MIT DocuSign Landing Page

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On this page:

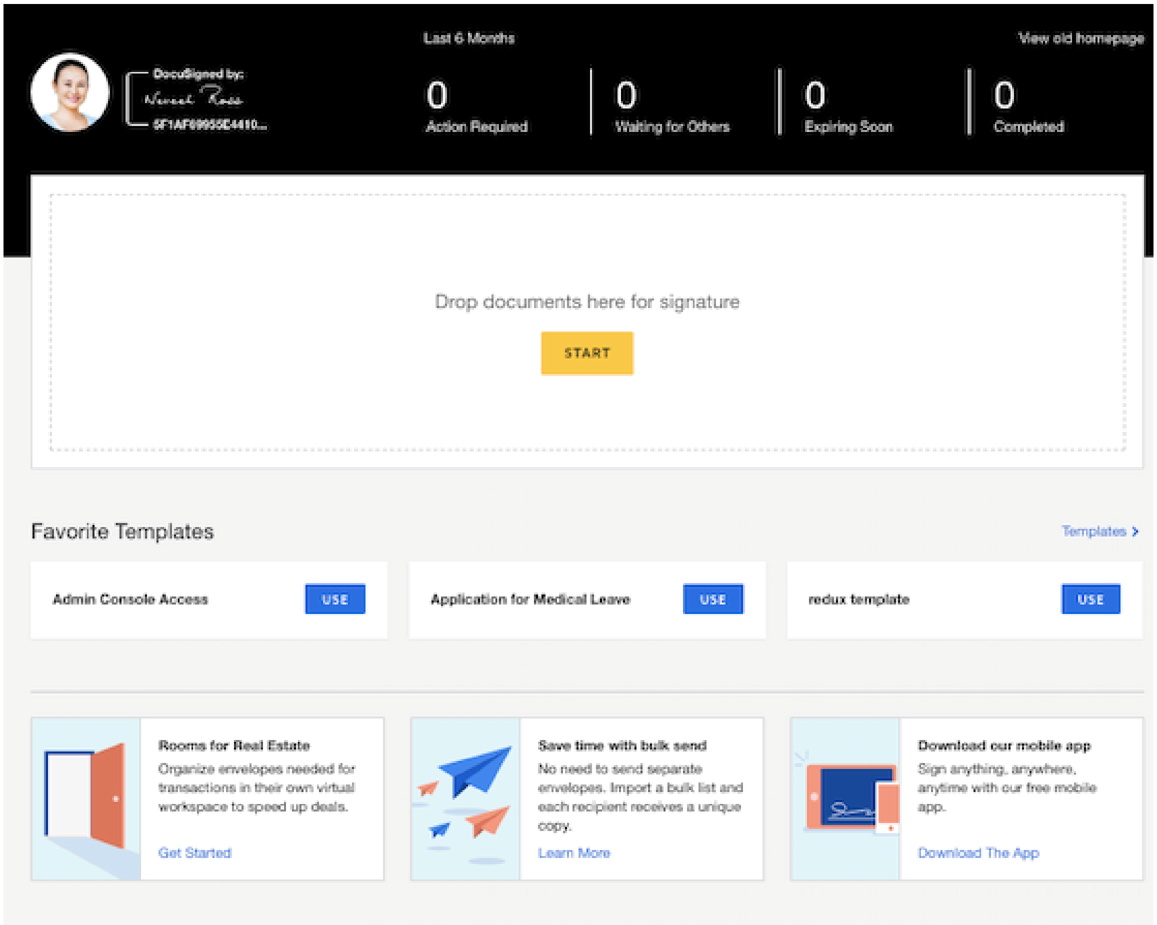
Overview

- DocuSign is a company that provides electronic signature technology for signing of contracts and documents. IS&T has a DocuSign license 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.
- For more information about DocuSign, please visit the IS&T DocuSign page.

Design and Feature Updates

- 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
- New account home page will give users easier access to key features and actions for the MIT DocuSign account. The new home page will not impact DocuSign functionality.
- **New home page will include changes such as:**
    - Quick access to your favorite templates to create envelopes.
    - More visible dashboard counters for quick insight into envelope status.
    - Ability to drag and drop files to start envelopes right from the home page.
    - A dedicated area to view information about features and education.

- **New Home Page Design:**



How to Obtain

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

How to Use

Login

- 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.

System Requirements/Supported Browsers

- DocuSign will end support for IE11 starting February 15th, 2022.
- Minimum System Requirements Needed to Sign with DocuSign

Mobile Device Use

DocuSign can be used from an iPad, iPhone, Android 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. See information about Create Templates.
3. See information about How do I get signatures on a document?.

Requirements for a Template to become a PowerForm

1. You have DocuSign permission to create and use PowerForms. To check if you have permission, go to **Templates** and for your template click the arrow on the **Use** button. Look for option **Create PowerForm**.
   Note: If you don't have permission for PowerForms, please contact the IS&T Service Desk.
2. First recipient must be a role. Name and email need to be blank for the first signer.
3. A document is uploaded to the template.
4. Template fields have been added/tagged for each signer role.

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.

Manage Contacts

DocuSign includes a contacts list to help make sending envelopes easier. When you send an envelope, the recipient's name and email address are automatically added to your address book. You can use the contacts list to quickly add recipients from either your address book or the directory for when you send envelopes. Click on section **Add From Contacts** to view your contacts and add them to envelopes.

The contacts list has two components:

Address Book: Contains personal contacts, contacts shared with you and account signing groups.
Directory: Contains all active users on your account. DocuSign administrators always have directory access.

How to Add, Edit or Delete Personal Contacts

You can create, edit and remove your personal contacts. To manage your personal contacts go to the DocuSign homepage, click on your initials and go to **My Preferences**. In the left-hand menu, under **Account**, select **Contacts**. You're in the contacts view and click the **Add Contact** button and enter the contact's information. After save it.

Contact Information

Field	Note
Full Name	Required field. Enter the contact's name as you expect them to sign the document with.
Email	Required field. Enter the email address to send notifications for the contact to view and sign documents. If the contact has a DocuSign account that you know of, use their account email address in order for your documents to arrive at their DocuSign account. Recipients do not need an account to sign documents.
Company	Optional field.

Mobile/Home/Work/Other Phone	Optional fields. Non-US numbers must include a leading "+" for country code, example: +42 7 872 0517. US numbers require the 10-digit number without the country code, example: 202.555.1234. Phone numbers should be entered as: 2025551234. **Note:** Saved phone numbers cannot be used for recipient identity verification options i.e. Phone Call and Knowledge-Based. **Note:** Fax is not used for the MIT DocuSign account. **Note:** Numbers are checked against an international phone number database for validity.
Shared Contact	Optional setting. You can share your contacts with account users. Account users with shared access will be able to view and use the contact. The contact's name, email address and company name information is shared. Only the contact owner can edit or delete a shared contact.

Edit Personal Contacts
If you need to edit a contact. Locate the contact by searching or scanning the list. Click **Edit** and update the contact's information. Then click **Save**.

Delete Personal Contacts
If you need to remove one or more contacts. Locate the contacts by searching or scanning the list. Check the box next to the contacts you want to remove and click **Delete**.

Unshare Personal Contacts
If you need to unshare one or more contacts. Locate the contacts by searching or scanning the list. Check the box next to the contacts you want to unshare and click **Unshare**.

Bulk Import Contacts

Please see Bulk Import Contacts for more information.

Using Bulk Send

Please see Using Bulk Send for more information.

Envelope Data

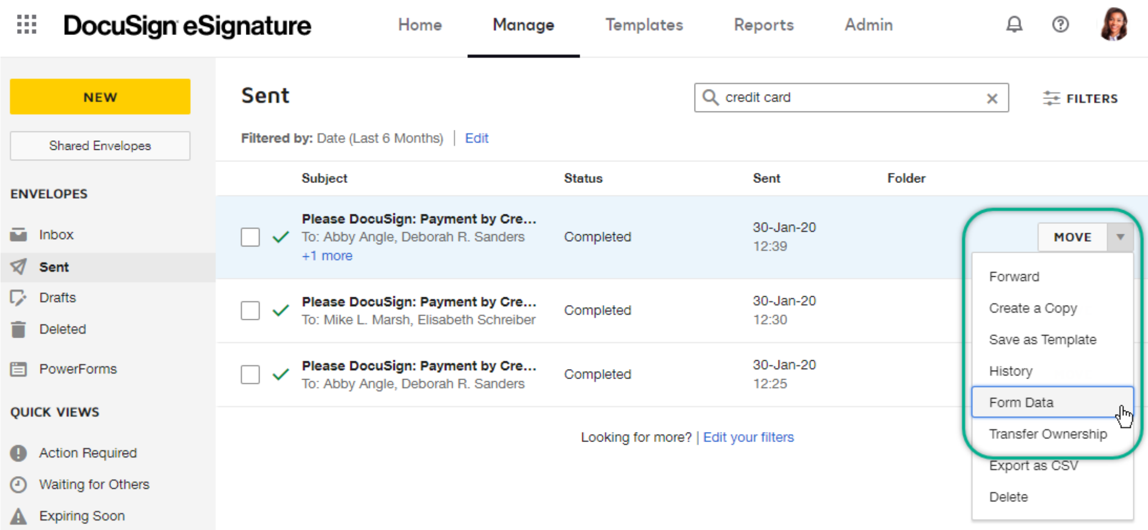
Users can view and download field data from any in process, completed, or voided envelope that is sent by you or is shared with you. Document text that is hidden with asterisks for privacy and security purposes is visible in the form data. Fields **Signature**, **Initial**, **Approve** and **Decline** are not data fields and therefore are not included in form data.

You can view form data from the Manage page or the Envelope details view. Also, envelope and recipient data can be downloaded for envelopes.

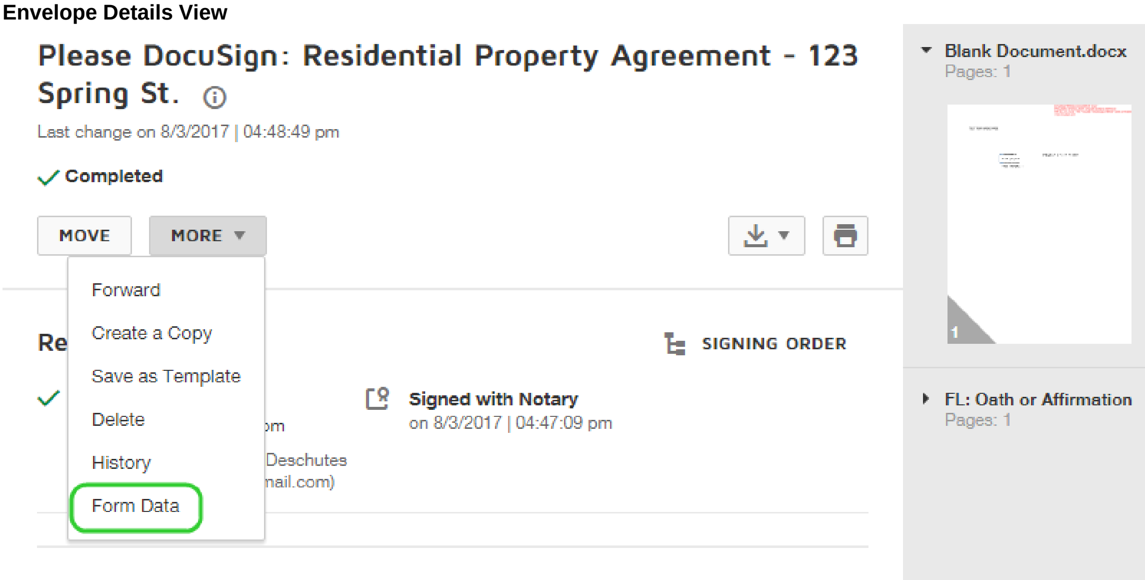
Envelope and Recipient Data such as:

- Envelope ID
- Document Subject
- Sender
- Date Sent
- Status
- Decline and Void Information
- Recipient ID
- Recipient Name and Email
- Recipient Actions/Status (Viewed, Signed)
- Routing Number

Manage Page



Envelope Details View

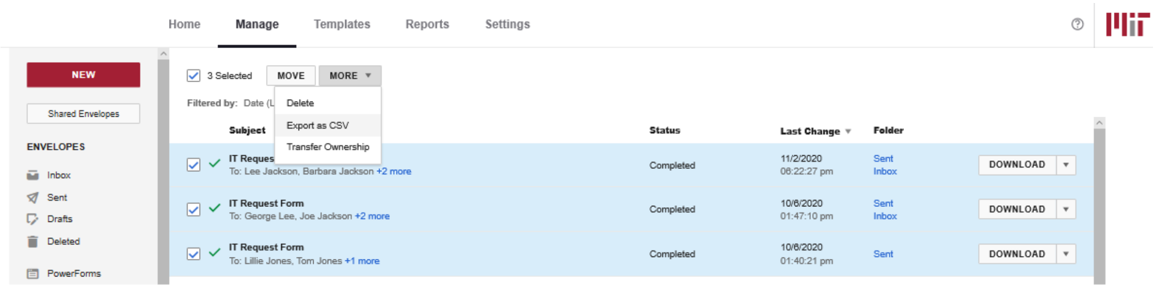


How to Download Form Data

1. From the Manage page, put a check mark for the envelope you want to review.
2. Click the dropdown arrow for the envelope and select **Form Data**.
3. The envelope form data appears.
4. Click the **Download** button at the bottom.
5. Form data is exported to a CSV file and you can save it to your local drive.
6. Repeat steps for each envelope you want to download form data.
   Note Follow these steps if you're using Bulk Send.

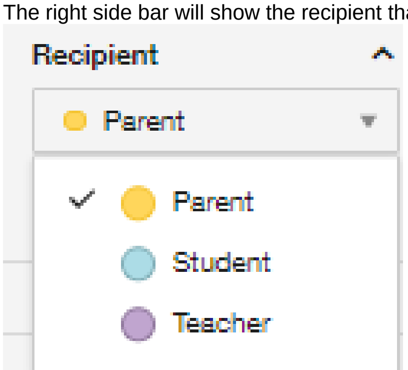
How to Download Envelope and Recipient Data for Multiple Envelopes

1. From the Manage page, put a check mark for each envelope you want to review.
2. Click the dropdown arrow for the **More** button and select **Export as CSV**.
3. Envelope and recipient data is exported to a CSV file and you can save it to your local drive.
4. Repeat steps for the multiple envelopes you want to download envelope and recipient data.



How to Reassign Fields to Another Recipient

1. Add the new recipient to your template.
2. Reset the signing order to include the new recipient.
3. In your template, click **Next** to go to the section to add and assign fields to recipients.
4. Select the fields you want to reassign by putting your cursor on a field and holding the shift key.
   Note: Use Ctrl+G to select all fields on a current page. Click **Actions** to view shortcut keys.
5. The right side bar will show the recipient that has the fields assigned. Click on it to reassign the fields to the new recipient.



6. After reassignment, check the field properties such as data label to make sure all is correct. If not, update the field properties as needed.
7. Save and close your template.
8. Go back to your template and click **Edit**. Remove the old recipient. No message should appear about removal of fields if recipient is deleted.
9. In your template, click **Next** and check again the new recipient still has the correct fields and properties assigned.
10. Save and close your template.
11. Now, fields have been reassigned to another recipient.

Additional Documentation

- Optimizing Accessibility in DocuSign eSignature
- Working with Templates
- Add Fields to Documents
- PowerForms vs Templates
- 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.

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]