

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**.

DocuSign		DocuSign Please log in to your account
Please log in to your account		
CONTINUE		LOG IN Forgot password
No account? Sign up for free		USE COMPANY LOGIN Sign in as a offerent user

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**.

DocuSign eSignatu	e Home	Manage	Templates	Reports	Settings		Ø	€Concordia
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	Drawing With drawing field	, recipients		Need help getting Get help with basic	started?	7	Download our mobile ap	,

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.

 Upload a Document and Add 	Envelope Recipients		0	ACTIONS Y	ADVANCED OPT	IONS NEXT
	C Open	×				
Add Documents to th	← → × ↑ 🧧 « RML_Sh > Shared Documents >	✓ ð				
	Organize + New folder	💷 • 💷 👔				
	OneDrive Name	Date modified Type				
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USE A TEMPLATE	Documents 5112	10/30/2020 10:53 AM File felder				
GET FROM CLOUD *	Downloads 5113	10/30/2020 10:53 AM File folder				
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Add Recipients to the	RMA (\\fs-sgu+) 5160	10/30/2020 10:54 AM File felder				
As the sender, you automatically rece	v < Finance	v Custom Elex Pulsent dormit de vi		ADD FRO	M CONTACTS	SIGNING ORDER
Set signing order		Open Cancel		-		-
Name *	NEEDS T	o sign v Customize v				
	8					

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.

Please DocuSign: Test Records 2.docx		⑦ ACTIONS ~	
Add Recipients to the Envelope			
As the sender, you automatically receive a copy of the completed envelope.		ADD FR	OM CONTACTS
Set signing order			
Name *	🖉 NEEDS TO SIGN 🔻 CUSTOMIZE 🔻		
John Smith			
Email *			
john.smith@concordia.ca			
ADD RECIPIENT			

Select the actions to be taken by the recipient:

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

Add Recipients to the Envelope			
As the sender, you automatically receive a copy of the completed envelope.		ADD FROM CONTACTS	SIGNING ORDER
O det synny odor None * Enda* Enda*	KEEDS TO SIGN + CUSTOMIZE + Meeds to Sign CC Receives a Copy	0	
2 Name * 20 Email *	Ź NEEDS TO SIGN ♥ CUSTOMIZE ♥		
책 ADD RECIPIENT			

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

Contact RMA:

ne sender	r, you automatically receive a copy of the completed en	velope	ADD FROM CONTACTS	SIGNING ORDE
	Name "	KEES TO SIGN - CUSTORIZ - Add access cost Cost and beta rely on and the receiver from Cost and beta rely on and the receiver from Cost and and cost are the rely pencies accesses the endinge.		
	Name "	Aud private interession Include a personal note with this respirer.		

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

Add F	Recipients to the Envelope			
As the se	nder, you automatically receive a copy of the completed envelope.		ADD FROM CONTACTS	SIGNING ORDER
Set :	signing order			
1	Name *	Ź NEEDS TO SIGN ▼ CUSTOMIZE ▼	Ø	
2	Name *	Ź NEEDS TO SIGN ▼ CUSTOMIZE ▼		
* 1 AD	D RECIPIENT			

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

Message to All Recipients Custom email and language for each recipient		
Email Subject * Please DocuSign:	□	
Characters remaining: 100 Email Message		
Enter Message	\$	
Characters remaining: 10000	60	
	SEND NOW N	хт

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

C Upload a Document and Add Envelope Recipients	
Message to All Recipients	
Custom email and language for each recipient	
To:	
Email Language *	
English (US)	
Email Subject *	
Please DocuSign:	
Characters remaining: 100	
Email Message	
Enter Message	
Characters remaining: 10000	
To:	
Emel Language *	
English (US)	
Email Subject *	

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.

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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.