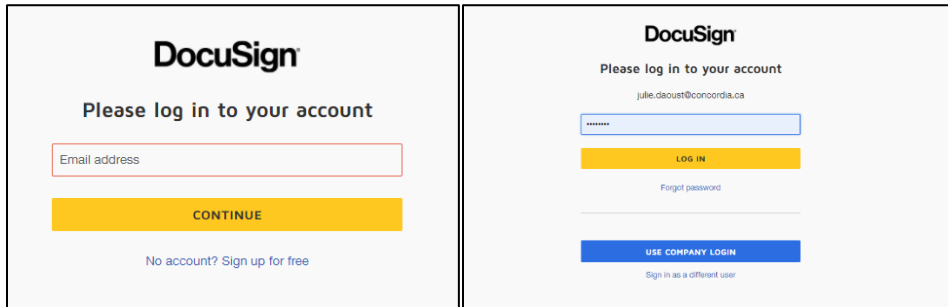


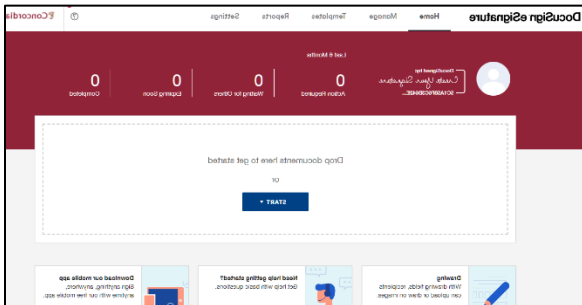
DocuSign User Guide

Get to DocuSign

Open your favorite Web browser. In the address bar, type account.docusign.com, to open the DocuSign dashboard. Sign-in with your Concordia email address and click **Continue**. A second window will appear. Enter your Concordia password and click **Log In**.

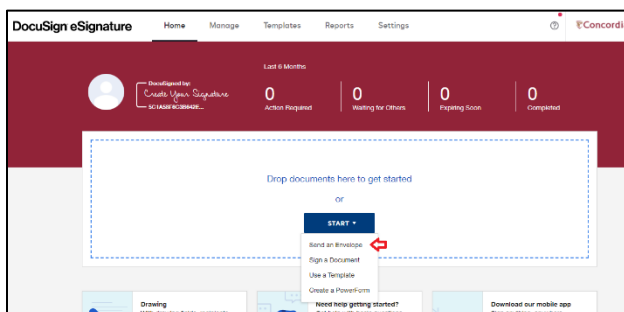


You are now in DocuSign!



Send a document for signature

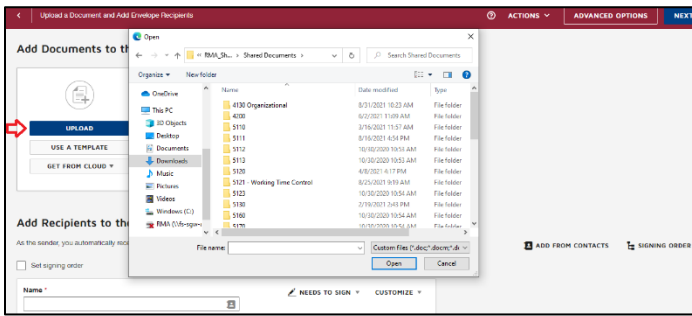
A signature project is called an *envelope* in DocuSign. To send a document to be signed, click on **Start** and select **Send an Envelope**.



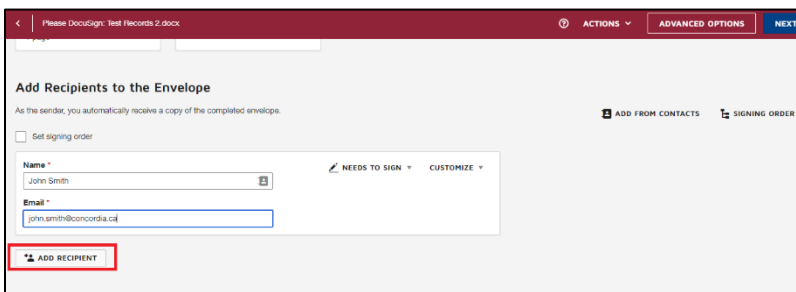
Contact RMA:

Configure sending

Upload the document for signature by clicking on **Upload** or **Upload from the Cloud** for documents stored on OneDrive. Navigate to select your file.

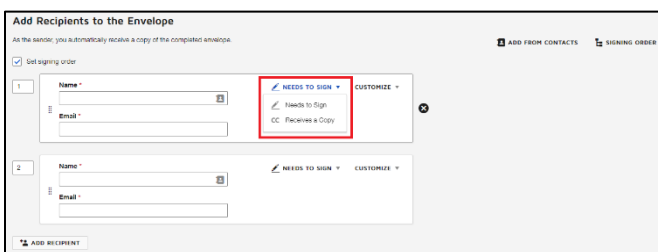


Identify the signatory(ies) for the document in the **Add Recipients to the Envelope** section. (a signatory is a named recipient in DocuSign) As sender, you will automatically receive a copy of the document. Identify the name and email of each recipient. Add recipients by clicking **Add Recipient**.



Select the actions to be taken by the recipient:

- **Needs to sign:** recipient must complete the required, assigned fields i.e. signature, initial, and date.
- **Receives a Copy:** recipient receives a copy with no further action required.



This is strongly recommended to add a privacy setting by adding a password to protect confidentiality of information.

Contact RMA:

To have recipients sign in a specific order, select **Set signing order**.

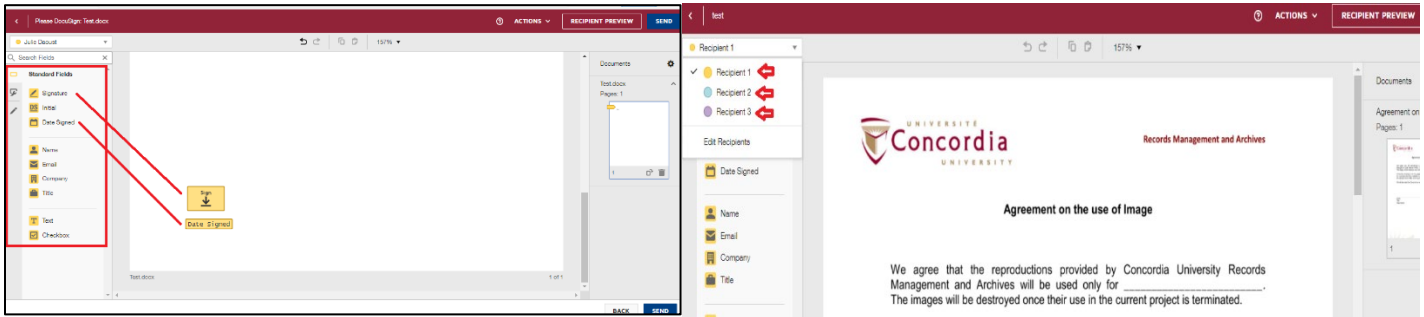
Set an optional message to be sent to recipients. Add a subject and type a message.

Customize individual messages by selecting **Custom email and language for each recipient**.

Click **Next**. An insert signature field will open. Drag and drop the required information: signature, date, title, name for each recipient.

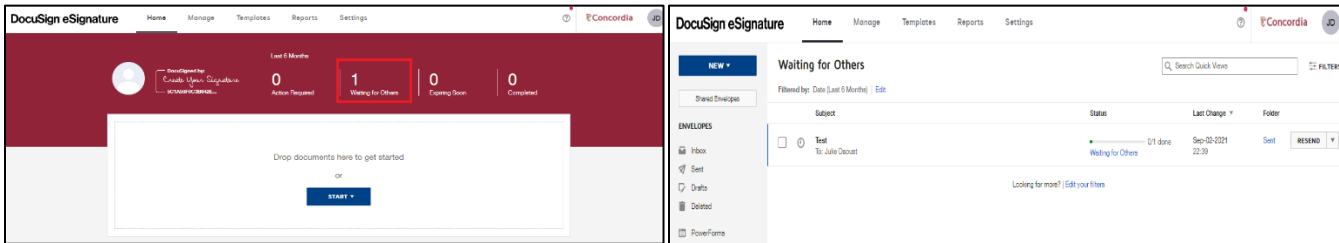
Contact RMA:

More information on setting signature fields can be found in the following video:
<https://support.docusign.com/en/videos/New-Docusign-Experience-Sending-Documents>



You are now ready to send your document for signature. Click **Send**.

To verify the status of your envelope, access the Home page and click on **Waiting for Others**.



Note: signed documents are kept 30 days in DocuSign. Signed files are considered confidential and official and should be saved in CONDOR, or another secure repository.

Contact RMA:

<https://cspace.concordia.ca/offices/archives.html> | records.management@concordia.ca | 514 848-2424 x7775