Overview

- DocuSign is a company that provides electronic signature technology for signing of contracts and documents. IS&T has recently completed licensing DocuSign for Business service for use by MIT faculty, staff, students and affiliates.
- DocuSign, users will be able to send, sign, track and store documents. All documents will be stored in DocuSign's cloud to track and provide an audit trail of signatures.
- DocuSign supports many document types such as Microsoft Word, Excel and PDF. Also, DocuSign can integrate with tools and business systems such as Dropbox, Google Drive, OneDrive and Salesforce.

New 2020 features include:

- Drag-and-drop file upload
- One-click to use a template
- Bulk-send improvements
- A diagram for better visualization of signing order (when there is more than one recipient)
- The New DocuSign Admin includes capabilities for administrators such as audit logs
- Autosave
- Use Supplemental Documents to provide additional information to recipients, which does not require a signature. Examples are legal disclosures or terms and conditions. To learn more about Supplemental Documents, please see Send Supplemental Documents.
- Auto-tagging, add fields in a template automatically with AutoPlace. For more information, see Add Fields Automatically with AutoPlace

For more information about DocuSign, visit the IS&T DocuSign page.

How to Obtain

For instructions on how to set up your DocuSign account, visit How can I begin to use DocuSign?.

How to Use

Logging In

- MIT users should access DocuSign at http://docusign.mit.edu. You must be on campus using ethernet or MIT Secure. Or use VPN if off campus.
- DocuSign is Touchstone-enabled. Once you have set up your account, you will be able to log in using an MIT personal certificate or kerberos username and password.

Mobile Device Use

DocuSign can be used from an iPad, iPhone, Android, Windows 8 and Windows phone.
Searching for Envelopes

To find envelopes in your DocuSign inbox, visit Locate Envelopes.

Creating Templates

1. To create a new template, click on 'NEW.' If you do not see the 'NEW' option, contact the IS&T Service Desk for assistance.
2. Then visit How do I get signatures on a document?.

Sharing Templates

When you create a template the sharing defaults to all account users and system administrators. System administrators can view all templates, this option cannot be changed. Administrators will only view templates if you have questions or need to troubleshoot issues.

You can change the setting to not share your template with all account users. This can be done by performing the steps below:

1. For your template, click the dropdown arrow on the USE button.
2. Go to option Share with Users.
3. In the sharing screen, uncheck option Select All for the USERS section.
4. In the sharing screen, go to the GROUPS section and the Everyone option should not be selected.
5. In the sharing screen, click the SELECTED section and check the Everyone option is not listed.
6. Click the Share button.

   Note: If you need to share your template with a user. Type the user's name or email in the search field.

Additional Documentation

- Working with Templates
- Add Fields to Documents
- Using PowerForms
- PowerForms vs Templates
- Send Documents Using Bulk Send
- Responsive Signing
  - Responsive Signing, where you can preview your documents across different device types i.e. tablet, mobile view.
  - This will allow recipients to view your documents more easily on their mobile devices.
- Minimum System Requirements Needed to Sign with DocuSign

Documentation for Developers

- Integration setup and testing must be done first in a sandbox. You can get a free developer sandbox account from DocuSign. To create an account, see DocuSign's Developer Sandbox
- For more information about DocuSign's APIs and developer resources, see DocuSign's Developer Center
- Check out the developer blog series, see DocuSign's Developer Blog Series

Report Suspicious Emails

Please send phishing emails to DocuSign's security team at spam@docusign.com.

Here are some tips to help spot the difference between real and spoof DocuSign emails:

- All URLs to view or sign DocuSign documents will contain “docusign.net/” and will always start with https.
- All legitimate DocuSign envelopes include a unique security code at the bottom of notification emails. If you don't see this code, then don’t click on any links or open any attachments within the email. Forward it to spam@docusign.com.

See Also

- DocuSign Overview.
- For more information on how to do a specific DocuSign task, visit the DocuSign User Guide.
- To understand and watch how DocuSign works, visit How DocuSign Works.

Have Questions or Still Need Help?

- Contact the IS&T Service Desk
Additional escalation information for Help Staff can be found here:

- [se:DocuSign Recon]