RUTGERS
School of Arts and Sciences

Docusign – Advanced Class – Part 2

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SASIT – Web Development

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WHAT IS DOCUSIGN?

https://it.rutgers.edu/docusign/

DocuSign is Rutgers' electronic signature platform provided by the Office of Information Technology and locally administered by department staff who complete DocuSign training.

With DocuSign, the university has moved to replace paper-intensive processes with an online tool accessible from phones, tablets, and computers. Rutgers departments and units now have access to a secure e-signature tool to verify, route, track, and store documents requiring signatures

- It is a legally defensible signature
- Do NOT need an official account to use
- Can be set to outside of Rutgers
- Official documents
- Anything needing a 'signature', Offer letter
- ntt, ptl (we created an app to do this and work with docusign)

REQUEST DOCUSIGN SERVICES:

If you would like to CREATE TEMPLATES, CREATE POWERFORMS, SEND ENVELOPES (Documents), please create a WORK ORDER, requesting Docusign Permission to send forms. An SAS-IT person will create this account for you. If you already have a 'create' account with docusign, but you do not see 'SAS' on the top left, please create a work order and let us know, so we can move your account over and we can assist.

NEED ASSISTANCE / DOCUMENTATION WITH DOCUSIGN?

Our hope is that each person will be able to build their own forms and send out documents. If you need assistance or if you need special customization options, please create a work order. In the work order be specific that you need assistance with a DOCUSIGN FORM. We will have support available specifically for these types of customizations.

Additional Training / Documentation

https://it.rutgers.edu/docusign/

Login to Linkedin Learning (using your netid)
https://www.linkedin.com/learning/search?keywords=docusign&software=DocuSign&u=76115650

FILES NEEDED FOR CLASS

https://www.sas.rutgers.edu/cms/training/images/docusign.zip

visit:

https://sasit.rutgers.edu/docusign

(Scroll to bottom of page for project materials)

SAVE this file docusign.zip onto local computer

Extract the file

File Contents:

- 2020-powerform-test.pdf (powerform pdf file for application)
- independent-study-form.pdf
- independent-study-form2.pdf (to use for 'replacement')
- research-account-renewal.pdf
- sample-passport.jpg
- sign-doc1.pdf (document with 1 signature)
- sign-doc2.docx (document with 2 signatures)
- ssn-card.jpg
- student-employent-form.pdf
- test-signature.jpg (sample signature)

DocuSign Environment

- We have been advised by OIT that the creation and testing of all DocuSign templates and powerforms should be done in our **demo environment**.
- The main reason for this change is that the production DocuSign environment creates legally binding documents.
- When you want to create a new Docusign process, you should begin in the demo environment.
- Create and test your process(es) in **demo** and when you are ready to go live, you will move the template(s) to the production environment.
- The **demo** environment operates in the same fashion as production and you will have the same level of access.
- The screen colors are different, and all emails sent out from the system have a SAS logo that clearly states DEMO.
- Additionally, completed envelopes in the demo environment state that the document is a **"Demonstration Document Only".**

Production Environment:

Create Document in DocuSign

Login to DocuSign (DEMO ENVIRONMENT)

Visit: demo.docusign.net

Login: NETID@rutgers.edu

It is important to ALWAYS login as NETID@rutgers.edu (do not login as NETID@english.rutgers.edu, for example)

Independent Study Project Form

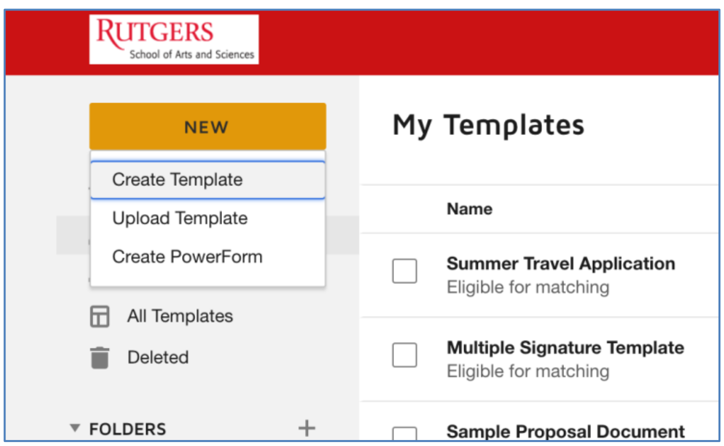
Purpose of Form

This form is for a student to complete and have their faculty advisor approve of an Independent study project / course. The student initiates the ‘sending’ by completing most of the information as well as the Faculty name / email. Next the faculty member will complete with their specific details and if they approve or not.

Goals Workshop 1

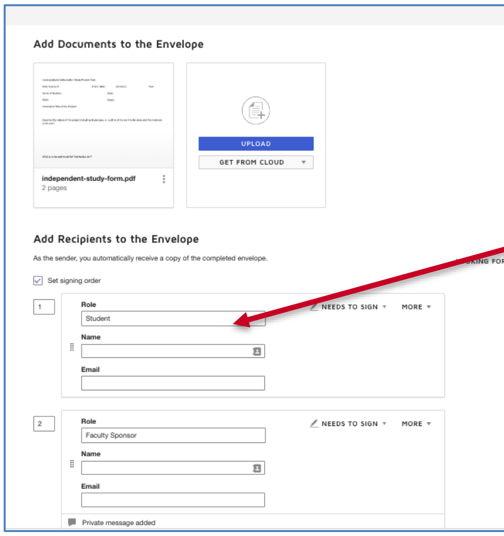
- Use ROLES and Specify Names/Emails
- Private message to recipient
- Set Email Message (private message)
- Drop down field
- Create Custom Field
- Restrict field value (Year) – Validation
- Swap PDF for New One

Click to create a NEW Template



Build Template and Recipients:

- Template Name & Description
- Add Document
- Add Recipients



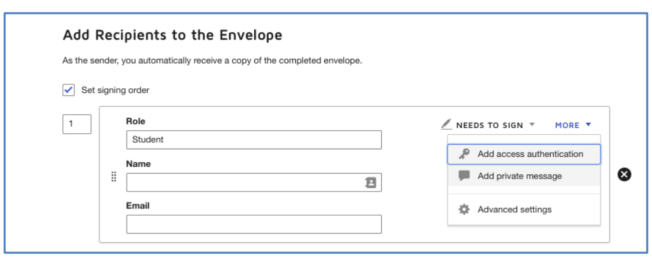
Enter a Recipient ROLE, this way when you USE the template you can select any recipients that you want to receive this document

Document: Independent Study Form

Define Roles / Recipients

- Student – leave Name & Email blank
- Faculty Sponsor – leave Name and Email Blank
- Undergraduate Chair → SET THIS TO A SPECIFIC NAME and EMAIL
- Administration → SET THIS TO A SPECIFIC NAME and EMAIL
- The Student and Faculty Sponsor will get completed by the person who 'begins' filling out the form. So if the STUDENT initiates he process, they will fill in their personal name / email and complete the faculty member name and email

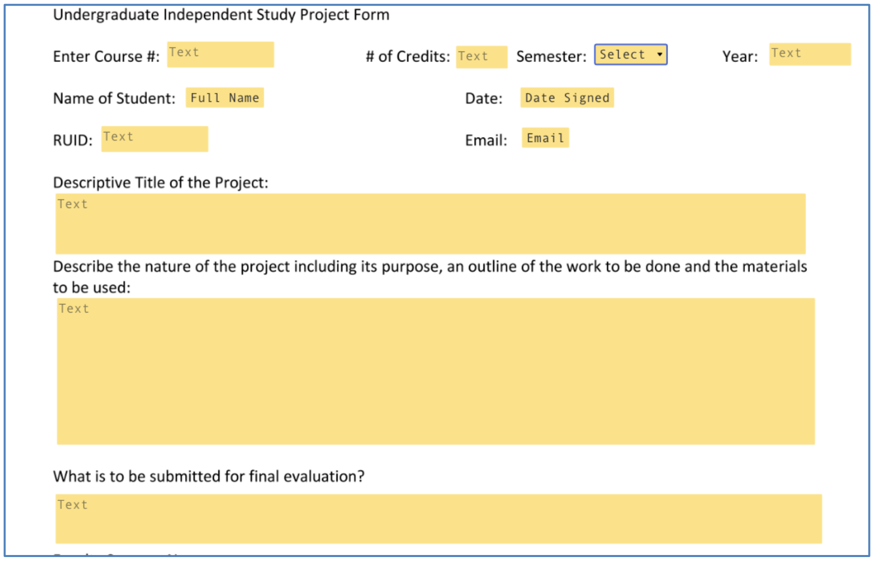
Add a Specific Email Message to Participant



1. Click 'more'
2. Click add private message
3. Enter specific message to go to this 'role'

BUILD TEMPLATE

Add fields for STUDENT



Undergraduate Independent Study Project Form

Enter Course #: Text # of Credits: Text Semester: Select Year: Text

Name of Student: Full Name Date: Date Signed

RUID: Text Email: Email

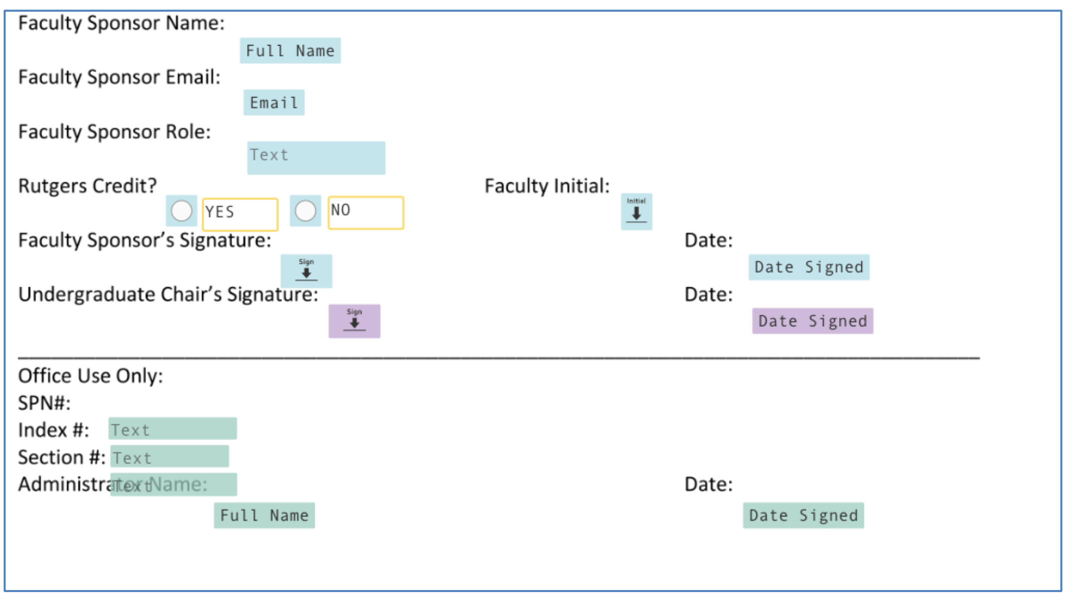
Descriptive Title of the Project:
Text

Describe the nature of the project including its purpose, an outline of the work to be done and the materials to be used:
Text

What is to be submitted for final evaluation?
Text

Add fields for Faculty Member & Chair

The only chair fields are: Undergraduate Chair Signature and Date



Faculty Sponsor Name: Full Name

Faculty Sponsor Email: Email

Faculty Sponsor Role: Text

Rutgers Credit? YES NO Faculty Initial: Initial

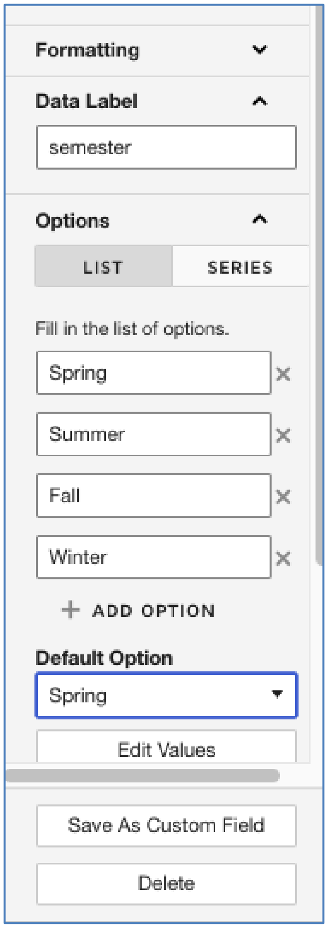
Faculty Sponsor's Signature: Sign Date: Date Signed

Undergraduate Chair's Signature: Sign Date: Date Signed

Office Use Only:
SPN#:
Index #: Text
Section #: Text
Administrator Name: Text Date:
Full Name Date Signed

Drop Down List Field

For the Semester set this as a ‘drop down’ type of field.



1. Specify the DATA LABEL → semester
2. Options → LIST
    a. Enter: Spring, Summer, Fall, Winter
3. Default Option → select spring
4. SAVE AS CUSTOM FIELD

When it is saved as a custom field, it can be selected for another form

Field Validation

Pre-formatted options

- # of Credits → select to be NUMERIC ONLY
- Validation = NUMBERS

Custom Option

Uses REGULAR EXPRESSIONS

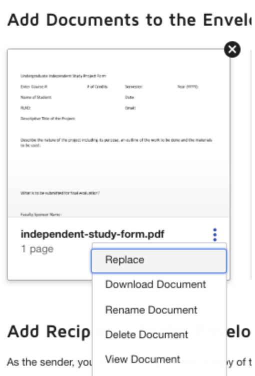
- Require 4 digits: `^\d{4}$`
- Requires: 20 then 0-2, then 0-9: `^[2][0][0-2][0-9]$`
- http://regexstorm.net/tester
- https://www.petefreitag.com/cheatsheets/regex/

SWITCH PDF

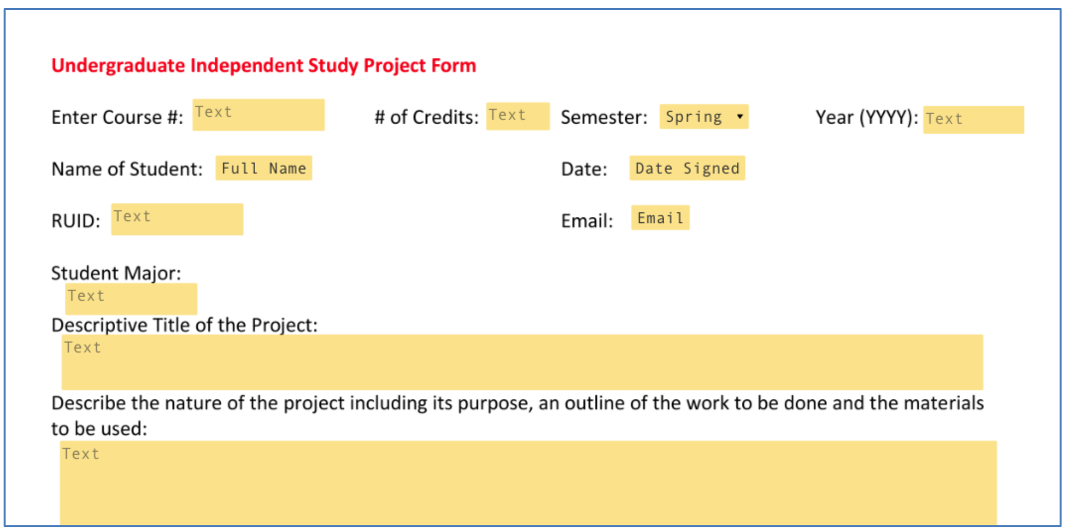
If after making a template, you realize you need to change your pdf document slightly, it is possible to SWAP the pdf with another one, without losing any of your work.

If you 'EDIT' your template, or 'go back' to return to the 'main template name / description page

Add Documents to the Envelope, click on the '3 dots' to the right of the file name, click REPLACE.



To replace the file, select the independent-study-form2.pdf, to see how the fields are saved, you can just move things around…


Undergraduate Independent Study Project Form

Enter Course #: Text # of Credits: Text Semester: Spring Year (YYYY): Text

Name of Student: Full Name Date: Date Signed

RUID: Text Email: Email

Student Major:
Text

Descriptive Title of the Project:
Text

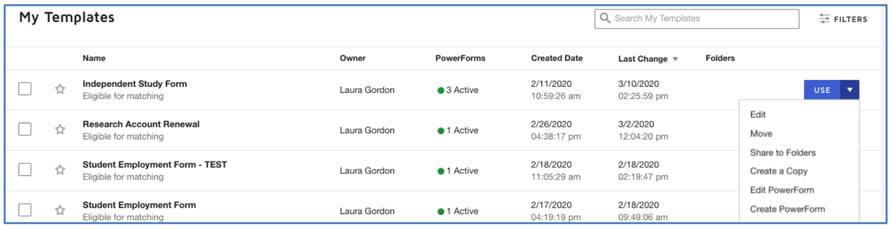
Describe the nature of the project including its purpose, an outline of the work to be done and the materials to be used:
Text

Create PowerForm and Test

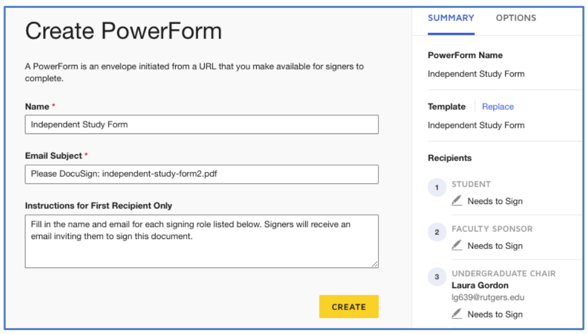
Save / Close all changes made

Return to 'My Templates' listing

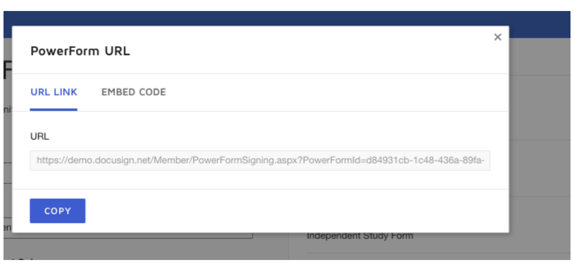
For form, click 'dropdown' next to use, select → Create PowerForm



It is possible to edit the Name, Subject, Instructions (for first SIGNER only), hit create to create the form.

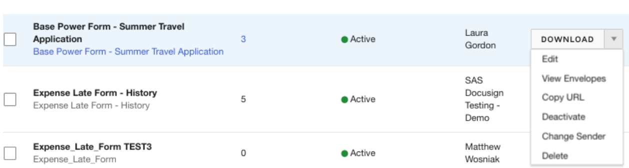


Copy the URL code from the form, this can be put on a web page, or given out via email



Test out the form and see how it works.

To MANAGE power forms visit: MANAGE → Powerforms
you can DOWNLOAD results, EDIT,



Student Employment Form

Purpose of the Form

This is a form that an administrator initiates and sends to the student to complete. The administrator fills out the job details, then the student completes their personal details including uploading a pdf/jpg of their passport and social security card. Once the student has completed their details the document goes back to the administrator for verification then to the business office for final approval. Lastly the administrator gets the final copy for their files.

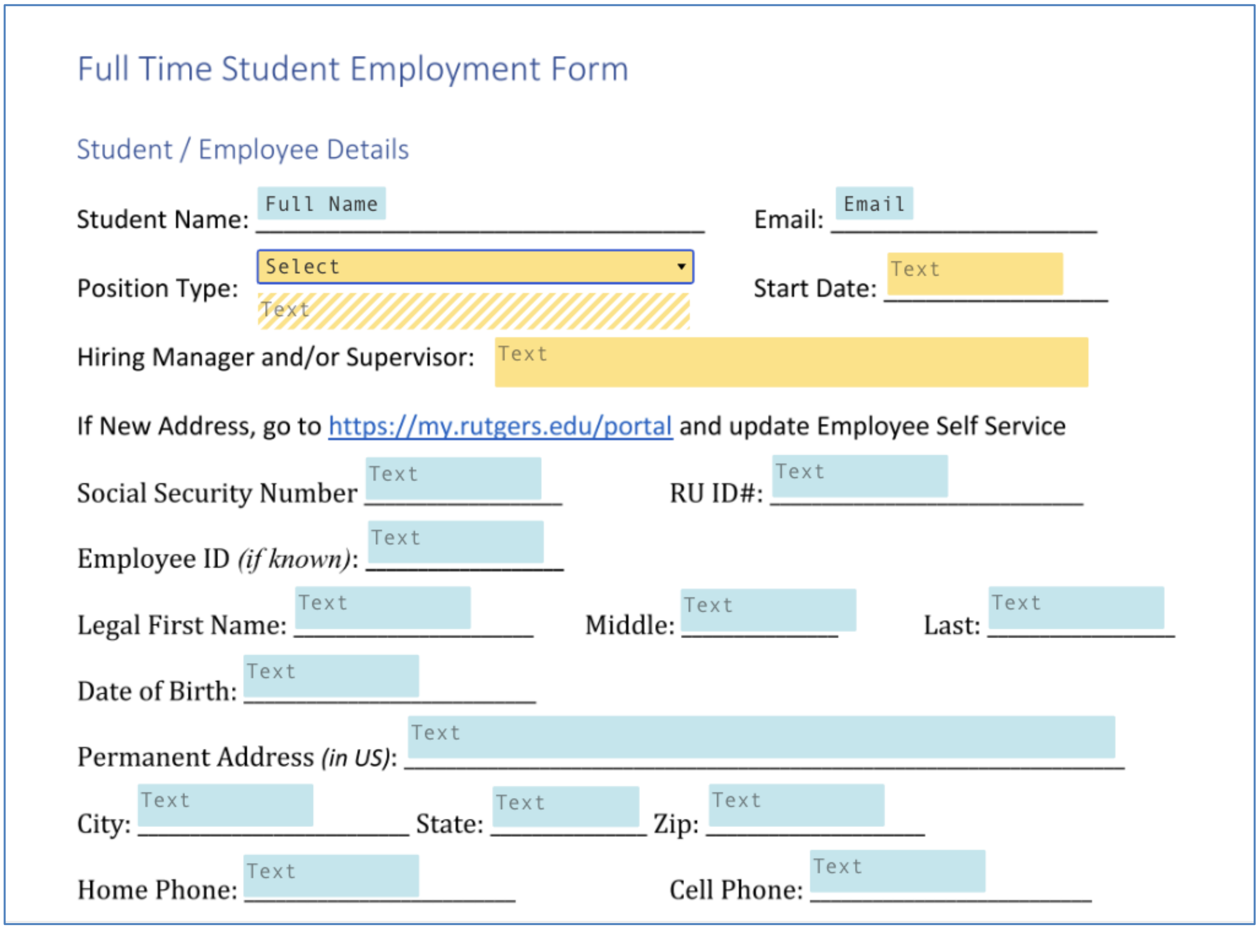
Goals of Workshop 2

- Add multiple Roles (some are the same role additional times)
- Create READONLY Fields
- Create Conditional Fields
- Use of Attachment Specifications

Roles to Create:

- Administrator
- Student
- Administrator
- Business Office
- Administrator

Upload file: student-employment-form.pdf



Full Time Student Employment Form

Student / Employee Details

Student Name: Full Name ______________________ Email: Email ______________

Position Type: Select ▾ Text Start Date: Text ______________

Hiring Manager and/or Supervisor: Text

If New Address, go to https://my.rutgers.edu/portal and update Employee Self Service

Social Security Number Text __________ RU ID#: Text ______________

Employee ID *(if known)*: Text __________

Legal First Name: Text __________ Middle: Text __________ Last: Text __________

Date of Birth: Text ______________

Permanent Address *(in US)*: Text ________________________________

City: Text ______________ State: Text ________ Zip: Text __________

Home Phone: Text ______________ Cell Phone: Text ______________

Build Roles and Set Fields for Roles

Assign DATA LABELS for ALL FIELDS

Set fields for ADMINISTRATOR:

Page 1:

- Position Type (drop down field – Douglass, Livingston, Grader, Other)
- Position type text (text field) – just below the drop down
- Stat Date
- Hiring Manager

Page 2:

- Pay Rate/Hour – Drop down ($11, $12, Other)
- Other Pay Rate
- Job Class Code: READ ONLY, value = 05100
- Org Id: READ ONLY, value = 10331
- Location Code: READ ONLY, value: 3011

Set fields for STUDENT

Page 1:

- Student Reference fields:
- Name, Email, SSN, RU ID, Employee ID, First Name, Mdidle, Last, DOB, address, city, state, zip, phone, Citizenship status: drop down: Citizen, Lawful resident, Not a citizen
- Proof of SSN → Attachment, Proof of Birth Date → Attachment

Page 2:

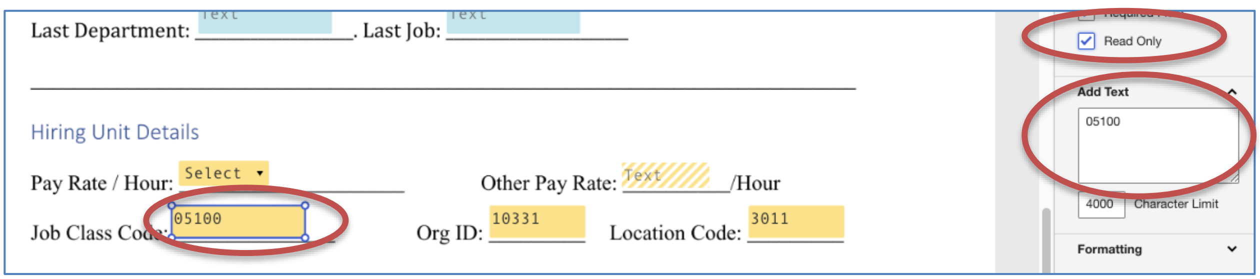
- Employment History Details
- Signature: Student, date signed

Page 3:

- Employee Name
- Employee Signature
- Date Signed

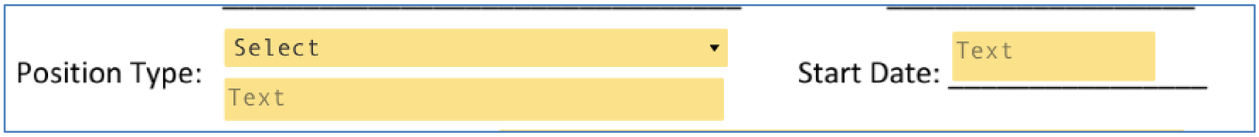
Create Read Only / Default Text Field

- Check off 'READ ONLY' for the field to be read only
- Enter 'add text' for default text to appear.
- Note: a field can have DEFAULT TEXT, but not be set to READ ONLY



Conditional Field Values

A conditional field values, allows you to determine if a field is displayed depending on if a specific value is in another fields.

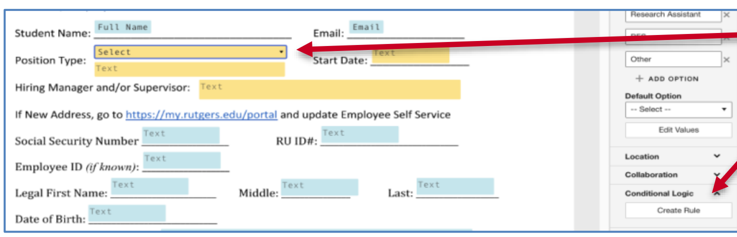


Set Data Labels for Fields:

Be sure to set the DATA LABEL for both Position Type fields

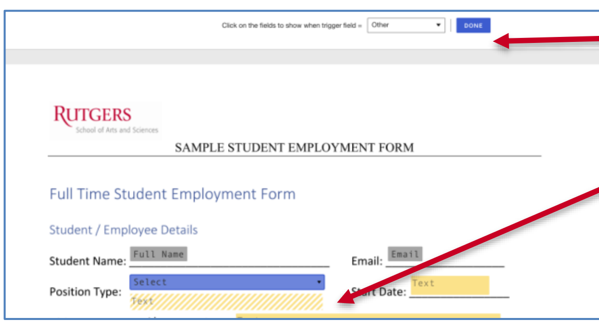
- Drop Down field data label = Position Type
- Text field below data label = Position Type Other

Steps to Set conditional Rule:



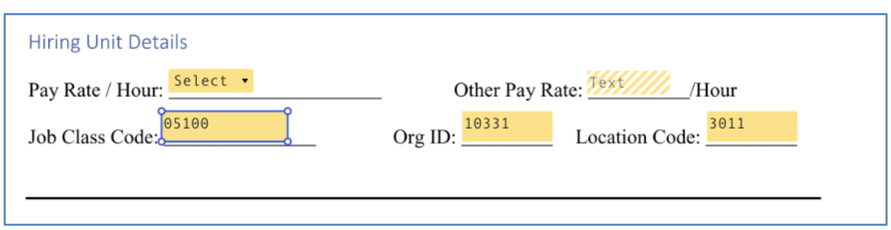
1. Click on the DROP DOWN POSITION TYPE FIELD
2. Click on RIGHT for CREATE CONDITIONAL RULE

Define Actual Rule



1. Select value = OTHER
2. Click on '2nd position type field
3. After you click it will turn to STRIPES
4. Click DONE

Create another Conditional Field:



If Pay Rate = Other

Allow Pay Rate to be entered.

Create Powerform and Test

- Create Powerform, 'try out' the form and see how it works

Research Account Renewal Form

Purpose of Form

This form is for a faculty member to complete when they want to renew their research for the upcoming year. We will have 3 people complete this form, the Faculty member starts the request, then the administrator reviews it, the chair reviews and comments, then the dean can approve of it. When the faculty member starts this form for sending they enter the email address for the Administrator, Chair and Dean.

Goals Workshop 3

- Copy fields and reassign
- Collaborative Text Field (multiple people can edit)
- Notes Field (hidden from others view)

Assign Roles

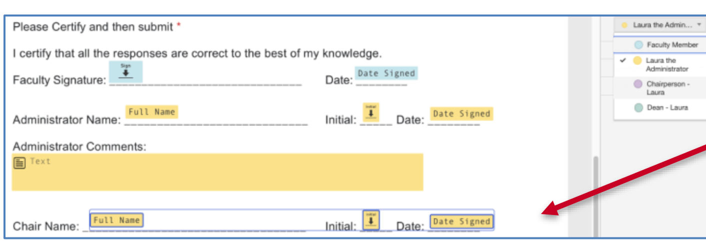
- Faculty Member
- Administrator → assign the name, email (assuming there is just one faculty member in dept)
- Chair → assign the name, email (assuming there is just one chair in the department)
- Dean → there is only one dean, the dean will only receive if the CHAIR approves

Pdf: research Renewal.pdf

Copy Fields

After entering fields (Name, Initial, Date). Hold SHIFT key down and select each field, then hit <CTRL><C>

Hit <ctrl><v> to PASTE the fields

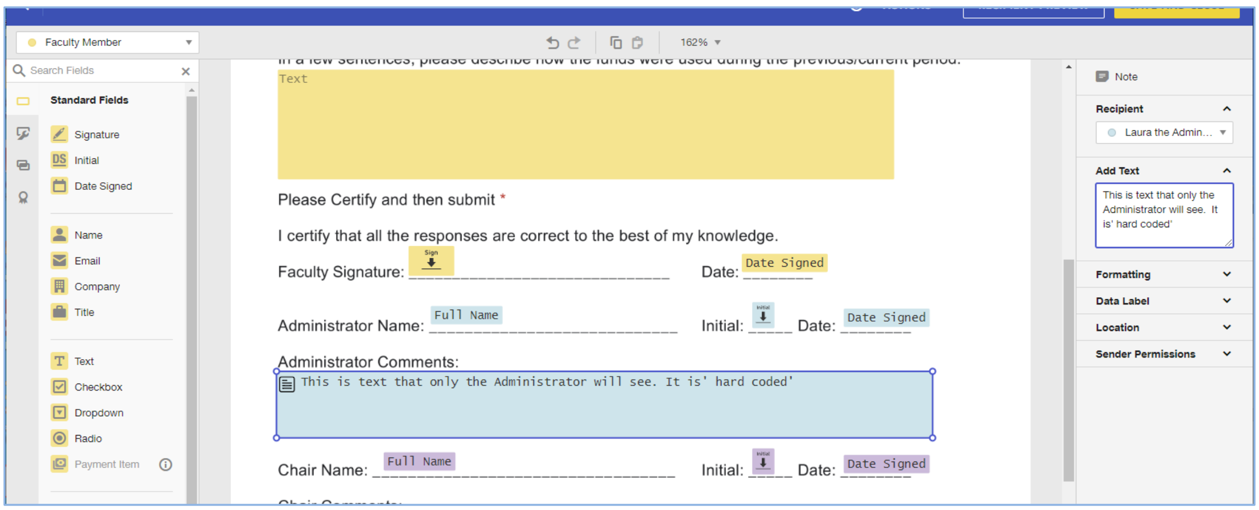


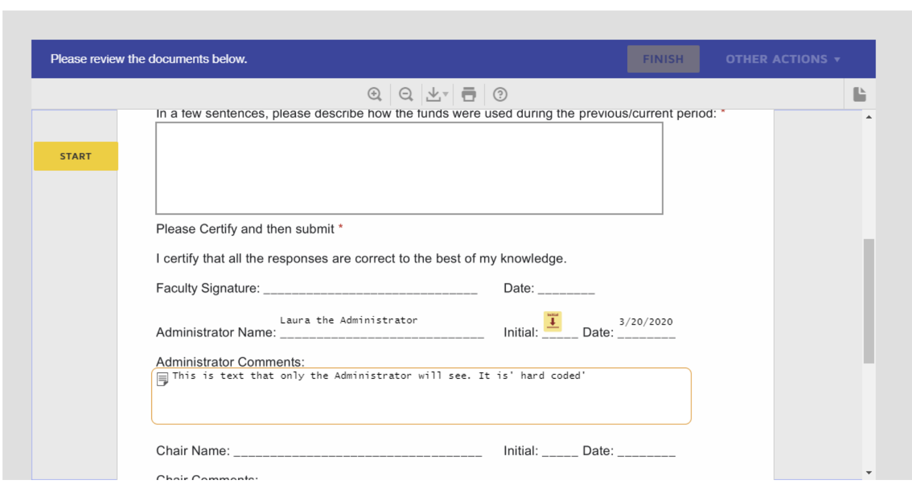
1. Select the 3 fields
2. Click on the recipient on the RIGHT, and select Chair Person

Note Field - Field for Signor View Only

The Note field is a free text field that you can use to enter additional information to your recipients. You can add a Note for an individual recipient and the text that you enter appears only during the signing session. Notes are visible only to their assigned recipient. Notes do not remain on the completed documents. However, you can use the download form data option to recall and view the information.

For testing purposes, for the ADMINISTRATOR comments use a NOTE FIELD, for the Chair Comments use a regular field.



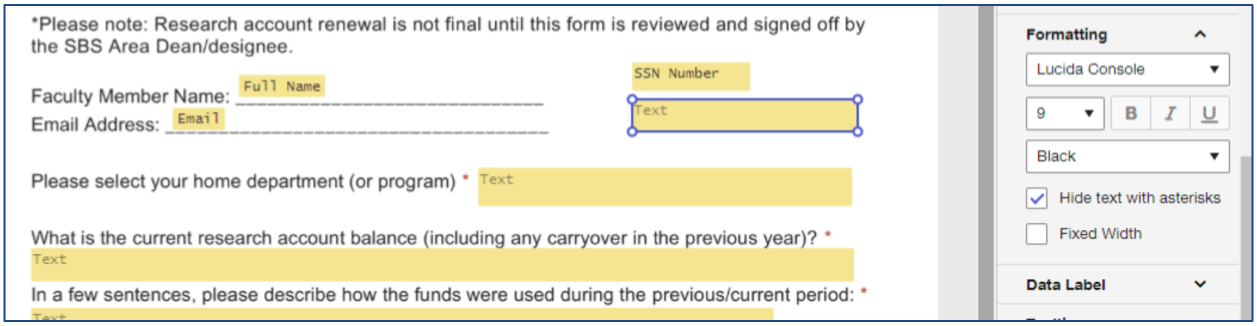


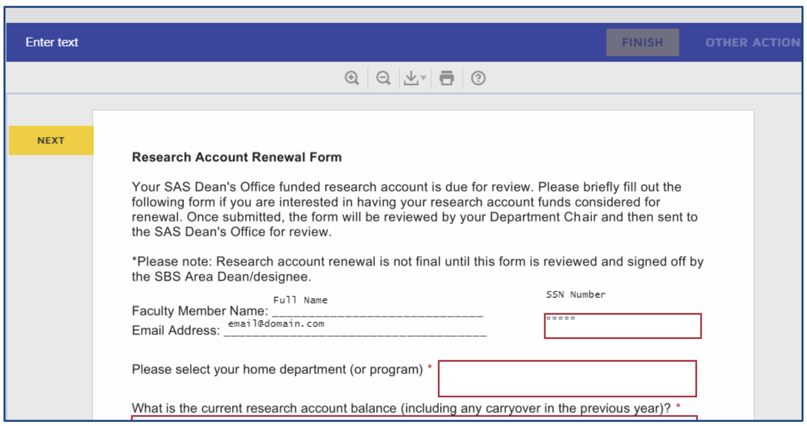
In preview mode, you can see the administrator notes in preview, but only as administrator

CREATE HIDDEN FIELD VIA ASTERISKS

For text fields, there is an additional formatting property to hide the text entered with asterisks, concealing the data from anyone else viewing the document.

Create a field for ‘SSN’ for example, you can set the format to be ‘hide with asterisks’. The data can be viewed by the ‘owner’ of the document only.

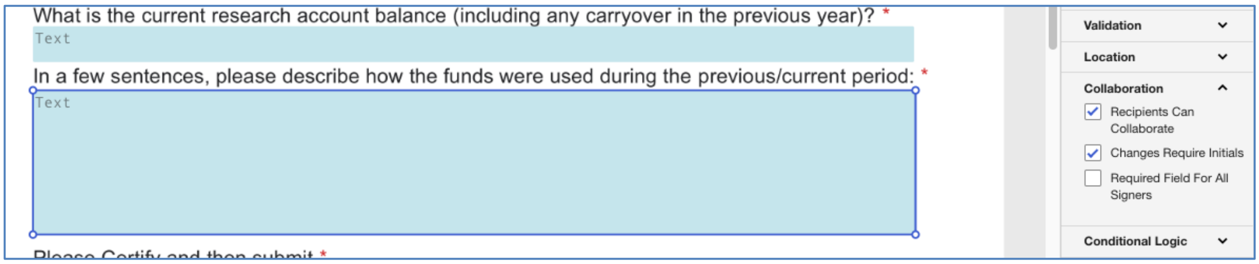




Collaborative Fields

With a collaborative field, all recipients on a document can make or change entries to the field. Optionally, changes made by one recipient can be rerouted to all recipients for review and approval. Recipients that signed a document before the changes were made are given a new opportunity to review and approve the changes before the document is finalized.

Adjust the field to describe how the funds were used to include collaboration.



NEW HIRE FORM

PURPOSE OF THE FORM

This for is used by the administrator of a department when they have a new hire. The administrator 'kicks off' the signing of the form by entering in the Employee information and the supervisor information. The administrator fills out the 'hiring details', then the employee fills out their personal details, then the supervisor approves, and sends it back to the administrator for final approval. In the normal process after the supervisor reviews it would go to the business office, but we will skip that step for now.

GOALS OF WORKSHOP 4

- Hide some fields with 'asterisks', so they are hidden from view
- Line up fields (horizontal and vertical)
- Create Calculated Field

Roles to Create:

- Administrator
- Employee
- Supervisor
- Administrator

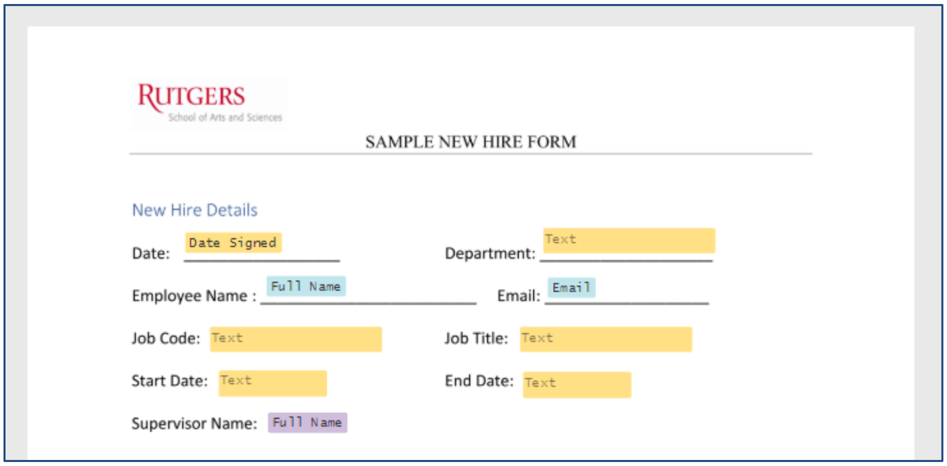
Upload file: new-hire-form.pdf

Create a new template, upload the file…

Update document with fields

Yellow → FIRST ADMINISTRATOR

Purple → SUPERVISOR



RUTGERS
School of Arts and Sciences

SAMPLE NEW HIRE FORM

New Hire Details

Date: Date Signed Department: Text

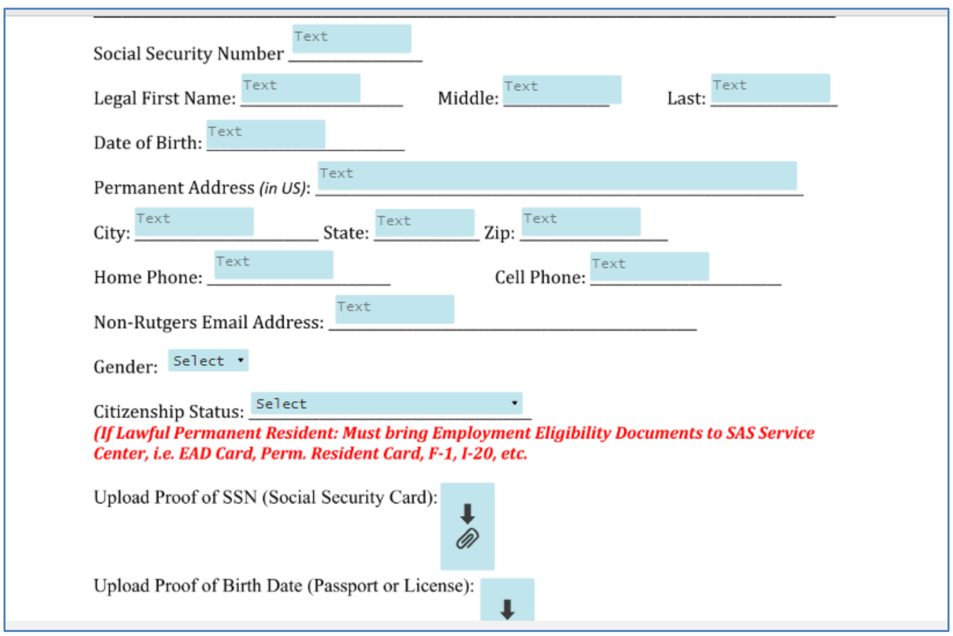
Employee Name : Full Name Email: Email

Job Code: Text Job Title: Text

Start Date: Text End Date: Text

Supervisor Name: Full Name

Blue → Employee



Social Security Number Text

Legal First Name: Text Middle: Text Last: Text

Date of Birth: Text

Permanent Address *(in US)*: Text

City: Text State: Text Zip: Text

Home Phone: Text Cell Phone: Text

Non-Rutgers Email Address: Text

Gender: Select

Citizenship Status: Select

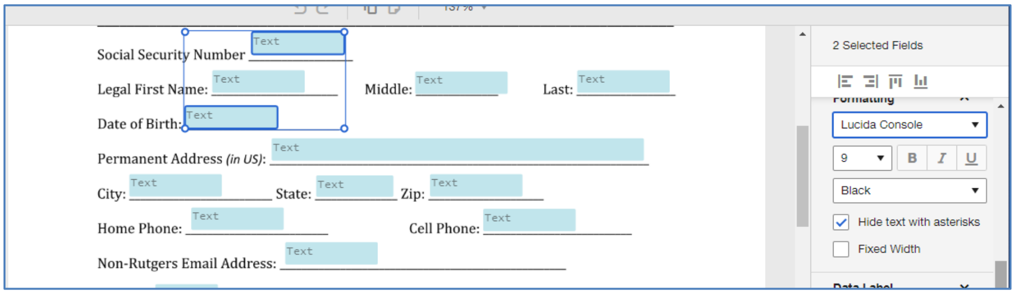
(If Lawful Permanent Resident: Must bring Employment Eligibility Documents to SAS Service Center, i.e. EAD Card, Perm. Resident Card, F-1, I-20, etc.

Upload Proof of SSN (Social Security Card):

Upload Proof of Birth Date (Passport or License):

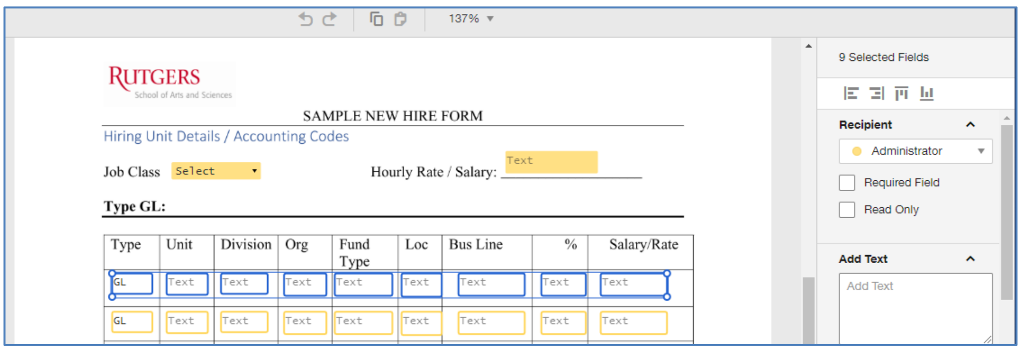
Hide Personal Fields

Set Personal fields to be ASTERISKS, select fields, click on FORMAT, click on asterisk



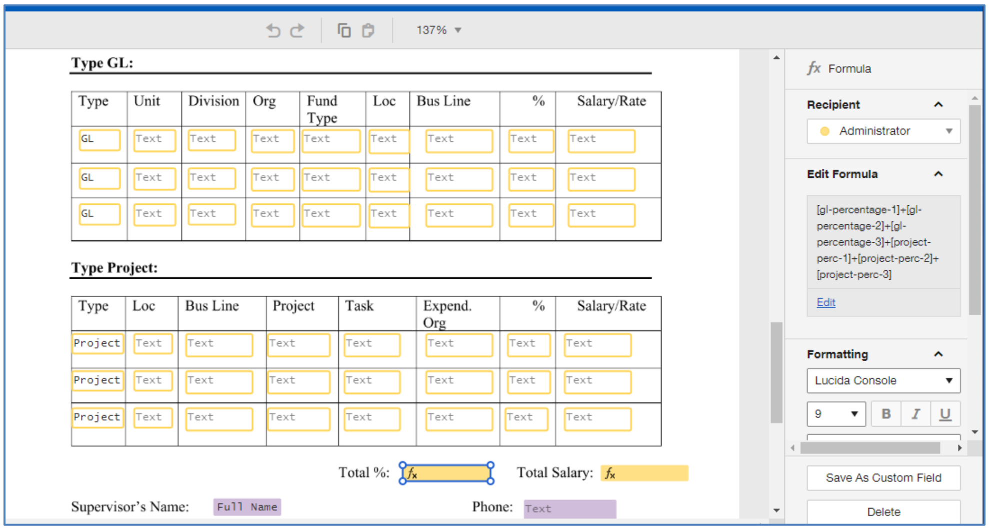
Align Fields

- Select fields (it's possible to drag a box around all fields)
- Click on RIGHT SIDE for the various alignment options (After fields are selected)



Create Calculated Field (Formula)

Add FORMULA type field



On RIGHT for formula, type in field names with action, and it will calculate automatically

This sample formula will add up all of the gl percentage fields, you can add as many as you like. In my example, I also add the project-percentage fields, fields must be named FIRST!

```
[gl-percentage-1]+[gl-percentage-2]+[gl-percentage-3]
```