How do I create/send a DocuSign document?

There are 2 ways to send a document to recipients for signing. The first involves uploading a document to DocuSign for one-time use. This would be useful if you just need a few recipients to sign a specific document. The second involves uploading a document and creating an envelope in DocuSign to be used as a template. You would use the second way if you need to send the same document multiple times to different, unrelated recipients. Even though the second way involves a template, it is still not an enterprise solution. More information about ad hoc vs. enterprise solutions can be found on DoIT’s DocuSign page and here.

Show Me

Sending a Document for One-Time Use

Video: 04:00

Creating and Sending a Template for Reuse

Video: 04:17

Tell Me

Sending a Document for One-Time Use

1. Log in to DocuSign.
2. Navigate to the Manage tab, which can be found at the top of the page.
3. Click the black New button at the top of the gray menu on the left side of the page.
   a. If you don’t see this button, it means that you are a viewer and do not have the ability to create documents. To change your status as a viewer, submit an RT ticket requesting an upgrade to a Sender role.
4. Select Send an Envelope.
5. Upload a document to be signed to the envelope by selecting Upload in the square at the top of the page. You can only upload PDFs to DocuSign, so you may need to reformat the file you want to upload.
6. Once you have uploaded a document, fill in the name and email of the first recipient under Add Recipients to the Envelope.
7. Specify what that recipient needs to do in relation to the document for it to be considered complete. Do this by selecting what action you would like recipients to perform in the drop-down menu that is labeled NEEDS TO SIGN by default.
   a. A description of all possible recipient actions can be found under Options for Recipients in the Workflow in the wiki.
8. You can add more recipients by selecting the Add Recipient button under the box containing the name and email of the first recipient. Remember to specify actions for all added recipients.
9. The More drop-down allows you to add access authentication and a private message to recipients.
10. To set the signing order of recipients, you can either drag the boxes with their information into the correct order or check the Set signing order box. If you check the box, edit the numbers corresponding to the recipient information boxes to reflect the signing order you want.
11. Scroll to the bottom of the page and specify what you want the subject of the email to recipients containing the document to be.
a. Add a message to recipients if desired. An in-depth description of how to do this can be found in the How do I add Messages to the Email wiki.

12. Editing Advanced Options allows you to do things like changing recipient's abilities, setting when to remind recipients of your envelope, and to setting when the envelope expires.

13. Click Next which can be found in both the top and bottom right-hand corner of the page.

14. Add any fields you would like to be on the document. An in-depth description of how to do this can be found on the How do I add fields to a document in DocuSign? wiki.

15. Review that everything in the envelope is how you would like it to be by clicking Back in the right-hand corner at the bottom of the page.

16. Once everything is complete, click Send.

Creating and Sending a Template for Reuse

1. Log in to DocuSign.

2. Navigate to the Templates tab, which can be found at the top of the page.

3. Click the black New button at the top of the gray menu on the left side of the page.
   a. If you don't see this button, it means that you are a viewer and do not have the ability to create documents. To change your status as a viewer, submit an RT ticket requesting an upgrade to a Sender role.

4. Select Create Template.

5. Upload a document to be signed to the envelope by selecting Upload in the square at the top of the page. You can only upload PDFs to DocuSign, so you may need to reformat the file you want to upload.

6. Once you have uploaded a document, decide what you want the role of the first recipients of this document to be called.
   a. You are creating roles to serve as placeholders in the template until you add the actual information of recipients.

7. Specify what that role needs to do in relation to the document for it to be considered complete. Do this by selecting what action you would like recipients to perform in the drop-down menu that is labeled NEEDS TO SIGN by default.
   a. A description of all possible recipient actions can be found under Options for Recipients in the Workflow in the wiki.

8. You can add more roles by selecting the Add Recipient button under the box containing the name and email of the first recipient. Remember to specify actions for all added roles.

9. The More drop-down allows you to add access authentication and a private message to recipients.

10. To set the signing order of roles, you can either drag the boxes with their information into the correct order or check the Set signing order box. If you check the box, edit the numbers corresponding to the recipient information boxes to reflect the signing order you want.

11. Scroll to the bottom of the page and specify what you want the subject of the email to recipients containing the document to be.
   a. Add a message to recipients if desired. An in-depth description of how to do this can be found in the How do I add Messages to the email? wiki.

12. Editing Advanced Options allows you to do things like changing recipient's abilities, setting when to remind recipients of your envelope, and to setting when the envelope expires.

13. Click Next which can be found in both the top and bottom right-hand corner of the page.

14. Add any fields you would like to be on the document. An in-depth description of how to do this can be found on the How do I add fields to a document in DocuSign? wiki.

15. Review that everything in the envelope is how you would like it to be by clicking Back in the right-hand corner at the bottom of the page.

16. Once everything is complete, click Save and Close.

17. Back on the Templates main screen, click the gray Use button that corresponds to the template you would like to send.

18. Fill in the recipients' names and emails in their respective roles.

19. Review everything in that window is correct and select the gray Send Button.

20. To send that document again, just follow steps 16-18 in this section.