steal any login IDs, passwords, or credit card numbers you type)
- Cause you to download a virus that could disable your computer

##### 2. Fake sender email address

Fake emails may include a forged email address in the "From" field, which is easily altered. If you don't recognize the sender of a DocuSign envelope, contact the sender to verify the authenticity of the email.

##### 3. Attachments

DocuSign emails that request you to sign a document never contain attachments of any kind. Don't open or click on attachments within an email requesting your signature. DocuSign emails only contain PDF attachments of completed documents after all parties have signed the document. Even then, pay close attention to the attachment to ensure it's a valid PDF file. DocuSign never attaches zip files or executables.

#### 4. Generic greetings

Many fake emails begin with a generic greeting like “Dear DocuSign Customer.” If you don’t see your name in the salutation, be suspicious and don’t click on any links or attachments.

#### 5. False sense of urgency

Many fake emails try to deceive you with the threat that your account is in jeopardy if you don’t provide immediate updates. They may also state that unauthorized transactions have occurred on your account or that DocuSign needs to update your account information immediately.

#### 6. Emails that appear to be websites

Some fake emails are made to look like a website to get you to enter personal information. DocuSign never asks you for personal information, including login, ID, or password, via an email.

#### 7. Deceptive URLs

Check the Web address. Just because the address looks OK, don't assume you're on a legitimate site. Look in your browser's URL bar for signs that you may be on a phishing site:

- Often the Web address of a phishing site looks correct but actually contains a common misspelling of the company name or a character or symbol before or after the company name, such as docusing.com instead of docusign.com
- Look for tricks like substituting the number "1" for the letter "l" in a Web address or transposing consecutive letters of the brand, such as rea1estate.docusign.com instead of realestate.docusign.com
- Your browser has ways of detecting certain types of malicious sites—always heed these browser warnings, especially when they notify you that the site or certificate can’t be trusted

#### 8. Misspellings and bad grammar

While no one is perfect, fake emails often contain misspellings, incorrect grammar, missing words, and gaps in logic. Mistakes like this help fraudsters avoid spam filters.

#### 9. Unsafe sites

The term "https" should always precede any website address where you enter personal information. The "s" stands for secure. If you don't see "https," you're not in a secure Web session, and you shouldn't enter any personal data. A legitimate DocuSign sign-in page address always starts with “https://” not “http://.”

#### 10. Pop-up boxes

DocuSign never uses a pop-up box in an email because pop-ups aren’t secure. <sup>1</sup>

Please refer to DocuSign’s White paper

[[https://www.docusign.com/sites/default/files/Combating\\_Phishing\\_WP\\_05082017.pdf](https://www.docusign.com/sites/default/files/Combating_Phishing_WP_05082017.pdf)] on a proactive approach to combating phishing.

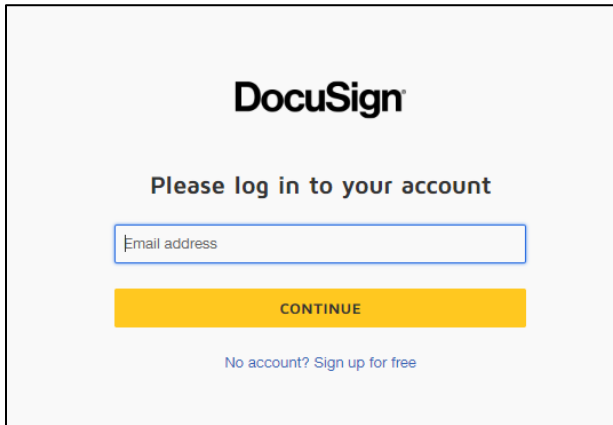
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<sup>1</sup> Taken from DocuSign Incident Reporting [<https://www.docusign.com/trust/security/incident-reporting>]

### 4.3 First Steps

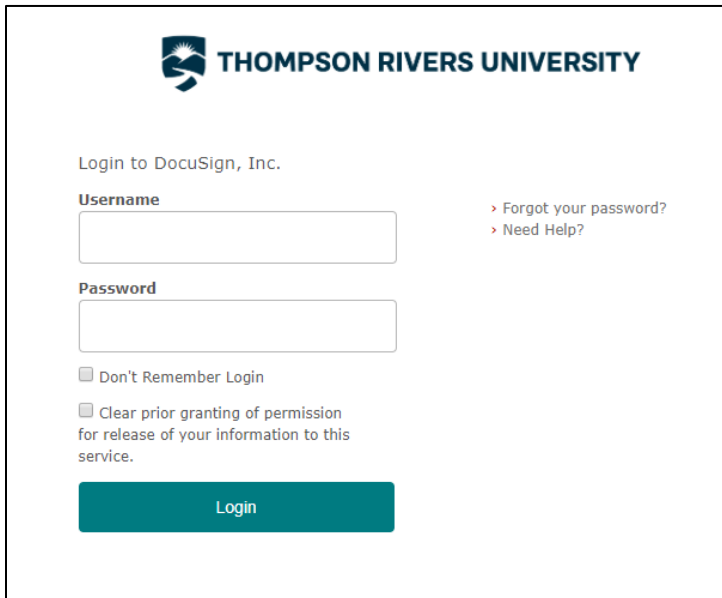
Before creating your first envelope, use the following checklist to ensure you have all the resources that you will need.

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 Thompson Rivers University logo is displayed. Below it, the text "Login to DocuSign, Inc." is centered. There are two input fields: "Username" and "Password". To the right of the input fields, there are two links: "> Forgot your password?" and "> Need Help?". Below the input fields, 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>]

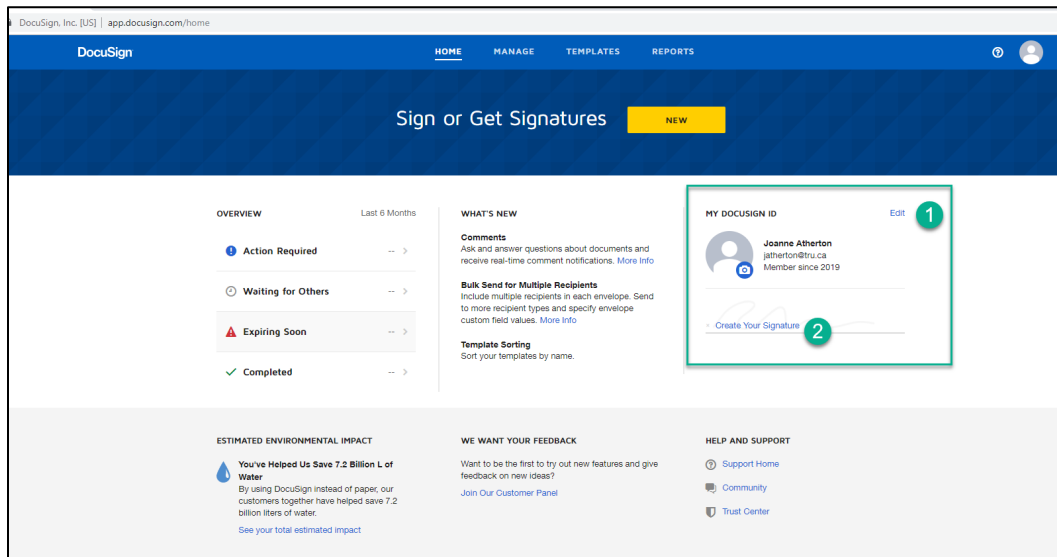
2. Get to know DocuSign (Page 14): <https://docs.docusign.com/supportdocs/pdf/ndse-user-guide.pdf>
3. Ensure that you have the correct permission settings (submit ASAR to change permission setting)
  - a. Viewer
  - b. Sender – are able to **see and use** templates
  - c. Super User – are able to **create** templates
  - d. Admin



4. Set up an account with DocuSign University: <https://dsu.docebosaaS.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>

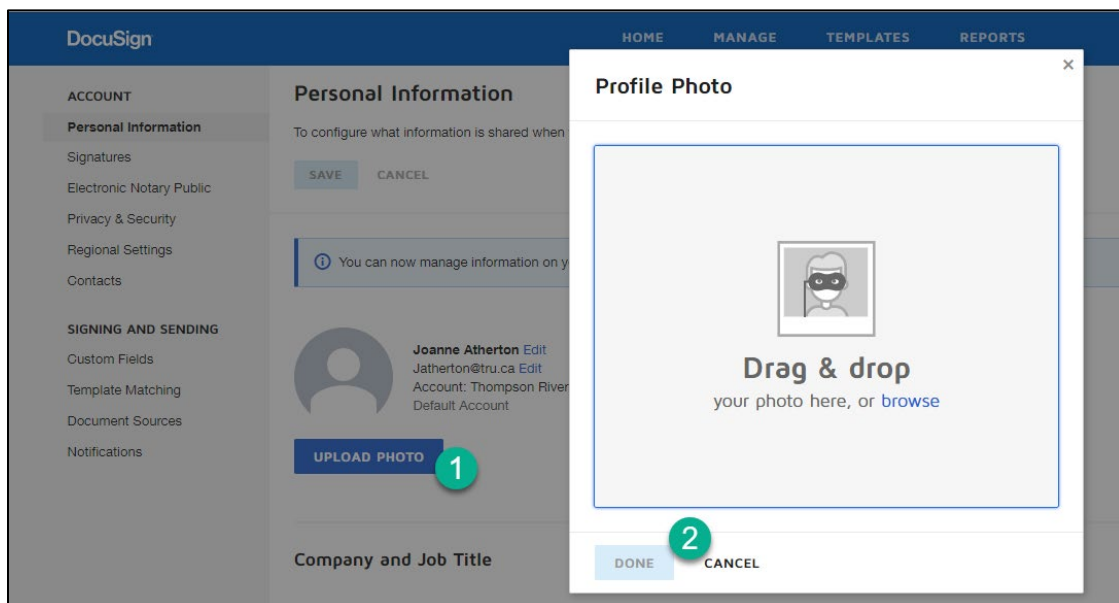
## 4.4 Setting up User Preferences

To set up a profile picture and signatures, go to the right-hand side of the screen.



### 4.4.1. To add a profile picture

- 1 click on Edit:



- 2 Click on Upload Photo
- 3 Drag and Drop photo into the box
- 4 Click Done

### 4.4.2. To add a signature

- 1 Click on Create your signature

- 2 Edit name if required
- 3 Choose signature, draw or upload
- 4 Click Create

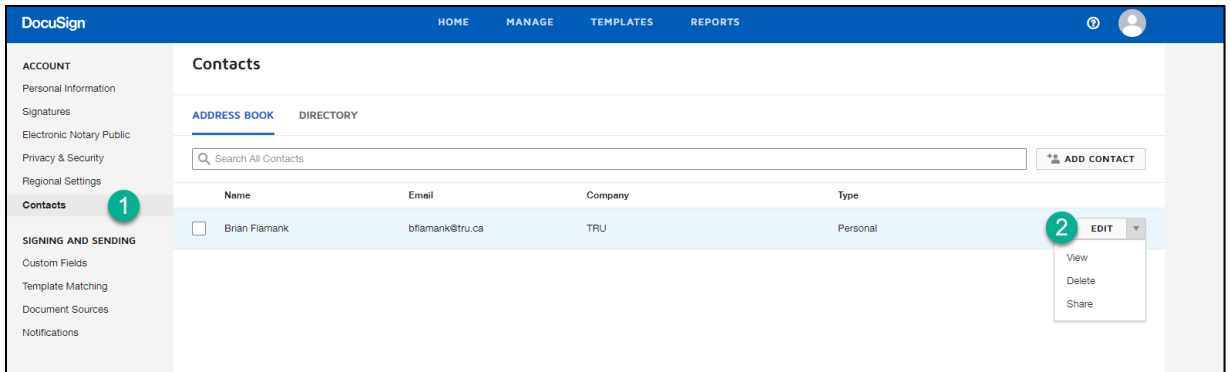
For more information on Signatures: <https://support.docusign.com/en/guides/signer-guide-signing-adopt-new>

### 4.4.3. Managing Contacts

To manage your contacts, share contacts with others, on the home page right click on the profile and select My Preferences.

- 1 Select Contacts from the list on the left-hand side

- 2 Use the drop down Edit to select whether to view, delete or share the contact.



For more information on managing your account, check out the DocuSign support on Preferences:  
<https://support.docusign.com/en/guides/ndse-user-guide-preferences>

#### 4.4.4. Manage Email Notifications

Setting up email notifications preferences for your account:

<https://support.docusign.com/en/guides/ndse-user-guide-manage-notifications>

## 5 Templates

1. The TRU Naming convention should be adhered to when creating any new templates:  
<https://tru.teamdynamix.com/TDClient/84/Portal/KB/ArticleDet?ID=4594>
2. Please review the video in the DocuSign User guide on what a template is:  
<https://support.docusign.com/en/videos/What-are-DocuSign-Templates>
3. The following links give step by step guide on how to:
  - a) **Create:** <https://support.docusign.com/en/guides/ndse-user-guide-create-templates>
  - b) **Edit:** <https://support.docusign.com/en/guides/ndse-user-guide-edit-templates>
  - c) **Share:** <https://support.docusign.com/en/guides/ndse-user-guide-share-template>
  - d) **Use:** <https://support.docusign.com/en/guides/ndse-user-guide-use-templates>
  - e) **Merge Fields to customize:** <https://support.docusign.com/en/guides/ndse-user-guide-template-merge-fields>
  - f) **Template Passwords:** <https://support.docusign.com/en/guides/ndse-user-guide-template-passwords>

This information can also be found: O:\TRU Share\DocuSign\Templates

### 5.1.1. Creating

Only users with Super User or Admin access can create Templates. If you need to be granted access to create Templates, please contact the IT Service Desk.

### 5.1.2. Using

Users with Sender, Super User or Admin can user Templates.

- If you need to be granted access to create Templates, please contact the IT Service Desk.
- If you are unable to see a template, please ensure that the Super User or Admin has granted you permission to use.

## 6 Envelopes

### 6.1 Sending a DocuSign Envelope

Starting an Envelope: <https://support.docusign.com/en/guides/ndse-user-guide-start-a-document>

Please review the video in the DocuSign User guide on sending an Envelope:

<https://support.docusign.com/en/videos/New-DocuSign-Experience-Sending-Documents>

The following diagram is the process to send an Envelope with DocuSign.



**NOTE:** if there has been a Hand signed document within the process, Review the transactions when downloaded/uploaded to ensure signature has occurred, DocuSign will not be able to confirm if this has taken place.

## 6.2 Resending a DocuSign Envelope

Review the following article on how to resend an envelope:

<https://support.docusign.com/en/guides/ndse-user-guide-send-reminders>

## 6.3 Receiving a DocuSign Envelope

Refer to section 2.2 on Security, in this document, for the checks that the sender is authentic before clicking on any of the links.

## 6.4 Voiding a DocuSign Envelope

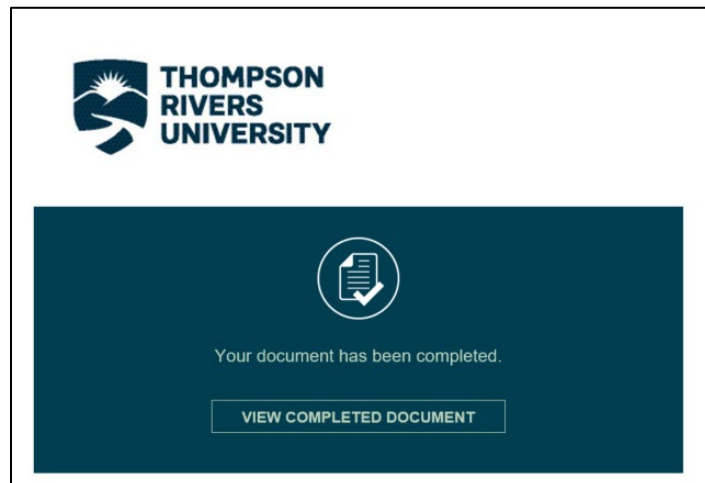
A sender can void an envelope whilst in progress and it will cancel all outstanding signing activities. For details on how to void an envelope: <https://support.docusign.com/en/guides/ndse-user-guide-void-documents>

If the voided envelope needs to be resent, there is the ability to clone the envelope, make changes and resend: <https://support.docusign.com/en/guides/ndse-user-guide-clone-documents>

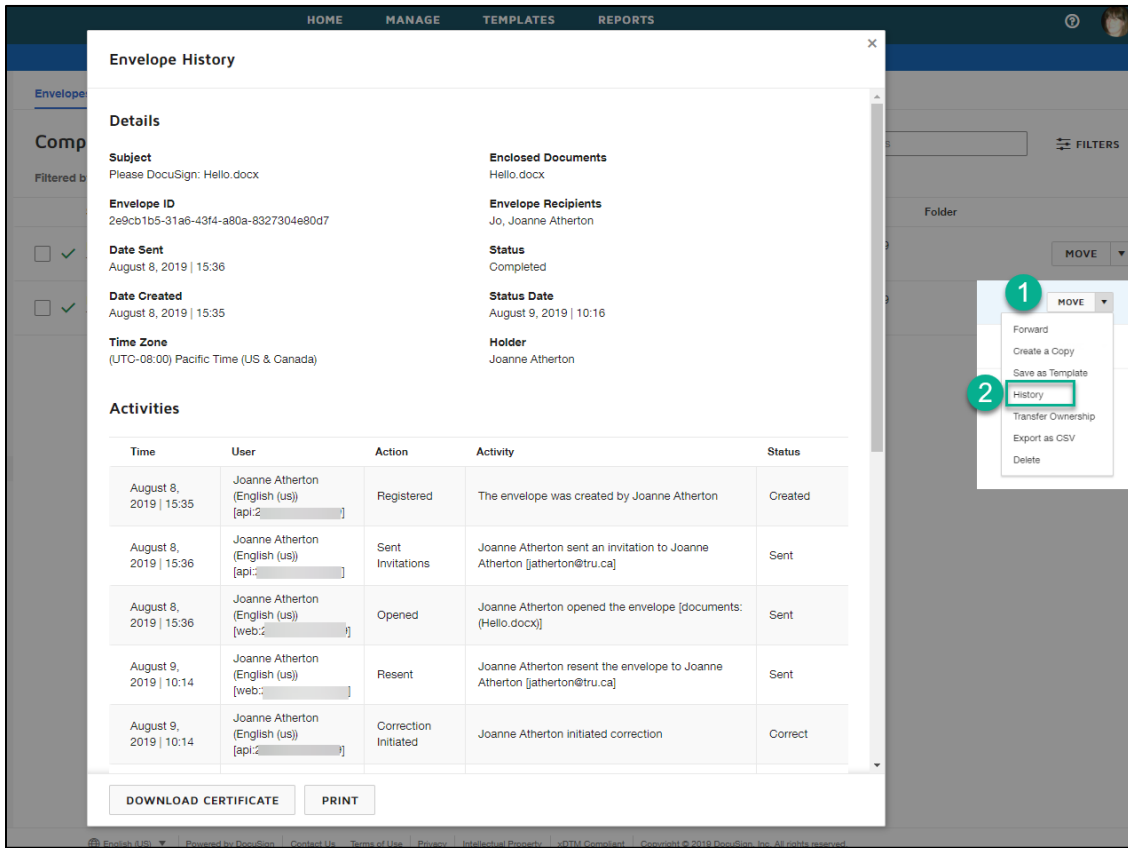
## 6.5 Completion of DocuSign Envelope

For full information regarding History and Certificate of Completion, please refer to the DocuSign Support page: <https://support.docusign.com/en/guides/ndse-user-guide-history-coc>

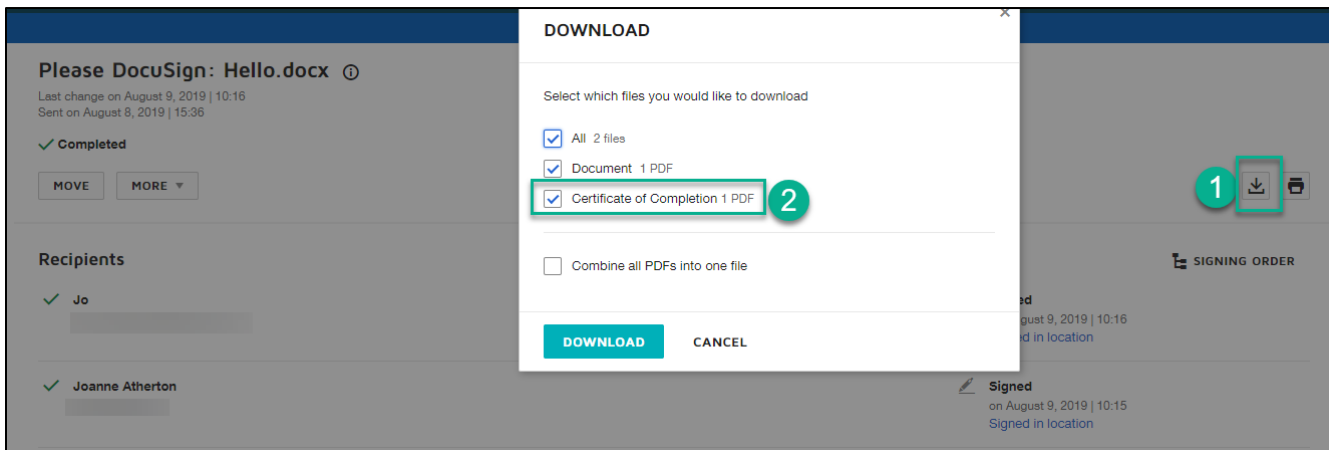
Once an envelope has been completed and all signatures have been obtained, an email will be sent to all recipients.



In the senders account, an Envelope and Document history can be found by selecting Move ->History



To view the certificate of completion, from the manage page, click the envelope to show the details view. Click the download button and ensure that Certificate of completion is checked.



The certificate of completion will be saved as a pdf.

**Certificate Of Completion**

Envelope Id: 2E9CB1B531A643F4A80A8327304E80D7 Status: Completed  
 Subject: Please DocuSign: Hello.docx  
 Source Envelope:  
 Document Pages: 1 Signatures: 2 Envelope Originator:  
 Certificate Pages: 5 Initials: 0 Joanne Atherton  
 AutoNav: Enabled 805 TRU Way  
 Enveloped Stamping: Enabled Kamloops, BC V2C 0C8  
 Time Zone: (UTC-08:00) Pacific Time (US & Canada) jatherton@tru.ca  
 IP Address: [REDACTED]

**Record Tracking**

Status: Original Holder: Joanne Atherton Location: DocuSign  
 August 8, 2019 | 15:35 jatherton@tru.ca

Signer Events	Signature	Timestamp
Jo [REDACTED]		Sent: August 9, 2019   10:15 Viewed: August 9, 2019   10:16 Signed: August 9, 2019   10:16
Security Level: Email, Account Authentication (Optional)	Signature Adoption: Pre-selected Style Using IP Address: [REDACTED]	
<b>Electronic Record and Signature Disclosure:</b> Accepted: August 9, 2019   10:16 ID: 746361bb-7453-4fc2-ac16-ed0f642a23c1		
Joanne Atherton jatherton@tru.ca TRU Security Level: Email, Account Authentication (Optional)		Sent: August 8, 2019   15:36 Resent: August 9, 2019   10:14 Viewed: August 9, 2019   10:15 Signed: August 9, 2019   10:15
Signature Adoption: Pre-selected Style Using IP Address: [REDACTED]		
<b>Electronic Record and Signature Disclosure:</b> Accepted: August 9, 2019   10:15 ID: 119315c9-86f0-4099-be44-ee9f48623dc		

The sender/Departmental resource needs to download the completed documents and certificate of completion within 30 days of completion.

Refer to TRU’s Records Retention/Destruction policy (ADM 02-3) for responsibility with the retention and/or destruction of documents.

<https://tru.teamdynamix.com/TDClient/84/Portal/KB/ArticleDet?ID=1256>

## 6.6 Timelines

The following reminders and expirations are set as default for TRU’s DocuSign account.

Reminders	Days before sending first reminder	2
	Days between reminders	5
Expiration	Days before request expires	120
	Days to warn signers before expiration	20

You are able to change these settings on an envelope basis if required:

<https://support.docusign.com/en/guides/ndse-user-guide-set-advanced-document-options>



## 6.7 Troubleshooting

If there are questions from senders or signers regarding DocuSign administration, refer them to one of the DocuSign Administrators (who are named at the top of this document).

If an envelope was sent to an incorrect recipient or the envelope contains incorrect documents, the sender should **void the envelope** immediately.

It is the responsibility of the department to ensure that they advise if an employee leaves their department and needs their access to the DocuSign site revoked (ASAR).

## 7 Miscellaneous

Enhancements, issues, and workarounds will be communicated through the DocuSign SharePoint site.

### 7.1.1. Reports

#### 7.1.1.1. *Creating a report*

Users and admins can create a report and filter by Envelopes, recipient's dates:

The screenshot shows the 'Reports' section of the DocuSign interface. The top navigation bar includes 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS' (1). Below the navigation bar, the page title is 'Developer Sandbox Environment'. On the left, there is a search bar and a sidebar with 'Overview' (2) selected. The main content area is titled 'Overview' and features a section 'You're Helping Us Save' with a link 'How do we calculate this estimate?'. This section contains five circular icons representing environmental metrics: a tree for '323 million kg of wood', a water drop for '7.2 billion l of water', a cloud for '727 million kg of CO2', a trash can for '47.7 million kg of waste', and a tree for an unlabeled metric. At the bottom, there is a dropdown menu for 'Graphs reflect activity in past' set to '1 month' (3), with the date range 'July 15, 2019 - August 14, 2019' displayed below it.

For more information on how to create a report: <https://support.docusign.com/en/guides/ndse-user-guide-using-reports> or watch the video: <https://support.docusign.com/en/videos/Reporting-Overview>

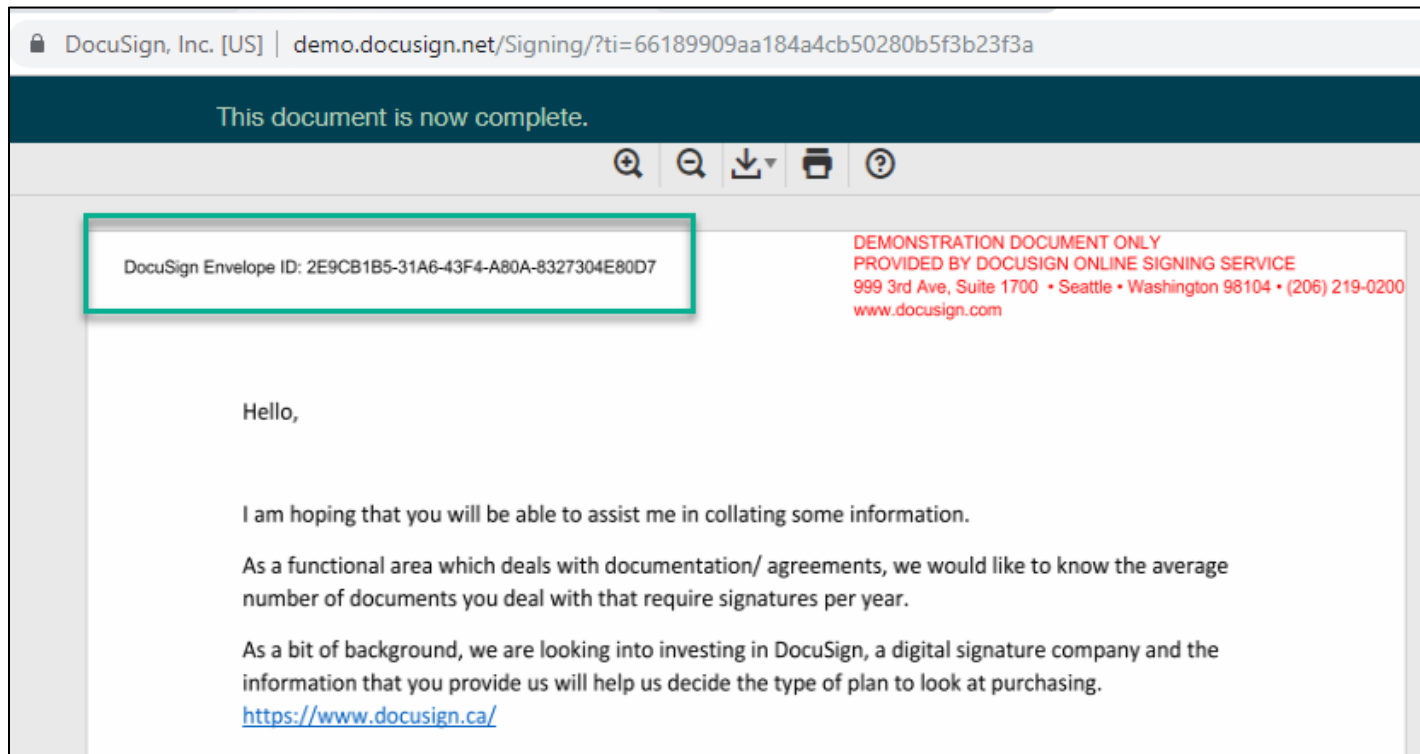
#### 7.1.1.2. *View and modify a report*

A default view is given when you create a report, you can modify the date ranges, filters and columns and export as CSV. <https://support.docusign.com/en/guides/ndse-user-guide-view-and-modify-reports>

### 7.1.2. Control Envelope ID placement

The Envelope ID is the long unique alphanumeric sequence generated for each envelope. You can decide whether or not to display this ID and where it should be displayed:

<https://support.docusign.com/en/guides/ndse-user-guide-envelope-id>



### 7.1.3. Signer Authentication

There are many ways to add verification to the envelopes. Adding an Access code is free, the other methods incur a charge. <https://support.docusign.com/en/guides/signer-authentication>

### 7.1.4. Alternative Signing Method

Using the security code given in the email, go to [www.docusign.com](http://www.docusign.com) and click "Access Documents" and enter the security code: <https://support.docusign.com/en/articles/Alternative-Signing-Method-Security-Code-Access>