DocuSign FAQs

What is DocuSign?

DocuSign provides electronic signature technology and digital transaction management services for facilitating electronic exchanges of contracts and signed documents. For more information, check out the SJSU’s DocuSign Service Web Page or CSUMB's DocuSign Overview. See our How to Fill PDFs Electronically Document on how to complete fillable PDFs and print them using Adobe Reader.

For a tutorial about how DocuSign works, watch this video.

Who can use DocuSign?

Any Faculty, Staff member, or student with a valid SJSUOne ID or OtterID may use the service for business-related purposes.

How do I login to DocuSign?

SJSU Faculty, Staff, and Students:

1. Visit docusign.com
2. Click login
3. Enter your SJSU email
4. You will be redirected to SJSUOne login
5. Enter your SJSUOne ID and password
6. Authenticate with DUO

CSUMB Students

1. Visit docusign.com
2. Click login
3. Enter your CSUMB email
4. You will be redirected to OtterID login
5. Enter your OtterID and password

How do I sign a document with DocuSign?

When you receive an email that requires a signature through DocuSign, select the link given and consent to the use of electronic records and signatures. Review the document and fill out any information needed. When entering your name for the signature, confirm your name and select your signature. You also have the option to draw your own signature, if desired.

For a tutorial on how to sign a document watch this video.

Read about signature policies of SJSU here.

How do I receive a copy of the document once signed?

You will automatically receive a copy of the signed document once you have completed the document and clicked **FINISH**.

How do I send a document that requires a signature?

1. Once logged in, select **NEW** then **Send an Envelope**.
2. Upload your documents that need to be filled out, or use a template.
3. **Add Recipient(s)** by entering their name and email address and select the action that the recipient(s) must take (i.e. Needs to Sign).
    1. If you have multiple recipients, you may select **Set signing order** and control the order in which your recipients receive and sign the document. (Ex: Second

recipient may sign the document after the first recipient)

4. Enter a message to your recipient(s).
    1. You may select **Custom email and language for each recipient** to personalise each message for each of your recipients.
    2. You can alter the recipients privileges, send reminders, and expirations through the **Advanced Options**.

5. Select **NEXT** in top right corner of screen.
6. Add fields to your documents. On the left side are fields where you can click and drag each field to the areas needed to be filled.
    1. You may use the panel on the right side to set or edit the field's properties.

7. Select **SEND** when done.

You will receive a copy of the completed envelope once the recipient has signed the document.

For a tutorial on how to send a document, watch this video.

How do I create an Envelope and send it?

An envelope in DocuSign is similar to a real-life envelope. It is a way to send documents to people that they may need to sign or add information to. You can create envelopes and send them to multiple people. Below are links to a couple tutorial videos, one is a quick overview, the second is an in depth look at how to use envelopes.

To create an Envelope and send it, follow the instructions from the section above, "How do I send a document that requires a signature?"

Quick tutorial of sending envelopes in Docusign, here.

Detailed tutorial of creating, sending, receiving envelopes in DocuSign, here.

What are Templates and how do I use them?

Templates are great when you are frequently using the same or similar documents multiple times. There are two ways to use a template: choose a template and input the signer's information or upload a document and apply a recommended template to the document.

For a tutorial on how to use, create, and manage templates, watch this video.

If you have access to creating templates, jump to "Creating a Template" section

Gaining Access to Template Creation:

Note: Access for certain personnel (e.g., students) to use/create templates requires you to work in SJSU's development environment first, follow these instructions:

1. Login to the DocuSign Development Environment:
    1. Reset the password of your xxxx@gtest.sjsu.edu email account using this link:

       https://sjsuone-dev.sjsu.edu/SJSUOne/ResetPassword/
    2. Verify new password is working by using this link: https://mail.gtest.sjsu.edu.
       Repeat step a and b if verification is not successful.
    3. Use this link to login:

       https://sjsudev.okta.com/app/docusign/exkec9pr9qSA7HvoR0x7/sso/saml
2. Your account will automatically be created once you login.
3. From here you can create test templates.
4. Once you have fully created and tested your template, submit an SJSU i-ticket stating you have tested your template.
5. Once they approve they will grant you access to create real templates.

Creating a Template:

1. From the **TEMPLATES** page, select New Template.
2. Enter a name and description for your template.
3. Upload your files.
4. Add recipient roles and any named recipients.
5. To save your template without adding fields, click **Other Actions** and select **SAVE AND CLOSE**.
6. To set the signing fields for your document, click **NEXT**.
7. Once your finished adding in other fields to your template, click **SAVE AND CLOSE**.

Using Templates:

1. Select **TEMPLATES** in the header and locate that template you want to use and select **USE**.
2. Enter the recipient's information and click **SEND**.

Applying a Recommended Template to a Document:

Automatically:

1. Start a new envelope and upload one or more files.
2. If your document matches a previously saved template, depending on your template matching preferences, the template is either applied to your document automatically, or the Select Matching Templates dialog appears for you to choose which templates to apply.
3. Select the templates you want to apply for each uploaded document, and click **APPLY**. (Click **CANCEL** if you do not want to apply any templates.)
4. The templates are applied to your documents. The recipients, messages, and recipient fields from the template are added to your document.

Manually:

1. Upload your file to an envelope.
2. Click the menu below the document name (⋮) and select **Apply Templates**.
3. From the Apply Templates dialog, select the templates to apply to your document. The dialog has three tabs:
    1. **SUGGESTED**: Templates that meet your account's matching preferences. The Match percentage reflects how closely the template matches with your document.
    2. **BROWSE**: Search all of your templates, including templates shared with you.
    3. **SELECTED**: The list of templates you have selected to apply.
4. Click **APPLY SELECTED**.

How do I send and sign documents from Google Drive or my Gmail?

To be able to quickly sign and send documents through your Gmail or Google Drive, you will first need to install the Google Chrome extension for DocuSign. It’s a quick easy installation process.

Follow this link to see the video tutorial to install the Google Chrome extension.

Once the extension is installed, you should now see the option to use DocuSign when you receive documents in Gmail or for documents in your Google Drive. The following quick video tutorials outline these processes very well.

Gmail DocuSign Tutorial

How can I fix a mistake on a document I’ve already sent out?

Envelopes can be corrected once the document has been sent and is in progress. They cannot be corrected once the envelope has been completed by the recipient, but you can upload a new file with the corrections and resend it to the recipient.

Correcting a Mistake:

1. Select **MANAGE**
2. Select **SENT** box and open the file you wish to edit.

Select **CORRECT** to change details as needed and click **CORRECT** once again when done. A new email will be sent to the recipient.

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