



University Information  
Technology Services

# Sending and Managing Envelopes

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DocuSign

University Information Technology Services

Technology Outreach

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# University Information Technology Services

## Sending and Managing Envelopes DocuSign

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## Introduction

With *DocuSign*, you have the ability to create, share, and sign documents online. As a paperless solution, DocuSign is fast and efficient allowing you to provide faculty, students, and staff a secure way to sign and return documents anytime, anywhere.

## Learning Objectives

After completing this booklet, you will be able to:

- Log in to DocuSign
- Create a new envelope
- Upload documents to an envelope
- Send an envelope
- View and resend delivered envelopes
- Review signed documents

**Note:** When accessing and sharing University data online, it is critical that you comply with KSU's Data Security Policy. This policy has been created to protect sensitive University data, including the personal data of students and employees, and is essential for compliance with federal, state, and the University System of Georgia data security regulations. When using DocuSign, users should not add documents that include Personally Identifiable Information (PII) data including

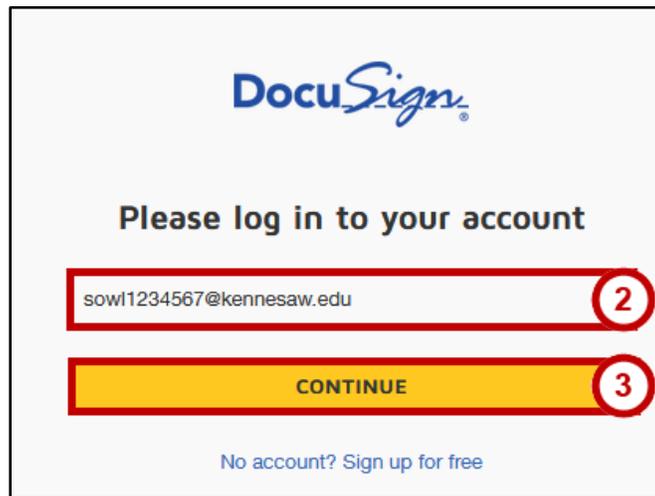
- Social Security Information
- Driver's Licence Numbers
- Banking Account Information
- Credit/Debit Card Numbers
- Passwords (unencrypted)
- Identifiable Medical Information
- Visa/Passport Data.

For more information, please visit the [UITS Document Management](#) home page.

## Logging into DocuSign

The following explains how to access and log in to *DocuSign*.

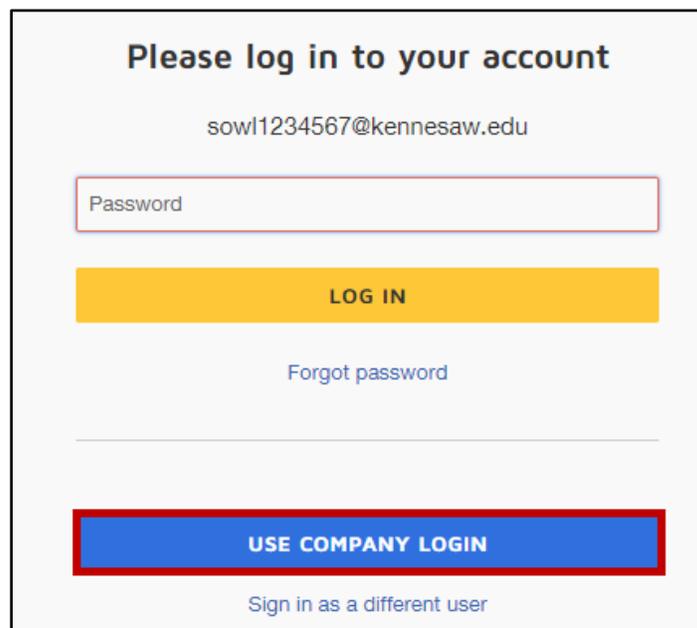
1. In an internet browser, navigate to <http://docusign.kennesaw.edu>.
2. In the *Email Address* field, enter your **KSU email address** (see Figure 1).
3. Click **Continue** (see Figure 1).



The screenshot shows the DocuSign login interface. At the top is the DocuSign logo. Below it is the heading "Please log in to your account". There is an input field containing the email address "sowl1234567@kennesaw.edu", which is highlighted with a red border and a red circle containing the number 2. Below the input field is a yellow button labeled "CONTINUE", also highlighted with a red border and a red circle containing the number 3. At the bottom, there is a link that says "No account? Sign up for free".

Figure 1 - Enter your KSUmail address

4. In the *password* page, click **Use Company Login** (see Figure 2).



The screenshot shows the password page of the DocuSign login interface. At the top is the heading "Please log in to your account". Below it is the email address "sowl1234567@kennesaw.edu". There is an input field labeled "Password". Below the input field is a yellow button labeled "LOG IN". Below the "LOG IN" button is a link that says "Forgot password". At the bottom, there is a blue button labeled "USE COMPANY LOGIN", which is highlighted with a red border. Below the "USE COMPANY LOGIN" button is a link that says "Sign in as a different user".

Figure 2 - Logging in

5. You will be taken to the login page. Enter your **KSU email address** and **password** (See Figure 3).
6. Click **Sign In** (See Figure 3).

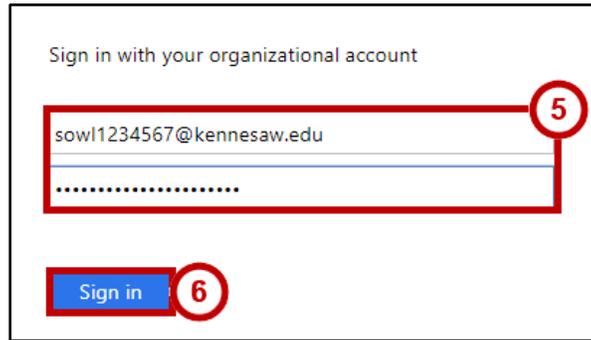


Figure 3 - Signing In

**Note:** If you are already logged into KSUmail, you will be taken directly into DocuSign upon completing Step 4.

## Creating Envelopes

Envelopes are document containers that can be sent to one or more recipients for viewing or signing. Prior to sending an envelope, you are able to add documents from your local computer or via the cloud. Each envelope will be unique to each person receiving them. The following explains how to create an envelope in DocuSign.

1. From the *DocuSign Home Page*, click **New** (See Figure 4).
2. Click **Send an Envelope** (see Figure 4).

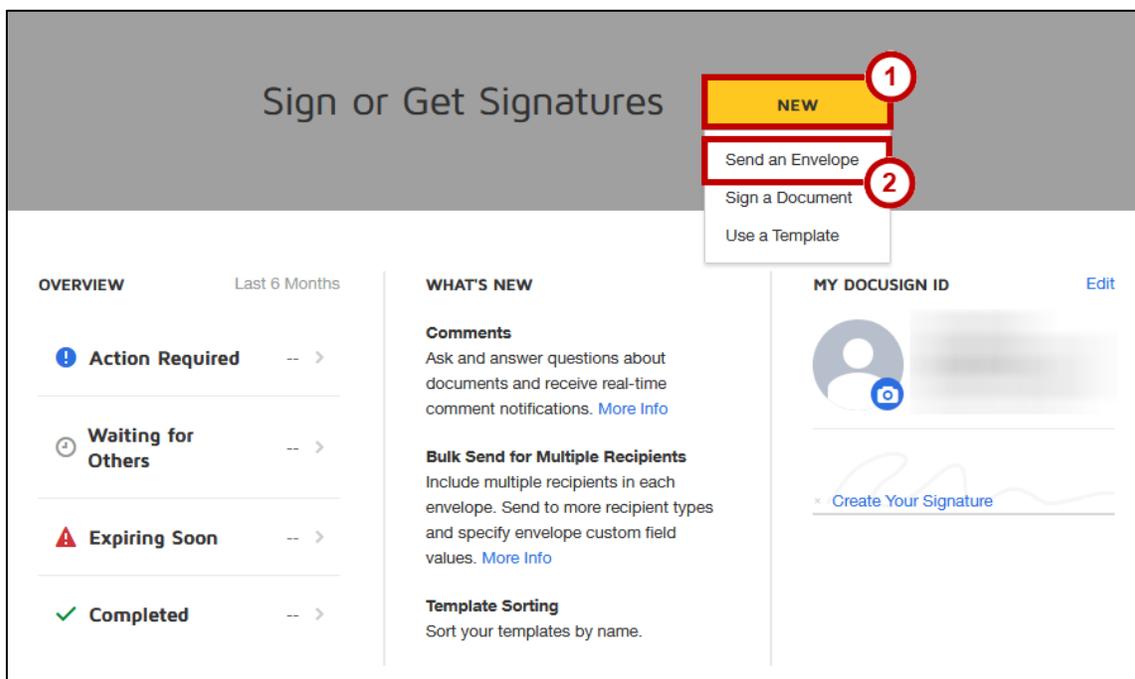


Figure 4 - Click New

3. You will be taken to the *Add Documents to Envelope* page. To upload a document to your envelope, click **Upload**.

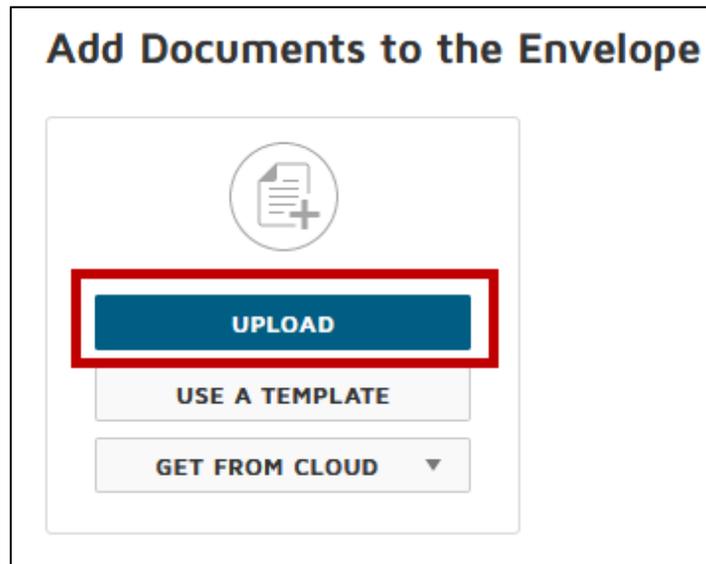


Figure 5 - Click Upload

4. Navigate to and select the **document** you wish to upload (see Figure 6).
5. Click **Open** (see Figure 6).

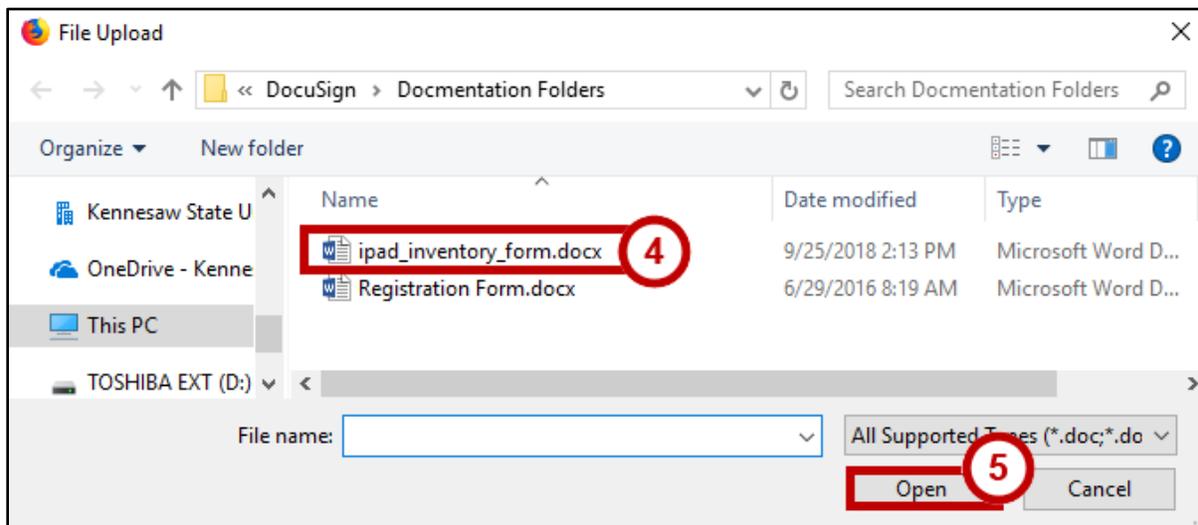


Figure 6 - Uploading a file

**Note:** Upon uploading a file, it will be converted into an uneditable pdf.

6. Your document will be uploaded. To upload additional documents, repeat steps 3-5. Otherwise, move on to Step 7.

7. To add a recipient, type their **name** into the *name* field (see Figure 7).
8. Type the recipient's **email address** into the *email* field (see Figure 7).

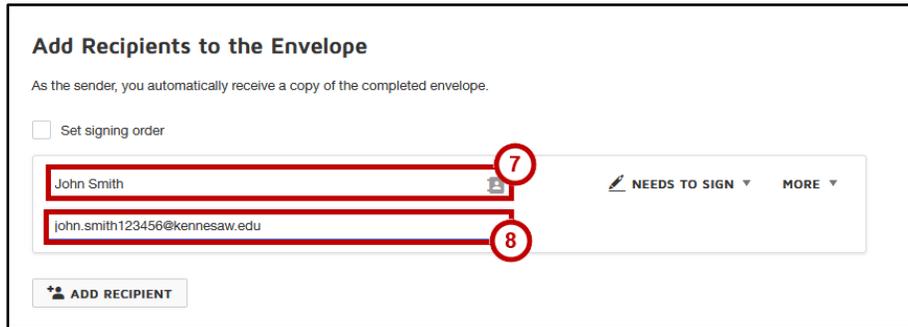


Figure 7 - Entering Recipients

9. The *Needs to Sign* dropdown allows you to set the action that the recipient must take. The actions available are as follows:



Figure 8 - DocuSign Roles

- a. **Needs to Sign:** The recipient must complete the required fields, add a signature, add initials, and provide a date as needed (See Figure 8).
  - b. **In Person Signer:** The DocuSign account holder hosts a signing session for the recipient (See Figure 8).
  - c. **Receives a Copy:** The recipient will receive a copy of the envelope. No action is required on the part of the recipient (See Figure 8).
  - d. **Needs to View:** The recipient must open and view the envelope (See Figure 8)
  - e. **Specify Recipients:** Recipient is able to enter the name/email address of the role recipients who are at the same position or later in the signing order (See Figure 8).
  - f. **Allow to Edit:** The recipient can make changes to the document or other recipients to an envelope in process. This person must have a valid DocuSign account (See Figure 8).
10. To add additional recipients, click **Add Recipient**.



Figure 9 - Add Recipient

11. Repeat steps 7-10 as needed. When finished adding recipients, continue to step 12.
12. Placing a check next to *Set signing order* (a) allows you to set the order of which recipients will sign the document. For instance, if this option is checked, the first person listed will sign the document. After they sign the document, it will be sent to the next signer and so forth. Clicking and dragging the rectangular dots (b) will allow you to order the signers (see Figure 10).

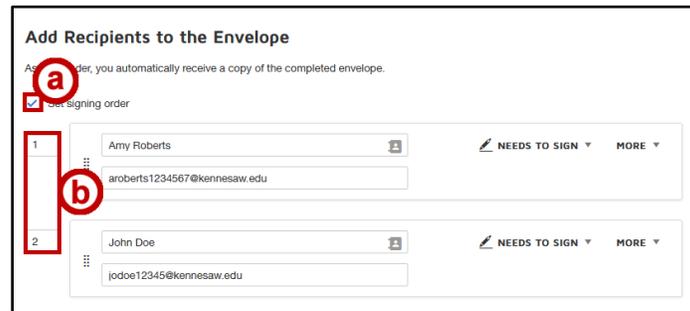


Figure 10 - Setting the Signing Order

**Note:** You may also allow multiple signers to sign at the same time while maintaining the signing order. To do so, simply type the same number to the individuals that need to sign at the same time.

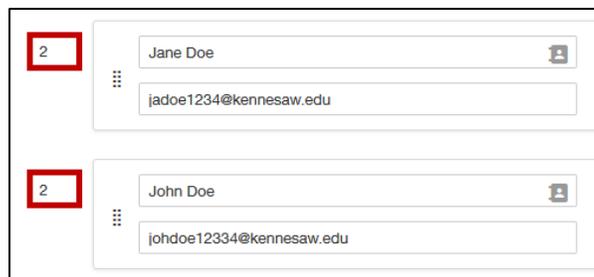


Figure 11 - Signing Order

13. You may add a message to all recipients via *Message to All Recipients* (see Figure 12).
14. You may also click **Edit**, located next to *Advanced Options* to access advanced messaging options such as *Recipient Privileges*, *Reminders*, *Expiration settings*, *Envelope ID settings*, and *Comments* (see Figure 12).



Figure 12 - Message to All Recipients

15. When you are ready to set your fields on the document, click **Next**, located at the top of the screen.



Figure 13 - Click Next

16. You will be taken to the *Add Fields* page. The layout is as follows:

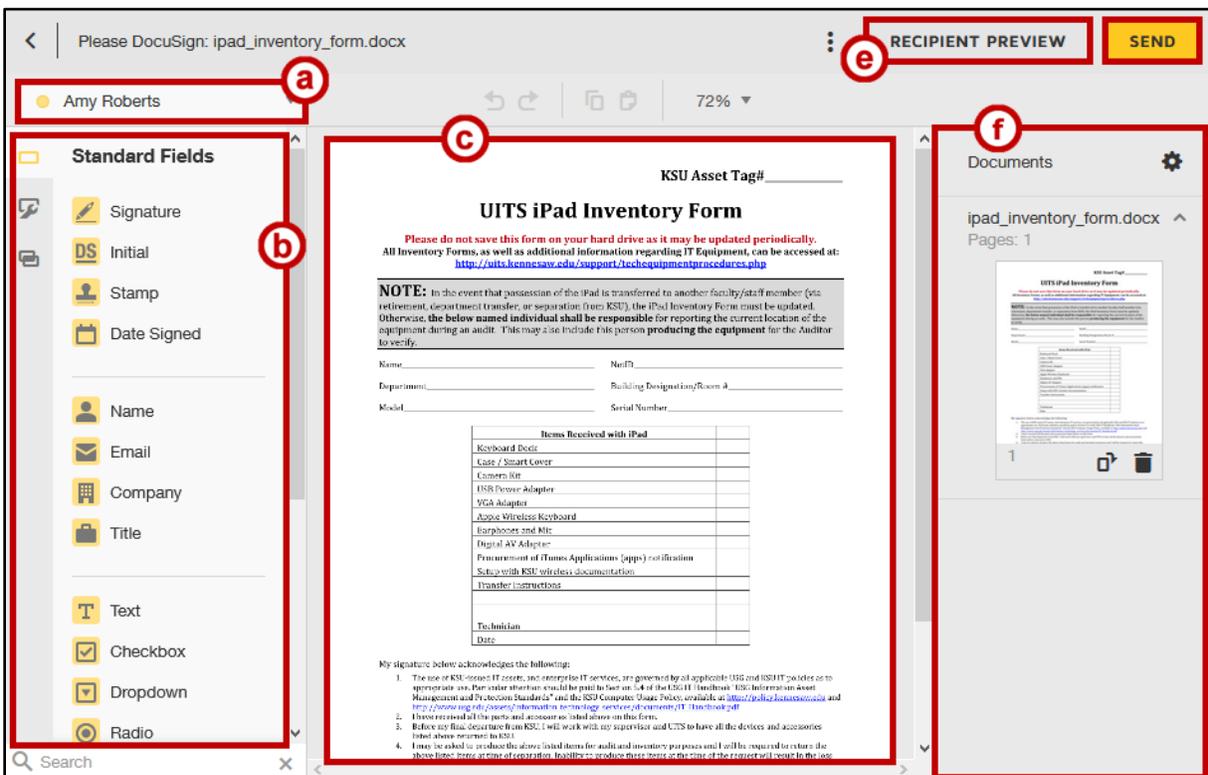


Figure 14 - Adding Fields

- a. **Recipient Selection** – Allows you to select the recipient so that you may indicate what fields they need to fill in. You may also edit recipients from this drop-down (see Figure 14).
- b. **Standard Fields:** Add fields into the document in which recipients can interact with (see Figure 14).
- c. **Document:** View and add *standard fields* into the document (see Figure 14).
- d. **Recipient Preview:** Preview the document as a selected recipient (see Figure 14).
- e. **Send:** Send the envelope to the the recipient (see Figure 14).
- f. **Documents:** View, select, add or delete the various documents included in the envelope (see Figure 14).

17. To add a field to your document, click and drag the **field** icon from the *Standard Fields* panel onto the desired location of your document.

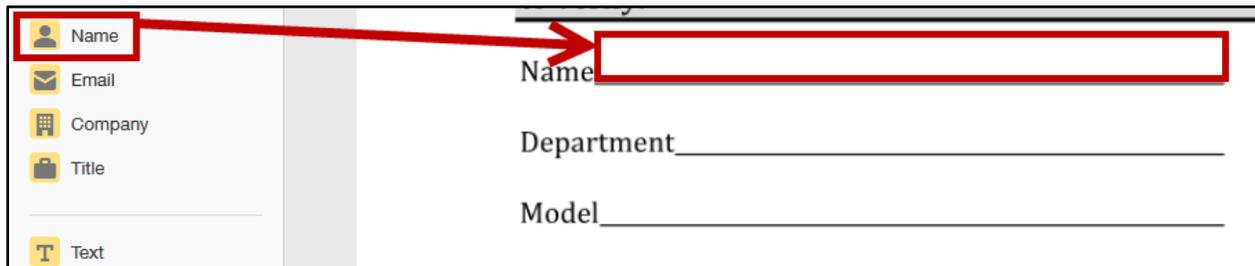


Figure 15 - The Name Field

18. To add a place for your recipient to sign their *signature*, click and drag the **signature** icon to the desired location.

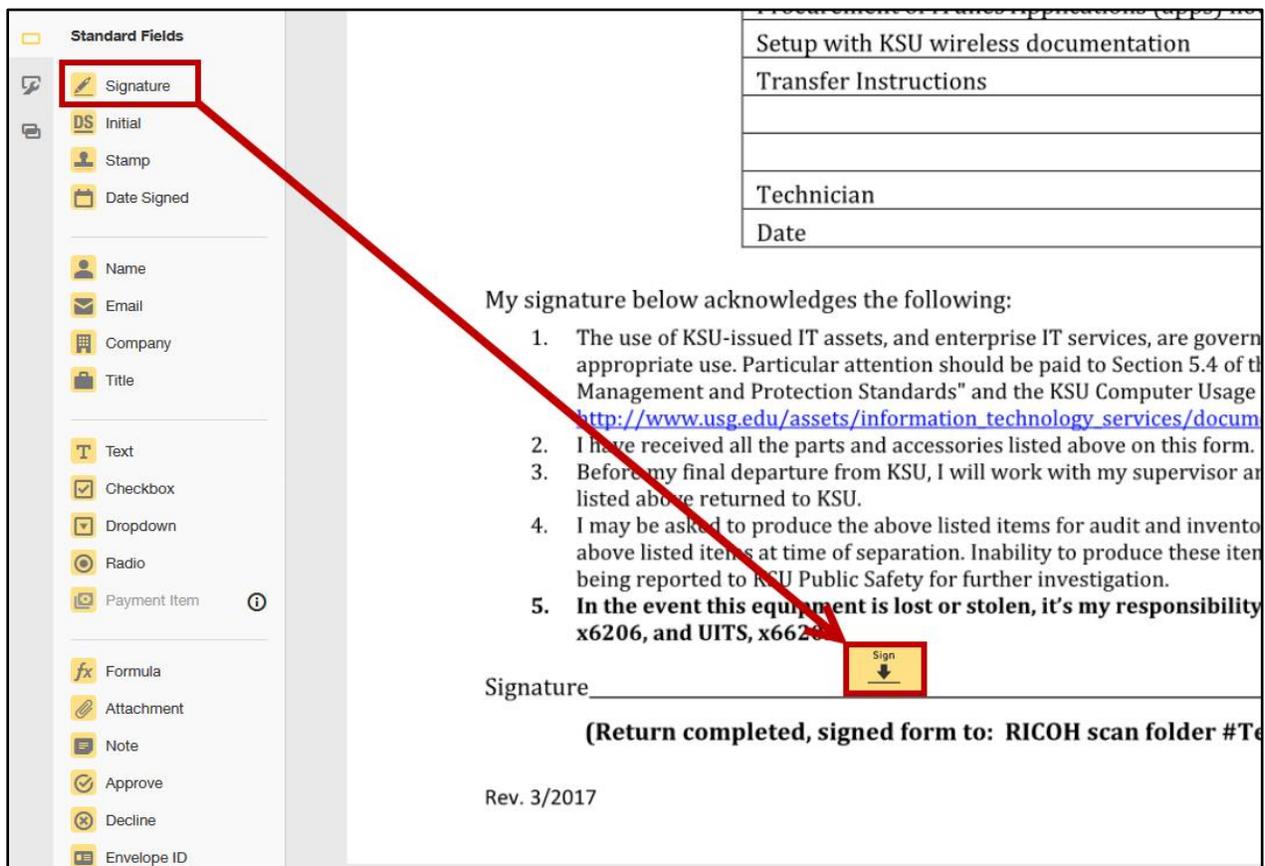


Figure 16 – Adding a signature

19. If you have additional recipients, you may adjust the fields they are required to edit. To do so, click the **Recipient Selection Dropdown**, located near the top of the screen (see Figure 17).

20. Select the **recipient** that you wish to send the document to (see Figure 17).

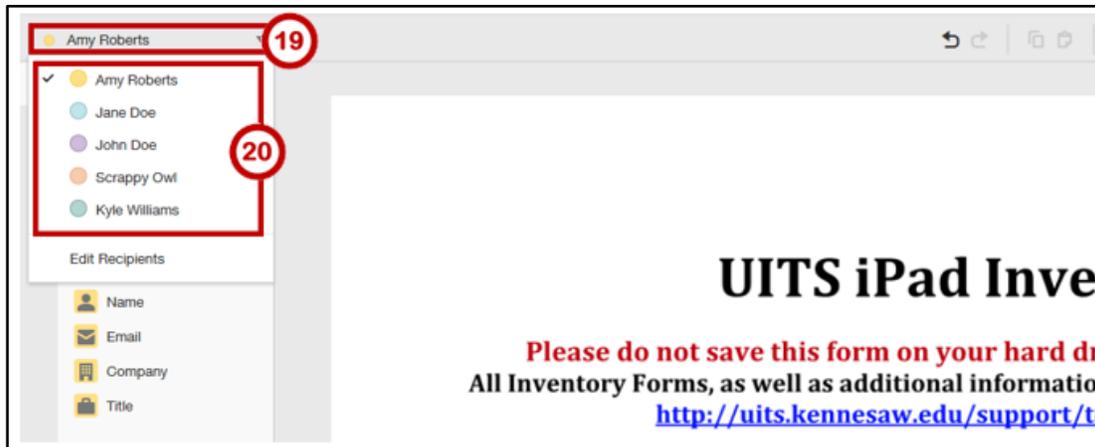


Figure 17 - Changing Recipients

21. Repeat steps 16 – 20 as needed.

22. If you wish to preview what the recipient(s) will see, click **Recipient Preview**.



Figure 18 - Recipient Preview

23. You will be taken to the recipient preview. Here you can preview the document as a specified recipient across different devices such as a PC, tablet, or mobile phone.

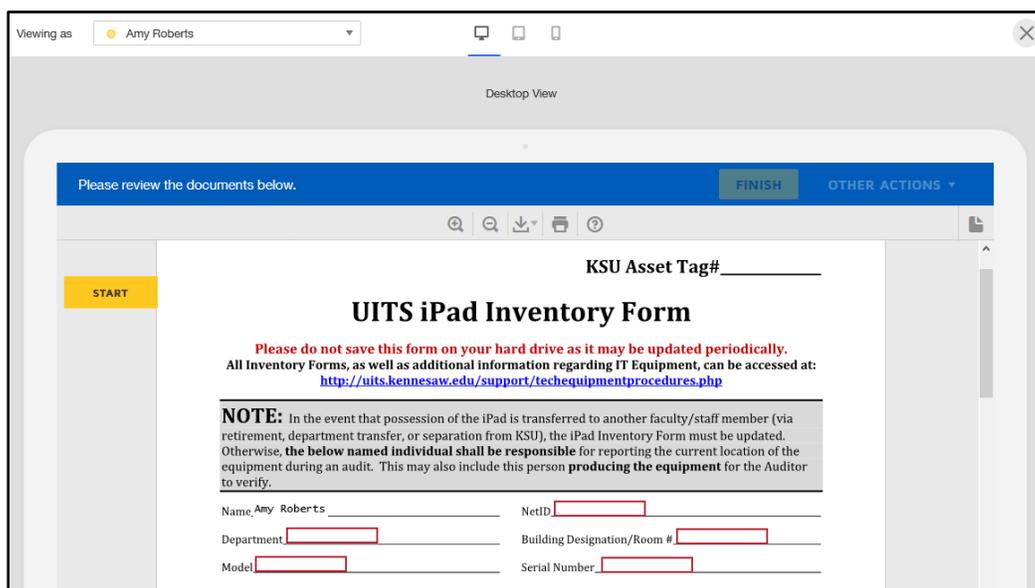


Figure 19 - Recipient Preview

24. When you have finished previewing the document, click the **X** located at the top of the recipient preview window.



Figure 20 - Exiting the preview

25. When you are ready to send the envelope, click **Send**.



Figure 21 - Click Send

26. Your envelope will be sent to your recipients and you will be taken back to the *Manage* screen.

## Viewing and Managing Envelopes

After sending documents, you have the ability to manage your envelopes. Through the *Manage* page, you may view sent envelopes, view the status of outstanding envelopes, resend envelopes, etc.

### Viewing Sent Envelopes

The following explains how to view sent envelopes.

1. From the *DocuSign Home Page*, click **Manage**.



Figure 22 - Click Manage

2. To view any envelopes that have been sent, click **Sent**.

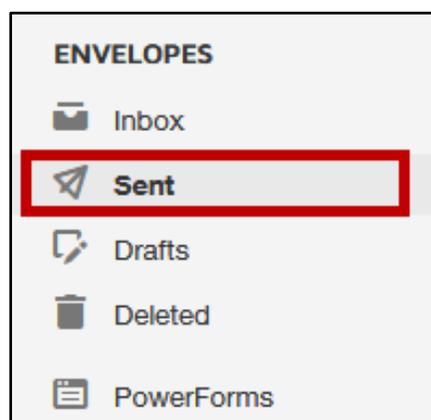


Figure 23 - Click Sent

3. You will be taken to your *Sent* folder. The layout for this page is as follows:

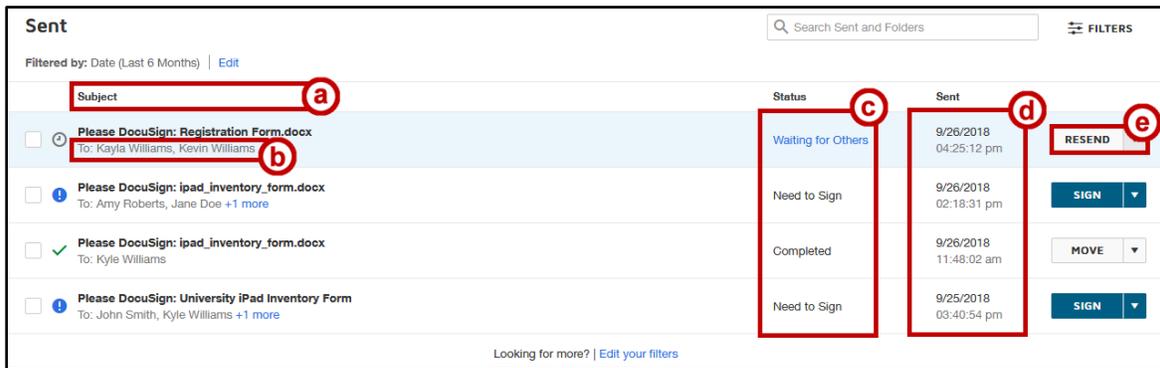


Figure 24 - Sent Folder

- a. **Subject** – Displays the subject(s) of all sent envelopes (see Figure 24).
- b. **Recipients** – Displays the recipients of the envelopes (see Figure 24).
- c. **Status** – Displays the current status of the envelope (see Figure 24).
- d. **Sent** – Displays when the envelope was sent (see Figure 24).
- e. **Action Dropdown** – Allows you to take actions on an envelope. For instance, you can resend the envelope to recipients, sign any envelopes awaiting your signature, move the envelope to a new folder, etc (See Figure 24).

## Resending Envelopes

In the event that a recipient loses or inadvertently delete’s an envelope, you have the ability to resend it. The following explains how to resend an envelope.

1. From the *DocuSign Home Page*, click **Manage**.



Figure 25 - Click Manage

2. To view any envelopes that have been sent, click **Sent**.

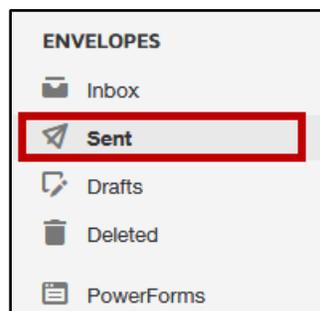


Figure 26 - Click Sent

- You will be taken to the *Sent* folder. Locate the envelope that you wish to resend and click the **Resend** button.



Figure 27 - Click Resend

**Note:** If you do not see an option to resend:

- Click the **dropdown** next to the *Sent* column (see Figure 28).
- Click **Resend** (see Figure 28).



Figure 28 - Clicking Send from the dropdown

## Viewing Signed Envelopes

With DocuSign, you have the ability to view envelopes that have been signed. The following explains how to do so.

- From the *DocuSign Home Page*, click **Manage**.



Figure 29 - Click Manage

- To view any envelopes that have been sent, click **Sent**.

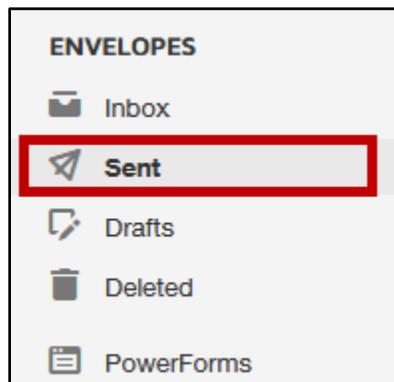


Figure 30 - Click Sent

3. You will be taken to the *Sent* folder. Click the envelope that you wish to view the status of.



Figure 31 - Click the envelope

4. You will be taken to a page where you can view the signing status of the envelope. For instance, you can view recipients who have:
- Signed the documents in the envelope* (see Figure 32).
  - Those envelopes that are *awaiting a recipient's signature* (see Figure 32).

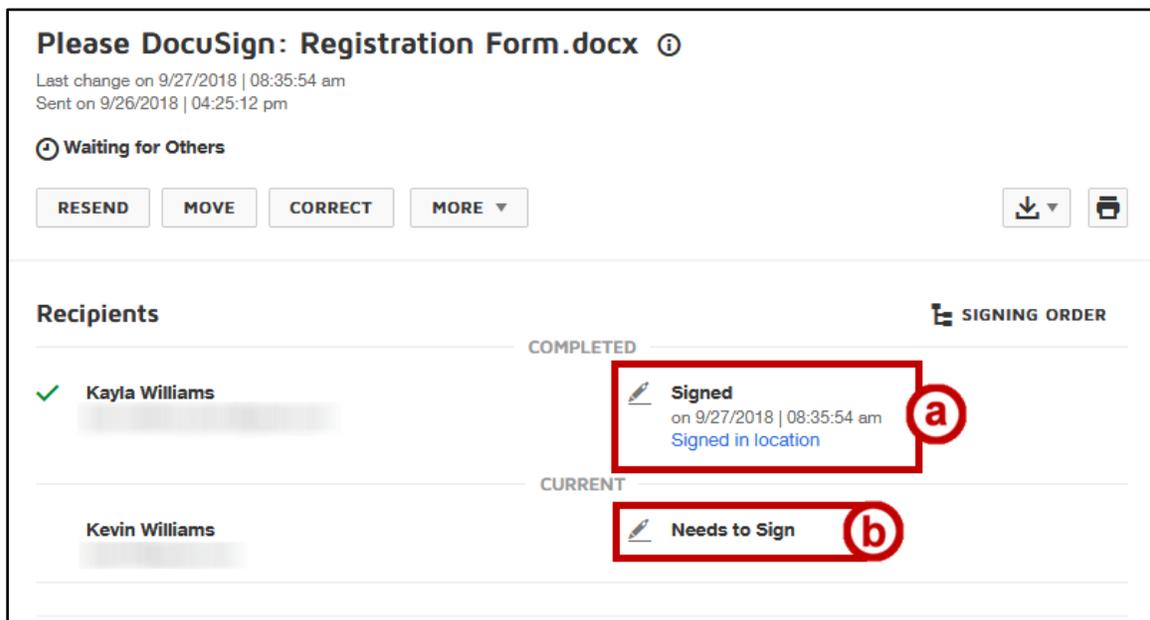


Figure 32 - Viewing signed envelopes

## Additional Help

For additional support, please contact the KSU Service Desk:

### KSU Service Desk for Faculty & Staff

- Phone: 470-578-6999
- Email: [service@kennesaw.edu](mailto:service@kennesaw.edu)
- Website: <http://uits.kennesaw.edu>