

Docusign – Advanced Class – Part 2

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SASIT – Web Development

March 2020

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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

The screenshot displays the DocuSign interface for the School of Arts and Sciences. At the top, the Rutgers logo is visible. The main area is divided into two sections. On the left, a sidebar contains a 'NEW' button, which has a dropdown menu open showing 'Create Template', 'Upload Template', and 'Create PowerForm'. Below this are links for 'All Templates' and 'Deleted'. At the bottom of the sidebar is a 'FOLDERS' section with a plus icon. The right section, titled 'My Templates', contains a table with three templates: 'Summer Travel Application', 'Multiple Signature Template', and 'Sample Proposal Document'. Each template has a checkbox and the text 'Eligible for matching'.

Build Template and Recipients:

- Template Name & Description
- Add Document
- Add Recipients

The screenshot shows the 'Add Documents to the Envelope' section with a document titled 'Independent-study-form.pdf' (2 pages) and an 'UPLOAD' button. Below it is the 'Add Recipients to the Envelope' section. A checkbox 'Set signing order' is checked. Two recipients are listed: 1. Student (Role dropdown, Name and Email fields) and 2. Faculty Sponsor (Role dropdown, Name and Email fields). A red arrow points from a text box to the 'Role' dropdown for the first recipient.

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 the process, they will fill in their personal name / email and complete the faculty member name and email

ADD A SPECIFIC EMAIL MESSAGE TO PARTICIPANT

The screenshot shows the 'Add Recipients to the Envelope' section. The first recipient is 'Student'. The 'NEEDS TO SIGN' and 'MORE' dropdowns are visible. The 'MORE' dropdown is open, showing options: 'Add access authentication', 'Add private message', and 'Advanced settings'.

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 #: # of Credits: Semester: Year:

Name of Student: Date:

RUID: Email:

Descriptive Title of the Project:

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

What is to be submitted for final evaluation?

Add fields for Faculty Member & Chair

The only chair fields are: Undergraduate Chair Signature and Date

Faculty Sponsor Name:

Faculty Sponsor Email:

Faculty Sponsor Role:

Rutgers Credit? ☐ YES ☐ NO

Faculty Sponsor's Signature: Faculty Initial:

Undergraduate Chair's Signature: Date:

Office Use Only:

SPN#:

Index #:

Section #:

Administrative Name: Date:

DROP DOWN LIST FIELD

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

The screenshot shows a configuration panel for a 'Drop Down List Field'. The 'Data Label' is 'semester'. Under the 'Options' section, the 'LIST' tab is active, displaying a list of options: Spring, Summer, Fall, and Winter. The 'Default Option' is set to 'Spring'. At the bottom, there are buttons for 'Save As Custom Field' and 'Delete'.

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/>

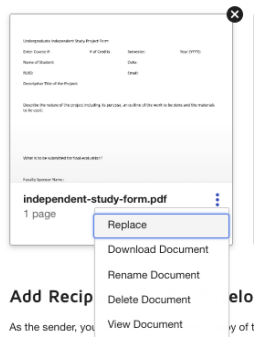
SWITCH PDF

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.

Add Documents to the Envelope



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 #: # of Credits: Semester: Year (YYYY):

Name of Student: Date:

RUID: Email:

Student Major:

Descriptive Title of the Project:

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

CREATE POWERFORM AND TEST

Save / Close all changes made

Return to 'My Templates' listing

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

| My Templates | | | | | |
|--------------------------|---|--------------|------------|--------------------------|--------------------------|
| Search My Templates | | | | | |
| FILTERS | | | | | |
| | Name | Owner | PowerForms | Created Date | Last Change |
| <input type="checkbox"/> | Independent Study Form Eligible for matching | Laura Gordon | 3 Active | 2/11/2020 10:59:26 am | 3/10/2020 02:25:59 pm |
| <input type="checkbox"/> | Research Account Renewal Eligible for matching | Laura Gordon | 1 Active | 2/26/2020 04:38:17 pm | 3/2/2020 12:04:20 pm |
| <input type="checkbox"/> | Student Employment Form - TEST Eligible for matching | Laura Gordon | 1 Active | 2/18/2020 11:05:29 am | 2/18/2020 02:19:47 pm |
| <input type="checkbox"/> | Student Employment Form Eligible for matching | Laura Gordon | 1 Active | 2/17/2020 04:19:19 pm | 2/18/2020 09:49:06 am |

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

Create PowerForm

A PowerForm is an envelope initiated from a URL that you make available for signers to complete.

Name *

Email Subject *

Instructions for First Recipient Only

Fill in the name and email for each signing role listed below. Signers will receive an email inviting them to sign this document.

CREATE

SUMMARYOPTIONS

PowerForm Name

Independent Study Form

Template [Replace](#)

Independent Study Form

Recipients

- STUDENT
Needs to Sign
- FACULTY SPONSOR
Needs to Sign
- UNDERGRADUATE CHAIR
Laura Gordon
lg639@rutgers.edu
Needs to Sign

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

PowerForm URL

URL LINK

EMBED CODE

URL

<https://demo.docusign.net/Member/PowerFormSigning.aspx?PowerFormId=d84931cb-1c48-436a-89fa->

COPY

Test out the form and see how it works.

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

| | | | | | |
|--------------------------|---|---|--------|--------------------------------------|---|
| <input type="checkbox"/> | Base Power Form - Summer Travel Application Base Power Form - Summer Travel Application | 3 | Active | Laura Gordon | DOWNLOAD |
| <input type="checkbox"/> | Expense Late Form - History Expense Late Form - History | 5 | Active | SAS DocuSign Testing - Demo | EDIT |
| <input type="checkbox"/> | Expense_Late_Form TEST3 Expense_Late_Form | 0 | Active | Matthew Wosniak | View Envelopes Copy URL Deactivate Change Sender Delete |

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: | <input type="text" value="Full Name"/> | Email: | <input type="text" value="Email"/> |
| Position Type: | <input type="text" value="Select"/> <input type="text" value="Text"/> | Start Date: | <input type="text" value="Text"/> |
| Hiring Manager and/or Supervisor: | <input type="text" value="Text"/> | | |
| If New Address, go to https://my.rutgers.edu/portal and update Employee Self Service | | | |
| Social Security Number | <input type="text" value="Text"/> | RU ID#: | <input type="text" value="Text"/> |
| Employee ID (if known): | <input type="text" value="Text"/> | | |
| Legal First Name: | <input type="text" value="Text"/> | Middle: | <input type="text" value="Text"/> |
| | | Last: | <input type="text" value="Text"/> |
| Date of Birth: | <input type="text" value="Text"/> | | |
| Permanent Address (in US): | <input type="text" value="Text"/> | | |
| City: | <input type="text" value="Text"/> | State: | <input type="text" value="Text"/> |
| | | Zip: | <input type="text" value="Text"/> |
| Home Phone: | <input type="text" value="Text"/> | Cell Phone: | <input type="text" value="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, Mmiddle, 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

Last Department: . Last Job:

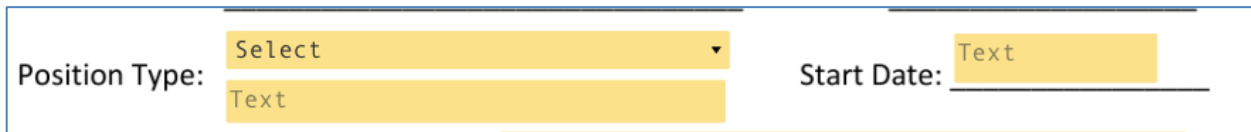
Hiring Unit Details

Pay Rate / Hour: Select Other Pay Rate: /Hour

Job Class Code: Org ID: Location Code:

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.

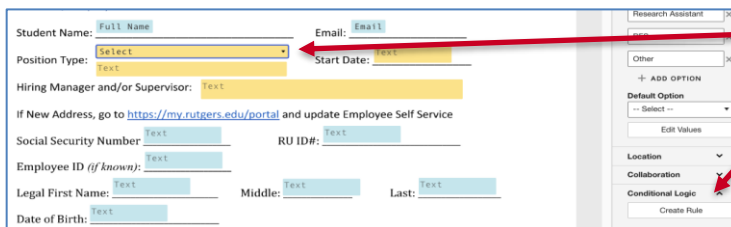


Set Data Labels for Fields:

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

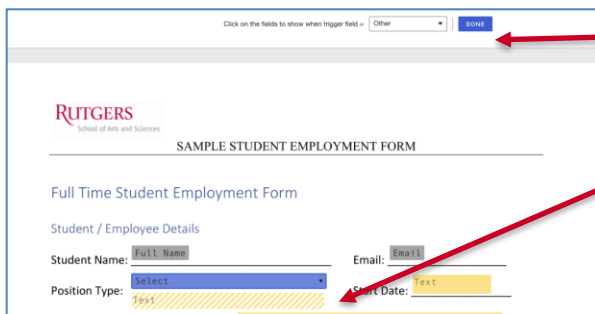
- Drop Down field data label = Position Type
- Text field below data label = Position Type Other

Steps to Set conditional Rule:



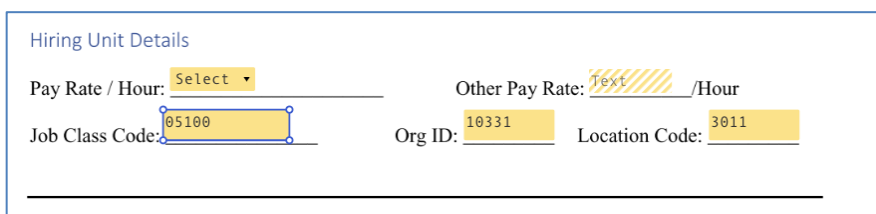
1. Click on the DROP DOWN POSITION TYPE FIELD
2. Click on RIGHT for CREATE CONDITIONAL RULE

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

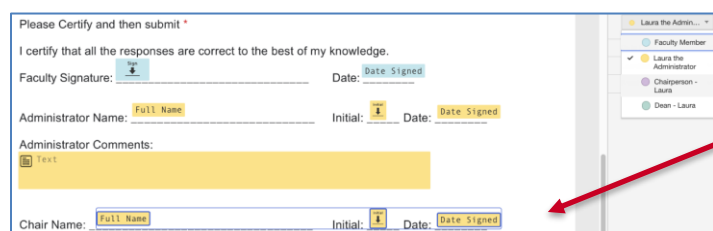
Pdf: research Renewal.pdf

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.

This screenshot shows the document creation interface. On the left is a 'Standard Fields' sidebar with options like Signature, Initial, Date Signed, Name, Email, Company, Title, Text, Checkbox, Dropdown, Radio, and Payment Item. The main area contains a form with a yellow text box for 'Text', a 'Please Certify and then submit' section, and fields for Faculty Signature, Date, Administrator Name, Initial, Date, Administrator Comments, Chair Name, Initial, and Date. The 'Administrator Comments' field is highlighted with a blue border. On the right, a 'Note' panel is open, showing the 'Recipient' as 'Laura the Admin...' and the 'Add Text' field containing the text: 'This is text that only the Administrator will see. It is 'hard coded''.

This screenshot shows the document preview interface. It includes a 'Please review the documents below.' header with 'FINISH' and 'OTHER ACTIONS' buttons. The form fields are populated: 'In a few sentences, please describe how the funds were used during the previous/current period:' is followed by a text box; 'Please Certify and then submit' is followed by a certification statement; 'Faculty Signature:' and 'Date:' are followed by lines; 'Administrator Name:' is populated with 'Laura the Administrator', 'Initial:' with an 'I' icon, and 'Date:' with '3/20/2020'; 'Administrator Comments:' is followed by a text box containing 'This is text that only the Administrator will see. It is 'hard coded''; 'Chair Name:', 'Initial:', and 'Date:' are followed by lines.

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.

The image shows two screenshots from the DocuSign interface. The top screenshot is the 'Form Editor' view, and the bottom screenshot is the 'Form Preview' view.

Form Editor View (Top):

- Instructions: *Please note: Research account renewal is not final until this form is reviewed and signed off by the SBS Area Dean/designee.
- Fields:
 - Faculty Member Name: Full Name (Text field)
 - Email Address: Email (Text field)
 - SSN Number: Text (Text field)
 - Please select your home department (or program) * (Text field)
 - What is the current research account balance (including any carryover in the previous year)? * (Text field)
 - In a few sentences, please describe how the funds were used during the previous/current period: * (Text field)
- Formatting Panel (Right):**
 - Font: Lucida Console
 - Size: 9
 - Style: Bold (B), Italic (I), Underline (U)
 - Color: Black
 - ☒ Hide text with asterisks
 - ☐ Fixed Width
 - Data Label: (Dropdown)

Form Preview View (Bottom):

- Buttons: Enter text, FINISH, OTHER ACTION
- Navigation: NEXT
- Form Title: Research Account Renewal Form
- Instructions: Your SAS Dean's Office funded research account is due for review. Please briefly fill out the following form if you are interested in having your research account funds considered for renewal. Once submitted, the form will be reviewed by your Department Chair and then sent to the SAS Dean's Office for review.
- Instructions: *Please note: Research account renewal is not final until this form is reviewed and signed off by the SBS Area Dean/designee.
- Fields:
 - Faculty Member Name: Full Name (Text field)
 - Email Address: email@domain.com (Text field)
 - SSN Number: (Hidden field, represented by asterisks)
 - Please select your home department (or program) * (Text field)
 - What is the current research account balance (including any carryover in the previous year)? * (Text field)

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.

| | |
|--|--|
| <p>What is the current research account balance (including any carryover in the previous year)? *</p> <p>Text</p> <p>In a few sentences, please describe how the funds were used during the previous/current period: *</p> <p>Text</p> <p>Please Certify and then submit *</p> | <p>Validation ▼</p> <p>Location ▼</p> <p>Collaboration ▲</p> <p><input checked="" type="checkbox"/> Recipients Can Collaborate</p> <p><input checked="" type="checkbox"/> Changes Require Initials</p> <p><input type="checkbox"/> Required Field For All Signers</p> <p>Conditional Logic ▼</p> |
|--|--|

NEW HIRE FORM

PURPOSE OF THE FORM

This form 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

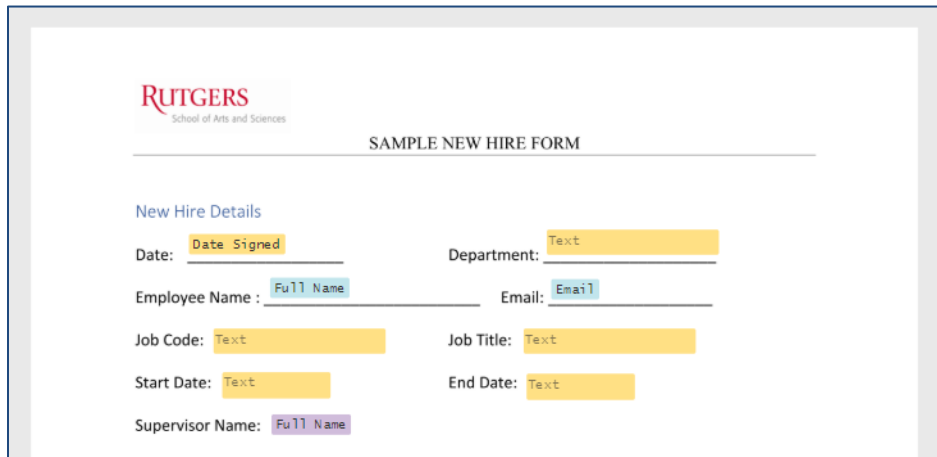
Upload file: new-hire-form.pdf

Create a new template, upload the file...

Update document with fields

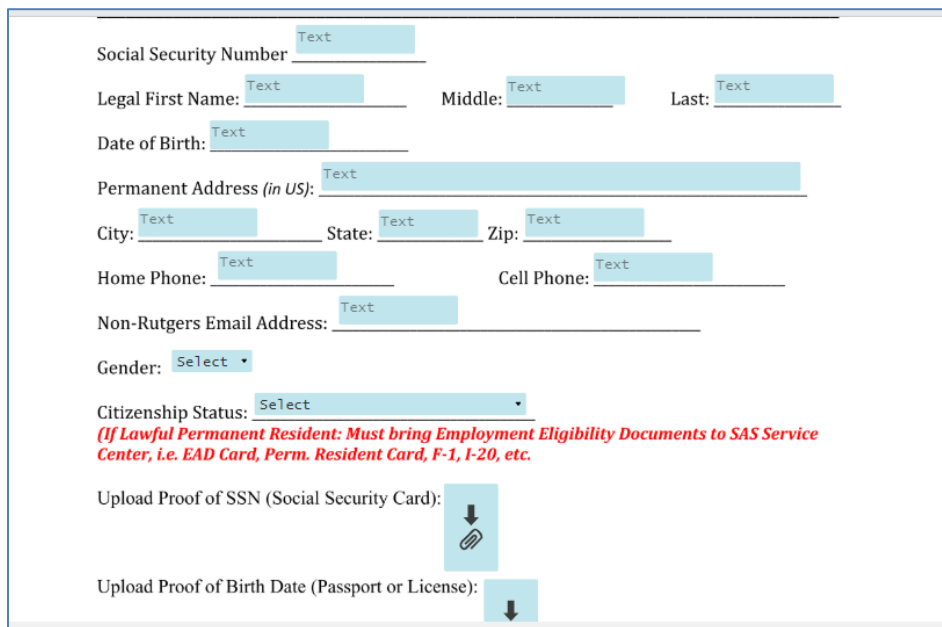
Yellow → FIRST ADMINISTRATOR

Purple → SUPERVISOR



The form is titled "SAMPLE NEW HIRE FORM" and features the Rutgers School of Arts and Sciences logo. It is divided into a "New Hire Details" section. Fields include: "Date Signed" (yellow), "Department" (yellow), "Employee Name" (purple), "Email" (blue), "Job Code" (yellow), "Job Title" (yellow), "Start Date" (yellow), "End Date" (yellow), and "Supervisor Name" (purple). Each field is represented by a colored box indicating its role: yellow for First Administrator, purple for Supervisor, and blue for Employee.

Blue → Employee



This form collects employee information. Fields include: "Social Security Number" (blue), "Legal First Name" (blue), "Middle" (blue), "Last" (blue), "Date of Birth" (blue), "Permanent Address (in US)" (blue), "City" (blue), "State" (blue), "Zip" (blue), "Home Phone" (blue), "Cell Phone" (blue), "Non-Rutgers Email Address" (blue), "Gender" (blue dropdown), and "Citizenship Status" (blue dropdown). A red note states: "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." Below this, there are two upload sections: "Upload Proof of SSN (Social Security Card):" with a blue box containing a downward arrow and a paperclip icon, and "Upload Proof of Birth Date (Passport or License):" with a blue box containing a downward arrow.

HIDE PERSONAL FIELDS

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

The screenshot shows a form editor interface with a form titled "SAMPLE NEW HIRE FORM" and a sidebar on the right. The form contains several text input fields: "Social Security Number", "Legal First Name", "Middle", "Last", "Date of Birth", "Permanent Address (in US)", "City", "State", "Zip", "Home Phone", "Cell Phone", and "Non-Rutgers Email Address". The "Social Security Number" field is selected, and a blue box highlights it. The sidebar on the right shows "2 Selected Fields" and a "Formatting" panel. In the "Formatting" panel, the "Hide text with asterisks" checkbox is checked, and the "Fixed Width" checkbox is unchecked. The "Date Label" dropdown is visible at the bottom of the sidebar.

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)

The screenshot shows a form editor interface with a form titled "SAMPLE NEW HIRE FORM" and a sidebar on the right. The form contains a table with 9 columns: "Type", "Unit", "Division", "Org", "Fund Type", "Loc", "Bus Line", "%", and "Salary/Rate". The table has two rows of data. The first row is highlighted with a blue box. The sidebar on the right shows "9 Selected Fields" and a "Recipient" panel. In the "Recipient" panel, the "Administrator" dropdown is selected, and the "Required Field" and "Read Only" checkboxes are unchecked. The "Add Text" panel is visible at the bottom of the sidebar.

| Type | Unit | Division | Org | Fund Type | Loc | Bus Line | % | Salary/Rate |
|------|------|----------|------|-----------|------|----------|------|-------------|
| GL | Text | Text | Text | Text | Text | Text | Text | Text |
| GL | Text | Text | Text | Text | Text | Text | Text | Text |

CREATE CALCULATED FIELD (FORMULA)

Add FORMULA type field

The screenshot shows a software interface for creating a calculated field. On the left, there are two tables: 'Type GL' and 'Type Project'. The 'Type GL' table has columns: Type, Unit, Division, Org, Fund Type, Loc, Bus Line, %, and Salary/Rate. The 'Type Project' table has columns: Type, Loc, Bus Line, Project, Task, Expend. Org, %, and Salary/Rate. Below these tables, there are input fields for 'Supervisor's Name' (with a dropdown menu) and 'Phone' (with a text input). In the center, there are two calculated fields: 'Total %' and 'Total Salary', both with a formula icon. On the right, there is a 'fx Formula' panel. It includes a 'Recipient' dropdown (set to 'Administrator'), an 'Edit Formula' section with a text area containing the formula: $[gl-percentage-1] + [gl-percentage-2] + [gl-percentage-3] + [project-perc-1] + [project-perc-2] + [project-perc-3]$, and a 'Formatting' section with a dropdown (set to 'Lucida Console') and buttons for 'Save As Custom Field' and 'Delete'.

| Type | Unit | Division | Org | Fund Type | Loc | Bus Line | % | Salary/Rate |
|------|------|----------|------|-----------|------|----------|------|-------------|
| GL | Text | Text | Text | Text | Text | Text | Text | Text |
| GL | Text | Text | Text | Text | Text | Text | Text | Text |
| GL | Text | Text | Text | Text | Text | Text | Text | Text |

| Type | Loc | Bus Line | Project | Task | Expend. Org | % | Salary/Rate |
|---------|------|----------|---------|------|-------------|------|-------------|
| Project | Text | Text | Text | Text | Text | Text | Text |
| Project | Text | Text | Text | Text | Text | Text | Text |
| Project | Text | Text | Text | Text | Text | Text | Text |

Supervisor's Name: Phone:

Total %: Total Salary:

fx Formula

Recipient:

Edit Formula

$[gl-percentage-1] + [gl-percentage-2] + [gl-percentage-3] + [project-perc-1] + [project-perc-2] + [project-perc-3]$

Formatting:

9

Save As Custom Field

Delete

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!

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