Wisconsin eSignature:

DocuSign Quick Guide for Template Builders

Updated 06/05/2019

Contents

Overview & Resources

This guide provides a quick overview for DocuSign Admins at Wisconsin State agencies and University of Wisconsin System campuses. For additional resources, visit the following links:

State of Wisconsin

Wisconsin eSignature: DocuSign User Guide:
>   https://doa.wi.gov/Documents/DEO/WisconsineSignatureUserGuide.pdf
>   Provides a practical overview of using DocuSign for an average State user.

Wisconsin eSignature: DocuSign Quick Guide for Admins:
>   https://doa.wi.gov/Documents/DEO/WisconsineSignatureAdminGuide.pdf
>   Provides basic instruction on performing common Admin tasks.

WisPro Help Desk:
>   doawispro@wisconsin.gov or (608) 264-7897
>   Hosted by the State Bureau of Procurement; members of the WisPro Help Desk are Organizational Admins for DocuSign.

DocuSign

DocuSign's User Guide:
>   https://support.docusign.com/guides/ndse-user-guide
>   The official DocuSign guide for general users. Provides detailed walkthrough of all user tasks, with pictures.

DocuSign University:
>   https://dsu.docebosaas.com/learn
>   DocuSign's video tutorial library. This resource is available to all users with a DocuSign account.

DocuSign's Support Page:
>   https://support.docusign.com
>   Allows users to access DocuSign's help topics and resources.

DocuSign Templates & PowerForms

Templates and PowerForms are tools that can save users a substantial amount of time. Templates can streamline the sending process by allowing users to automatically place tags on frequently sent documents or by pre-addressing envelopes that are sent to the same groups of people. PowerForms are a way to gather information from unspecified recipients by creating an online form for people to fill out (e.g., to collect conference registrations). Only users with certain roles and permission sets are able to create and share Templates and PowerForms, including Template Builder, Admin Lite, Admin, and Organizational Admin.

Template Builder Role

The Template Builder role allows users to send envelopes, use the Bulk Send feature, create and share Templates, and create and share PowerForms. In addition, Template Builders are able to run reports for an entire account (instead of just seeing reports of their own usage).

Creating a New Template

When you create a Template, you go through many of the same steps as you would when you create a standard envelope, including adding documents, recipients, and tags. However, with Templates, you can add placeholder roles as recipients (e.g., "Procurement Manager") that allows you to assign the tags to the correct role, and allows the user to fill in the name and email address of the person in that role when they use the Template. You can also add placeholder documents (e.g., a blank form) and attach all the necessary tags in the document, and the user can easily switch out the placeholder document with the final draft when using the Template.

Step 1: Create a New Template

Begin by logging into DocuSign and clicking the **Template** tab at the top of the page, then click **New** and **Create Template**. This will open a page similar to the one you see when you create a new envelope, except it will allow you to enter a name and description of your Template at the top of the page.

Alternatively, if you need to create a Template that is similar to one that already exists, you can copy and edit an existing Template (for instructions, see the section on Copying a Template below).

Step 2: Add Title and Description

Enter the title of the Template and a brief description (optional). If you'll be using an AutoPlace tag, we recommend adding the exact word or phrase you linked the AutoPlace tags to in the Template Description (for more information, see the section on Advanced Tags: Custom Tags & AutoPlace below).

Step 3: Add Documents to the Envelope

Click **Upload** and find the document that you'd like to include in the Template, then click **Open**. You may upload a placeholder document, but it should be as similar as possible to the final drafts that the end users will upload to allow the system to use the document matching capabilities (which allows the system to suggest appropriate Templates to users when they add documents to an envelope).

Once a document has been uploaded, clicking the **More Options** icon (three dots in a column) in the lower right-hand corner of the document box will allow you to view the available options, including **Rename Document** and **Delete Document**.

You may upload as many documents to a Template as you like, however each file may be no more than 25 MB and 2,000 pages. There is no overall size limit to the template. In addition, DocuSign supports many commonly used file types, including .doc, .docx, .pdf, .msg, .ppt, .pptx., .csv, .xls, .xlsx, .jpg, .png, and .gif. For a complete listing of supported file formats, visit DocuSign's Support page. Note that DocuSign doesn't support files with password security enabled (you must remove the security setting before uploading the file).

Step 4: Add Recipients to the Envelope

Click the **Add Recipient** button to add additional recipients. You have two options when deciding what information to enter for each recipient:

- **Enter Role Only:** Use this when the recipient will change depending on circumstance (e.g., a Contractor) and the person using this Template will enter the recipient's name and email address each time.
- **Enter Recipient's Name and Email:** Use this when a recipient should always be included when using this Template.

After adding a recipient, clicking the **Needs to Sign** dropdown menu will allow you to change the action required for each recipient. By default, all recipients will be set to **Needs to Sign**. You can also click the **More** dropdown menu to view additional options, including **Advanced Settings**, where you can opt to restrict a sender's ability to edit or delete each recipient.

To delete a recipient, place your mouse cursor in the recipient's box and click the X that appears to the right.

Step 5: Set Signing Order

Next you will need to determine if the Template will require a Signing Order and what that order will be.

When the **Set Signing Order Box** is checked, the envelope will be sent to the first recipient, who must complete their required actions, before it will be sent to the next recipient. To alter the Signing Order of the recipients, you can either drag a recipient box to a new location or change the numbers in the boxes to the left of each recipient. You may assign the same signing number to multiple recipients if you would like those recipients to receive the envelope and sign at the same time.

If the **Set Signing Order Box** is not checked, all recipients will receive the envelope at the same time and the recipients may be listed in any order.

Step 6: Edit Message to All Recipients

You have the option of changing the Email Subject and Email Message fields for anyone using this Template, if you like. When a Sender uses the Template, they will be able to change these fields as well.

Step 7: Advanced Options

You may also adjust the options set for all users of the Template by clicking **Edit** to the right of Advanced Options. Through this menu, you can add automatic reminders and set an expiration, among other options.

You may also set a password to restrict others' ability to edit the Template through this menu. However, since Admins don't need to provide passwords to edit Templates and since most users don't have the ability to edit Templates, it's not usually necessary to do this.

Step 8: Add Tags

When you're done, click **Next** to begin adding tags to the Template. Drag and drop any tags into the document(s) as necessary, the same way you would when sending an envelope (for detailed

instructions, see the [Wisconsin eSignature: DocuSign User Guide](#)). If you find that there are tags you'd like to have that aren't part of the Standard Fields list (e.g., address or phone number), you can create Custom Tags that can be available to use in multiple Templates (for more information on creating Custom Tags, see the section on Advanced Tags: Custom Tags & AutoPlace below).

If you're adding tags to a placeholder document that the user will replace, you will probably want to use the AutoPlace tool. This tool allows you to link the placement of a tag (or multiple tags) to a word or phrase in the document, ensuring that the tags are in the correct place, no matter how much additional text the user adds to the final document. For instructions on using the AutoPlace tool, see the section on Advanced Tags: Custom Tags & AutoPlace below.

Step 9: Assign Tags to Roles
Once you've added the tags, make sure you assign each tag to the appropriate recipient. To do this, click on a tag to view the tag menu on the right side of the screen, then click the **Recipient** dropdown menu and select the appropriate recipient. In addition, you can select multiple tags and align them using the alignment tools at the top of the menu on the right. (For full instructions regarding assigning tags and accessing the tag menu, see the [Wisconsin eSignature: DocuSign User Guide](#).)

Step 10: Recipient Preview
If you would like to see how the document will display to each of the signers, you can click the **Recipient Preview** button at the top of the screen. This will open a new window where you can view the document with all of the tags assigned to a signer. Each tag may be interacted with, allowing you to see how it will look once it has been completed (e.g., a Signature tag may be clicked to add a placeholder signature or an option may be selected from a dropdown menu). You may select a different recipient by clicking the **Viewing As** dropdown menu at the top of the window. In addition, you have the option of viewing it as if you were using a desktop computer (the default view), a tablet, or a mobile device by clicking the corresponding icons at the top of the window. Click the **X** at the top of the window to exit the preview.

Step 11: Complete the Template
When you're done adding tags, click **Save and Close**.

### Step 12: Share the Template
Once you've saved the Template, it is available for you to use, but you must Share it in order for other users to be able to access it. See the Sharing a Template section below for instructions on the different ways to share Templates.

Advanced Tags: Custom Tags & AutoPlace

Creating Custom Tags
In addition to the standard tags available in DocuSign, you have the ability to create a wide range of Custom Tags. To do this, create or edit a Template and complete the first seven steps in the list above to get to the page where you can add tags.

By default, the Standard Fields menu is visible on the left side of the page. To access the Custom Fields menu, click the second icon under the Search Fields search bar (highlighted in red in the picture to the right). Begin creating a Custom Tag by clicking the **Plus Sign (+)** to the right of Custom Fields. This will open a window where you will be asked to customize your tag. Enter a name for the tag, then click the **Type** dropdown menu to select the type of tag (e.g., text, checkbox, dropdown). Other than name and type (which will default to Text), all other customizations are optional. When you're done, click **Save** and the Custom Tag will appear on the Custom Fields list (where Address, Approval, and Phone Number appear in the image above).
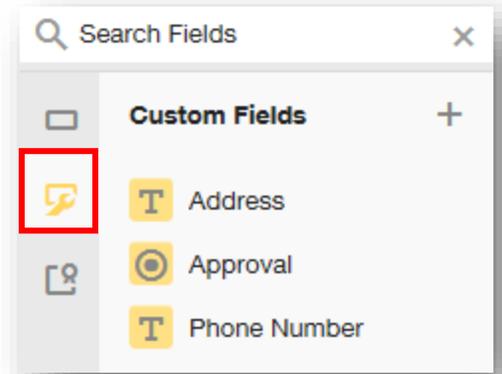

Using AutoPlace

So what do you do when you need to place tags at the end of a document, knowing the length of final document will vary? This is where the AutoPlace tool becomes invaluable. The AutoPlace tool will link the placement of a tag to a specific word or phrase in the document. For example, if I need to have a contract signed, I may choose to link all of the tags related to the signatures (e.g., name, date, signature, and title for all parties) to a phrase that appears near the signature lines, but is unlikely to appear anywhere else in the document (e.g., "To Be Completed By Contractor"). Keep in mind that the program will scan the entire document to search for that word or phrase, and it will place the tags each time it finds it. Make sure you choose the words or phrases you link to AutoPlace tags carefully.

Best Practice: AutoPlace Info in Template Description

As a best practice, we recommend noting the exact word or phrase you linked the AutoPlace tags to in the Template Description. This will allow someone using the Template to use the Find feature in Word (Ctrl + F) to search for the phrase in their document before uploading it to DocuSign, allowing them to edit their document if needed and avoid misplaced tags.
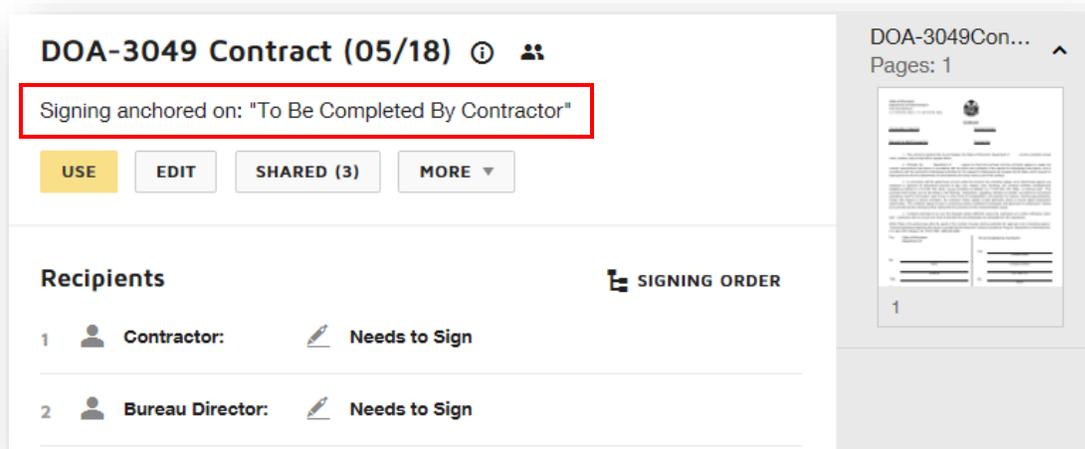
Sharing a Template

Once you've created a Template, you must share it before it will be available for others to use. You can choose to share Templates with specific users and whole groups, or you can create a Shared Folder. While the Templates will work the same for each method, users will locate the shared Templates in slightly different places (either Templates > Shared with Me or Templates > Shared Folders > *Name of Folder*).

Share the Template Directly with Specific Users or Groups
From the **Templates** tab, locate the Template you'd like to share and click **Share with Users** from the dropdown menu on the corresponding line. Scroll through the list of active users available on the account and click the **checkbox** next to the name of each person you'd like to share the Template with. You can review the list of users you chose by clicking the **Selected** tab at the top of the window (note that the Template is automatically shared with yourself and the Admins on the account). Click **Done** when you're finished.

When shared through this method, users can find the Template by going to the **Templates** tab and clicking the **Shared with Me** folder on the left.

Share the Template Through a Shared Folder
If your agency will be using a number of Templates, it might make more sense to create Shared Folders to organize all of the shared Templates and then share the Templates. To do this, go to the **Templates** tab. Click **Shared Folders** to view the full list of Shared Folders, then click the **Plus Sign (+)** to the right of Shared Folders to create a new Shared Folder. Enter a title and then click **Create**. You'll see the folder appear in the list below Shared Folders. Click the **More Options** icon (three dots in a column) to the right of the title of the new folder, then select **Share** and select the individuals or groups you'd like to share the folder with. You can review the list of users you chose by clicking the **Selected** tab at the top of the window (note that the Share Folder is automatically shared with yourself and the Admins on the account). Click **Done** when you're finished.

To add Templates to the Shared Folder, locate the Template you'd like to share and click **Share to Folders** from the dropdown menu on the corresponding line. Select the Shared Folder you'd like to place the Template in and click **Share**.

When shared through this method, users will locate the Template by clicking on the appropriate folder in the list of Shared Folders.

Copying a Template

At times, it may be easier to copy and edit an existing Template than creating a new one from scratch. To do this, go to the **Templates** tab and locate the Template you'd like to copy, then select **Create a Copy** from the dropdown menu. This will open the new Template and will allow you to edit any part of the template, including the title, files, recipients, and tags. When you're done editing the new Template, click **Save and Close**.

Editing a Template

To edit an existing Template, go to the **Templates** tab and locate the Template you'd like to edit. Select **Edit** from the dropdown menu on the corresponding line. This will open the Template window and will allow you to make any changes you need. Click **Save and Close** once you've finished. Any changes you make and save will be automatically available to everyone you've shared this Template with. To exit without saving your changes, select **Discard Changes** from the **Actions** dropdown menu at the top, then click **Discard** to confirm.

DocuSign PowerForms

As it was mentioned before, PowerForms are a way to gather information from unspecified recipients by creating an online form for people to fill out. One way to utilize this tool would be to collect conference registrations. For more information about PowerForms, see DocuSign's User Guide: https://support.docusign.com/en/guides/ndse-user-guide-using-powerforms.

Step 1: Create a Template in DocuSign
Follow the steps outline above to create whatever type of form is appropriate for your needs. If needed, you may include additional routing that can take place after the initial signer has taken action upon it.

Step 2: Create the PowerForm
From the **Templates** tab, locate the Template you want to use as a PowerForm and select **Create PowerForm** from the corresponding dropdown menu.

Step 3: Complete the Summary Information
Fill out the information about your PowerForm on the Summary tab, including the Name and Email Subject (required) and Instructions for the First Recipient (optional). To add merge fields to the Email Subject, click on the **Email Subject** line to see the **Merge Field Icon** (highlighted in red in the image to the right) appear on the right. Click the **Merge Field Icon** to see the available options, such as "Insert Registrant's Name," which will vary, depending on what fields and tags are available in the Template.

You can also click the **Options** tab (to require email validation, enter a message to all signers, to limit the number of times the form may be accessed, or set a limit on how frequent responses can be entered. When you're done, click **Create**.

Step 4: Copy the PowerForm's Link

Once the PowerForm has been created, you can find it by going to the **Manage** tab at the top of the window and clicking the **PowerForms** tab on the left. Find the PowerForm you created and select **Copy URL** from the corresponding dropdown menu. This will open a popup window that will allow you to copy the web address of the PowerForm.

Step 5: Share PowerForm's Link and Collect Responses

Share the PowerForm's link through whatever means make most sense for your project. Some common options include sharing it via email, posting it on a public website, or posting it on an internal website.

Step 6: Download Responses

Once you have collected responses, you can view a single response or download all responses into a CSV file.

To view a single response (or each response individually), go to the **Manage** tab at the top of the window and access the **PowerForms** tab on the left. Locate the desired PowerForm and click **View Envelopes** from the corresponding dropdown menu to view the list of all responses submitted within the last 6 months (click **Edit** to change the filter, if needed). Note that incomplete envelopes are included in this list as well; an incomplete envelope would happen when someone clicked the PowerForm link but failed to enter all required information.

To download all responses into a CSV (Excel) file, go to the **Manage** tab at the top of the window and click the **PowerForms** tab on the left. Locate the desired PowerForm and click **Download**, then enter a start and end date range that you would like to include in the report, then click **Download**. Follow any on-screen prompts from your browser to complete the download, then save the document to your computer. The CSV file will include all responses to all tags that are included in the PowerForm. This data will not be formatted and will likely require some manipulation, but all the data gathered from the form will be included.

Editing a PowerForm

To edit a PowerForm, go to the **Manage** tab at the top of the window and access the **PowerForms** tab on the left. Locate the desired PowerForm and click **Edit** from the corresponding dropdown menu. This will allow you to edit any of the information during Step 3 of the PowerForm creation. If you need to edit the Template used to create the PowerForm, refer to the section on **Editing a Template**.

Change the PowerForm's Sender

The PowerForm's Sender is the person who created the PowerForm. If you need to change this, go to the **Manage** tab at the top of the window and access the **PowerForms** tab on the left. Locate the desired PowerForm and click **Change Sender** from the corresponding dropdown menu. This will open a popup window that will let you select a new Sender, with options to search by name or email address.

Deactivating a PowerForm

To deactivate a PowerForm, go to the **Manage** tab at the top of the window and access the **PowerForms** tab on the left. Locate the desired PowerForm and click **Deactivate** from the corresponding dropdown menu.

Sending Envelopes in Bulk

Template Builders also have the ability to send envelopes in bulk. Through this process, a single sender can send identical envelopes to up to 999 recipients at a time. It's important to note that this is not a single envelope that is being delivered to 999 recipients, it's 999 envelopes that are each being sent to one or more recipients.

When using this method to send envelopes, the Sender will need to upload a CSV file containing all of the information necessary. To download a sample CSV template file, click the **Information Icon** in the Add Recipients to the Envelope section, then click **Download the Sample CSV Template** link in the popup window (both highlighted in red in the image below).

For detailed instructions on Sending Envelopes in Bulk, view the corresponding section of the DocuSign User Guide (https://support.docusign.com/en/guides/ndse-user-guide-multiple-recipient-bulk-send) or click the **Learn More…** link in the popup window shown in the image below.