

Mastering DocuSign

User Guide

March 2025

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Overview

DocuSign is a secure platform that lets you sign, send, and manage documents electronically.

Benefits of DocuSign:

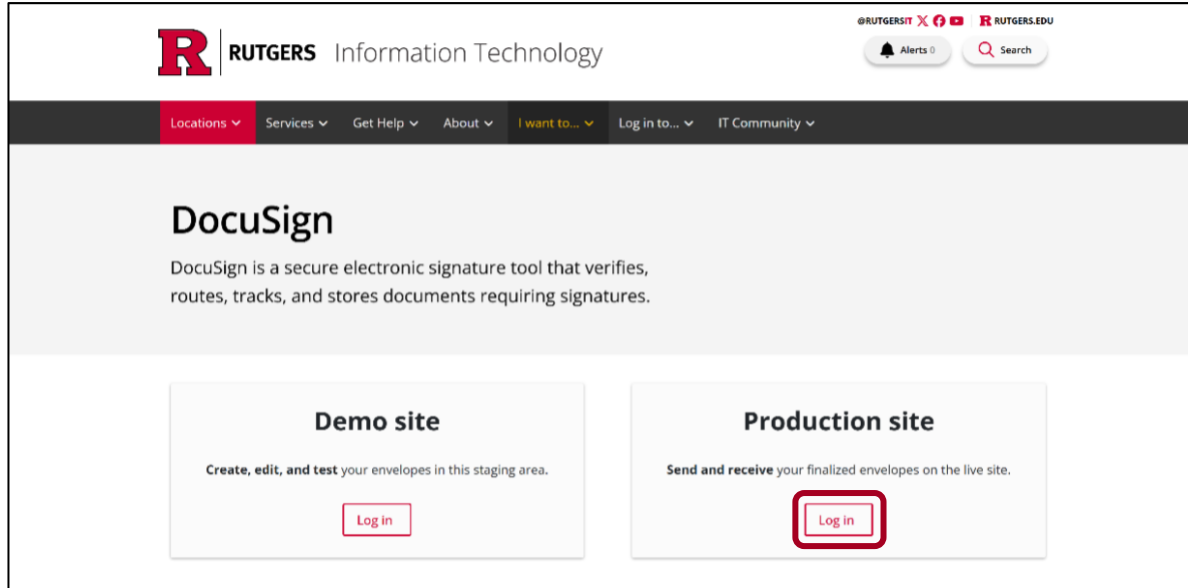
- Digital signatures are simple and seamless.
- Signatures are digitally encrypted, keeping documents safe and secure.
- Workflows are automated, eliminating printing and scanning.
- DocuSign signatures are legally recognized and binding in most places.
- DocuSign interfaces well with other tools, such as Microsoft Office or Google Drive.

In this guide, you will learn how to

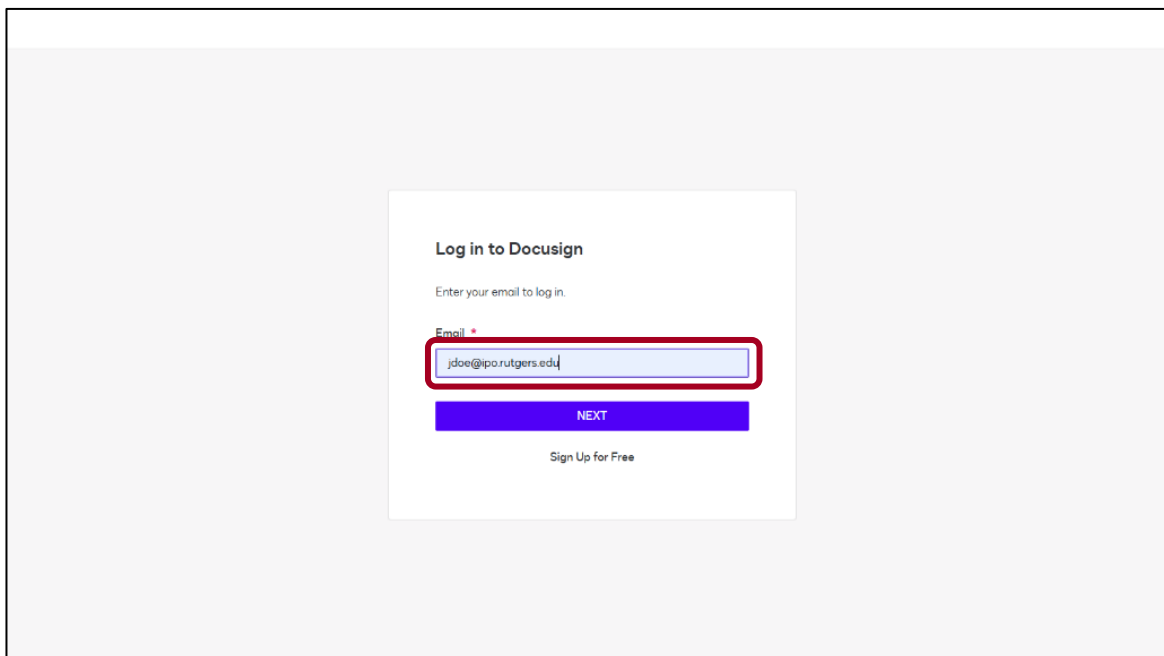
- Create a digital signature
- Sign documents with DocuSign
- Set up an envelope for signatures

Login to DocuSign

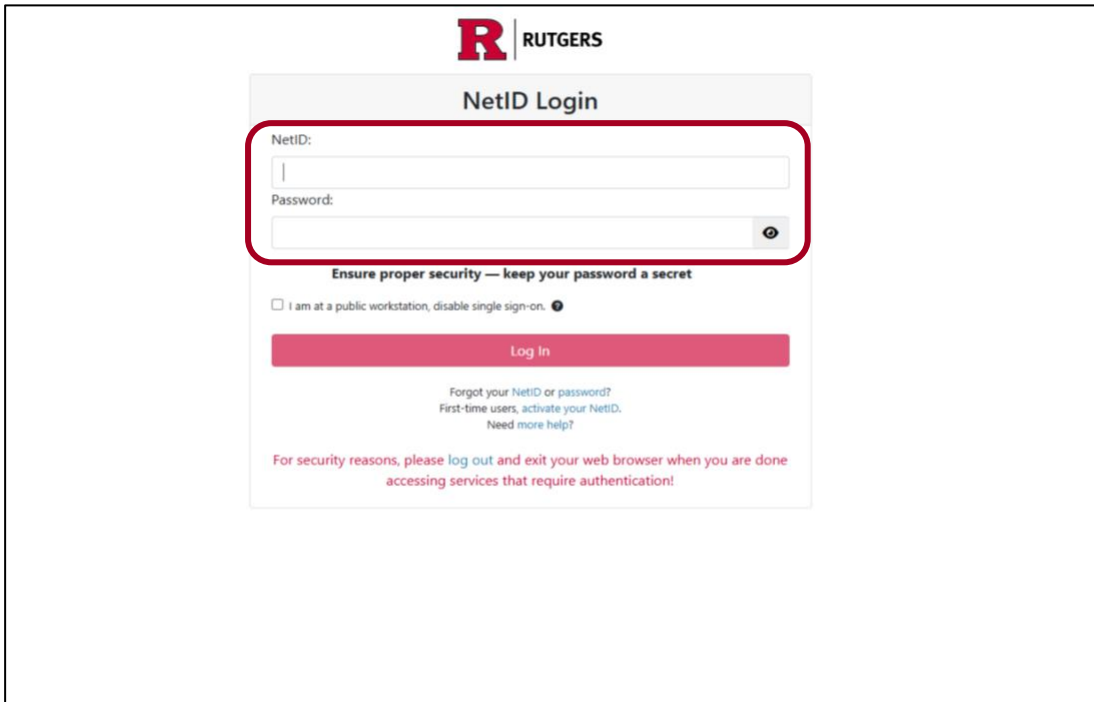
1. The link for Rutgers DocuSign is <https://it.rutgers.edu/docusign/>. Under **Production site**, click **Log in**.



2. Enter your Rutgers email, then click **Next**.

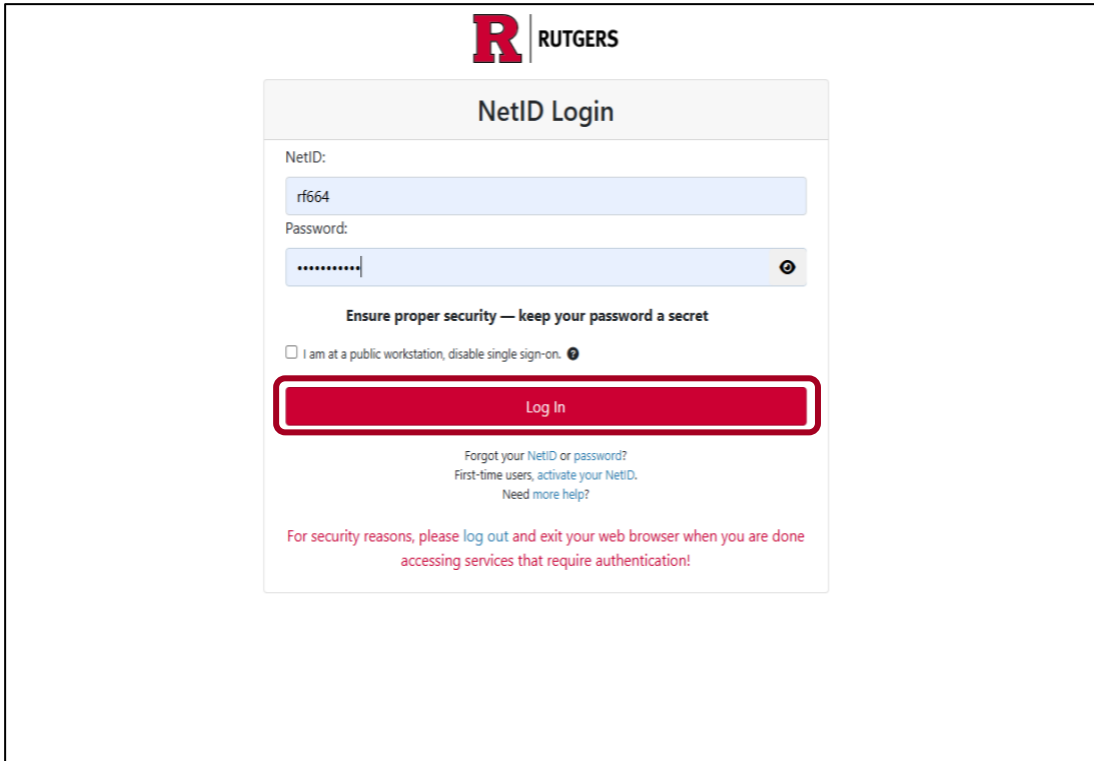


3. Enter your **NetID** and **Password**.



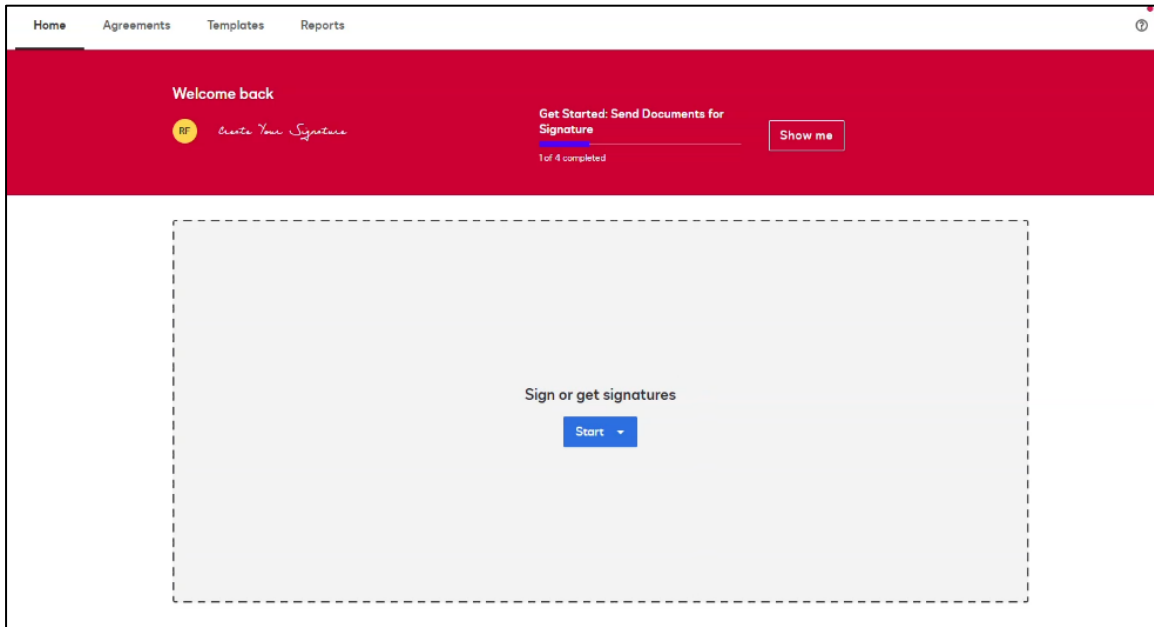
The screenshot shows the Rutgers NetID Login page. At the top is the Rutgers logo. Below it is the title "NetID Login". There are two input fields: "NetID:" and "Password:". The "NetID:" field contains a vertical cursor. The "Password:" field is empty. A red rounded rectangle highlights both input fields. Below the fields is the text "Ensure proper security — keep your password a secret" and a checkbox labeled "I am at a public workstation, disable single sign-on." Below that is a red "Log In" button. At the bottom, there are links for "Forgot your NetID or password?", "First-time users, activate your NetID.", and "Need more help?". A security warning at the very bottom reads: "For security reasons, please log out and exit your web browser when you are done accessing services that require authentication!"

4. Click **Log in**.



This screenshot is identical to the previous one, but the "Log In" button is now highlighted with a red rounded rectangle. The "NetID:" field now contains the text "rf664" and the "Password:" field contains a series of dots. The rest of the page content remains the same.

5. Once logged in, you can create or edit your signature, sign a document that originated in DocuSign, sign a document that didn't originate in DocuSign, or set up an envelope for signing.

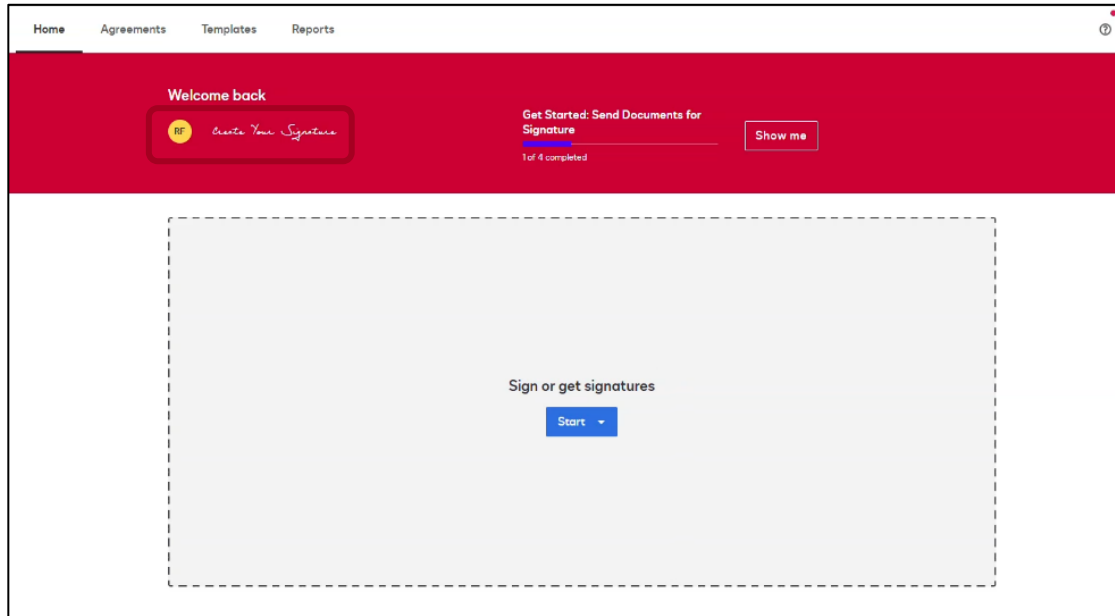


Create your Digital Signature

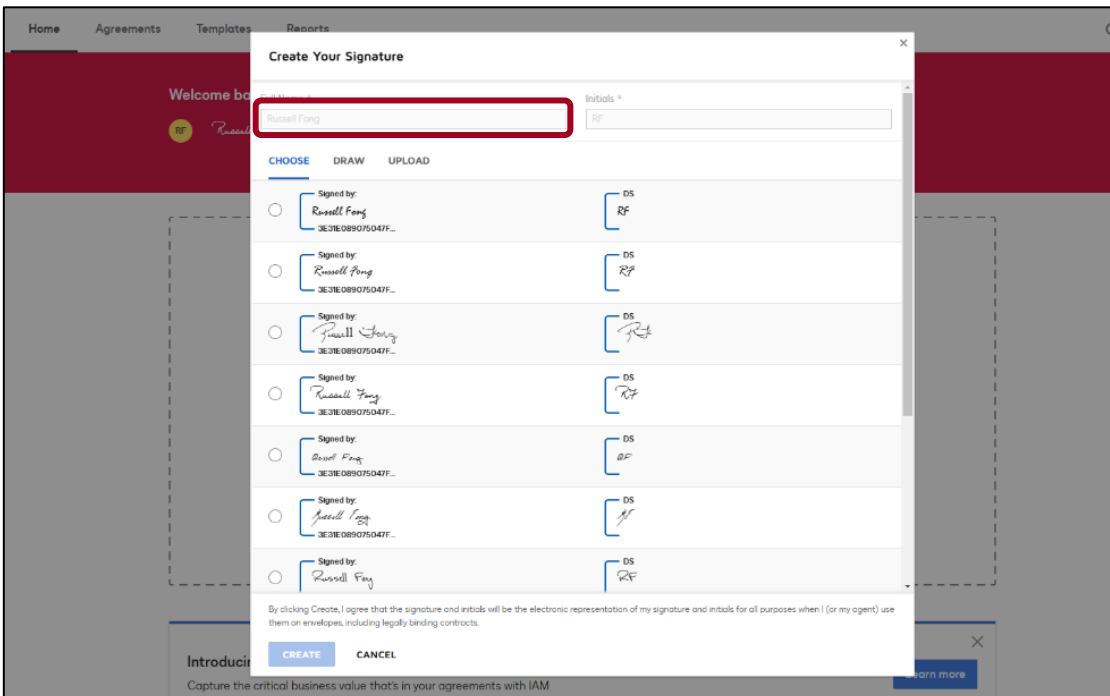
There are three ways to create a signature, **Choose**, **Draw**, and **Upload**.

A. Choose Option

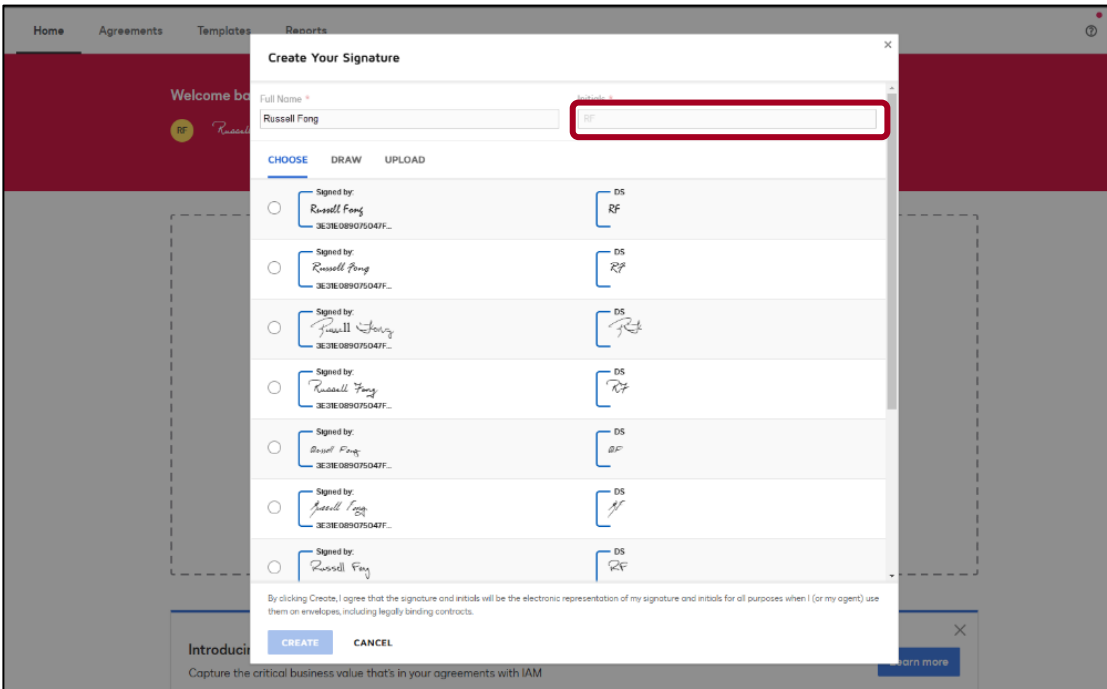
1. Click **Create Your Signature** or your saved signature.



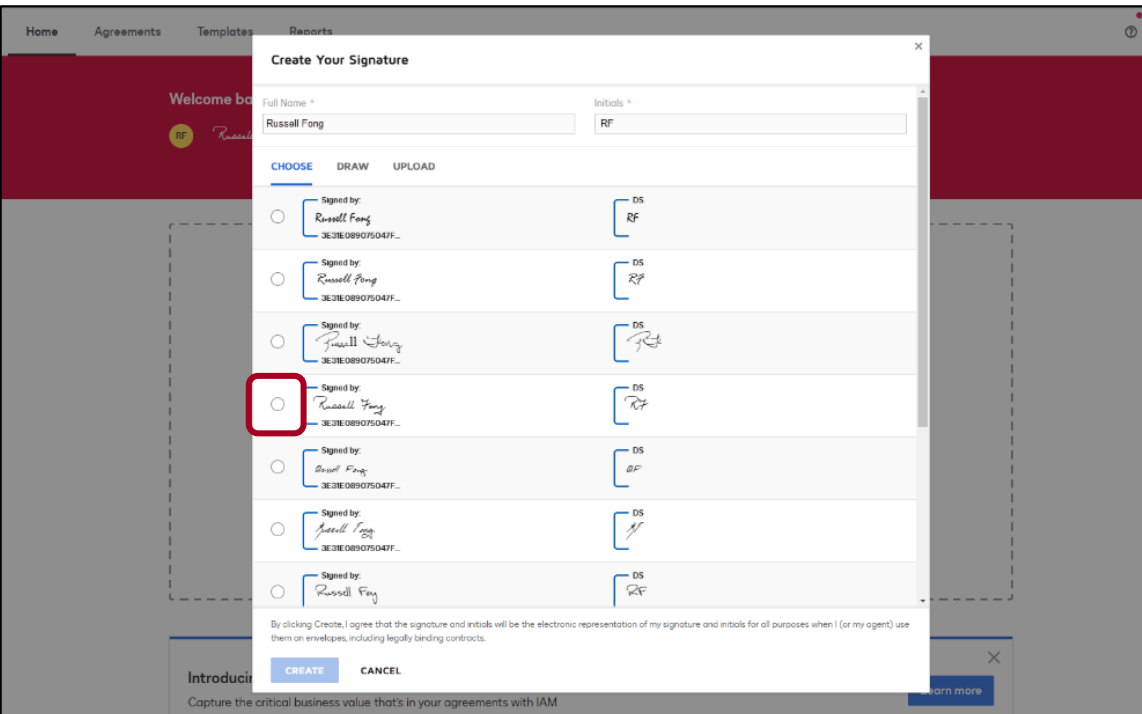
2. Enter your **Full Name**.



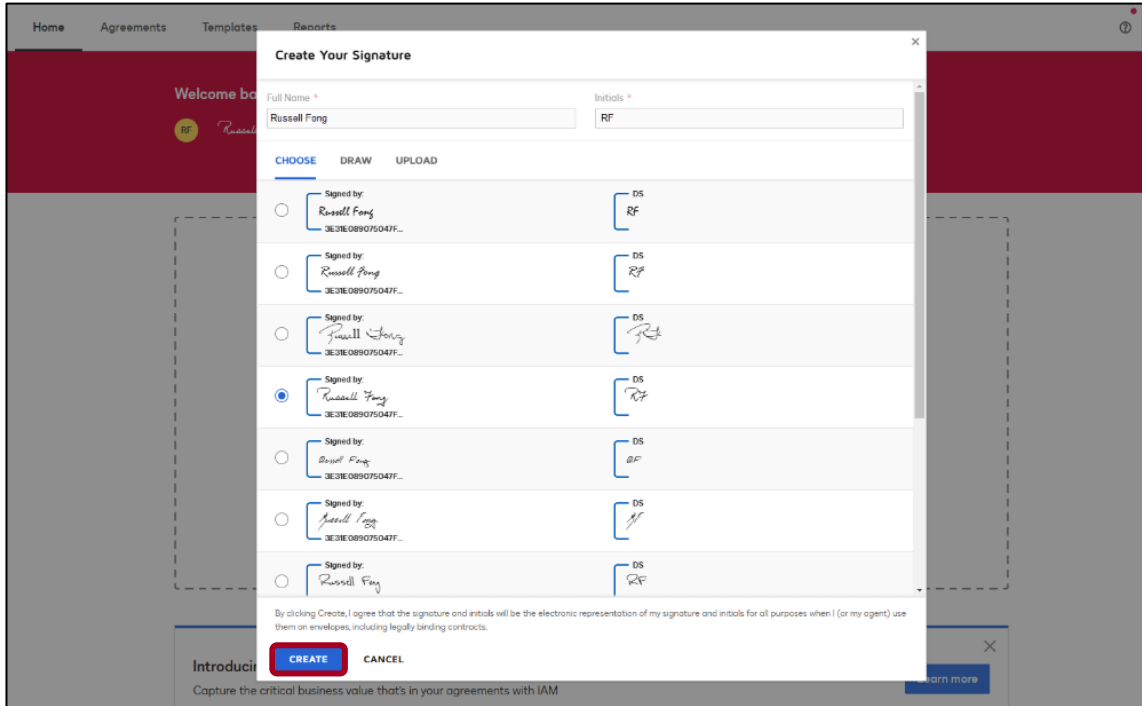
3. Enter your **Initials**.



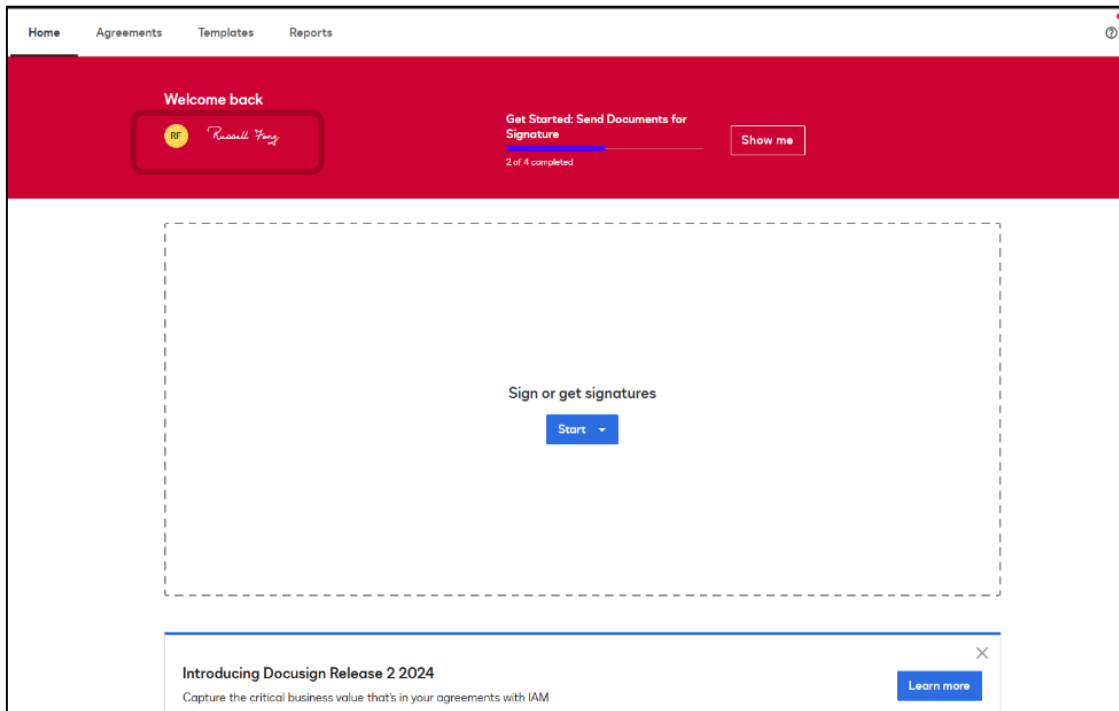
4. Click on the signature you would like to use. In this example, we are using the fourth option.



5. Click **Create**.

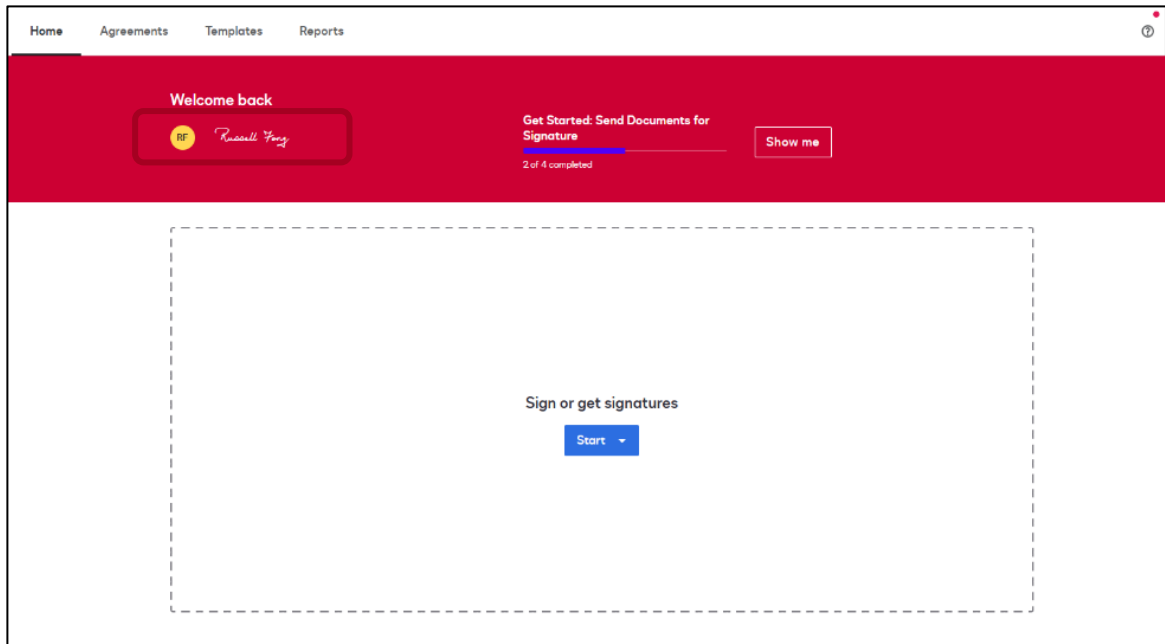


6. The **Create Your Signature** text will turn into the signature style you chose in the previous step.

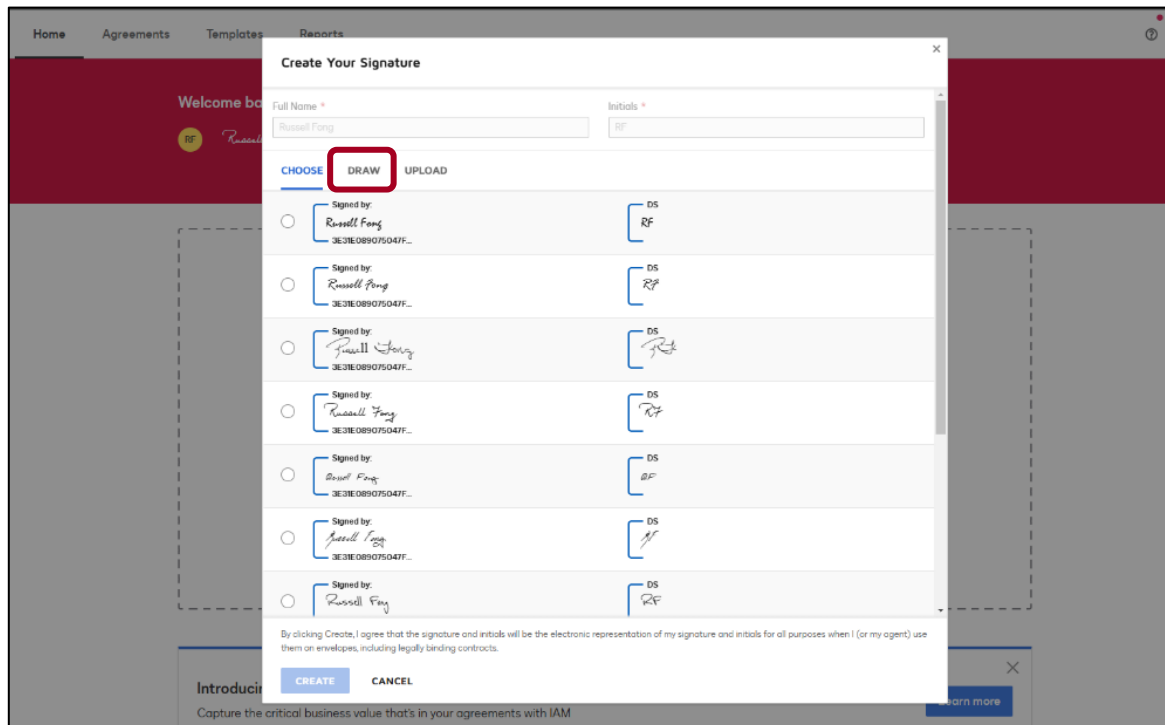


B. Draw Option

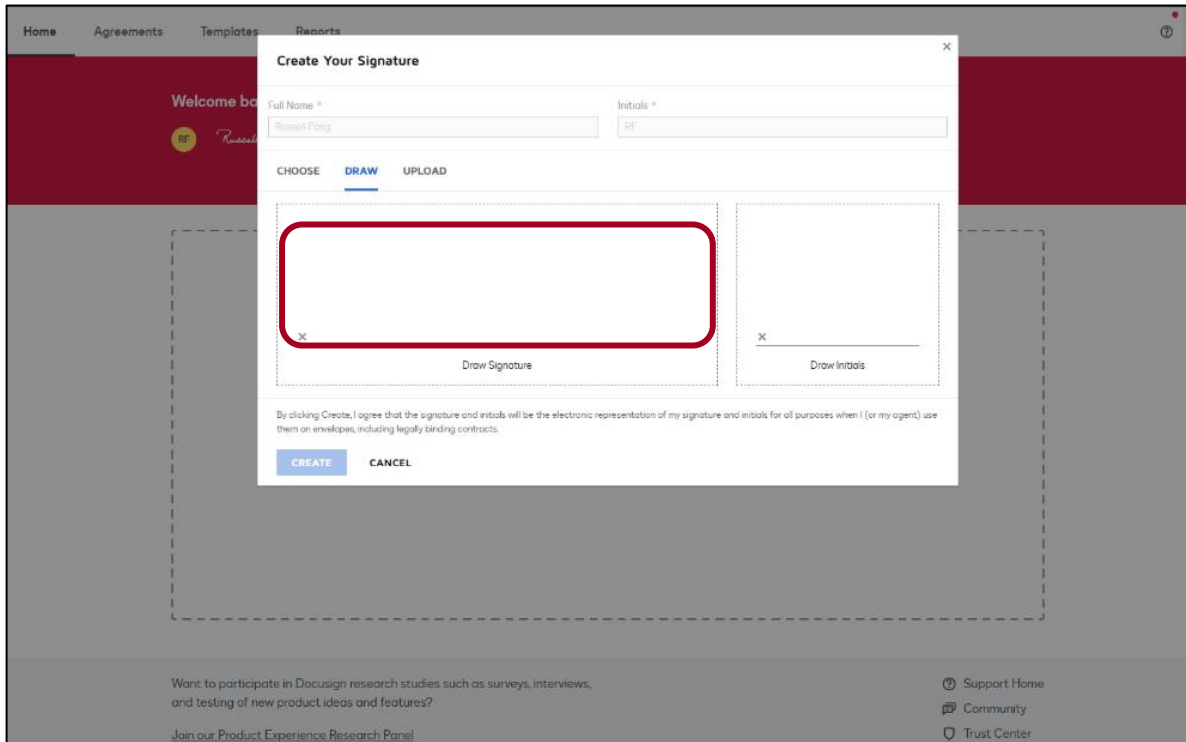
1. Click **Create Your Signature** or your saved signature.



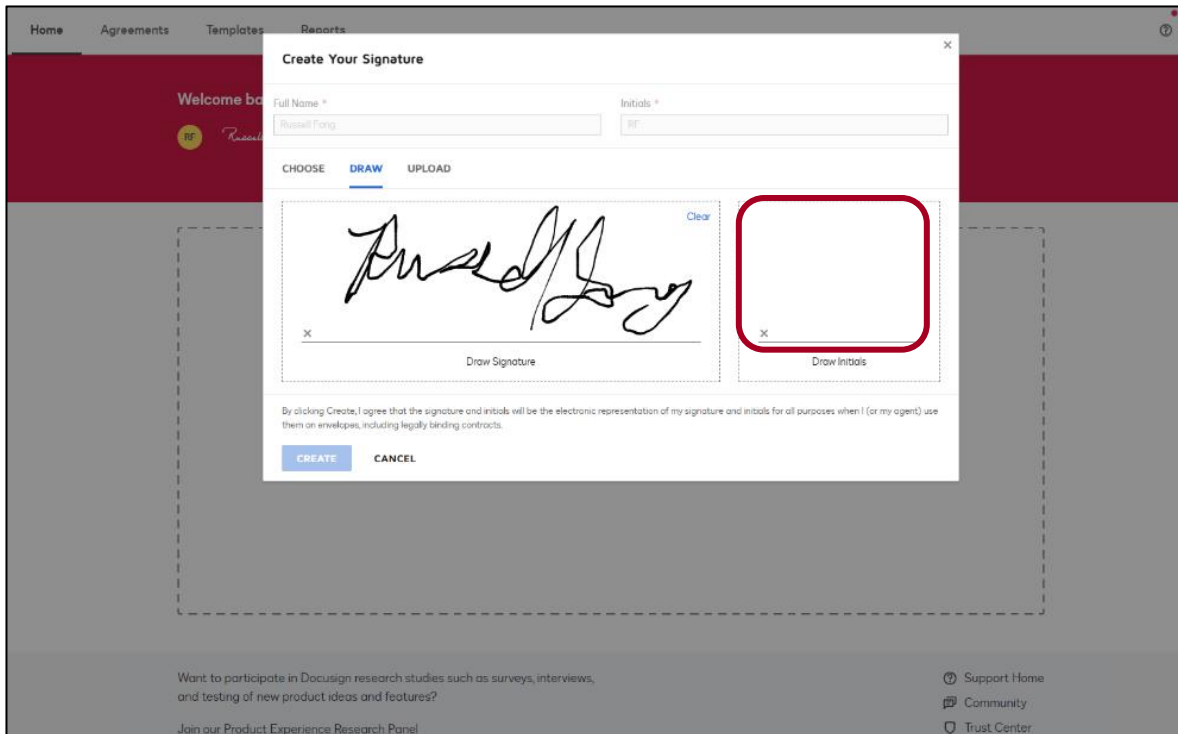
2. Click **Draw**.



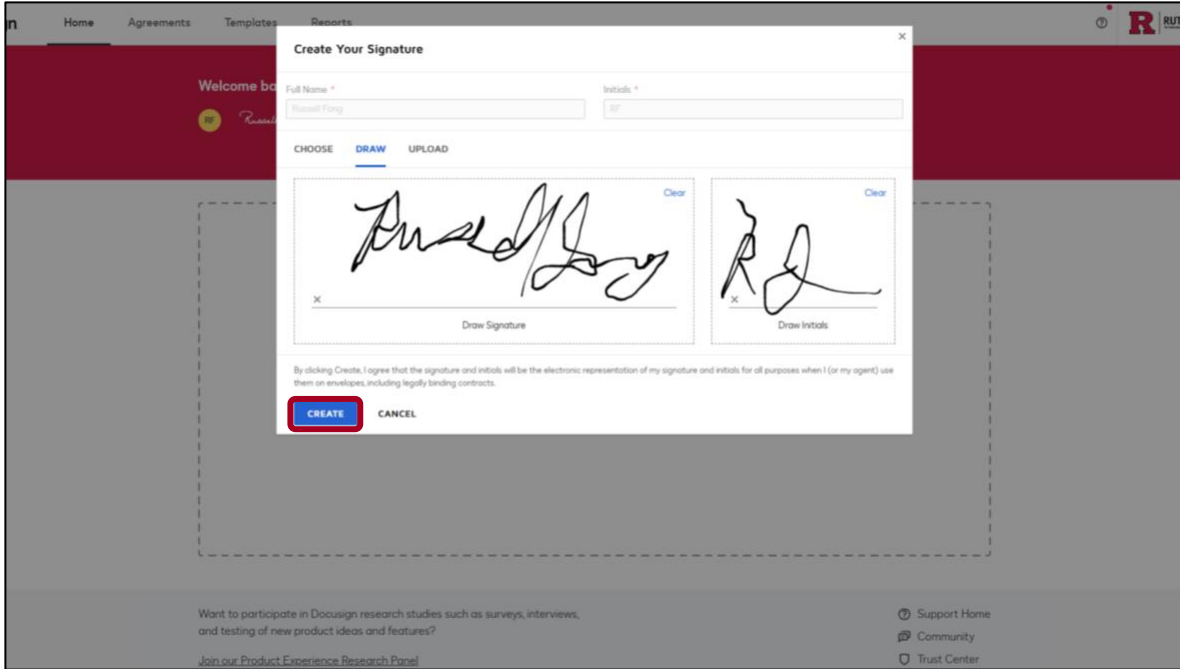
3. Use your mouse or finger to draw your signature.



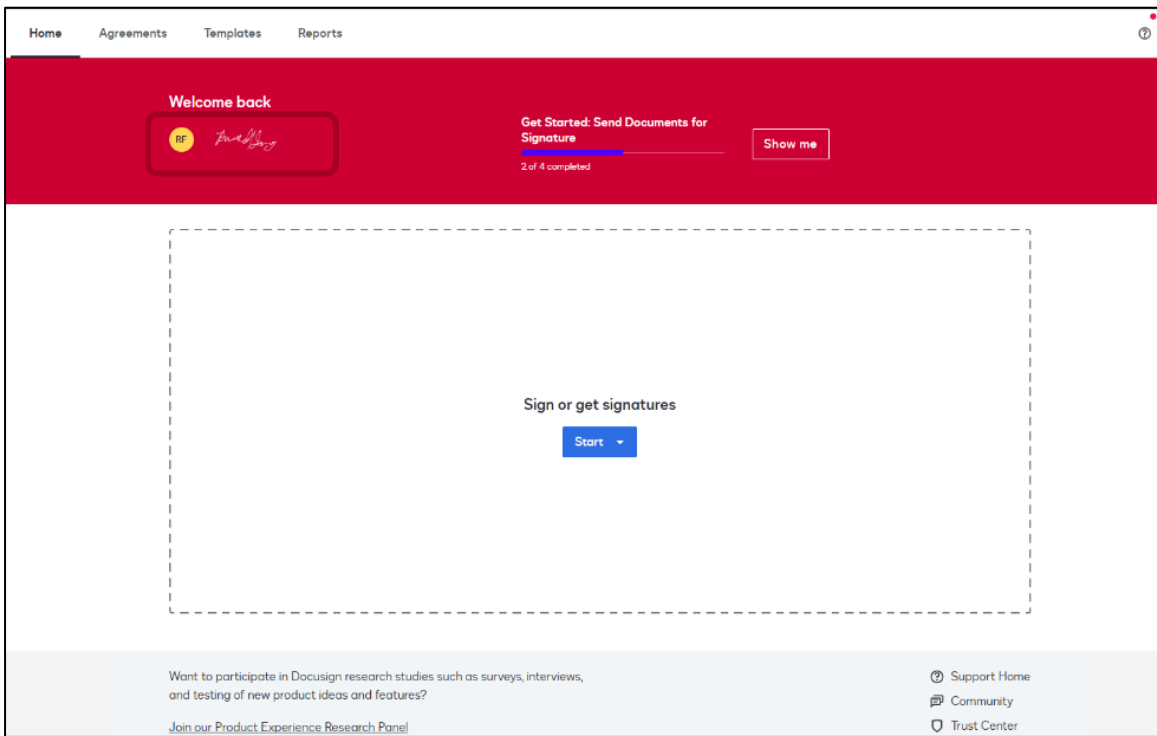
4. Use your mouse or finger to draw your initials.



5. Click **Create**.

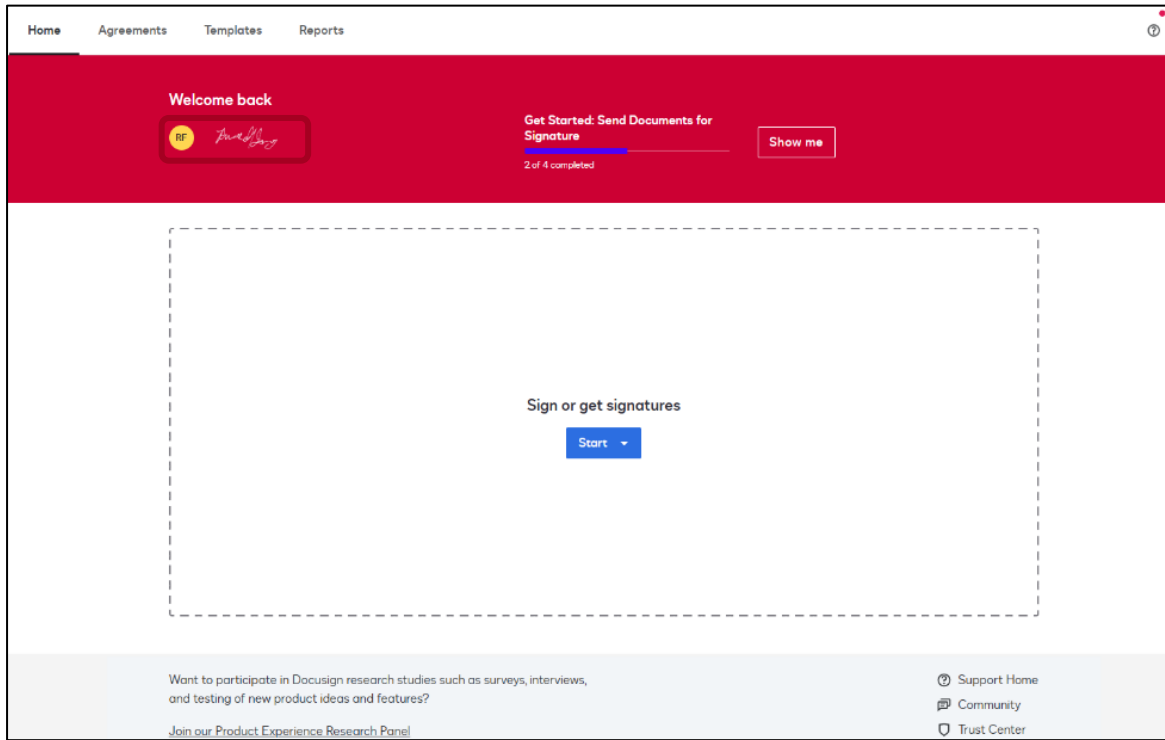


6. Your signature will be updated.

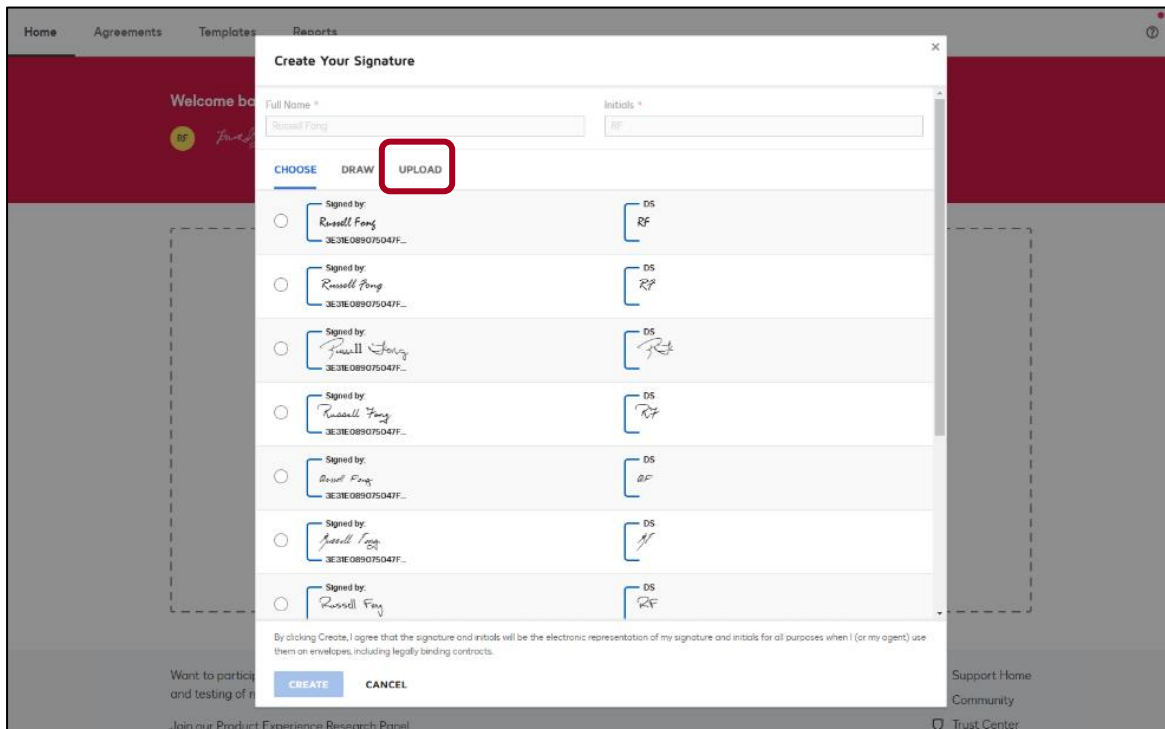


C. Upload Option

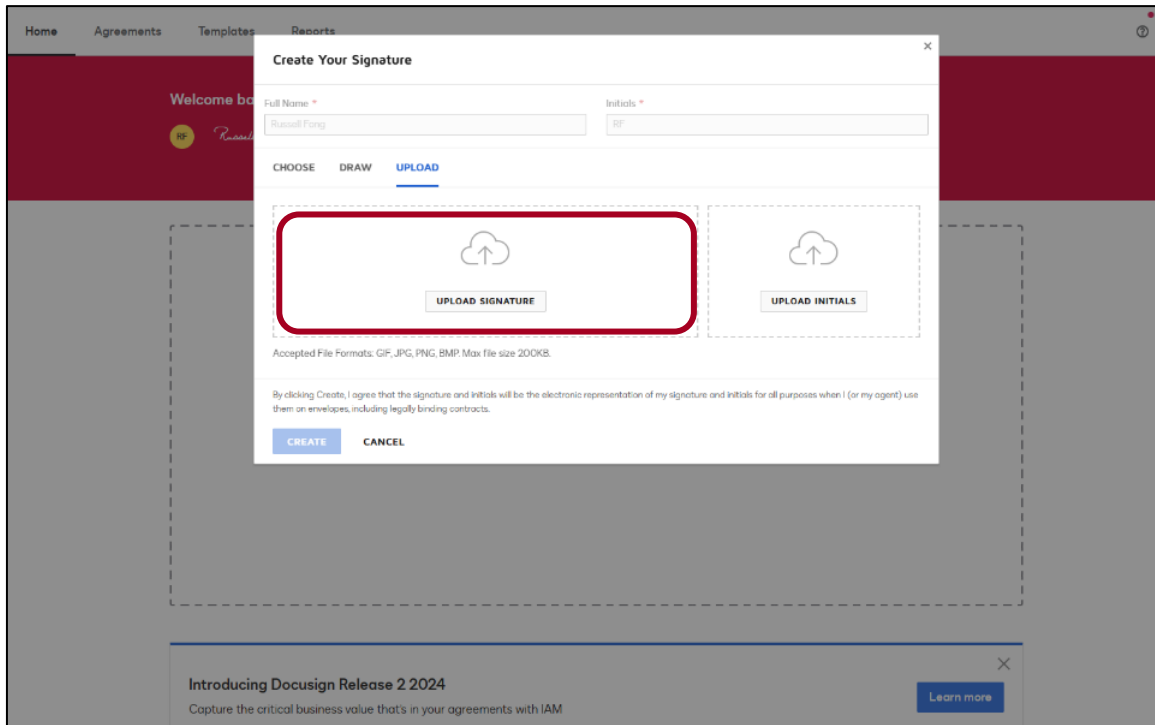
1. Click **Create Your Signature** or your saved signature.



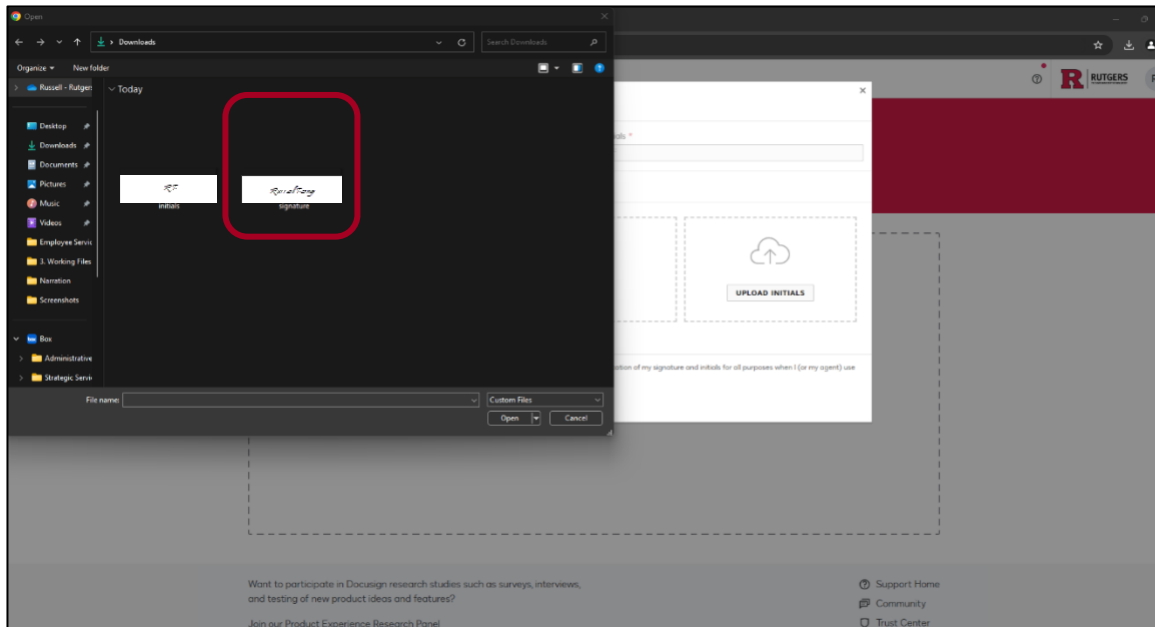
2. Click **Upload**.



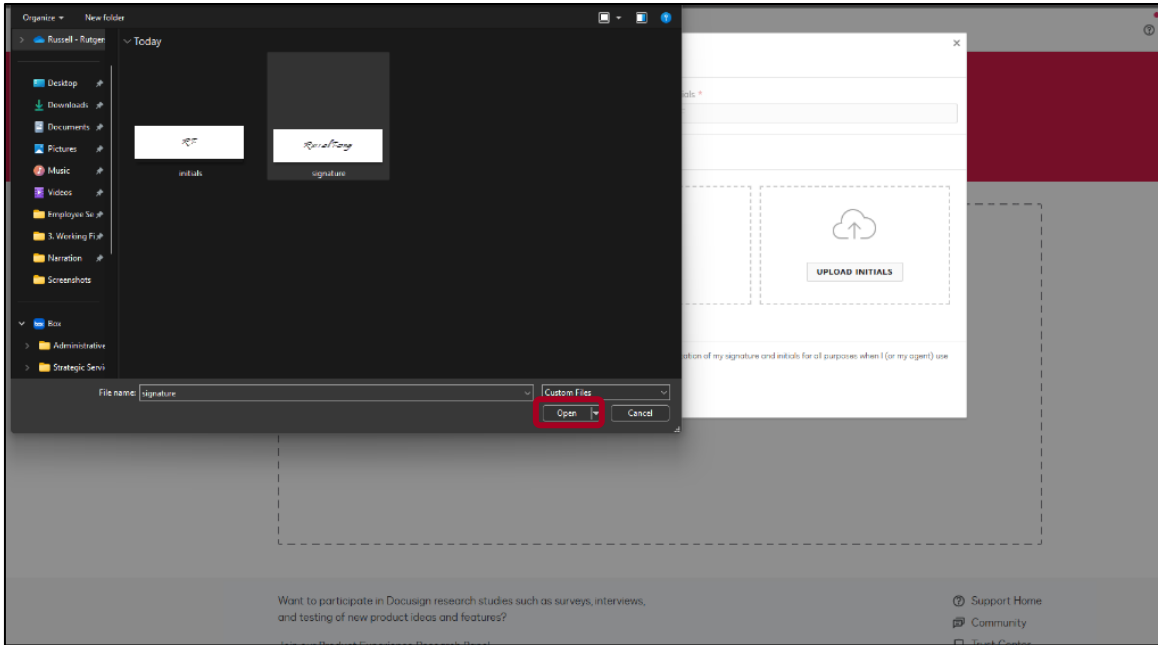
3. Click **Upload Signature**.



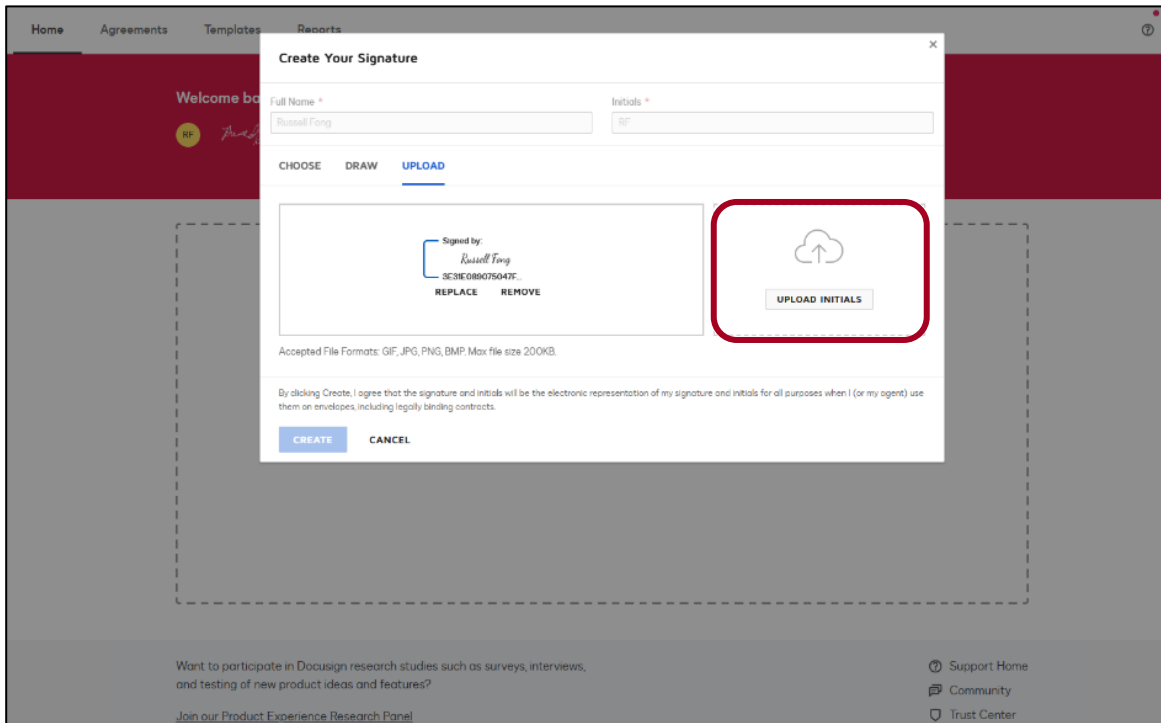
4. Select the file you want to upload.



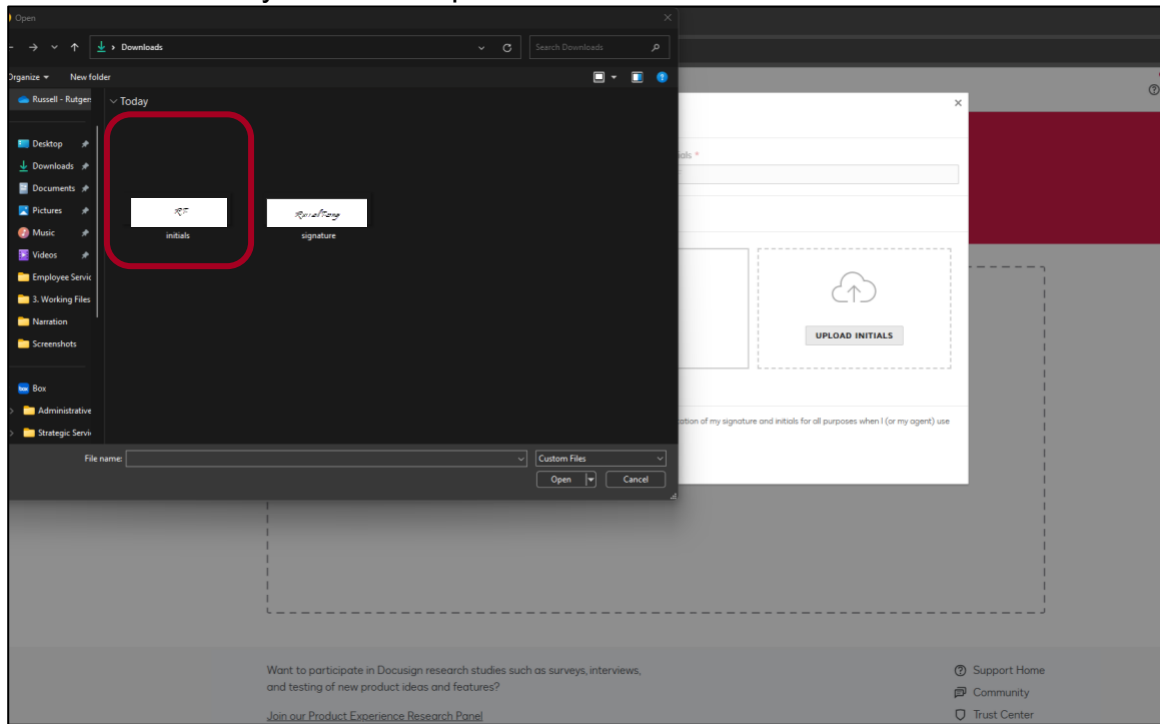
5. Click **Open**.



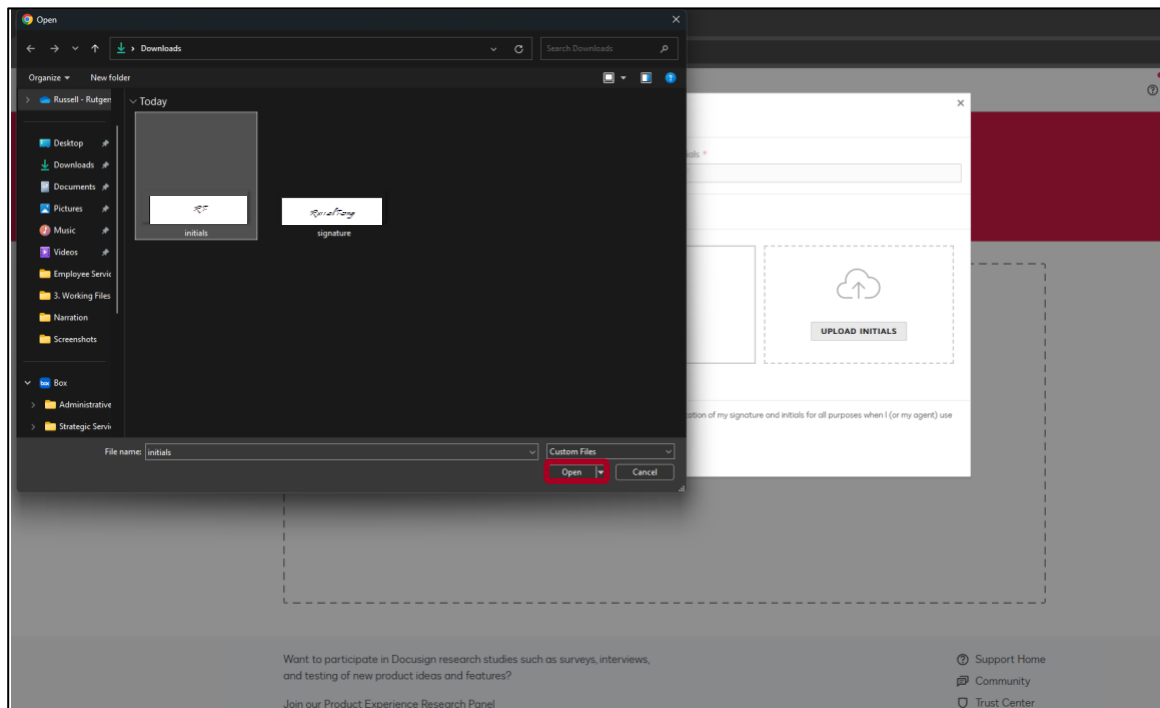
6. Click **Upload Initials**.



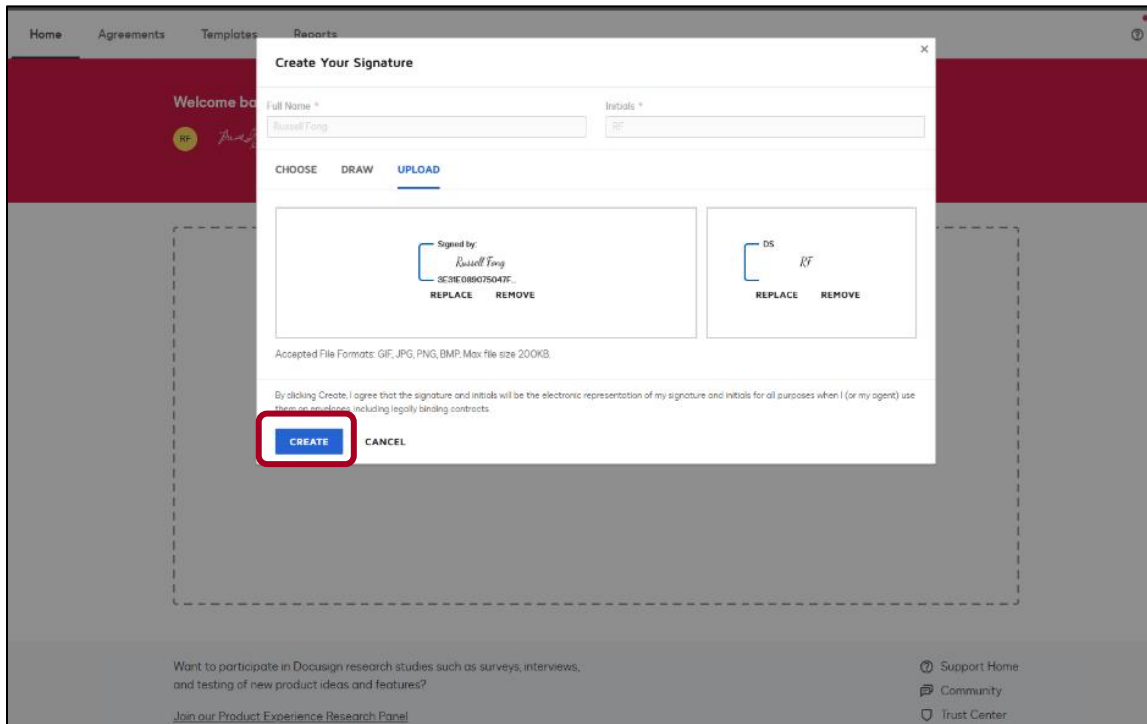
7. Select the file you want to upload.



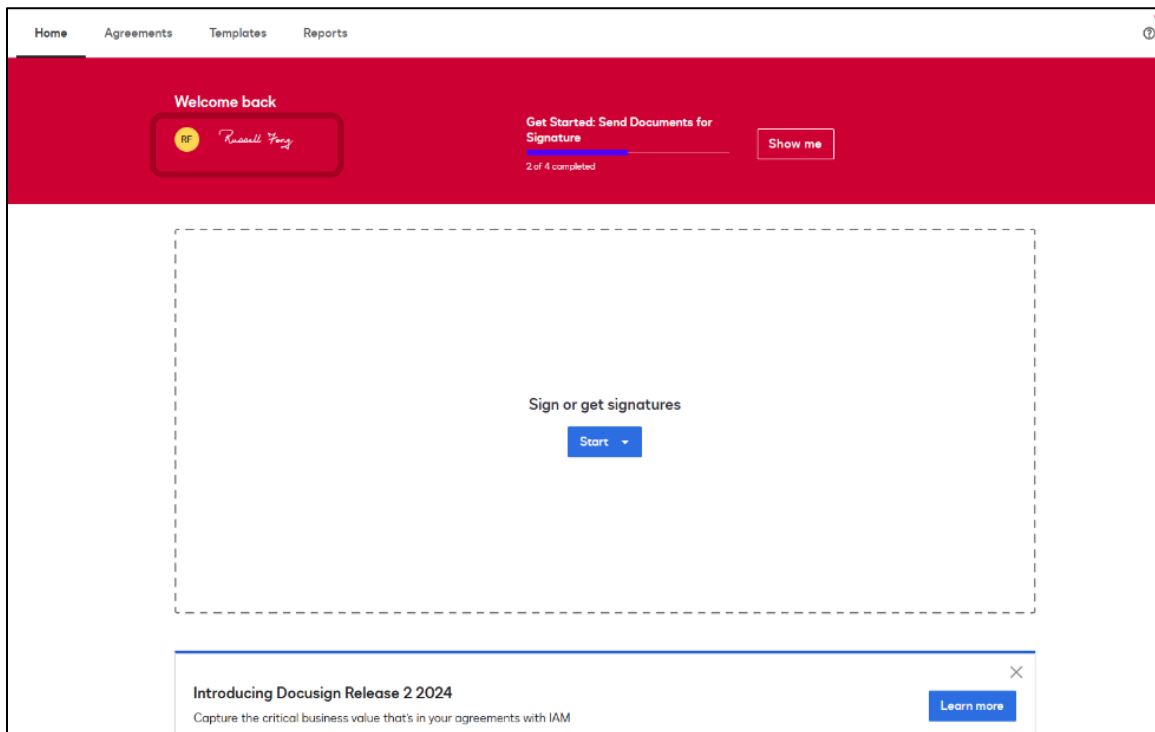
8. Click Open.



9. Click **Create**.



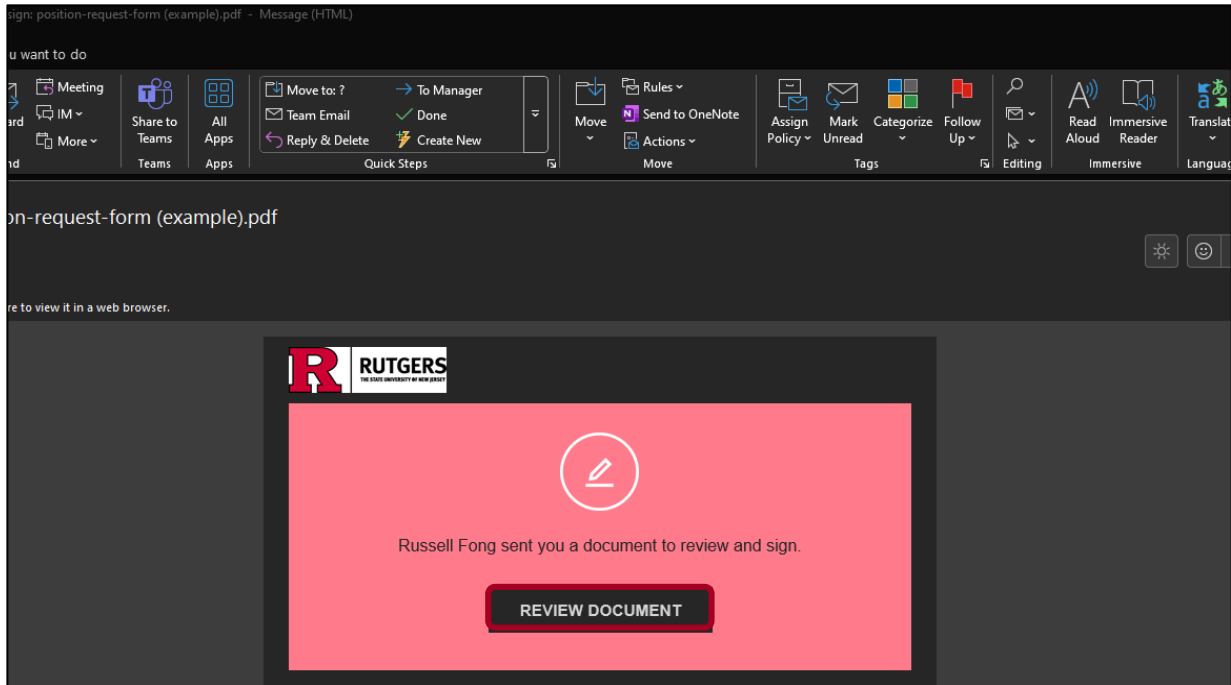
7. Your signature will be updated.



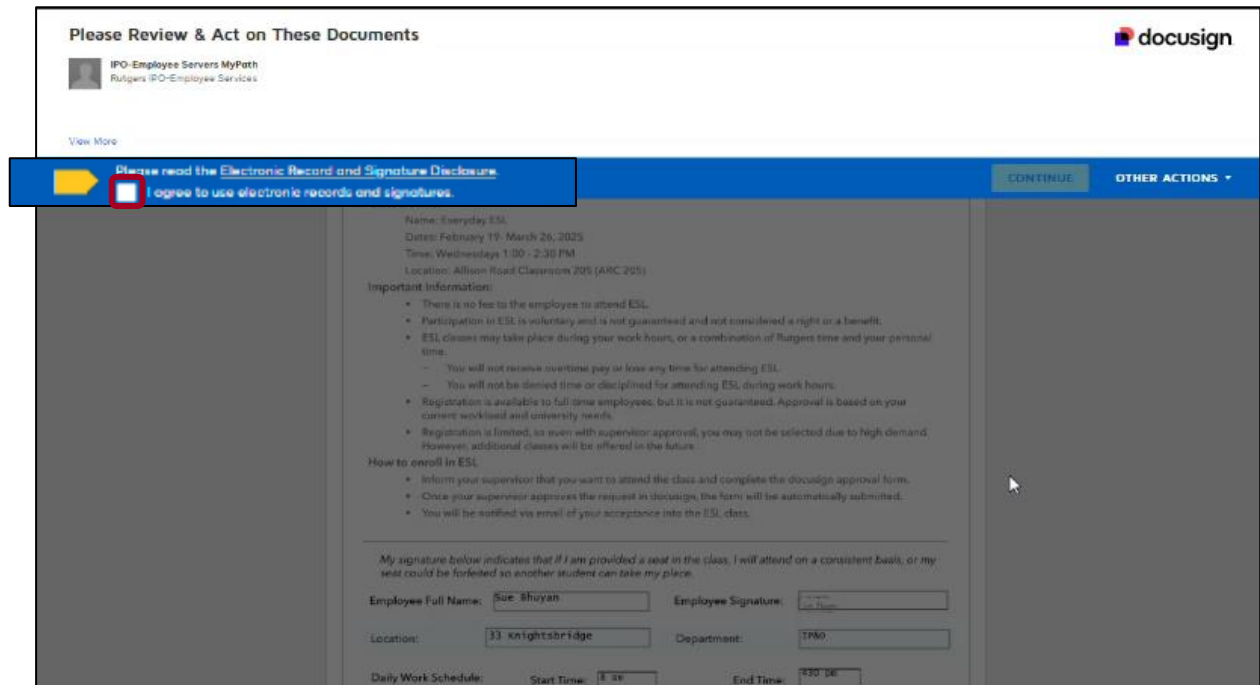
Signing Documents with DocuSign

A. Signing Documents created in DocuSign

1. When someone requests your signature, you will receive this email. Click **Review Document**.



2. Click the checkbox to agree to the terms of service.



3. Click **Continue**.

Please Review & Act on These Documents docusign

IPO-Employee Services MyPath
Rutgers IPO-Employee Services

View More

Please read the Electronic Record and Signature Disclosure
 I agree to use electronic records and signatures

CONTINUE OTHER ACTIONS ▾

Class Details:
 Name: Everyday ESL
 Dates: February 19 - March 26, 2023
 Time: Wednesdays 1:00 - 2:30 PM
 Location: Allison Road Classroom 205 (ARC 205)

Important Information:

- There is no fee to the employee to attend ESL.
- Participation in ESL is voluntary and is not guaranteed and not considered a right or a benefit.
- ESL classes may take place during your work hours, or a combination of Rutgers time and your personal time.
 - You will not receive overtime pay or lose any time for attending ESL.
 - You will not be denied time or disciplined for attending ESL during work hours.
- Registration is available to full-time employees, but it is not guaranteed. Approval is based on your current workload and university needs.
- Registration is limited, so even with supervisor approval, you may not be selected due to high demand. However, additional classes will be offered in the future.

How to enroll in ESL:

- Inform your supervisor that you want to attend the class and complete the docusign approval form.
- Once your supervisor approves the request in docusign, the form will be automatically submitted.
- You will be notified via email of your acceptance into the ESL class.

My signature below indicates that if I am provided a seat in the class, I will attend on a consistent basis, or my seat could be forfeited so another student can take my place.

Employee Full Name: Employee Signature:

4. Click the **Sign** button.



Registration is available to full-time employees, but it is not guaranteed. Approval is based on your current workload and university needs.

- Registration is limited, so even with supervisor approval, you may not be selected due to high demand. However, additional classes will be offered in the future.

How to enroll in ESL

- Inform your supervisor that you want to attend the class and complete the docusign approval form.
- Once your supervisor approves the request in docusign, the form will be automatically submitted.
- You will be notified via email of your acceptance into the ESL class.

My signature below indicates that if I am provided a seat in the class, I will attend on a consistent basis, or my seat could be forfeited so another student can take my place.

Employee Full Name: Employee Signature:

Location: Department:

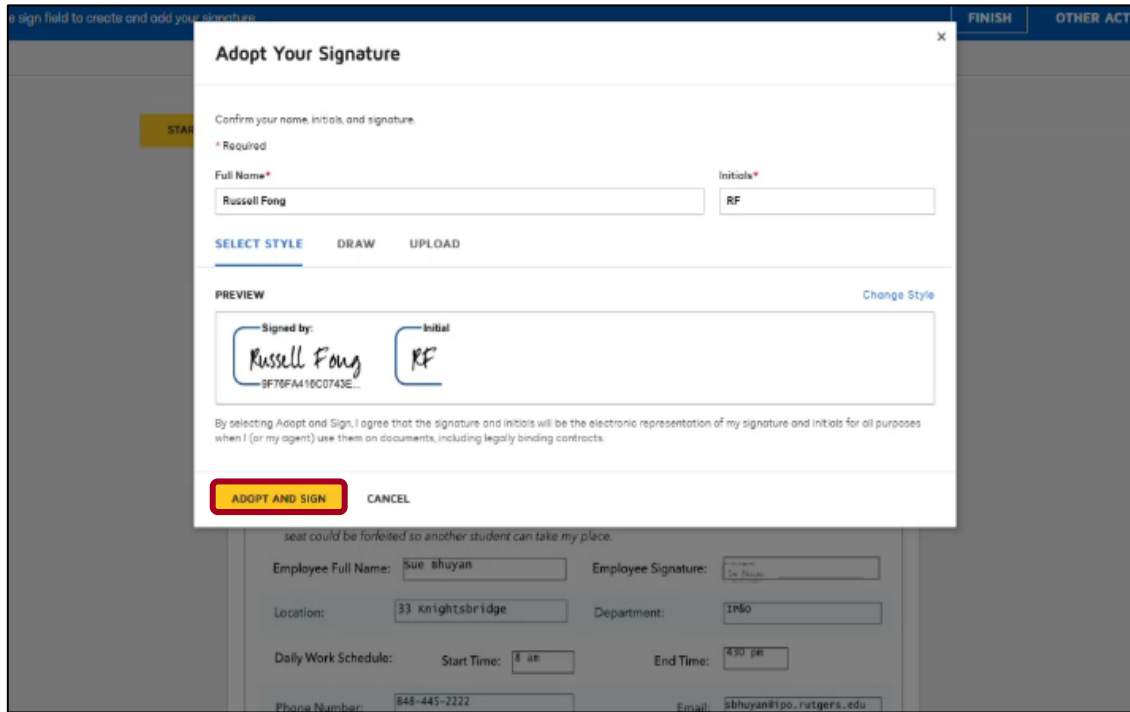
Daily Work Schedule: Start Time: End Time:

Phone Number: Email:

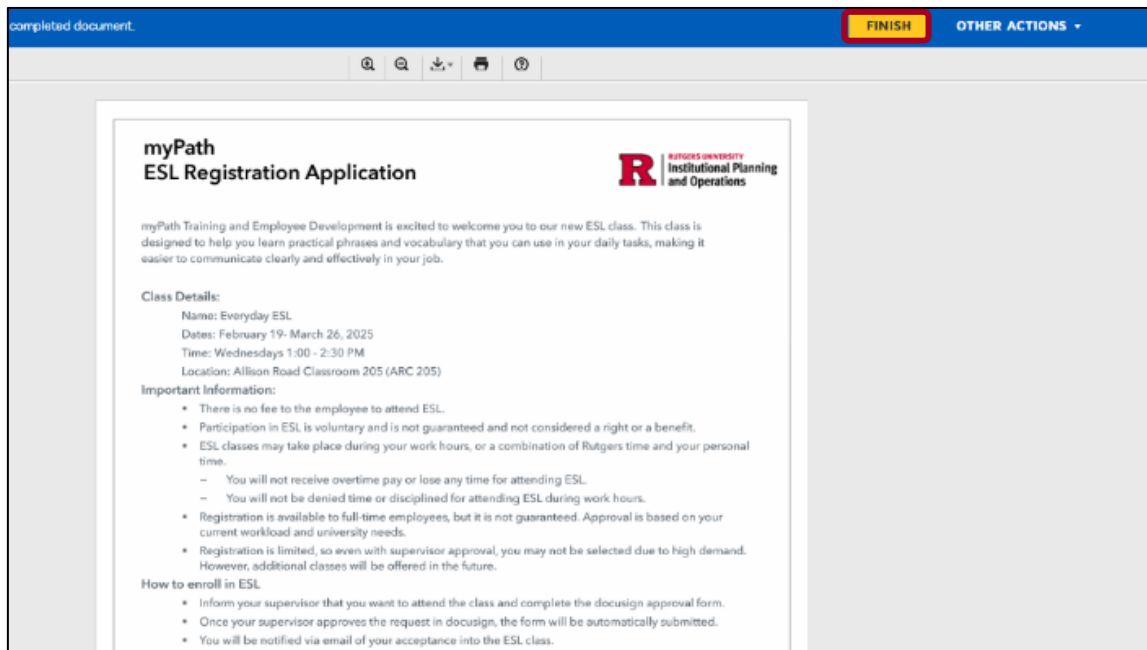
Supervisor Name: Supervisor Signature:

SUPPORTING TODAY. ENVISIONING TOMORROW.

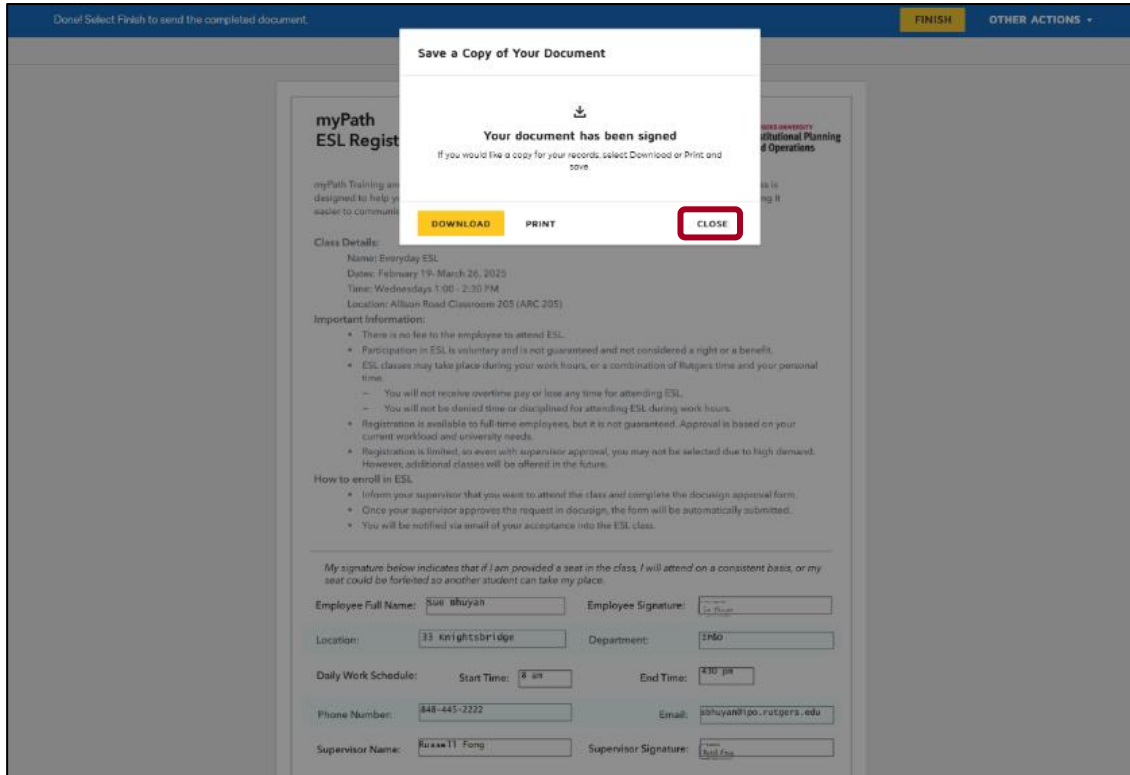
5. Select the desired signature and click **Adopt and Sign**.



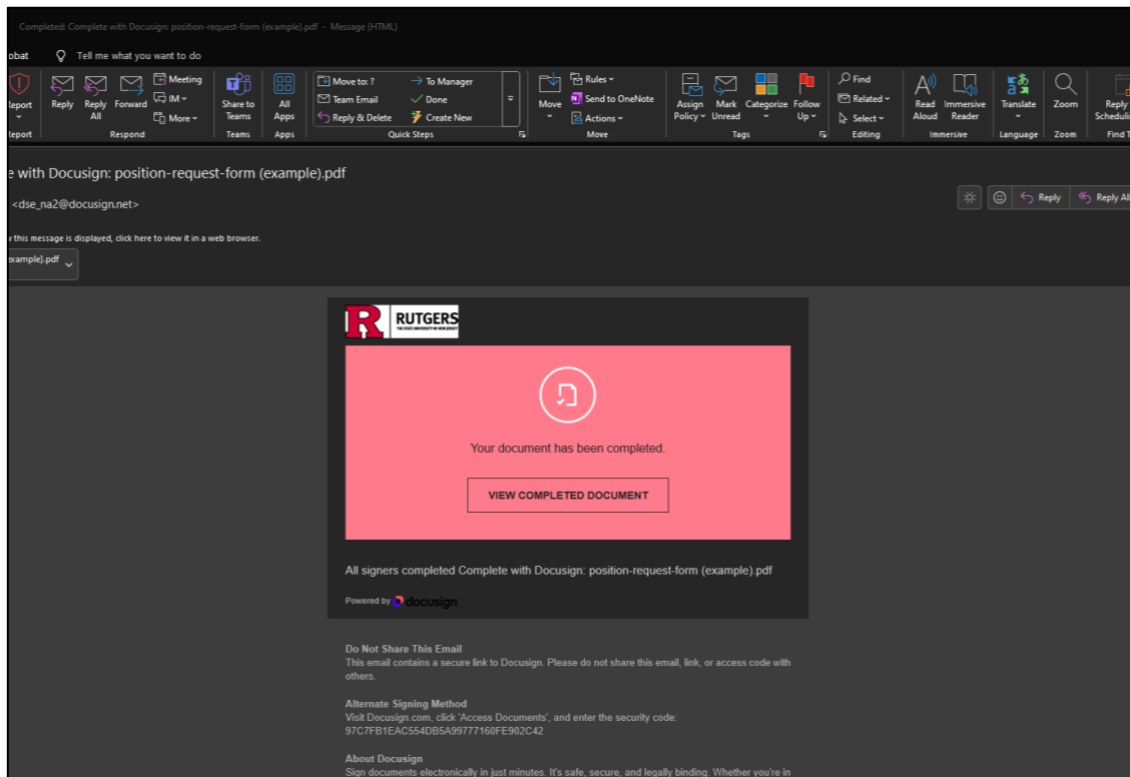
6. Click **Finish**.



7. If you would like a copy of the document, click **Download**. If you would like to print it, click **Print**. Click **Close** to exit the pop-up.



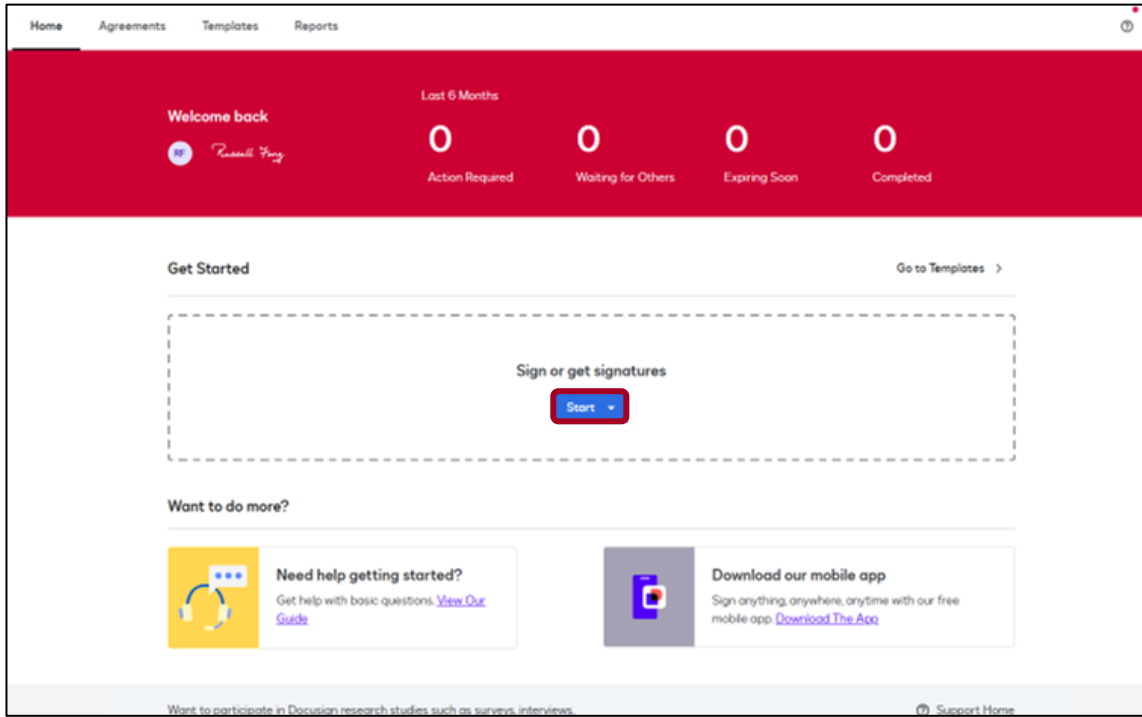
8. The document has been successfully signed. An email will be sent to anyone involved in signing the document.



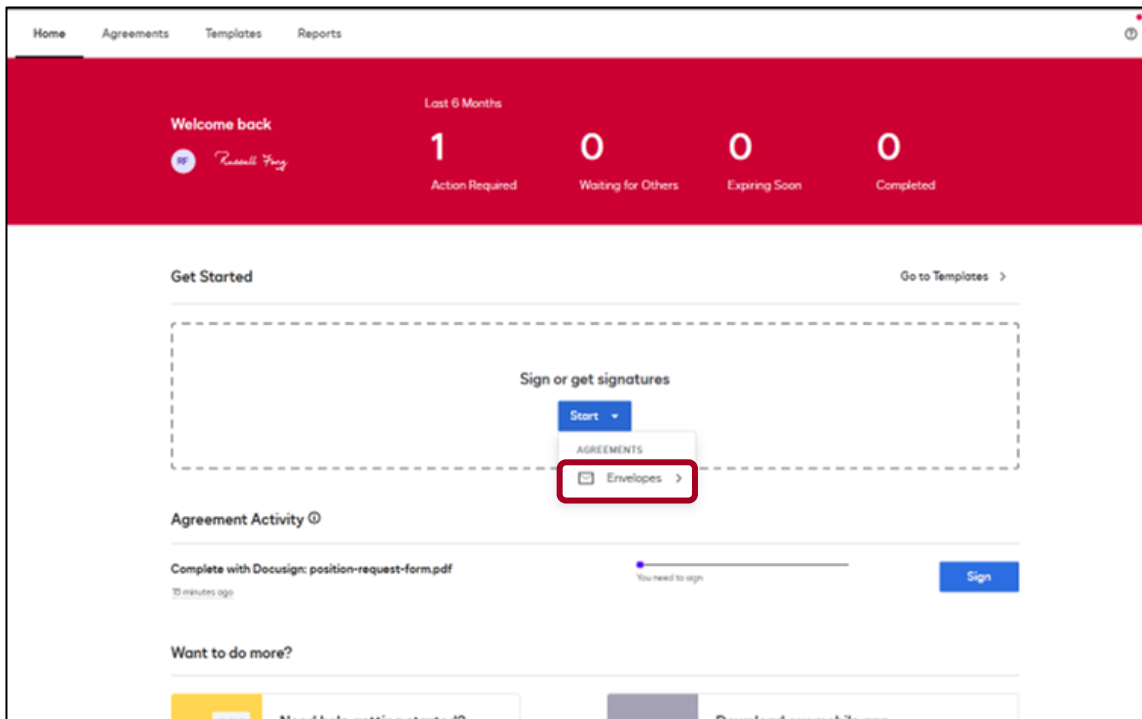
B. Signing Documents not Originating in DocuSign

This process is useful when using external forms and documents.

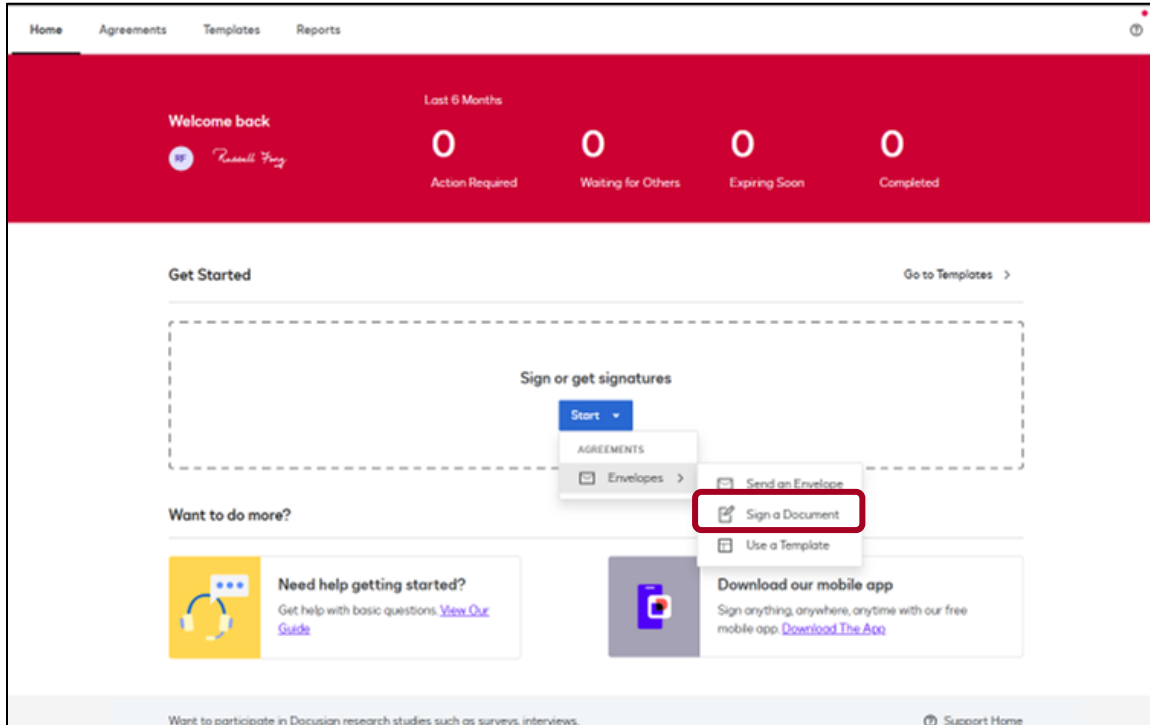
1. Click **Start**.



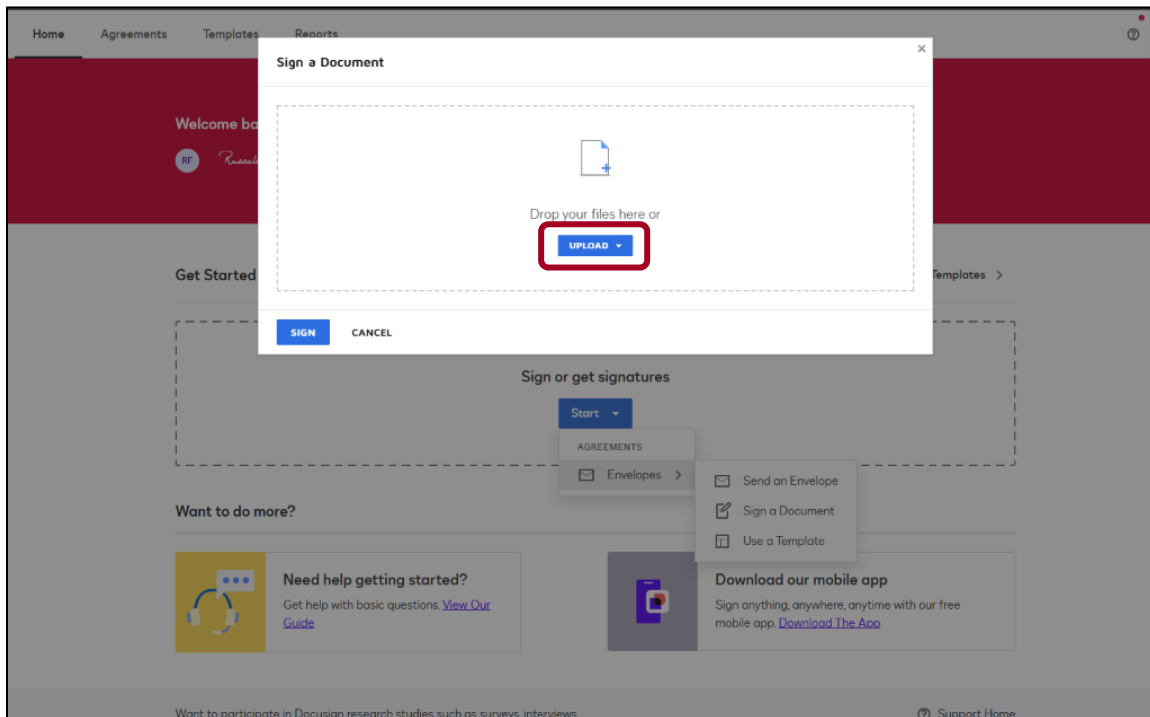
2. Hover over **Envelopes**.



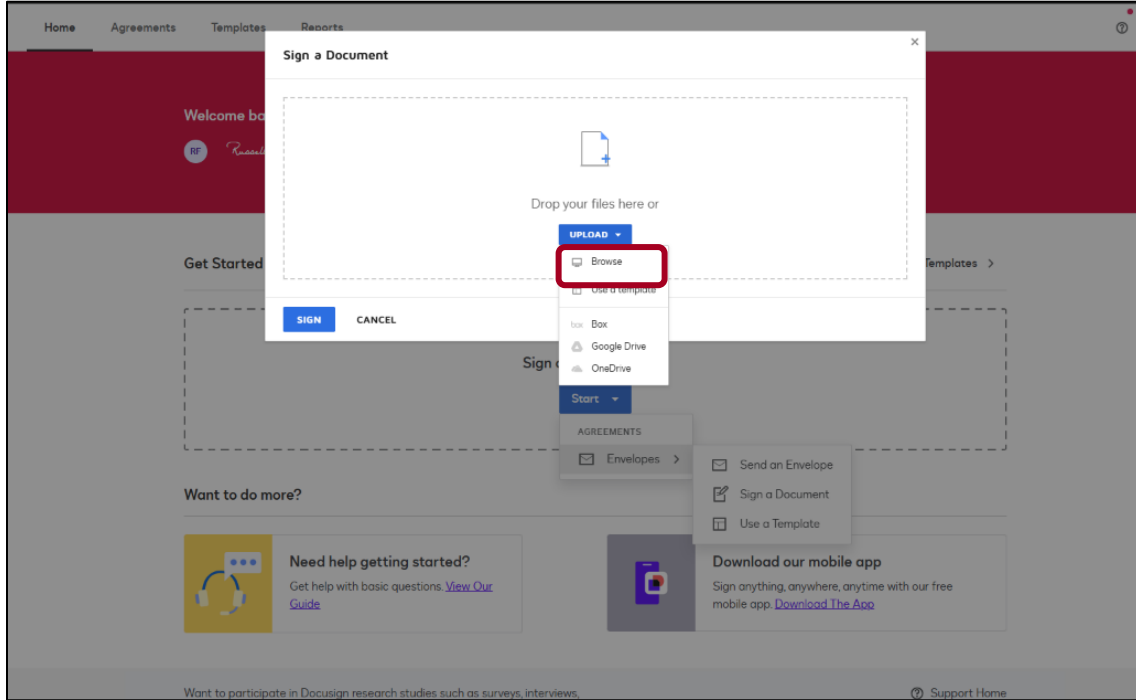
3. Click **Sign a Document**.



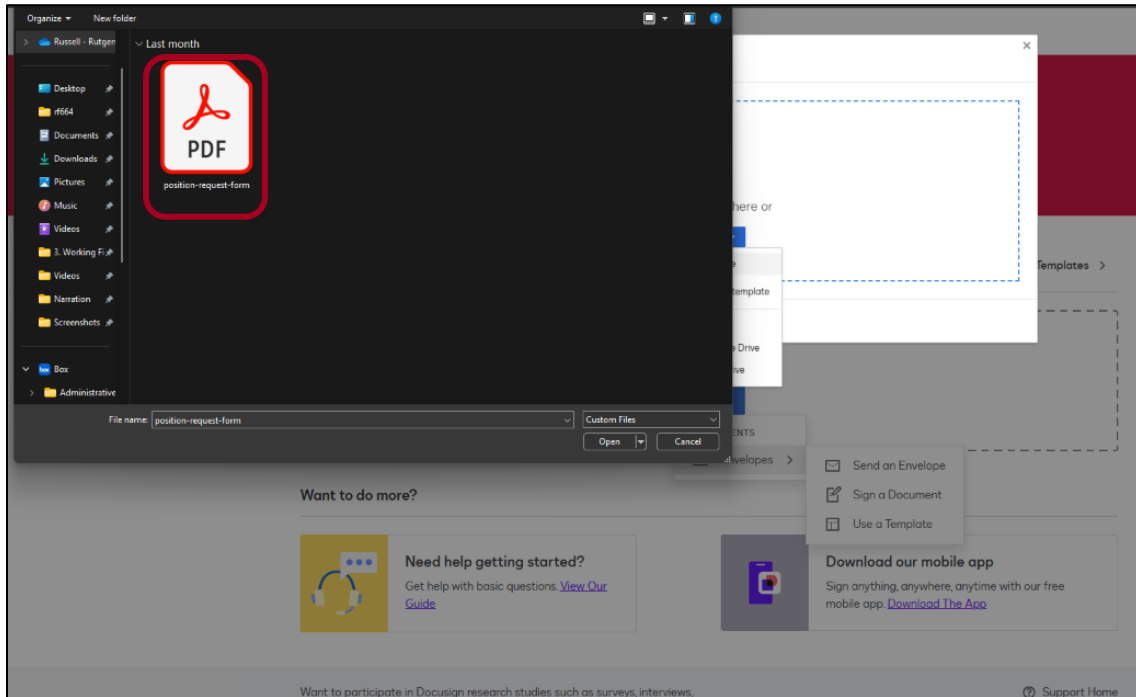
4. Click **Upload**.



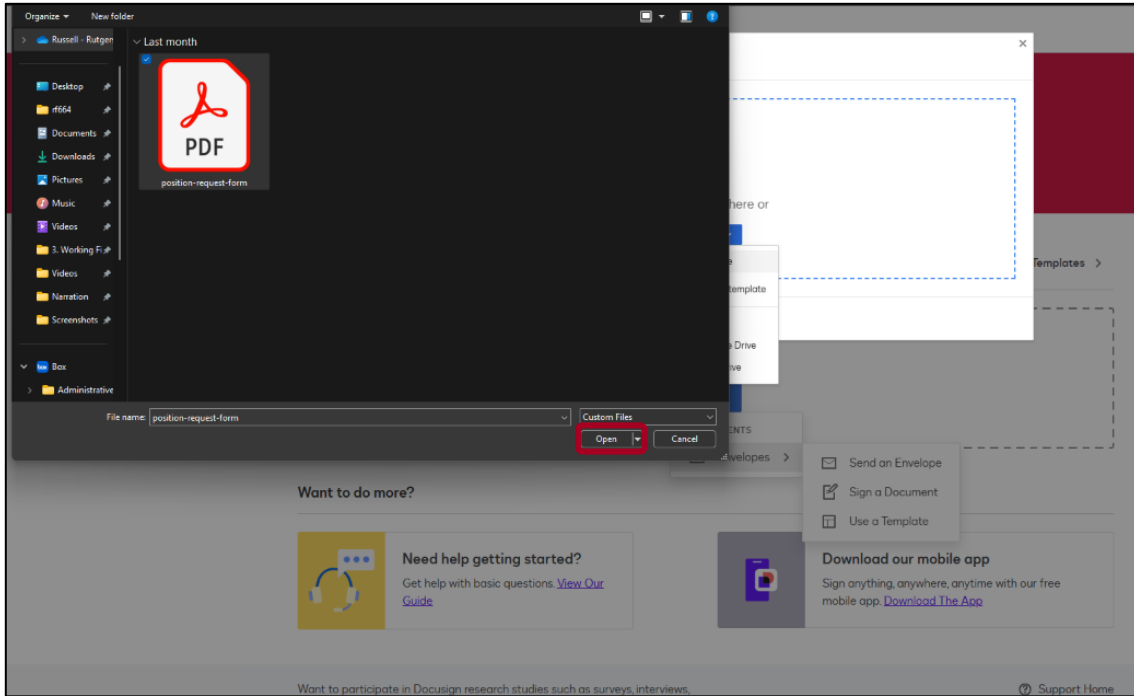
5. Click **Browse**.



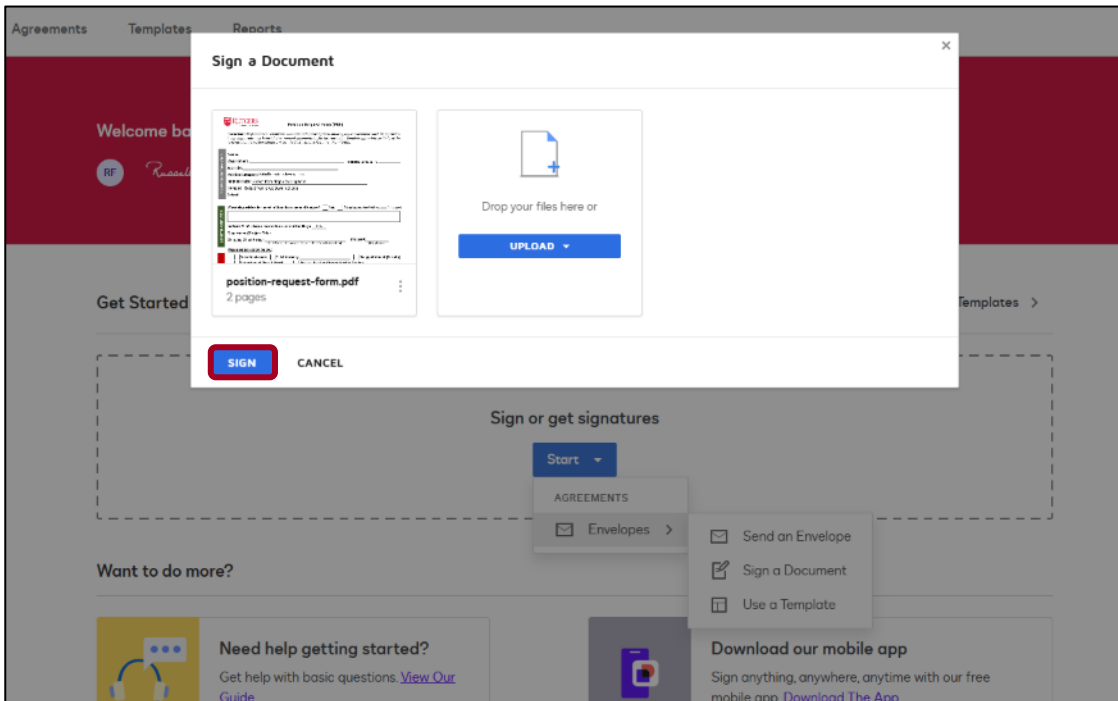
6. Select the file you want to upload.



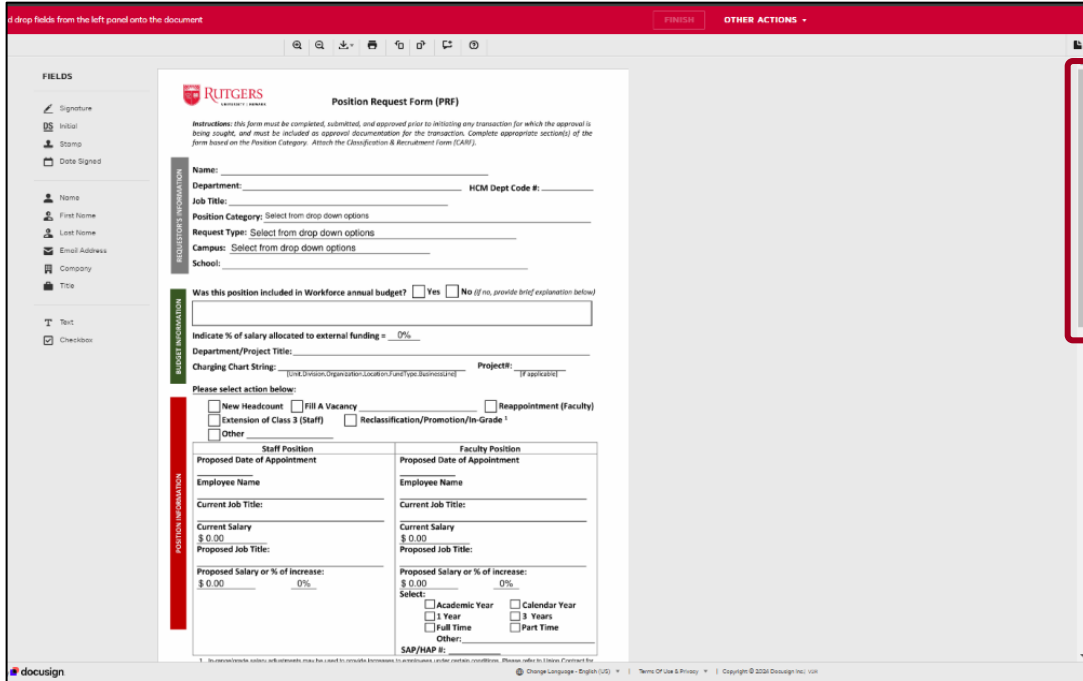
7. Click **Open**.



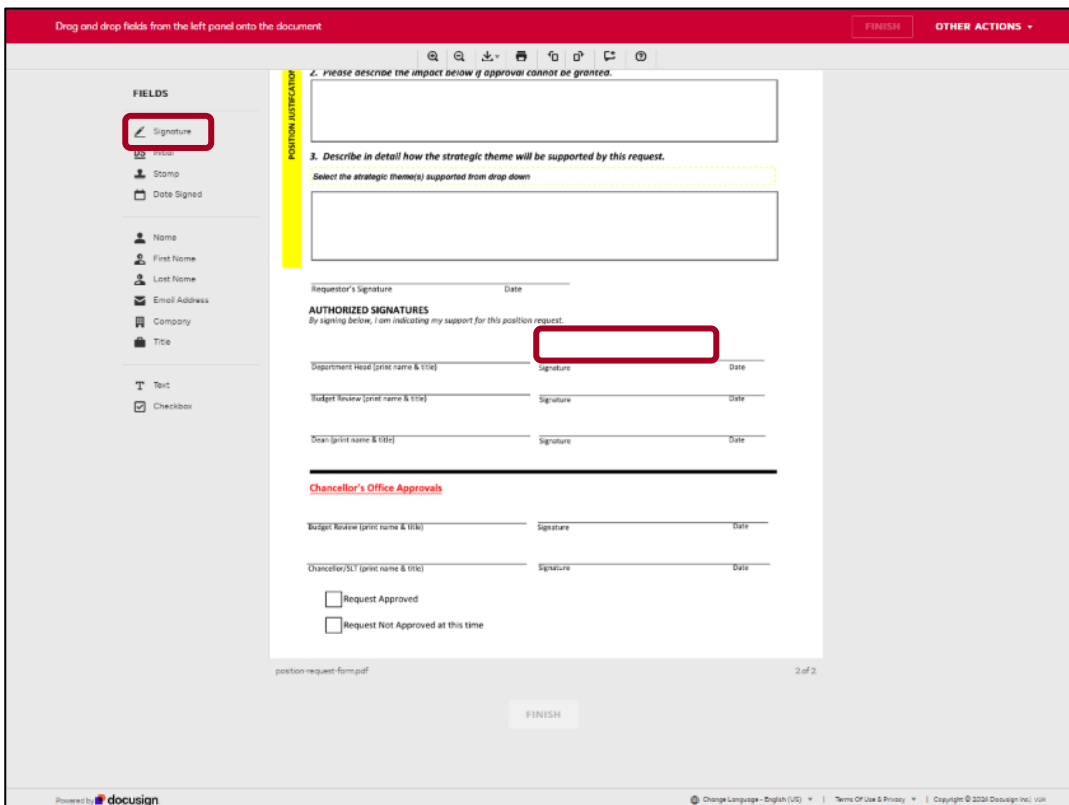
8. Click **Sign**.



9. Use the scroll bar to scroll down.



10. Click **Signature**. Drag your signature to where a signature is required.



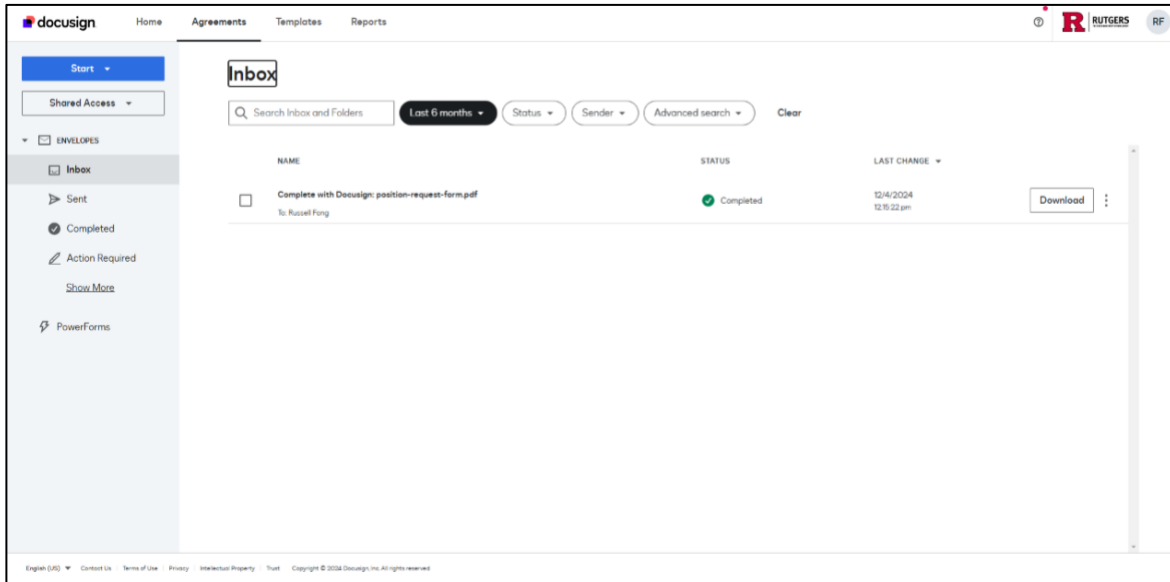
11. Click Finish.

The screenshot shows the DocuSign interface for a document titled "position request-form.pdf". The document content includes a "POSITION JUSTIFICATION" section with two numbered prompts: "1. Please describe the impact below if approval cannot be granted." and "2. Describe in detail how the strategic theme will be supported by this request." Below this is an "AUTHORIZED SIGNATURES" section with fields for "Requestor's Signature" and "Date", and a list of approvers including "Department Head", "Budget Review", and "Dean". A "Chancellor's Office Approvals" section follows, with fields for "Budget Review" and "Chancellor/ST" and checkboxes for "Request Approved" and "Request Not Approved at this time". A red box highlights the "FINISH" button at the bottom center of the document viewer.

12. Click No Thanks.

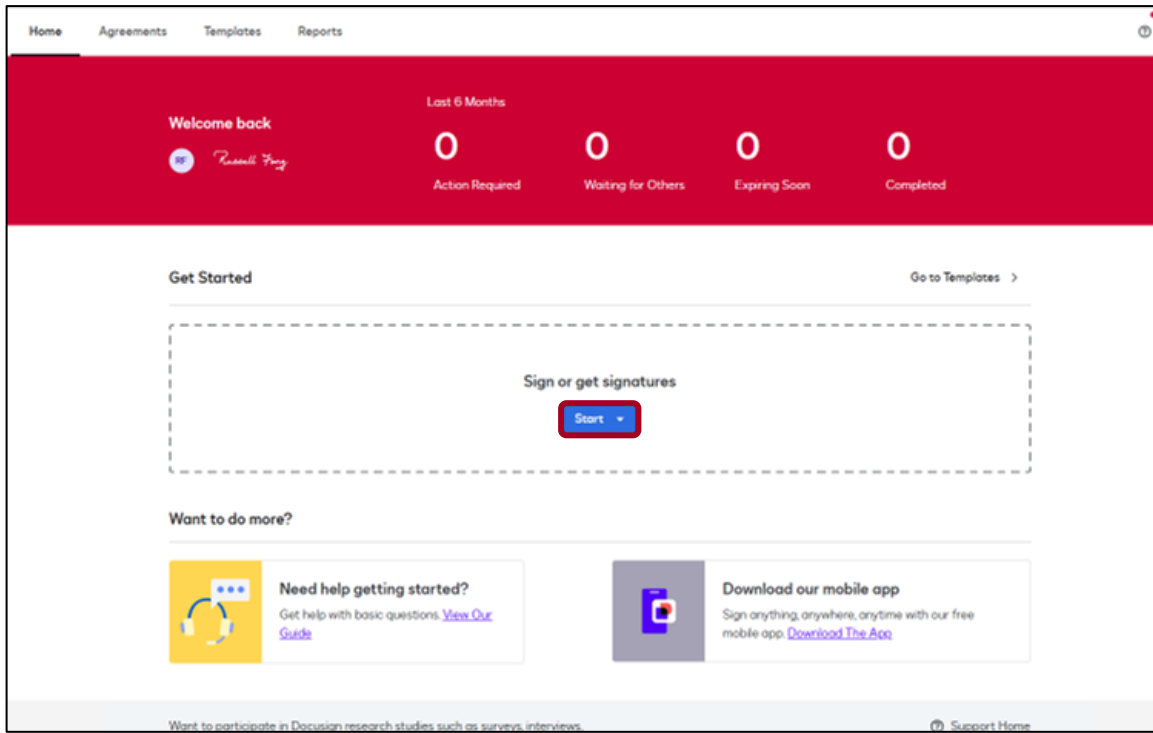
The screenshot shows the DocuSign interface with a "Share your signed document" dialog box open. The dialog box contains fields for "Email", "Subject", and "Message". The "Email" field has a placeholder "Enter email address". The "Subject" field has a placeholder "Here is your signed document: position-request-form.pdf". The "Message" field has a placeholder "Messages are optional" and a character count "Characters remaining: 250". A red box highlights the "No Thanks" button at the bottom right of the dialog box. The background shows the same document as in the previous screenshot, but it is dimmed.

13. The process is complete. You will be taken to your **Inbox** which will display your completed forms and sent envelopes.

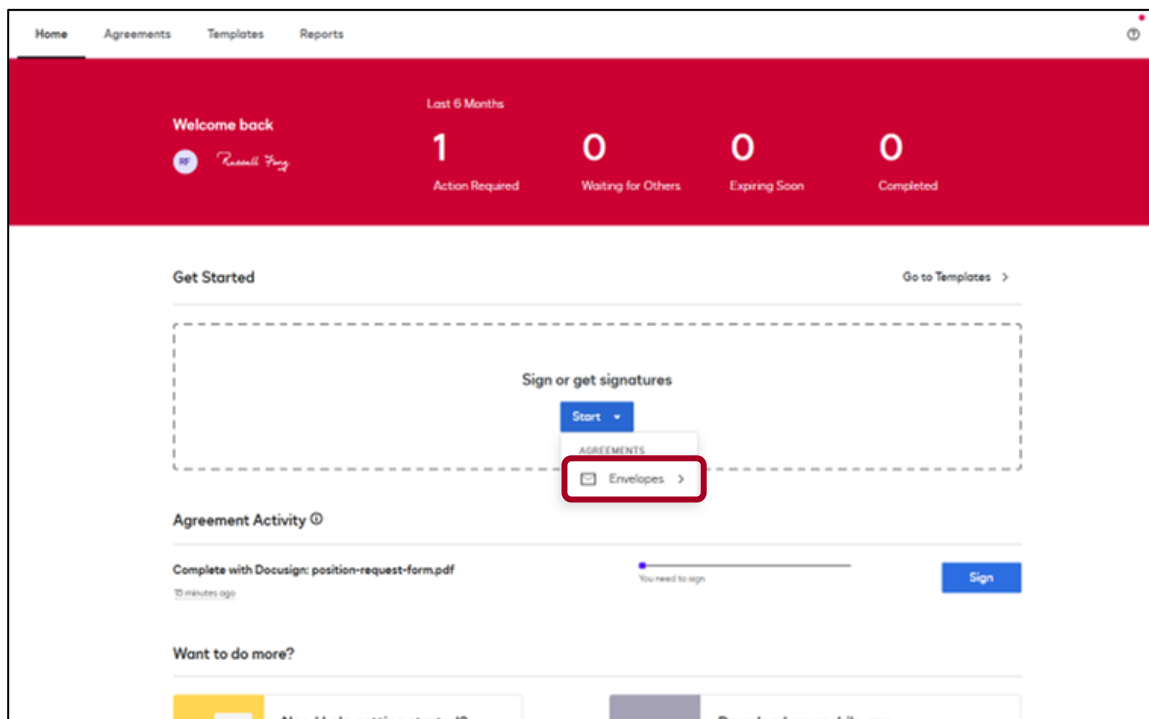


Setting up an Envelope for Signatures

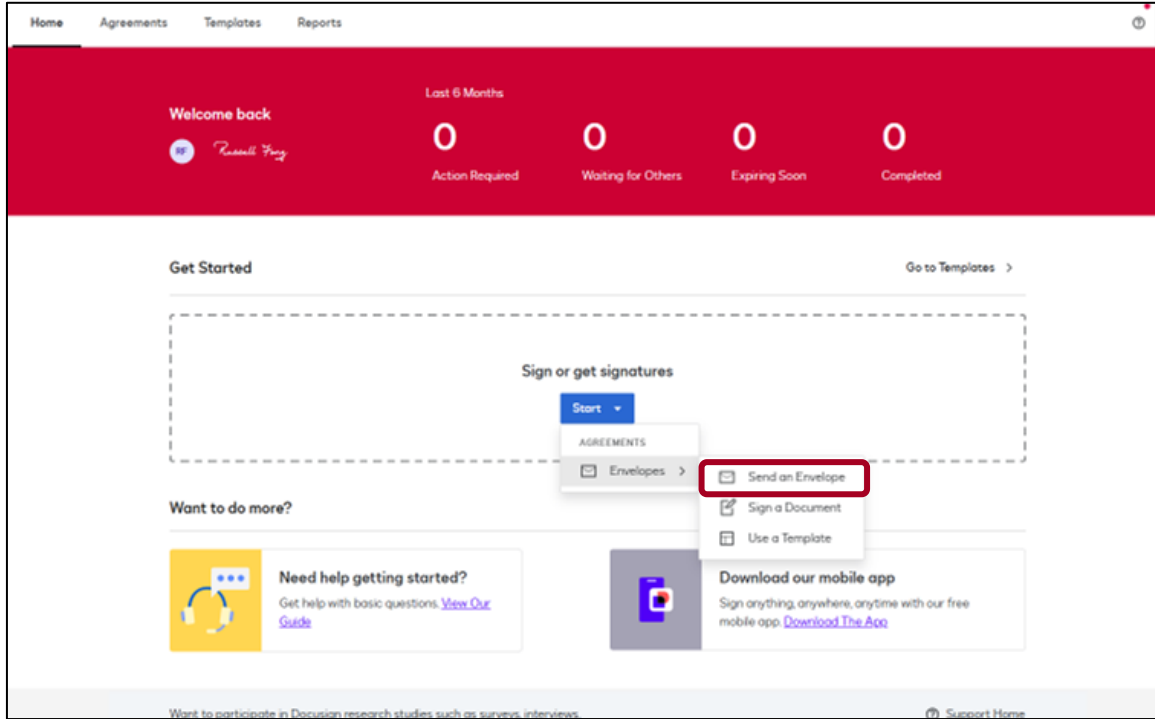
1. Click **Start**.



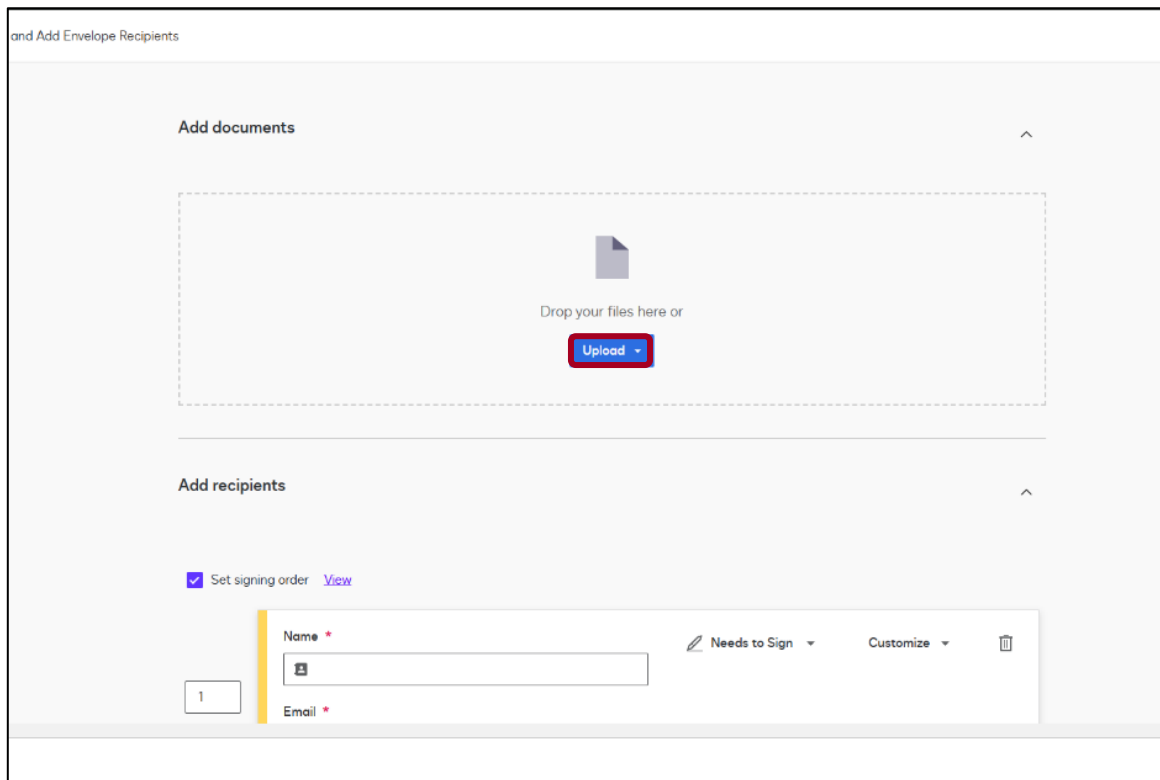
2. Hover over **Envelopes**.



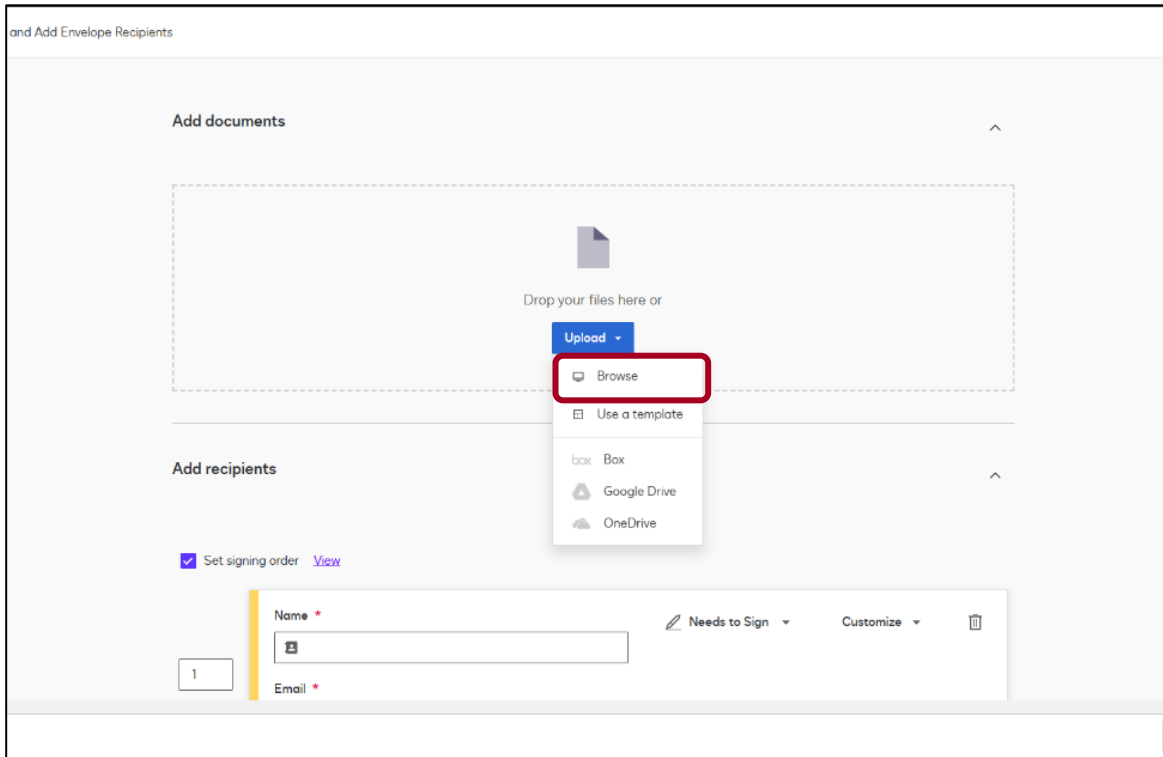
3. Click **Send an Envelope**.



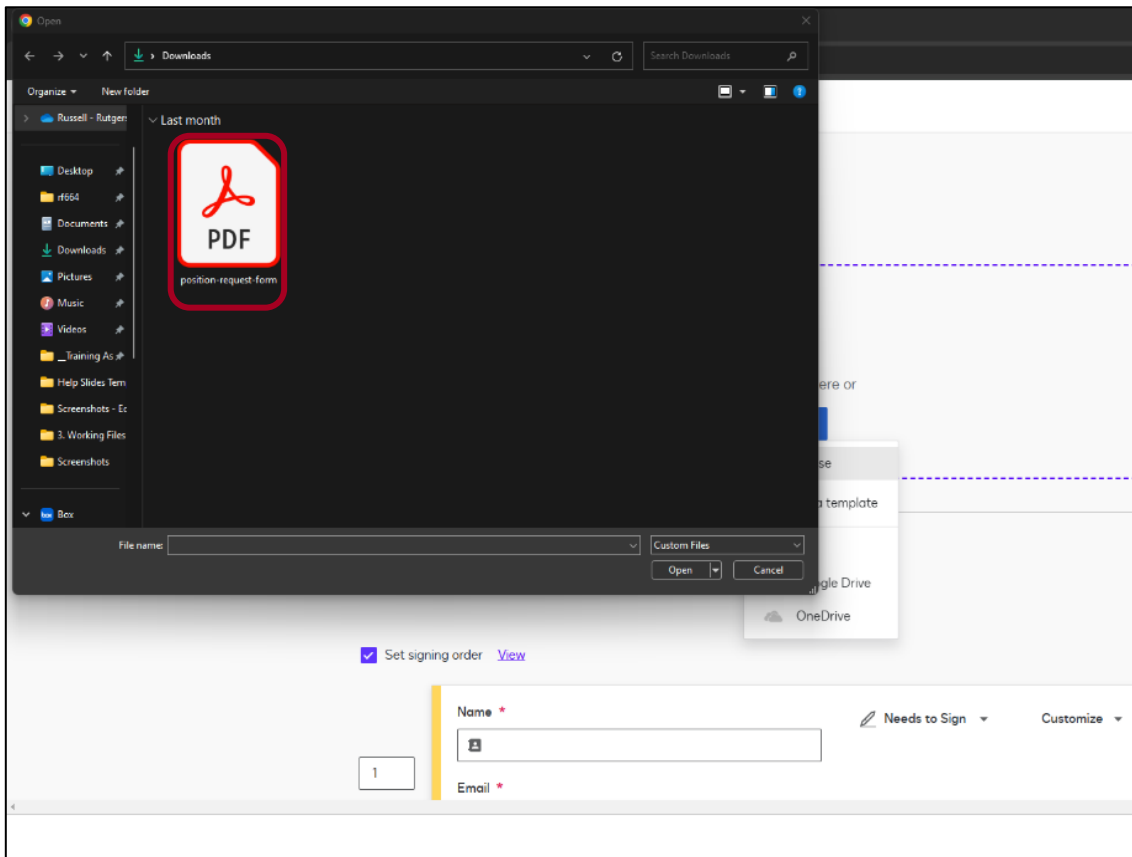
4. Click **Upload**.



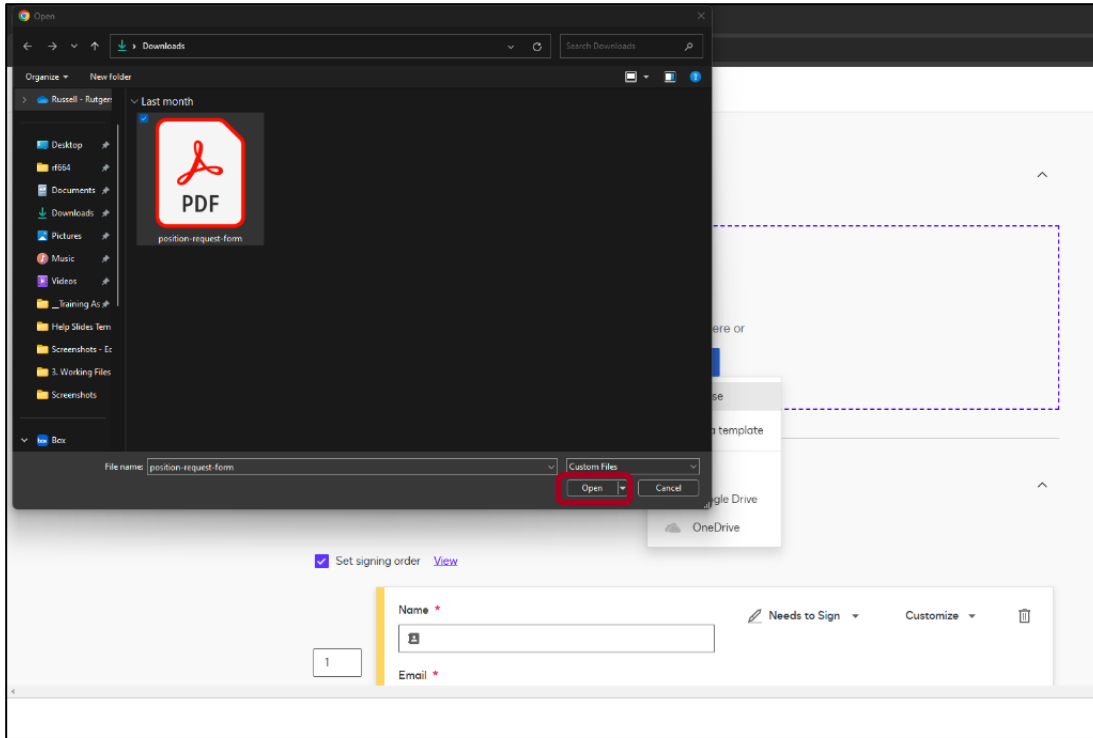
5. Click **Browse**.



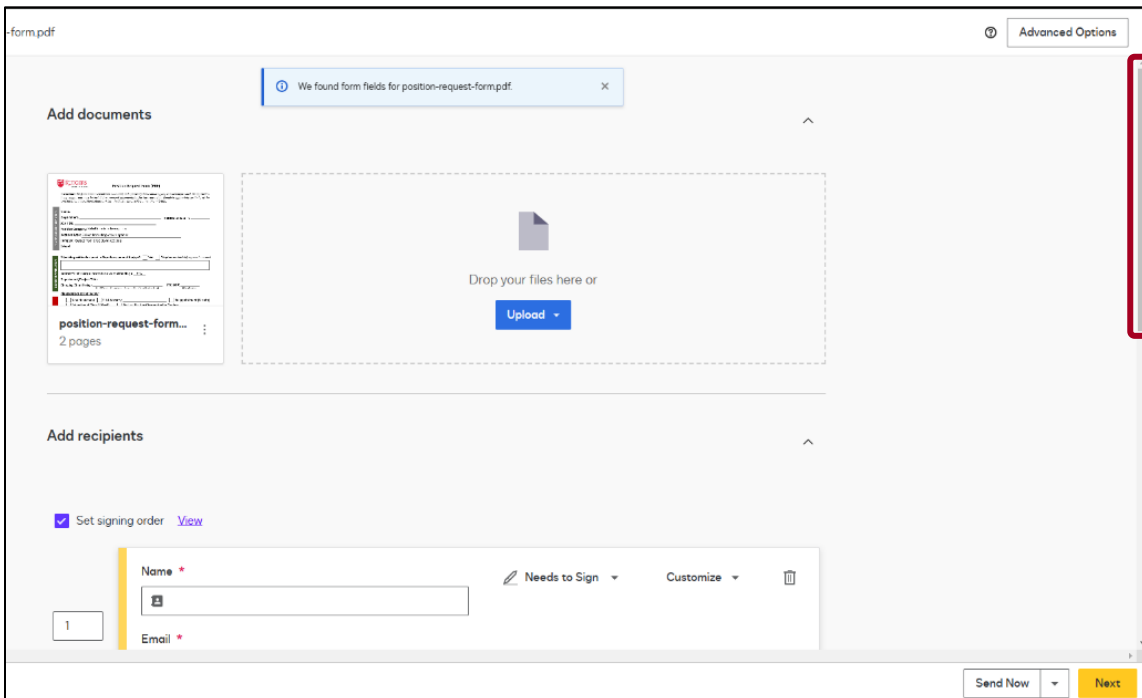
6. Select the file you would like to upload.



7. Click **Open**.



8. Use the scroll bar to scroll down.



9. Enter the **Name** and **Email** of the first recipient.

The screenshot shows the DocuSign interface for a document titled 'request-form.pdf'. At the top, there is a notification: 'We found form fields for position-request-form.pdf'. Below this, the 'Add recipients' section is expanded. A checkbox labeled 'Set signing order' is checked, with a 'View' link next to it. A list of recipients is shown, with the first recipient highlighted by a yellow vertical bar. The recipient's details are shown in a white box with a red border: 'Name' (with a red asterisk) and 'Email' (with a red asterisk) fields are empty. To the right of these fields are three icons: a pencil, a dropdown menu labeled 'Needs to Sign', and a trash can. Below the recipient list, there is a button labeled 'Add Recipient' with a plus sign and 'Add Delay' next to it. The 'Add message' section is also visible, with a checkbox for 'Custom email and language for each recipient' and an 'Email Subject' field. At the bottom right, there are 'Send Now' and 'Next' buttons.

10. Click **Add Recipient** to add another recipient.

The screenshot shows the DocuSign interface for a document titled 'request-form.pdf'. The 'Add recipients' section is expanded. The 'Set signing order' checkbox is checked. The first recipient is now filled out: 'Name' is 'Sue Bhuyan' and 'Email' is 'sbhuyan@ipo.rutgers.edu'. The 'Add Recipient' button is highlighted with a red box. The 'Add message' section is also visible, with a checkbox for 'Custom email and language for each recipient' and an 'Email Subject' field. At the bottom right, there are 'Send Now' and 'Next' buttons.

11. Enter the **Name** and **Email** of the second recipient.

request-form.pdf Advanced Options

Add recipients

Set signing order [View](#)

1 Name * Sue Bhuyan Needs to Sign Customize

Email * sbhuyan@ipo.rutgers.edu

2 Name * Needs to Sign Customize

Email *

⌵ Add Recipient + Add Delay

Send Now Next



NOTE: You can change the signing order by switching the numbers next to each recipient.

request-form.pdf Advanced Options

Add recipients

Set signing order [View](#)

1 Name * Sue Bhuyan Needs to Sign Customize

Email * sbhuyan@ipo.rutgers.edu

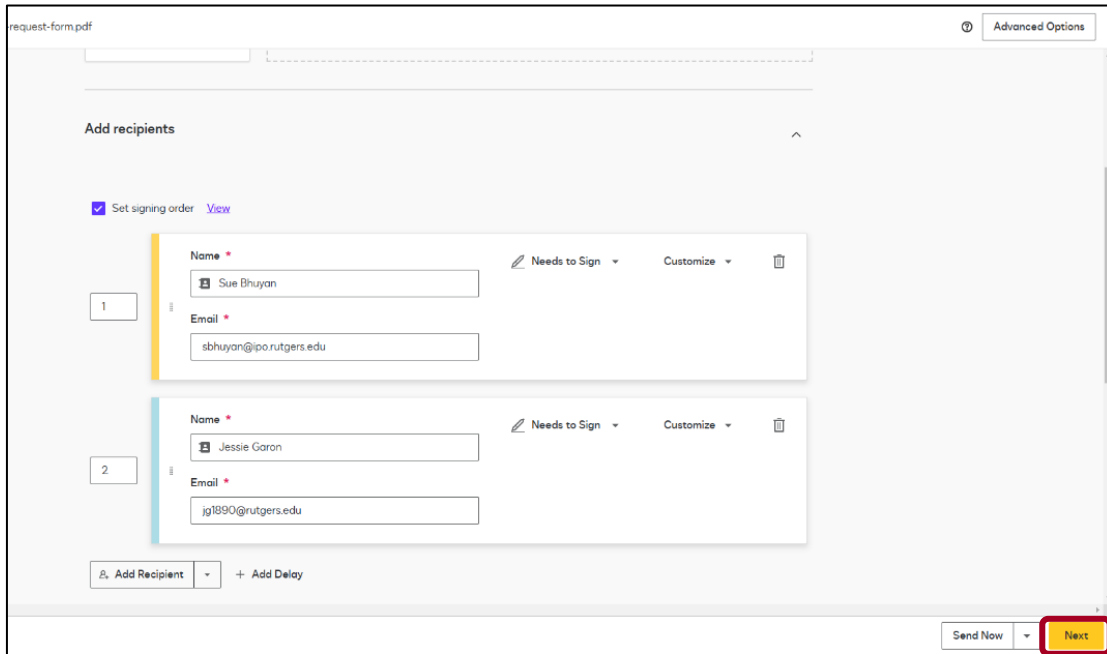
2 Name * Jessie Garon Needs to Sign Customize

Email * jg1890@rutgers.edu

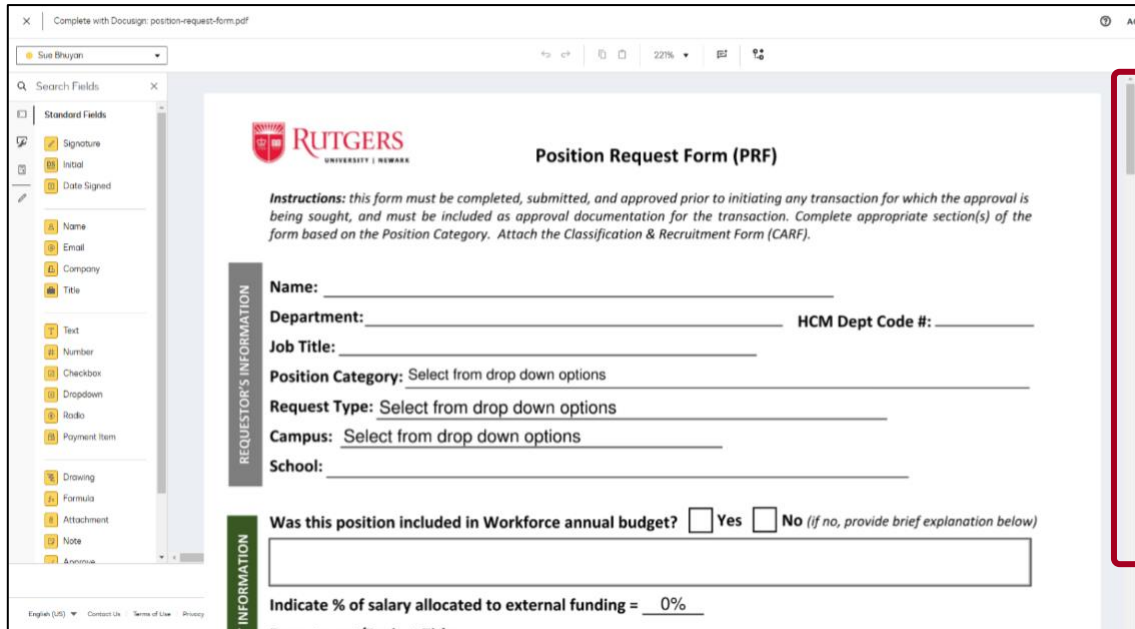
⌵ Add Recipient + Add Delay

Send Now Next

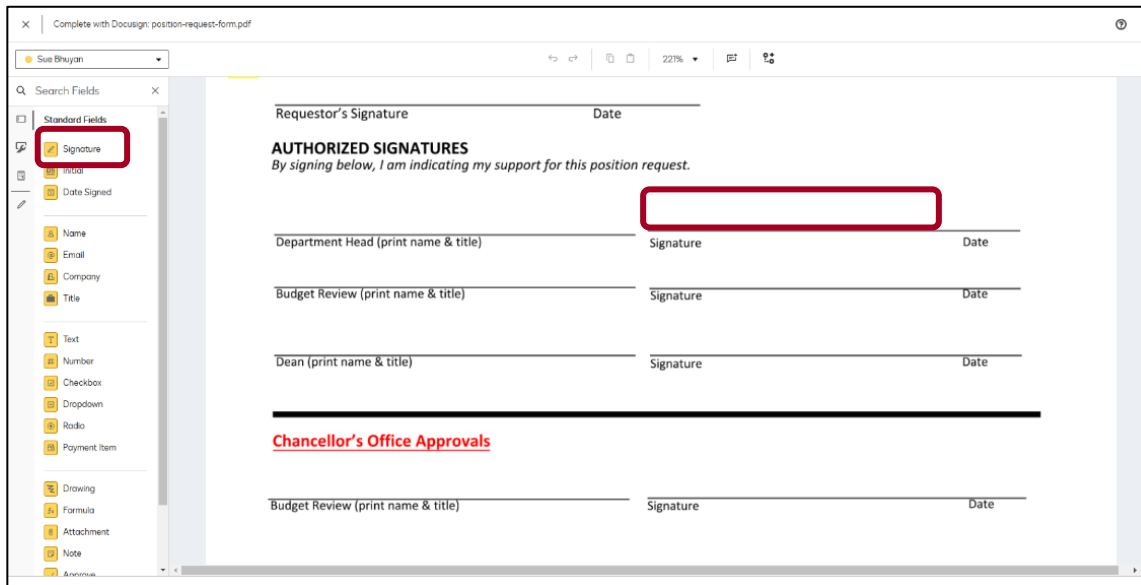
12. Click **Next**.



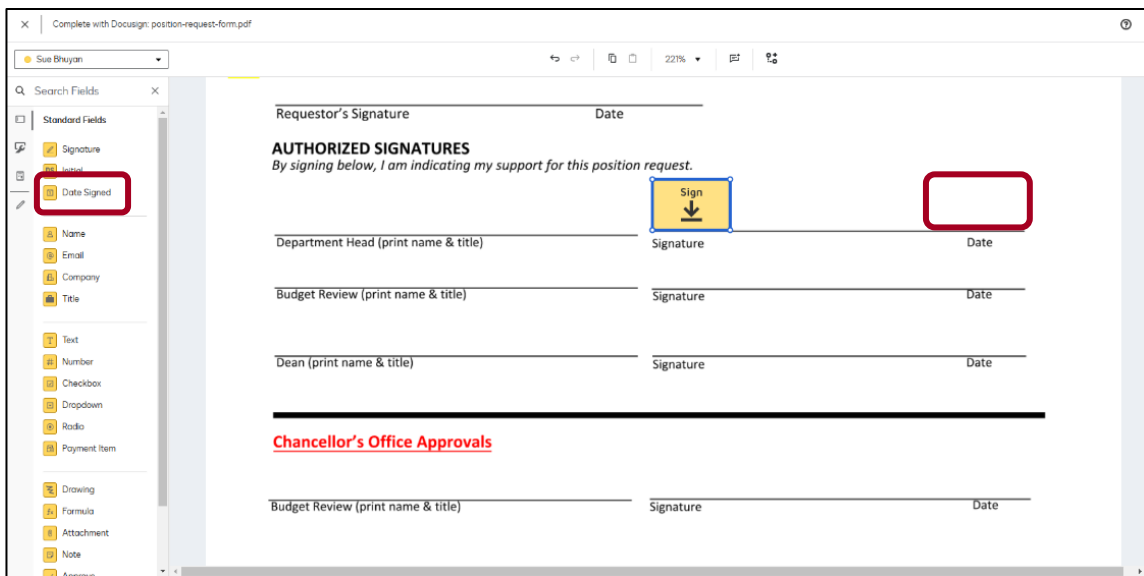
13. Use the scroll bar to scroll to the bottom of the document.



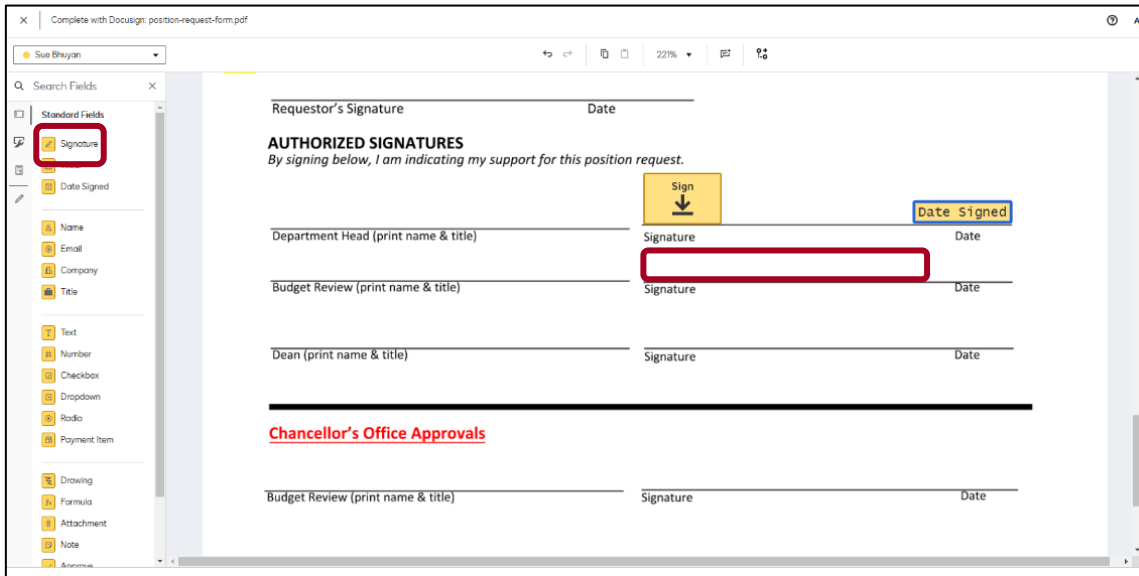
14. Click **Signature** then drag and drop it to the location where the first recipient needs to sign.



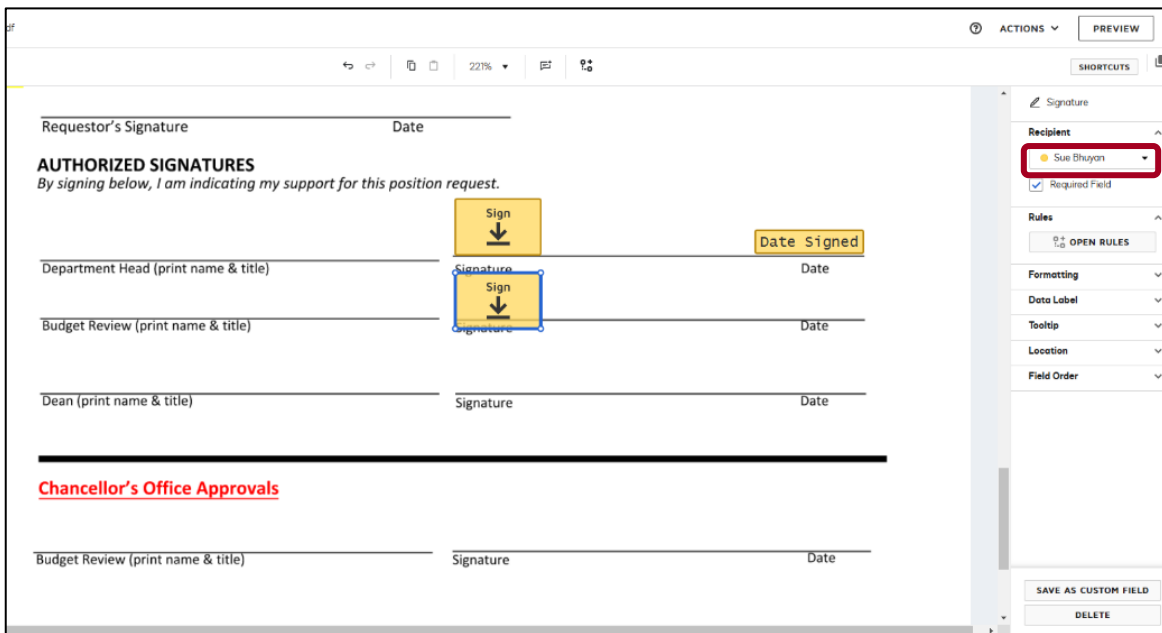
15. Click **Date Signed** then drag and drop it to the location for date.



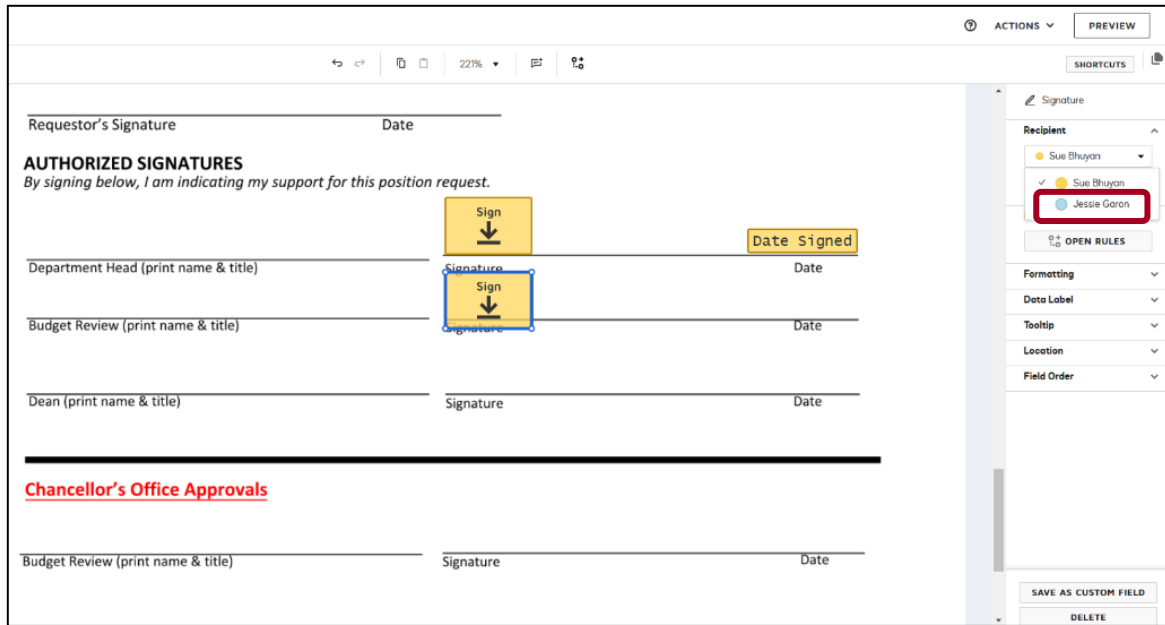
16. Click **Signature** then drag and drop it to the location where the second recipient needs to sign.



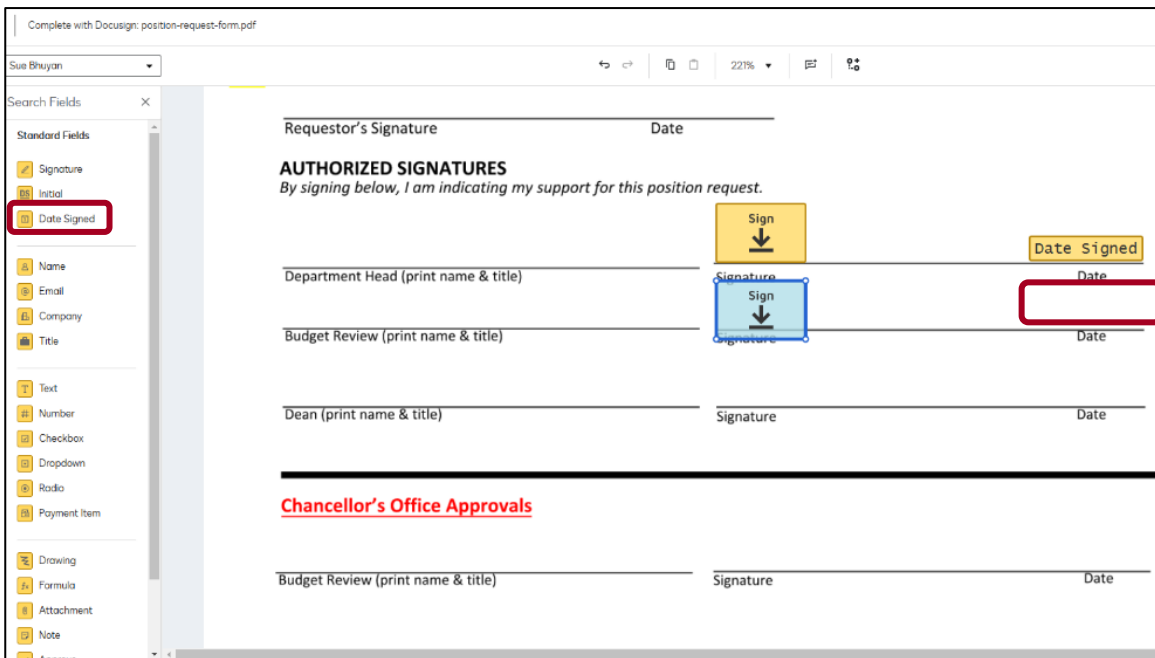
17. On the menu at the right, click on the drop-down box for **Recipient**.



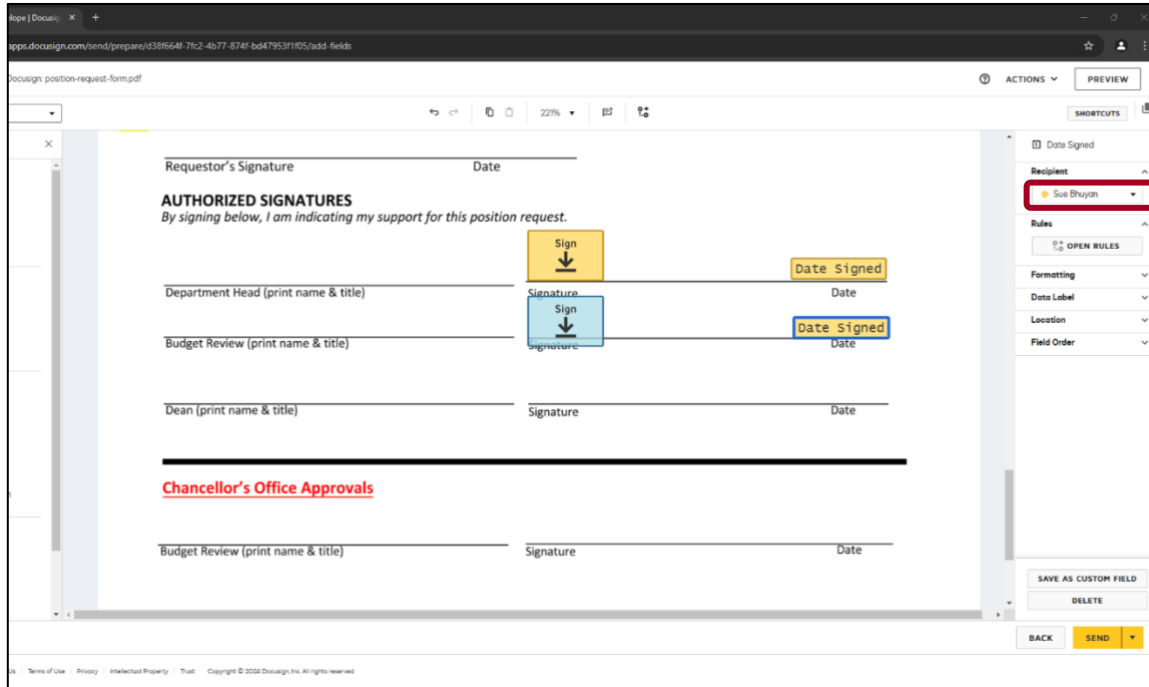
18. Select the name of the second recipient from the drop down.



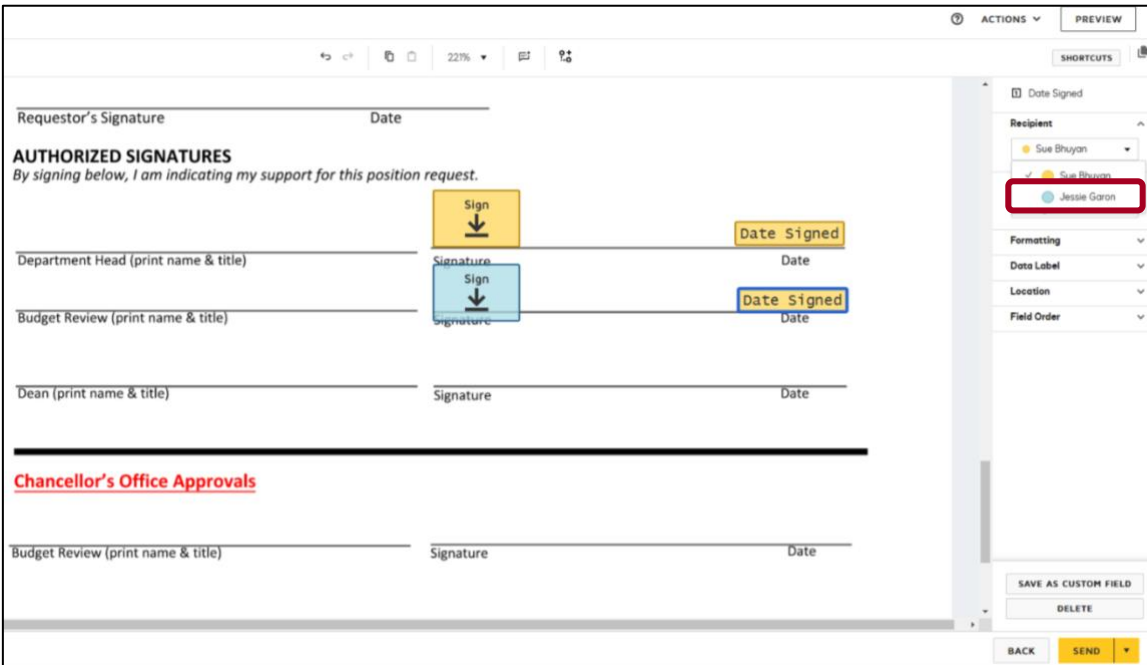
19. The **Sign** box will change color to match the second recipient. Click **Date Signed** then drag and drop it next to the second recipient.



20. On the menu at the right, click on the drop-down box for **Recipient**.



21. Select the name of the second recipient from the drop down.



22. Click **Send**.

Requestor's Signature _____ Date _____

AUTHORIZED SIGNATURES
By signing below, I am indicating my support for this position request.

Department Head (print name & title) _____ Signature _____ Date _____
Budget Review (print name & title) _____ Signature _____ Date _____

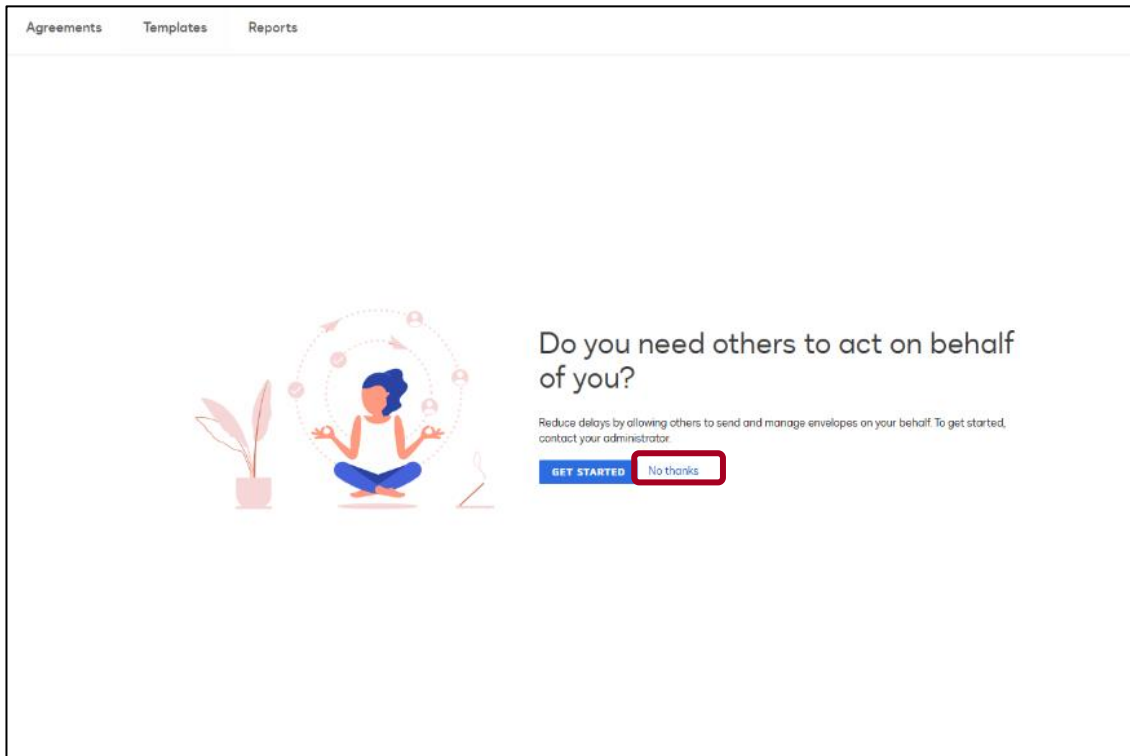
Dean (print name & title) _____ Signature _____ Date _____

Chancellor's Office Approvals

Budget Review (print name & title) _____ Signature _____ Date _____

BACK **SEND**

23. This screen may appear. Click **No thanks**.



24. The process is complete. You will be taken to your **Inbox** which will display your completed forms and sent envelopes. **Status** keeps track of how many people still need to sign.

