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About DocuSign
At Kent State University, security of information is imperative, and to maintain this security, many systems are in place. In many instances, acquiring access can be challenging due to the approvals needed, quite often in signature form. Though these challenges may be time consuming, they are necessary to protect the university, and the Faculty, Staff, and Students of Kent State.

With the introduction of the DocuSign application, the process of routing documents for signature, approving requests, and tracking timeline progress is simpler and more efficient. Documents are signed and forwarded digitally and instantly, to reduce time and effort, and minimize the potential for lost paperwork.

This user guide presents the tools and their uses in the DocuSign application and how to use them to effectively send documents through the approval chain in a digital format, improving the process, while maintaining and even increasing security.

Overview
DocuSign simplifies the signature and approval process for documents by creating a format for utilizing prepared document templates, inserting specific data, and preparing a routing queue to initiate a request form. The Document Routing is initiated by creating a digital Envelope in which an Online Document is sent for approvals, or other actions by those listed in the created queue. A Form Management section of the application delivers tracking information throughout the approval process and through to the completion and the authorization of the documents.

The application streamlines the process to Initiate, Approve, and Monitor the document in the approval process, saving time and effort using a secure and consistent system.
Accessing DocuSign

Users can access DocuSign by entering their Kent State University email address and password in the data fields of the home page and selecting the ‘Company Login’ button.

This will navigate the user to the DocuSign Home Page and access to the Document Routing tools and actions.
The DocuSign Home Page

The DocuSign Home Page displays a range of information and tools to create and monitor the progress of a document route to completion.

The tabs at the top of the Home page offer quick access to document status, document creation, and commentaries on document routings to improve the process.

The **Home** tab allows users to easily view the status, or form tracking and action information, in the *Overview* section, as well as see What’s New, customize DocuSign ID, or find help if needed.

The **Documents** tab shows more details about the Document Routing status and lets the user open the online document if action is necessary.

The **Templates** tab reveals options for managing existing templates, creating new ones, and selecting available *Documents for Signature*.

The **Reports** tabs allows users to run activity reports to analyze key metrics regarding the routing process.
DocuSign Process

When the process is initiated, a form is selected from the list of templates, this Online Document is updated with any additional routing, placed in a digital envelope, and sent in order to the Recipients in the routing queue. Emails are automatically sent to Recipients, as the Envelope navigates the queue, to notify them that a document is awaiting their review.

From the Templates Lists, forms that have been uploaded to Docusign become Online Documents when action fields, known as Tags, are added, and a Routing Queue is established for the particular form. With an Online Document selected, additional Signers, or Recipients, may be added to the Routing Queue, which will include them in the Envelope routing queue for the particular document.
Initiate the Process
The first step to the Document Routing process is to select the initial document to be presented to the queue Recipients for their attention.

Clicking the New button in the Home tab displays the selection options for preparing and sending Online Documents through the DocuSign system. This will be sent via the Envelope, which consists of four sections: Documents, Recipients and Routing, Email Message, and Envelope Settings.

Documents
To initiate a document for signatures, one must be selected from existing Online Documents. Currently, at Kent State University, Templates are used, offering documents with embedded data tags, creating the documents that can be electronically completed, and signed, to be sent to a string of approvers.

The Use a Template button reveals a selection window of the available ‘Documents for Signature’ to be used in the DocuSign approval process. The forms presented for the application at Kent State University are located in the All or Shared tab of the document options.
A document template can be selected using the appropriate check box next to the document title and clicking the ‘Add Selected’ button at the bottom of the template window. Using this template, creates the routed document by entering the subject information, and Recipients in the routing queue.

In the **Recipients and Routing** section, the names of the individuals involved in the process should be entered in the appropriate fields (1). The roles, noted in bold text, will be prompted by the particular document that has been selected.

Based upon the template chosen, a basic routing queue is established for the document, listing the Recipient queue for the Envelope to follow.

In some instances, you may need to adjust the action taken by a Recipient of the envelope, found under the “Required Action” dropdown (2). Additionally, there may be instances where you will select further settings for Recipients of the envelope, found under the “More” dropdown (3).
Email Messages
Changes to the email subject and message become available at this stage.

*Note:* Email messages may be locked by template administrators.

Envelope Settings
**Advanced Options** allows for selected options to be configured.
The **Next** button opens the Online Document for entry of the subject information as necessary. The document must be reviewed before the user can submit it to the DocuSign queue and **Initiate** the Online Document for Document Routing.
Document Review

Senders may enter any necessary information into the Document at this step. Once it is completed, clicking the Send button places the form in the digital Envelope and Initiates the Document Routing process, with the Envelope being sent to the first Recipient in the queue.

If the initiator is also the First Approver, a window will appear asking if a signature should be added, allowing the preparer to navigate to the saved document, and continue the process of the Document Routing. The user should navigate to the Documents tab to confirm the document has been Initiated and the Envelope sent to the first Approver.
Document Routing

With the process Initiated, the document is sent for the review and action of the Recipients in the routing queue.

Emails will be automatically sent to Recipients, as the Envelope navigates the queue, to notify them that a document is awaiting their attention.
Initiated Online Documents can also be accessed via the **Documents** tab, where they are saved for tracking and access.

The **Documents** tab is arranged in two basic sections.

1. A **Menu Bar** at the left allows users to view the *Envelopes* (documents in process), and Document Status overviews.
2. A **Work Area** to the right displays the items as selected in the Menu Bar.

*Double Clicking* the item in the Work Area displays the options to view a Summary of the envelope status.
Opening an Online Document, by following the link in your email or *double-clicking* on the item in the My Documents list, retrieves the document and allows for the Recipient to **Continue** to the document for review and signature. A drop down selection item labeled **Other Actions** offers additional options that may be taken.

By selecting the **Continue** button, the form can be reviewed and acted upon as needed, prior to sending it to the next Recipient.
In a column on the left, an orange location label appears to let the user easily follow the flow of input fields.

Clicking on the orange label moves it near the next data entry field, or tag, for review or action. The fields, lined in red, should be reviewed for accuracy and may be edited if needed before signing the form for approval.
In the Signature area, clicking the ‘Sign’ icon inside the document enters the preparer signature in the Online Document.

**Note:** The first time a signature is selected, users will be able to select from various fonts for their signature style. This may be edited in the future from the Home tab in the DocuSign ID Card panel.

With the Online Document signed, clicking the Finish button accepts any edits and the signature. A notification window appears to confirm that the signature has been accepted.

The Envelope is forwarded to the next Recipient in the Document Routing queue. Their DocuSign Home tab and Managed tab are updated, and an email is sent to them, notifying the next Recipient, that an Envelope has been sent to them and a document is awaiting attention.
Monitoring the Document Routing Queue

As the Online Document and Envelope travel through the Routing Queue, by Approvers signing the document, or other Recipients taking other action, and sending it to the next, the progress can be tracked in the Documents tab.

The Envelope Status is displayed in the Summary View, accessed by double clicking on an item in the work area of the Documents tab, listing the Participants as selected at the Initiation of the envelope, and noting if the appropriate actions have been completed. The next step in the process is highlighted in bold.
Once the final action has been taken on the form, and the process is finished, the initial preparer receives an email notification of the completion, with an attached copy of the completed document, showing all signatures. This final document may be saved for later reference, and to meet the university Document Retention Policy.