University of Delaware EXCHANGE

DocuSign Instructions

Revised 1/30/2024

University of Delaware

DocuSign Instructions

DocuSign is to be used by staff when a document, such as a contract, requires signature by one or more parties.

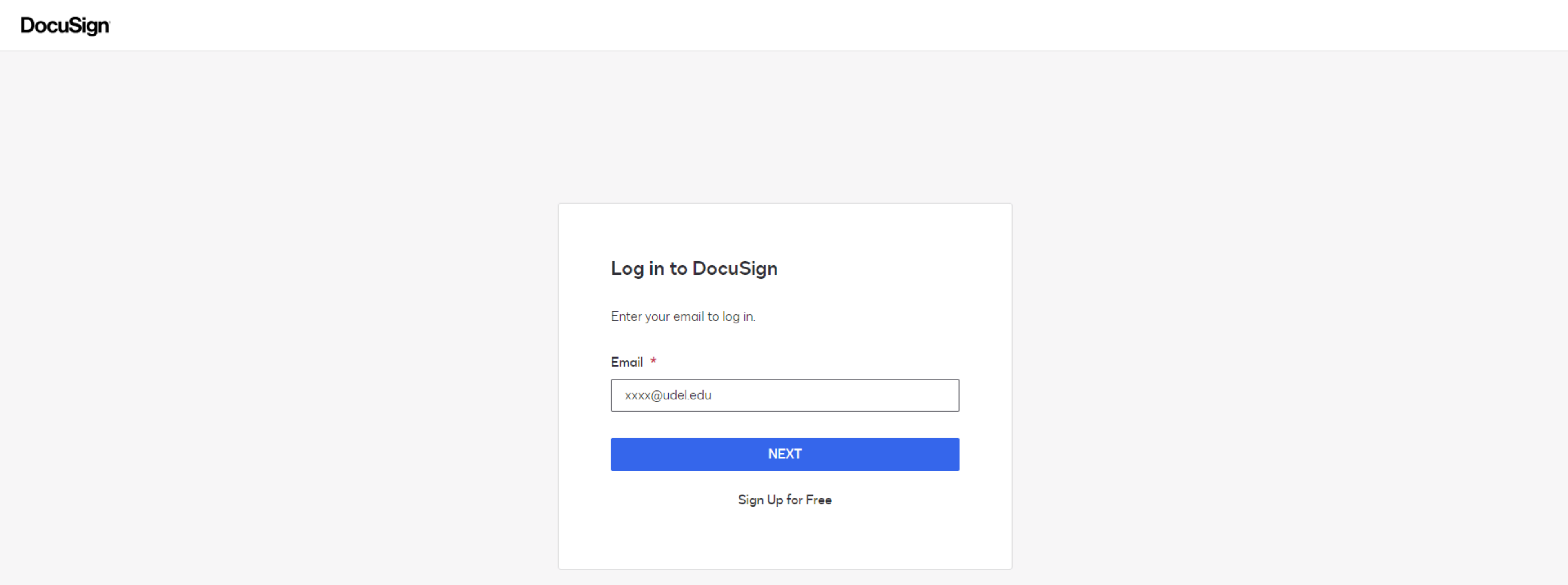
Users requiring access to DocuSign should contact procurement@udel.edu to request an invitation to an account.

Requests for DocuSign accounts made directly through the DocuSign system will not be processed.

This guide will illustrate:

- **Creating a DocuSign Document (Slide 2)**
- **Assigning a DocuSign to Someone Else (Slide 25)**

Creating a DocuSign Document

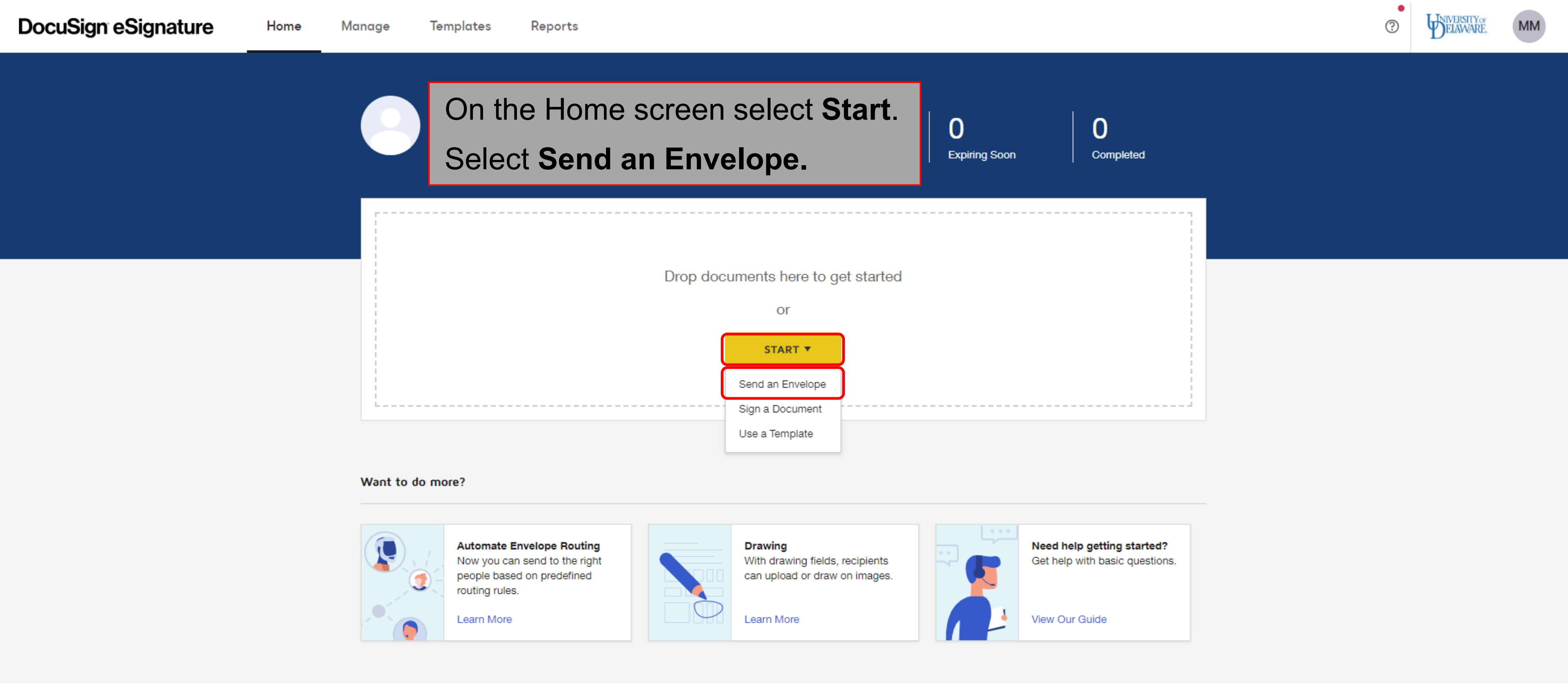


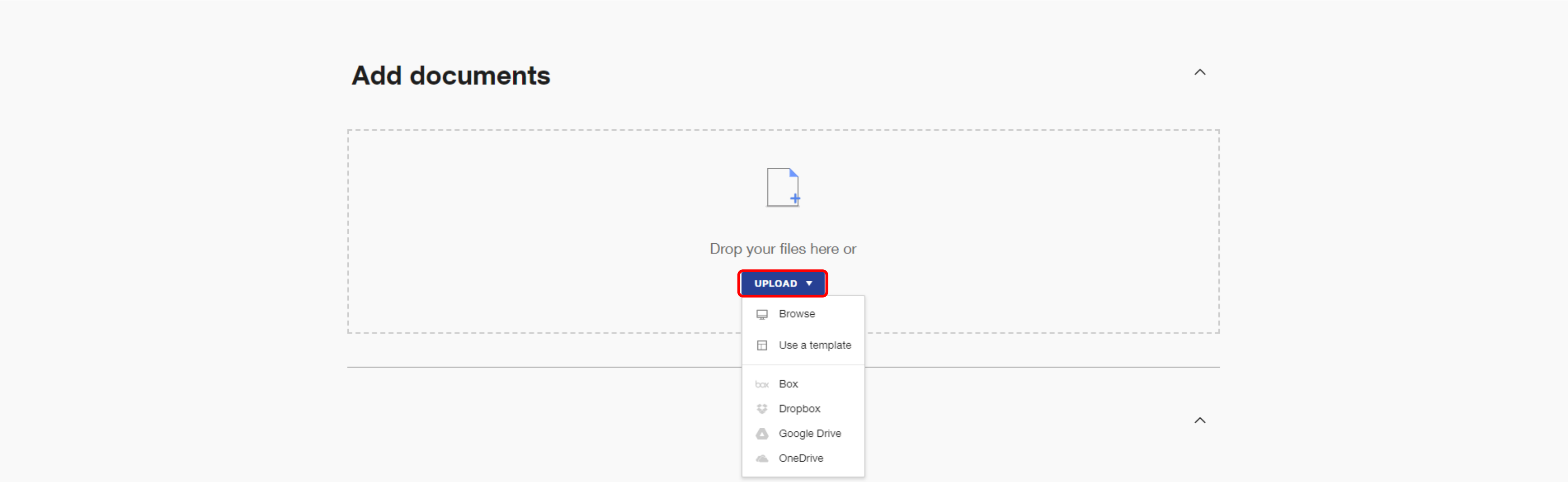
To access DocuSign, go to https://account.docusign.com/#/username.

Your login for DocuSign is your email address.

On the Home screen select **Start**.

Select **Send an Envelope.**

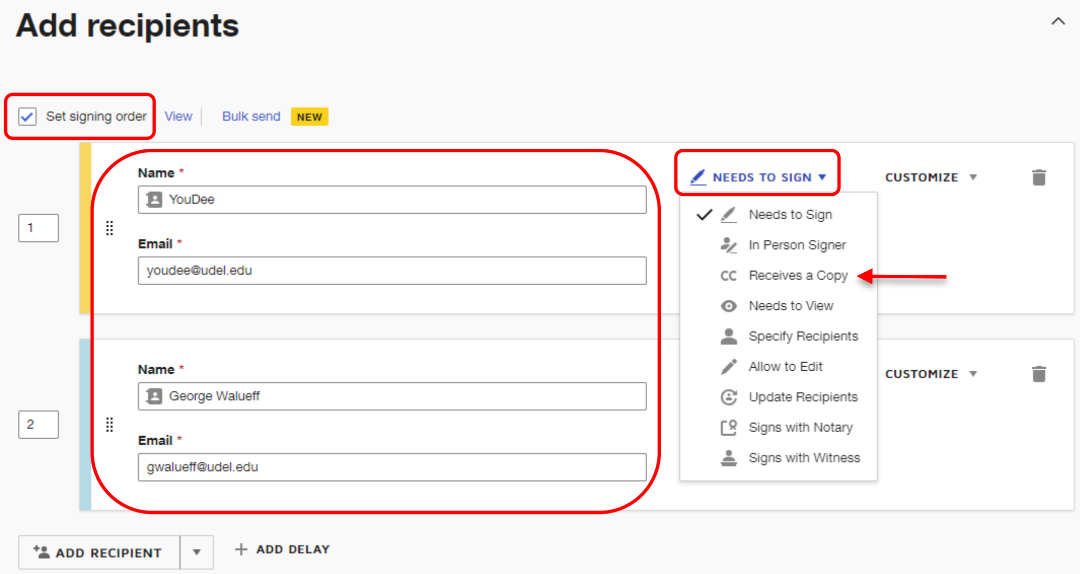




You will be prompted to **Add documents** to the Envelope:

Upload the final version of the document(s) you need signed.

- Uploads can be in Word or PDF formats (DocuSign automatically converts Word documents into PDF).
- You may also retrieve documents from the cloud and connect to Google Drive.

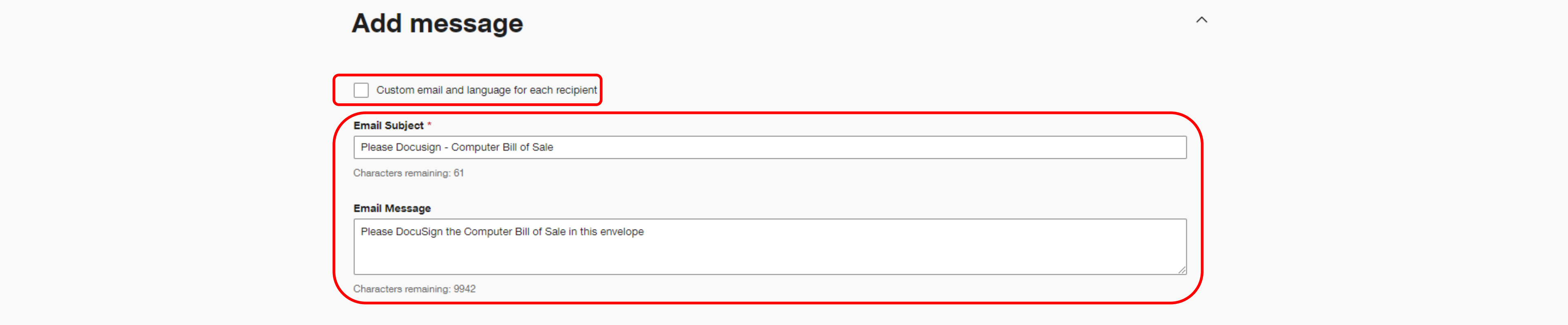


Add recipients to the Envelope:

Complete the recipient fields with the **name(s)** and **email address(es)** of the people who should receive the document for signature.

The menu offers additional options such as **cc** if a recipient should only **Receive a Copy**.

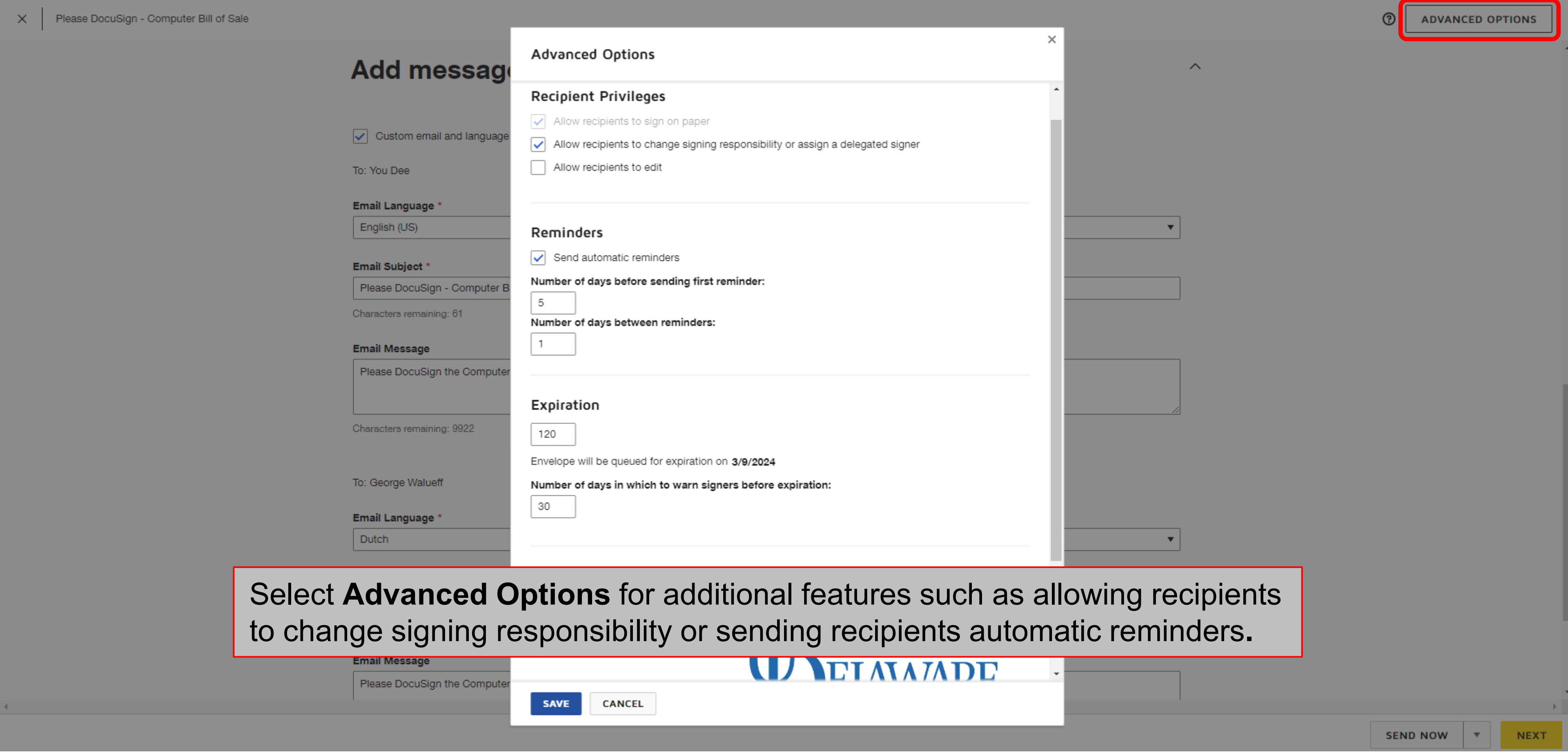
You can also **Set signing order**, if you require that one recipient sign before another.



Add message (optional):

You can add a message to be distributed to **all** recipients.

Or, you can select the option to create **Custom email and language for each recipient**.



Select **Advanced Options** for additional features such as allowing recipients to change signing responsibility or sending recipients automatic reminders.

× Please Docusign - Computer Bill of Sale

ADVANCED OPTIONS

English (US)

Email Subject *

Please Docusign - Computer Bill of Sale

Characters remaining: 61

Email Message

Please DocuSign the Computer Bill of Sale for the computer you are purchasing.

Characters remaining: 9922

To: George Walueff

Email Language *

English (US)

Email Subject *

Please Docusign - Computer Bill of Sale

Characters remaining: 61

Email Message

Please DocuSign the Computer Bill of Sale in this envelope for the computer you are selling.

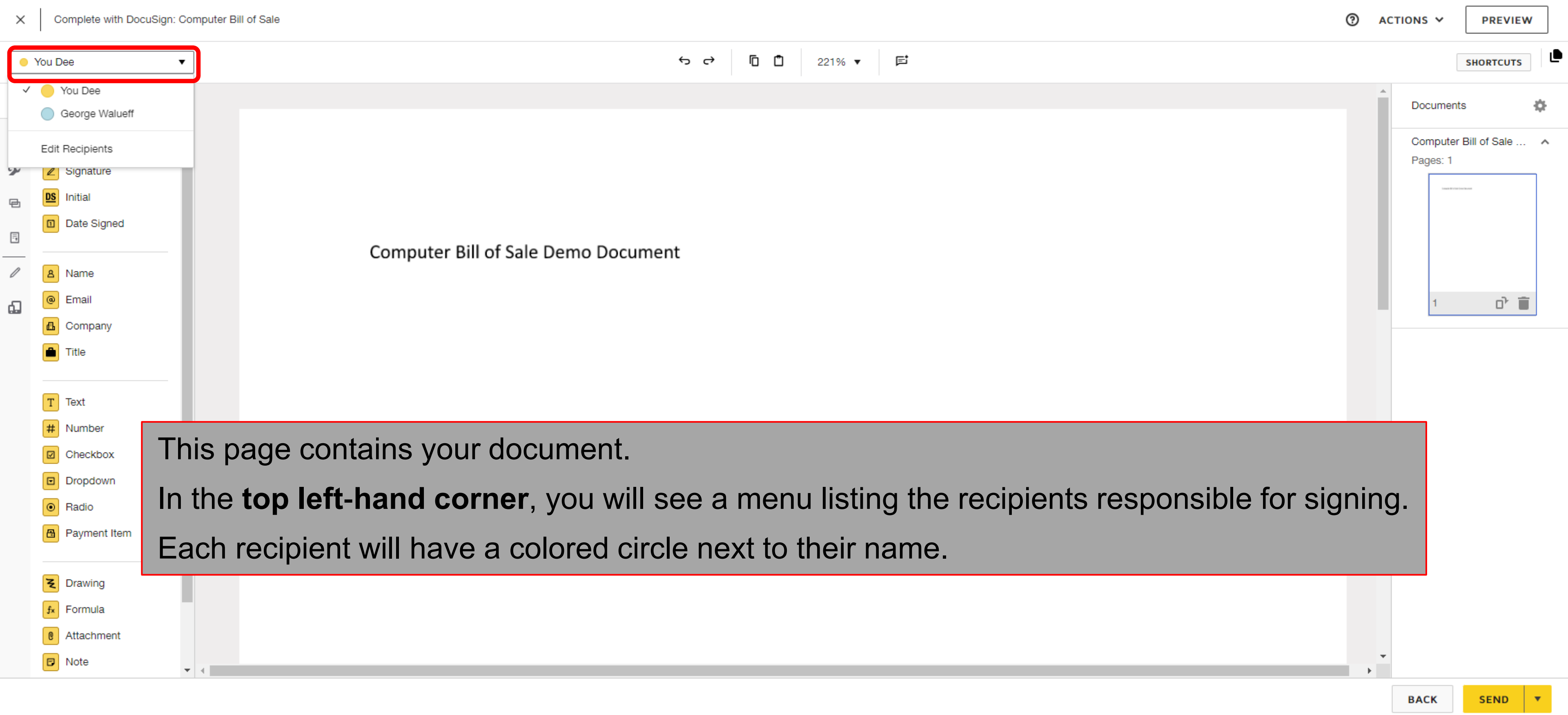
Characters remaining: 9908

Frequency of reminders: Every 0 days

Click **Next** in the bottom right corner of the screen.

SEND NOW

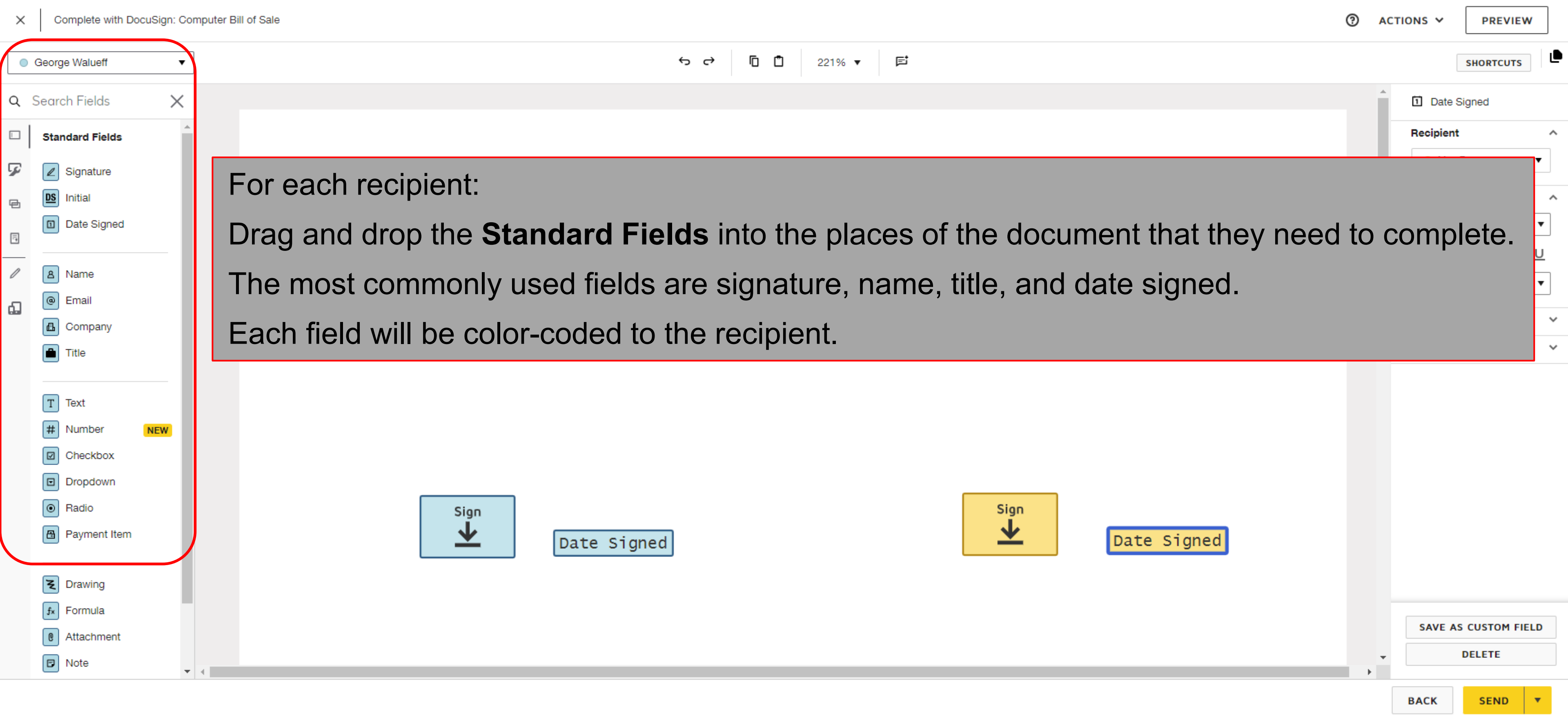
NEXT



This page contains your document.

In the **top left-hand corner**, you will see a menu listing the recipients responsible for signing.

Each recipient will have a colored circle next to their name.

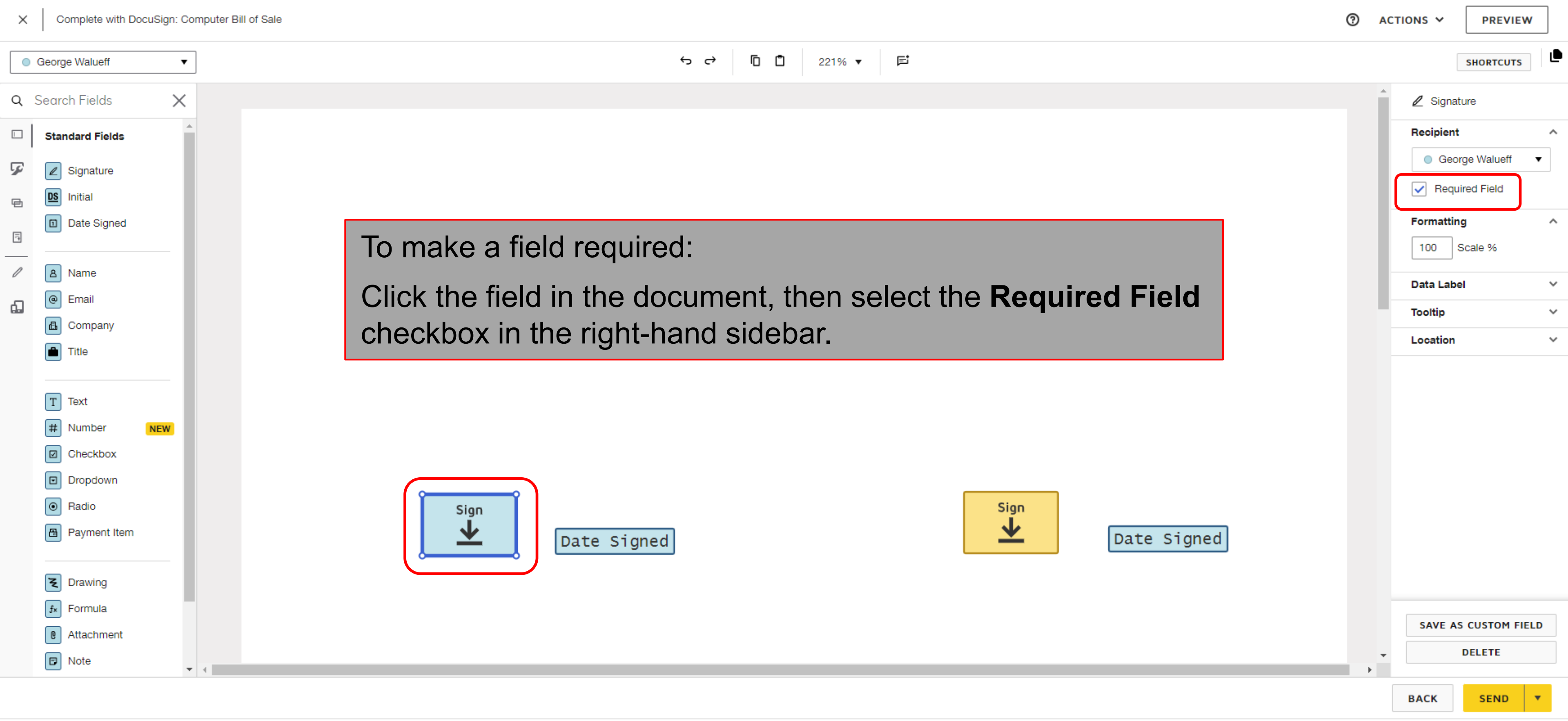


For each recipient:

Drag and drop the **Standard Fields** into the places of the document that they need to complete.

The most commonly used fields are signature, name, title, and date signed.

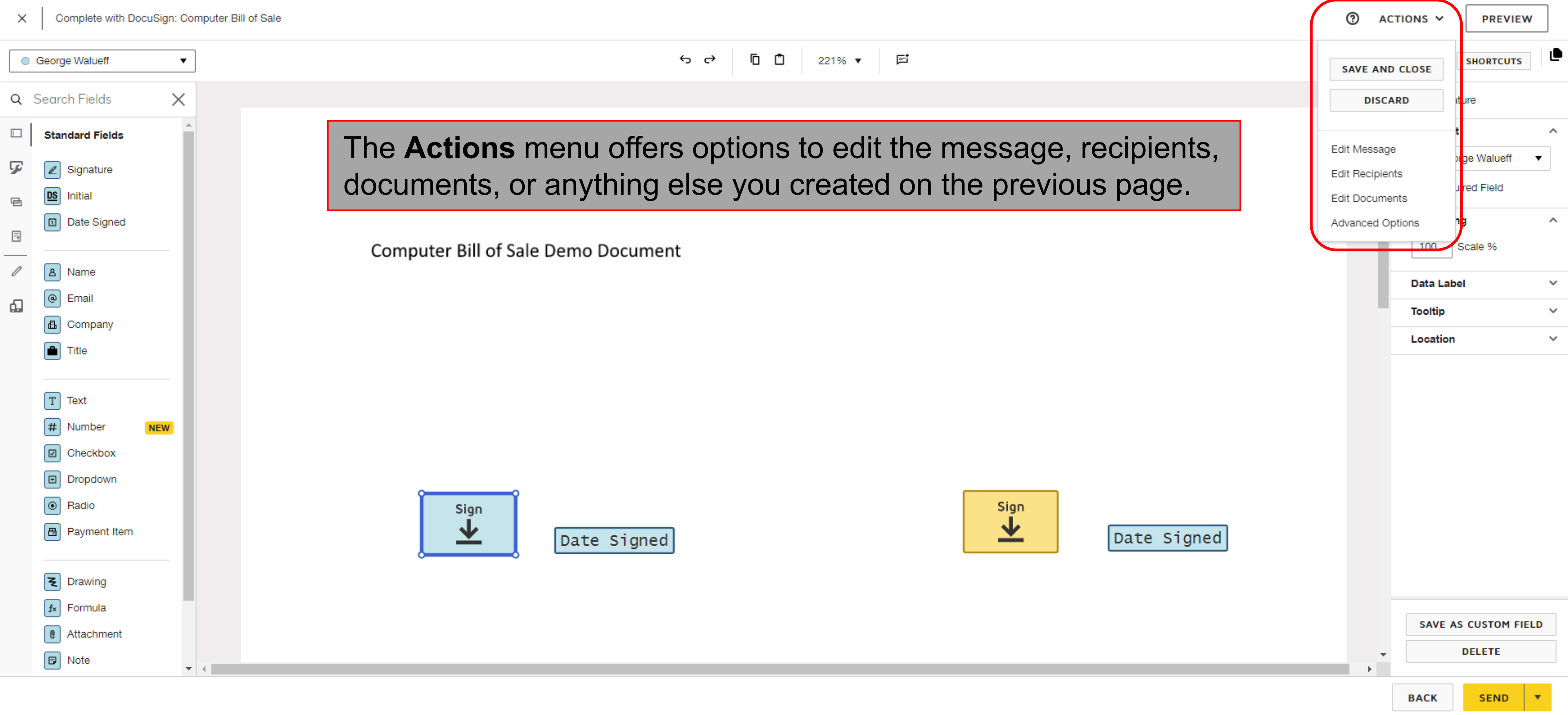
Each field will be color-coded to the recipient.

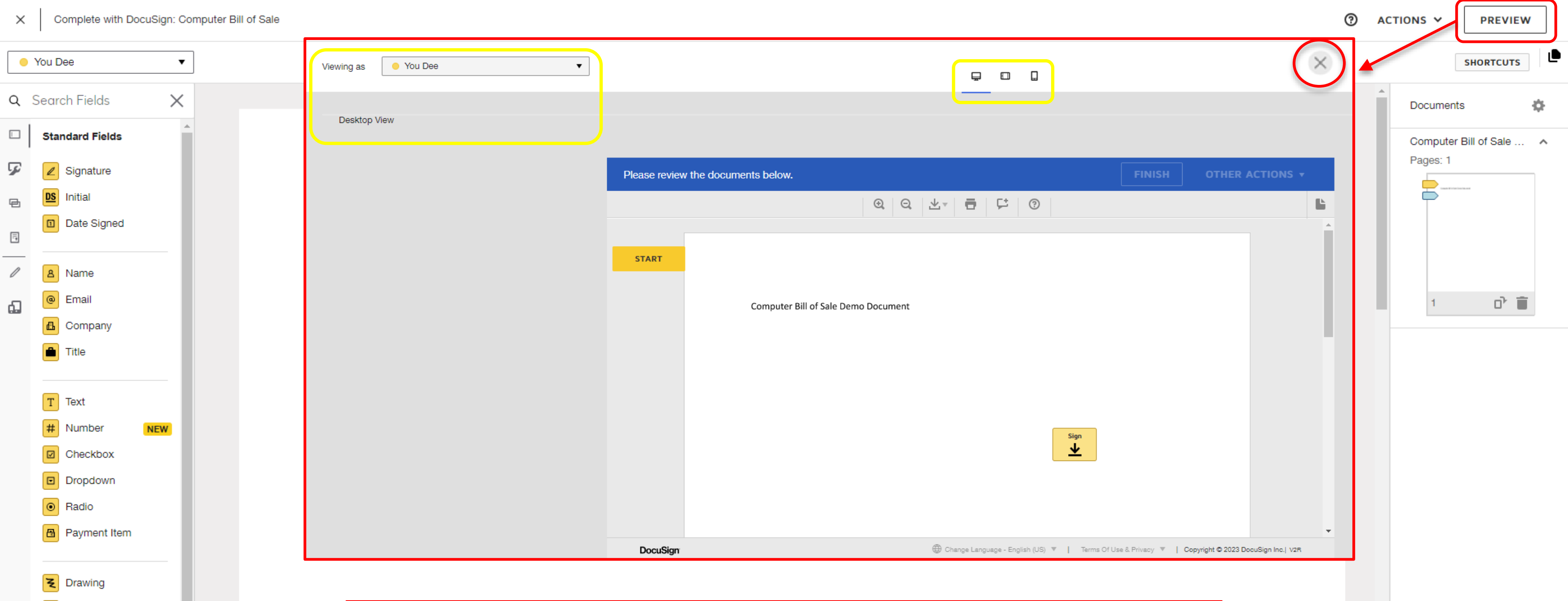


To make a field required:

Click the field in the document, then select the **Required Field** checkbox in the right-hand sidebar.

The **Actions** menu offers options to edit the message, recipients, documents, or anything else you created on the previous page.

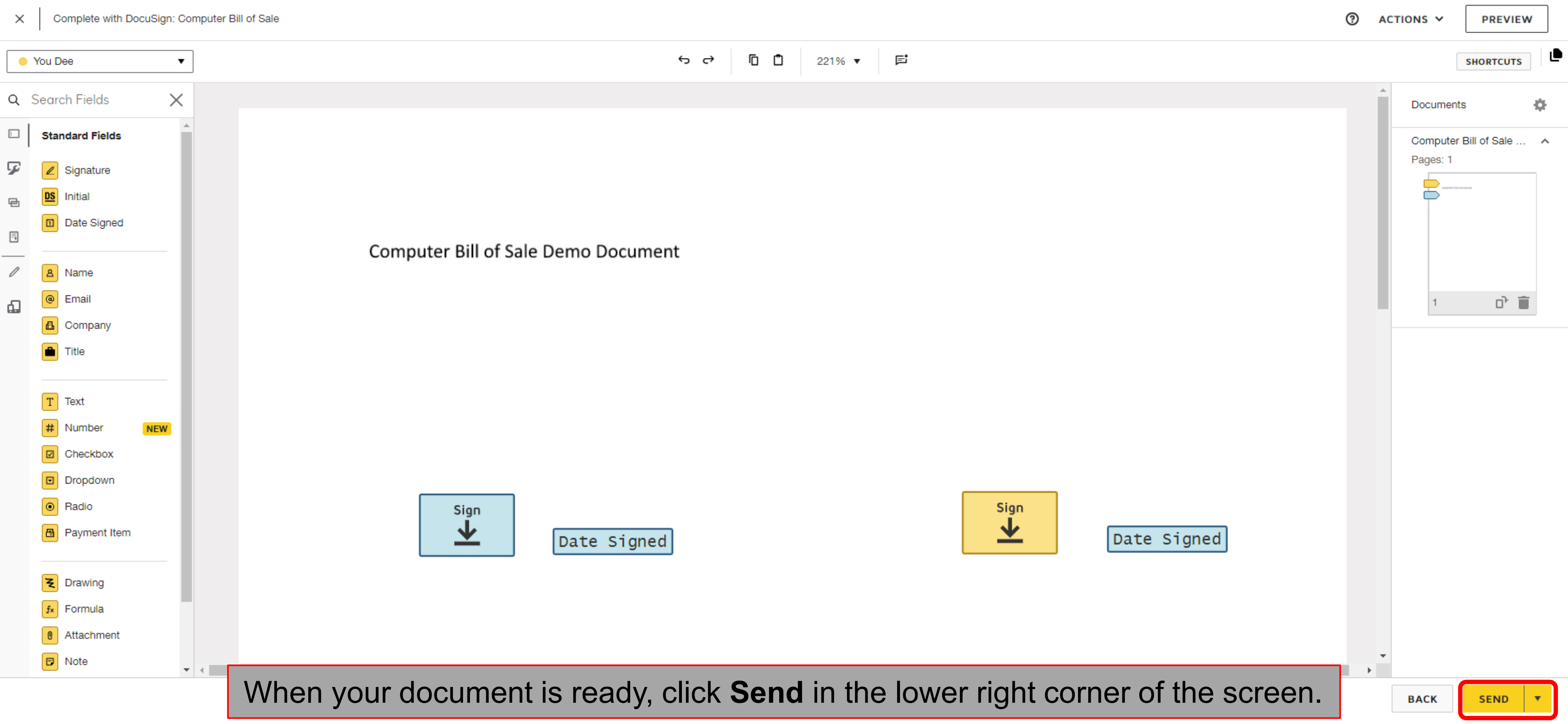




Click **Preview** to view the document as one of your recipients.

You have the option to select desktop, tablet, or mobile view.

Click the **X** in the top right to close recipient view.



When your document is ready, click **Send** in the lower right corner of the screen.

Please Review & Act on These Documents

DocuSign

Margot Martin
University of Delaware

Please DocuSign the Computer Bill of Sale in this envelope

Please review the documents below.

CONTINUE

OTHER ACTIONS ▾

Sign

11/9/2023

Recipients will receive an alert to sign the document.

If they are new to DocuSign, they will be asked to agree to use electronic records and signatures.

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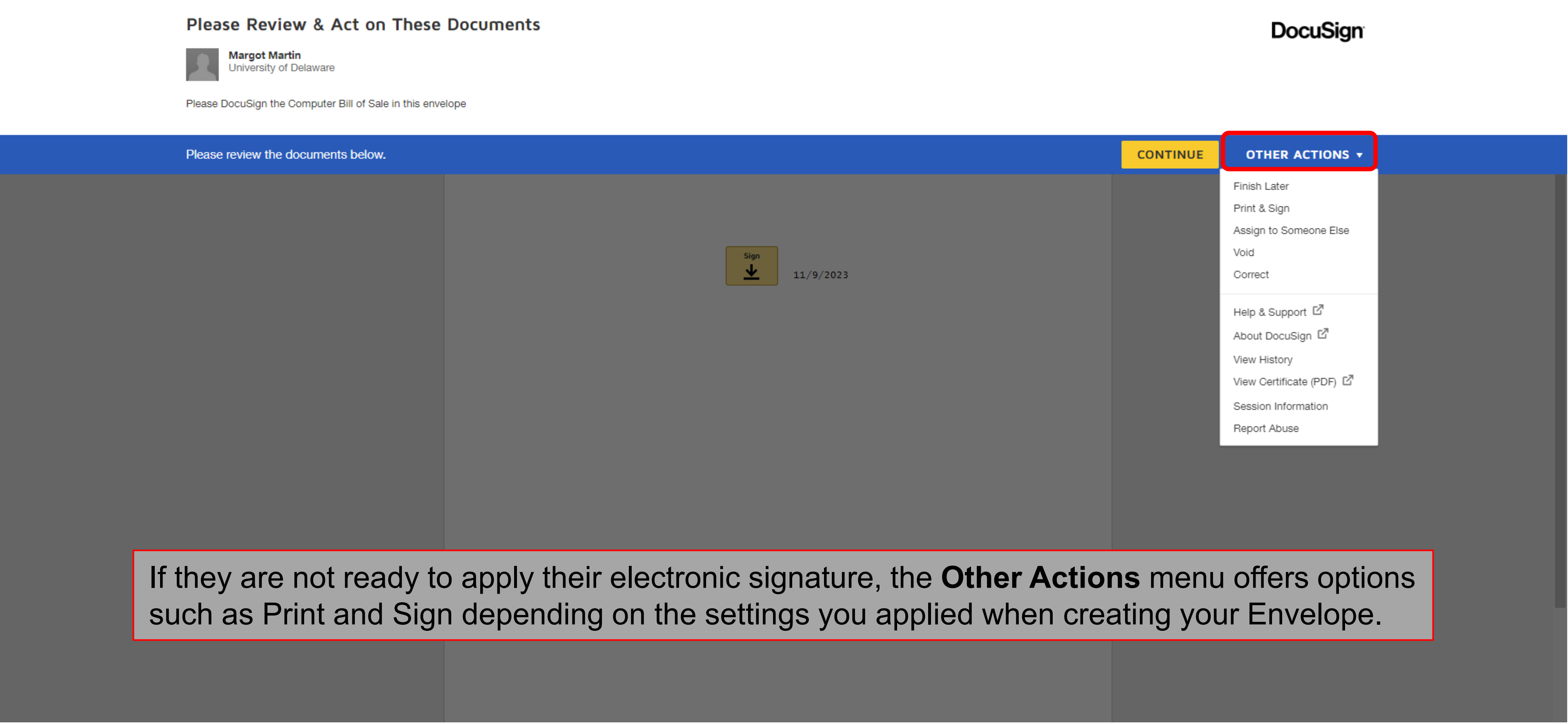

If they are not ready to apply their electronic signature, the **Other Actions** menu offers options such as Print and Sign depending on the settings you applied when creating your Envelope.

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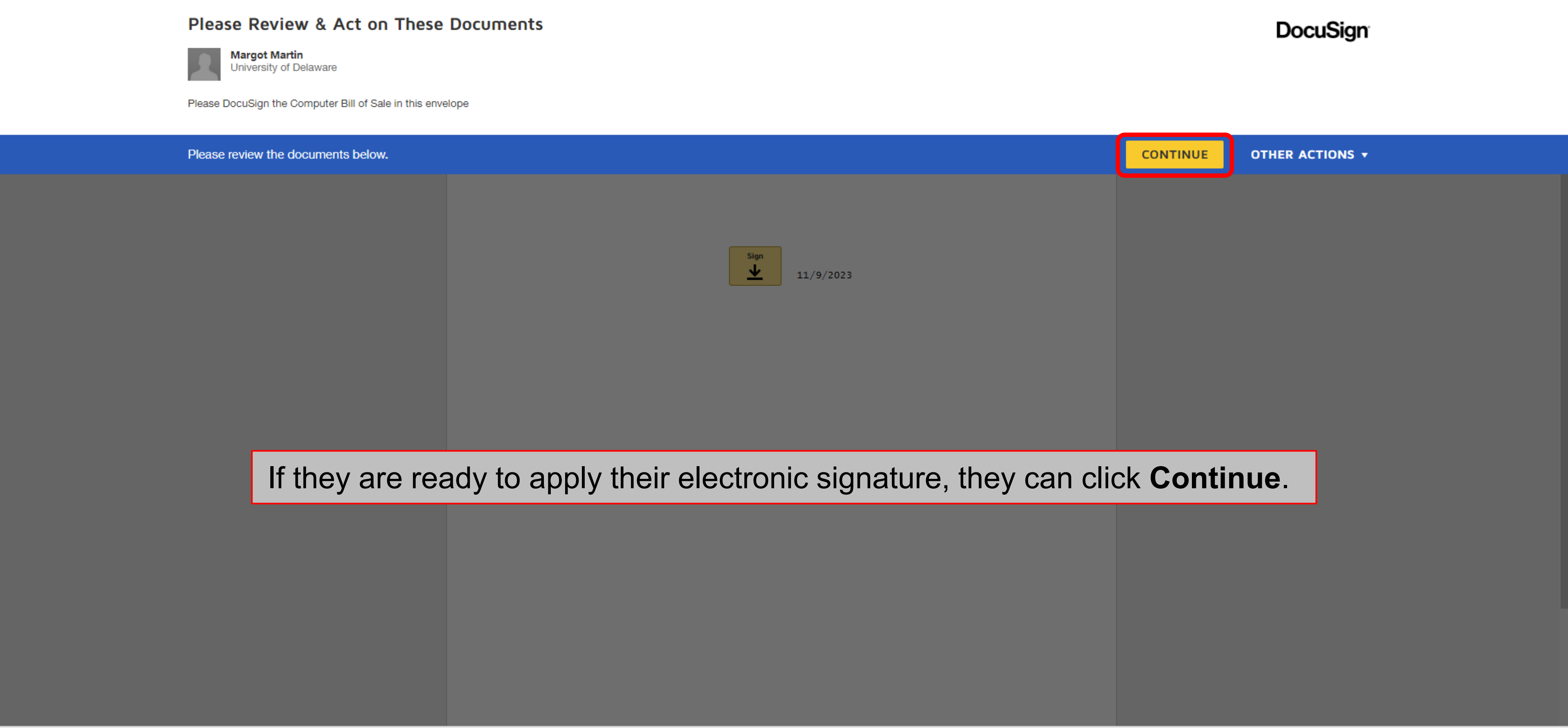
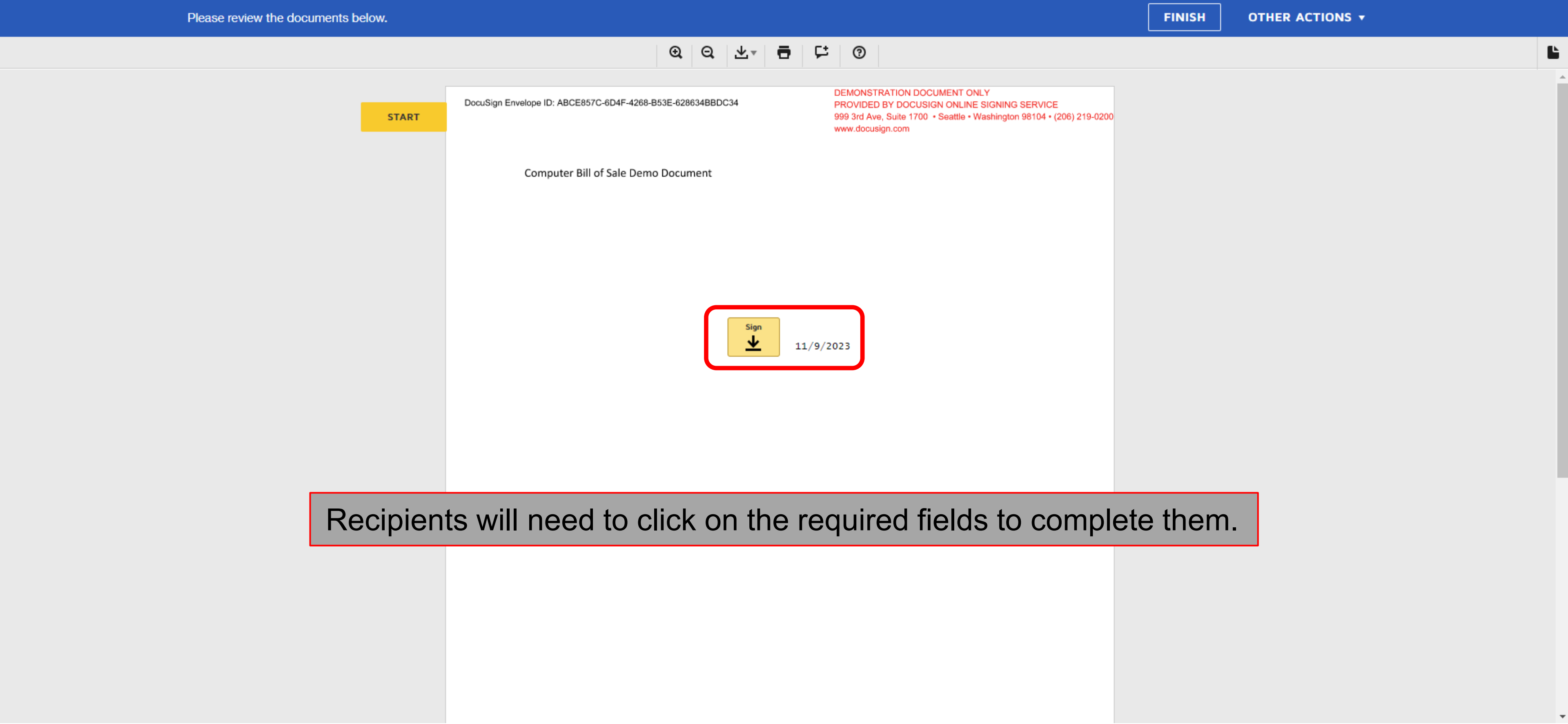
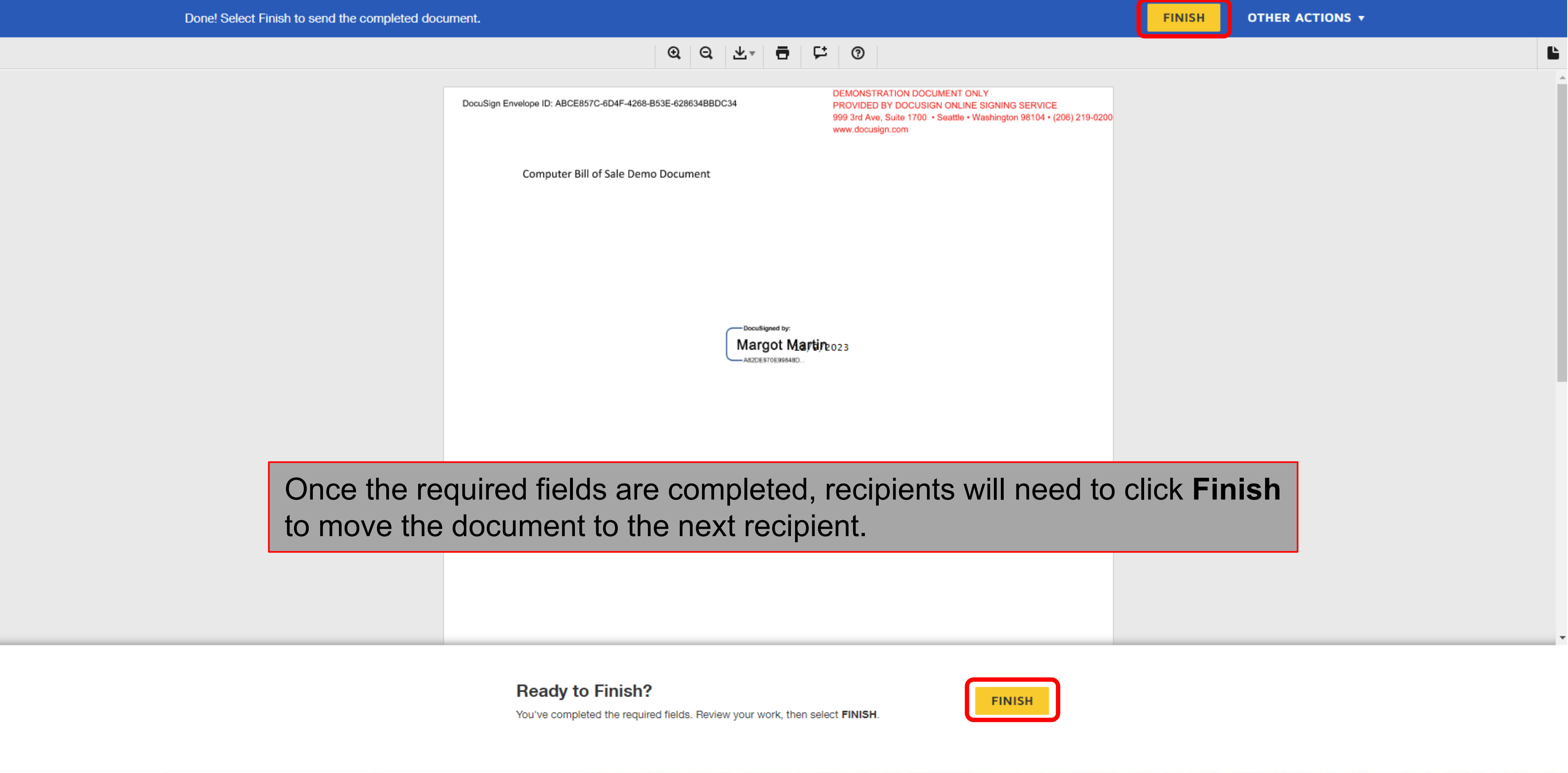


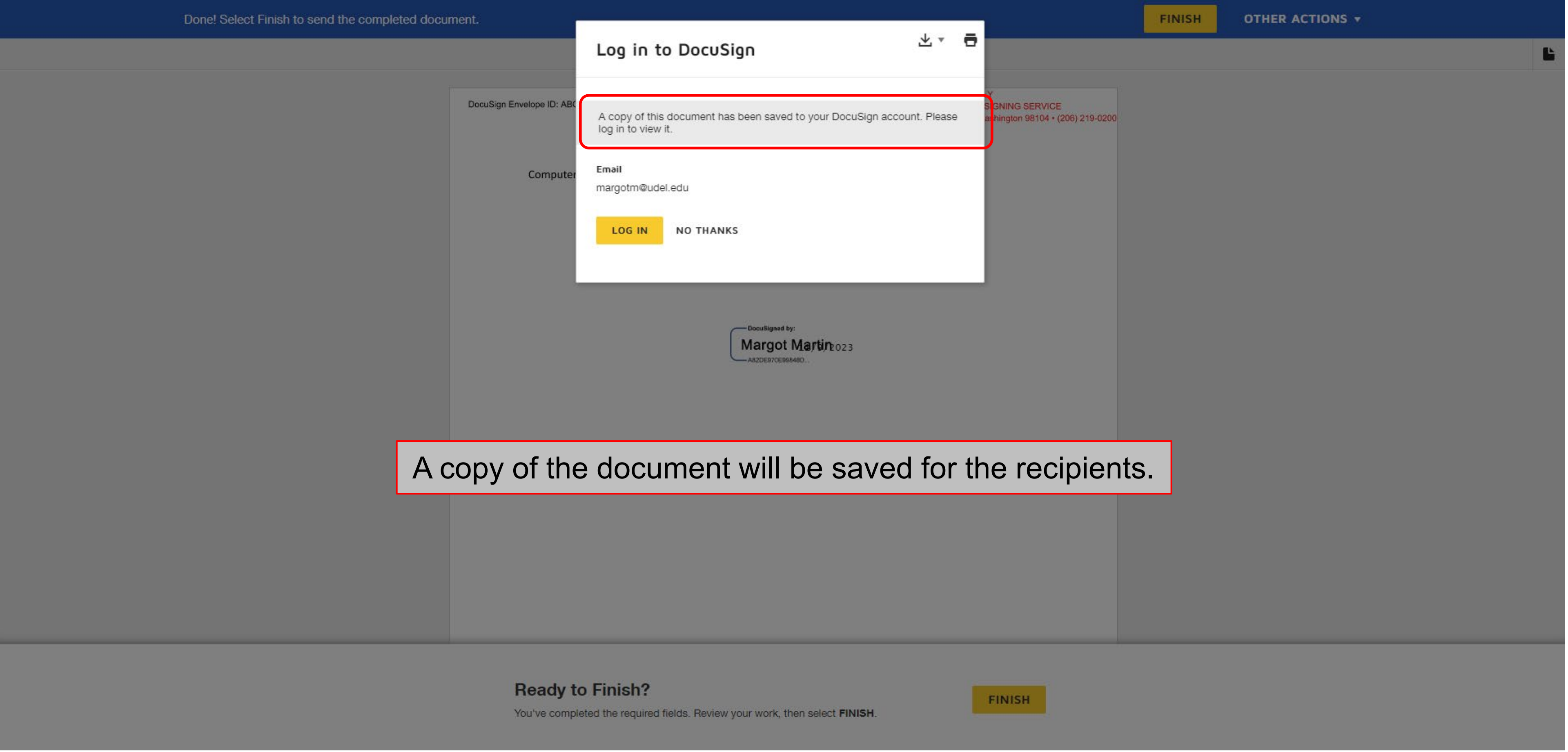
If they are ready to apply their electronic signature, they can click **Continue**.



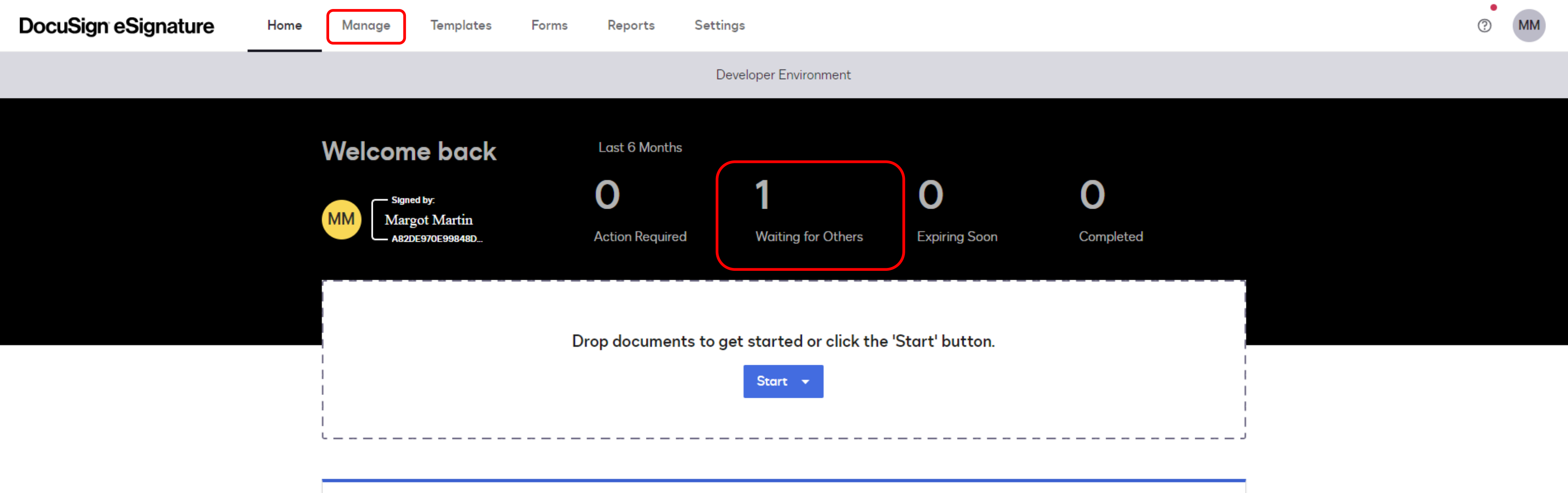
Recipients will need to click on the required fields to complete them.



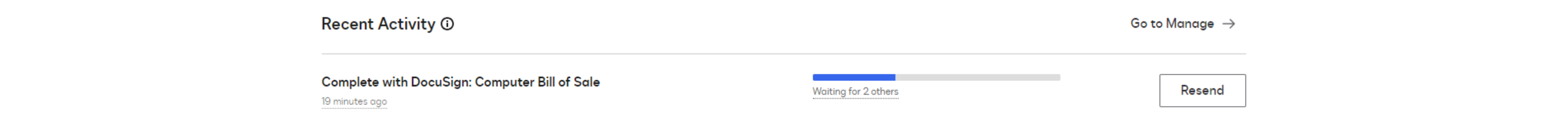
Once the required fields are completed, recipients will need to click **Finish** to move the document to the next recipient.

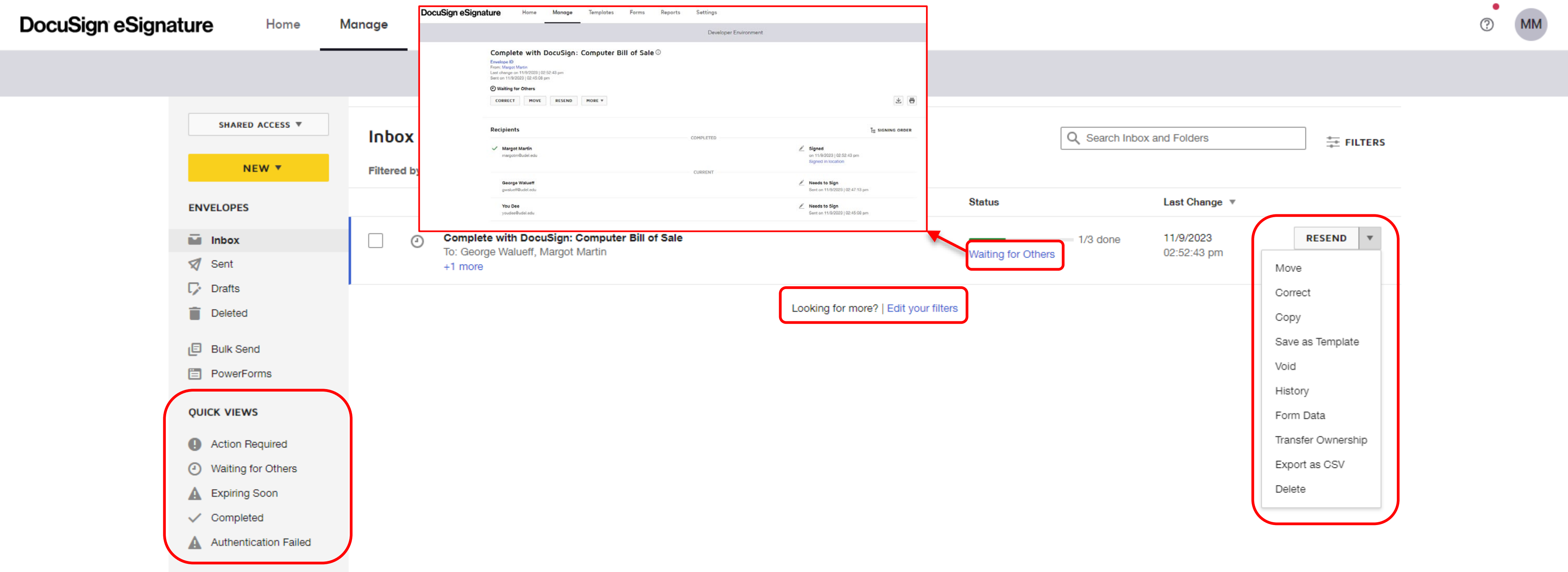


A copy of the document will be saved for the recipients.



The dashboard on the DocuSign Home displays the status of all your envelopes. You can click on one of the status options or on the Manage tab to view details.





On the **Manage** page you can select from options on the **Actions** menu as well as see additional linked details on each listed document.

The **Manage** page also offers pre-set **Quick Views** in the left-hand sidebar and options for additional **filters** in the document listing.

Once fully executed by all parties, you and all recipients will receive a copy of the executed document as well as a notification email.

Assigning DocuSign to Someone Else

Test DocumentComplete with DocuSign: Computer Bill of Sale

DD

DocuSign Demo System <dse_demo@docusign.net>

To McCabe, Margot

Reply | Reply All | Forward

Thu 11/9/2023 2:47 PM

If there are problems with how this message is displayed, click here to view it in a web browser.

This document is for demonstration purpose only.

DocuSign

Margot Martin sent you a document to review and sign.

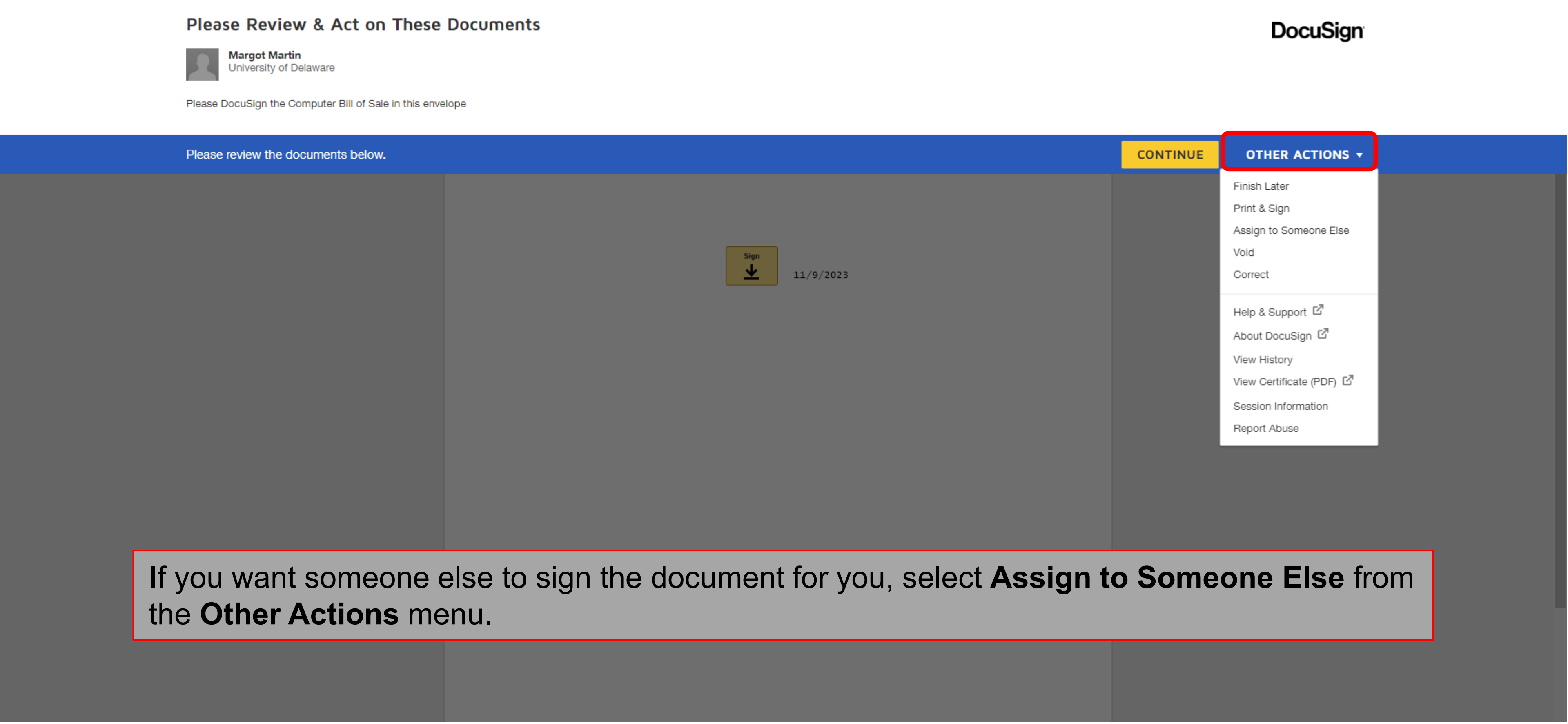
REVIEW DOCUMENT

Margot Martin
margotm@udel.edu

Please DocuSign the Computer Bill of Sale in this envelope

Do Not Share This Email
This email contains a secure link to DocuSign. Please do not share this email, link, or access code

You may receive an email notification asking you to review a document. Click **Review Document**.



If you want someone else to sign the document for you, select **Assign to Someone Else** from the **Other Actions** menu.

Assign to Someone Else

* Required

Email Address for the New Signer *

janedoe@udel.edu

New Signer's Name *

Jane Doe

Please provide a reason for changing signing responsibility

Jane Doe is my POA

232 characters remaining

Selecting the Assign to Someone Else button will send a notification to the person to whom you assigned this envelope. The original sender will also receive a notification. You will be added as a Carbon Copy (CC) recipient.

ASSIGN TO SOMEONE ELSE

CANCEL

Fill in the **email address** and **name** of the recipient who should sign and a brief **reason** for changing signing responsibility.

Click **Assign to Someone Else**.

Once you select **Assign to Someone Else**, a notification will be sent to the new recipient.

The original sender will also receive a notification.

You will be added as a Carbon Copy (CC) recipient.

Upon the document garnering all signatures, you will receive another email with the fully executed version.

Questions:

- procurement@udel.edu

Resources:

- Procurement Service Website
- DocuSign University