



McGill

Information
Technology
Services

DocuSign User Guide for Senders

**Connect.
Learn.
Innovate.**



DocuSign Quick User Guide: Sender



Connect to DocuSign

1. Go on <https://account.docusign.com/> and enter your **McGill Email** and click **Continue**
2. Click on **Use Company Login**.
If you are redirected to Microsoft Authentication page, enter your McGill Username and McGill Password.
3. You will arrive on **DocuSign Homepage**

A screenshot of the DocuSign login page. The text 'Please log in to your account' is at the top. Below it is an email input field containing 'xxxx@mcgill.ca'. A red box highlights this field. Below the email field is a yellow 'CONTINUE' button, also highlighted with a red box and a red circle containing the number '1'. At the bottom, there is a link that says 'No account? Sign up for free'.A screenshot of the DocuSign login page. The text 'Please log in to your account' is at the top. Below it is a partially visible email field ending in '@mcgill.ca'. Below that is a 'Password' input field. A yellow 'LOG IN' button is below the password field. Below the 'LOG IN' button is a link that says 'Forgot password'. At the bottom, there is a blue 'USE COMPANY LOGIN' button, highlighted with a red box and a red circle containing the number '2'. Below this button is a link that says 'Sign in as a different user'.

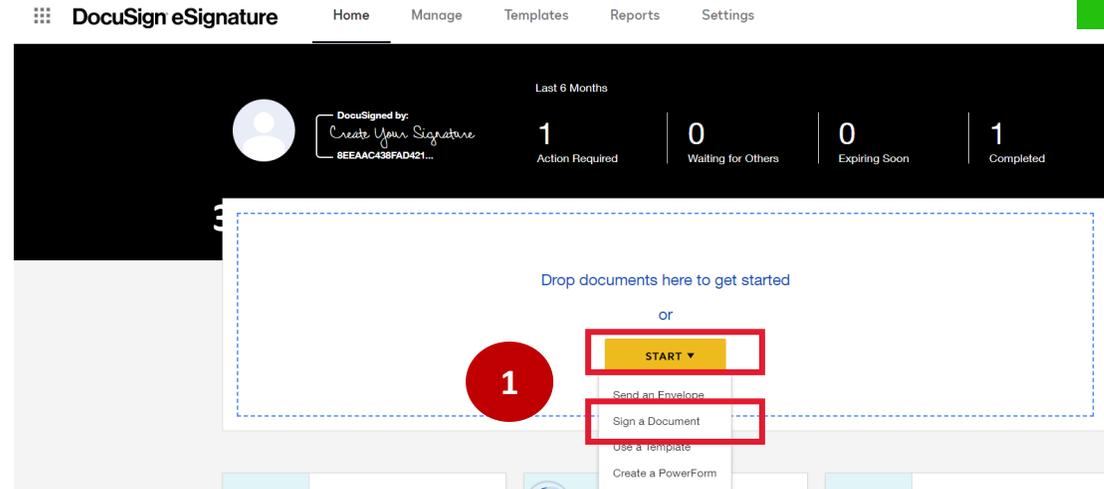
A screenshot of the DocuSign eSignature homepage. The navigation bar at the top includes 'DocuSign eSignature', 'Home', 'Manage', 'Templates', 'Reports', and 'Settings'. Below the navigation bar is a dark header area with a red circle containing the number '3' on the left. To the right of the circle is a user profile icon and the text 'DocuSigned by: Create Your Signature'. Below this are four statistics: '1 Action Required', '0 Waiting for Others', '0 Expiring Soon', and '1 Completed'. Below the statistics is a large white area with a dashed blue border containing the text 'Drop documents here to get started'. Below this text is a yellow 'START' button with a dropdown arrow. A dropdown menu is open below the 'START' button, showing options: 'Send an Envelope', 'Sign a Document', 'Use a Template', and 'Create a PowerForm'.

DocuSign Quick User Guide: Sender

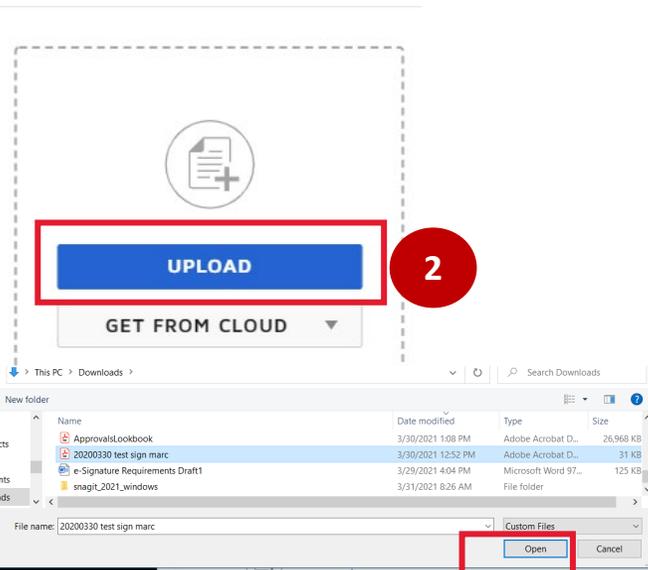


Sign a Document 1/2

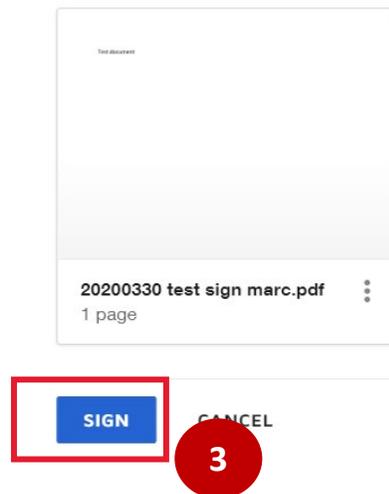
1. Click on **Start** and then **Sign a document**.
2. Click on **Upload** and **Select the document** you want to sign.
Note: You can also use the drag and drop function.
3. Once the document is uploaded, Click **Sign**.
4. Click **Continue**.



Sign a Document



Sign a Document



Please Review & Act on These Documents



Please review the documents below.

CONTINUE

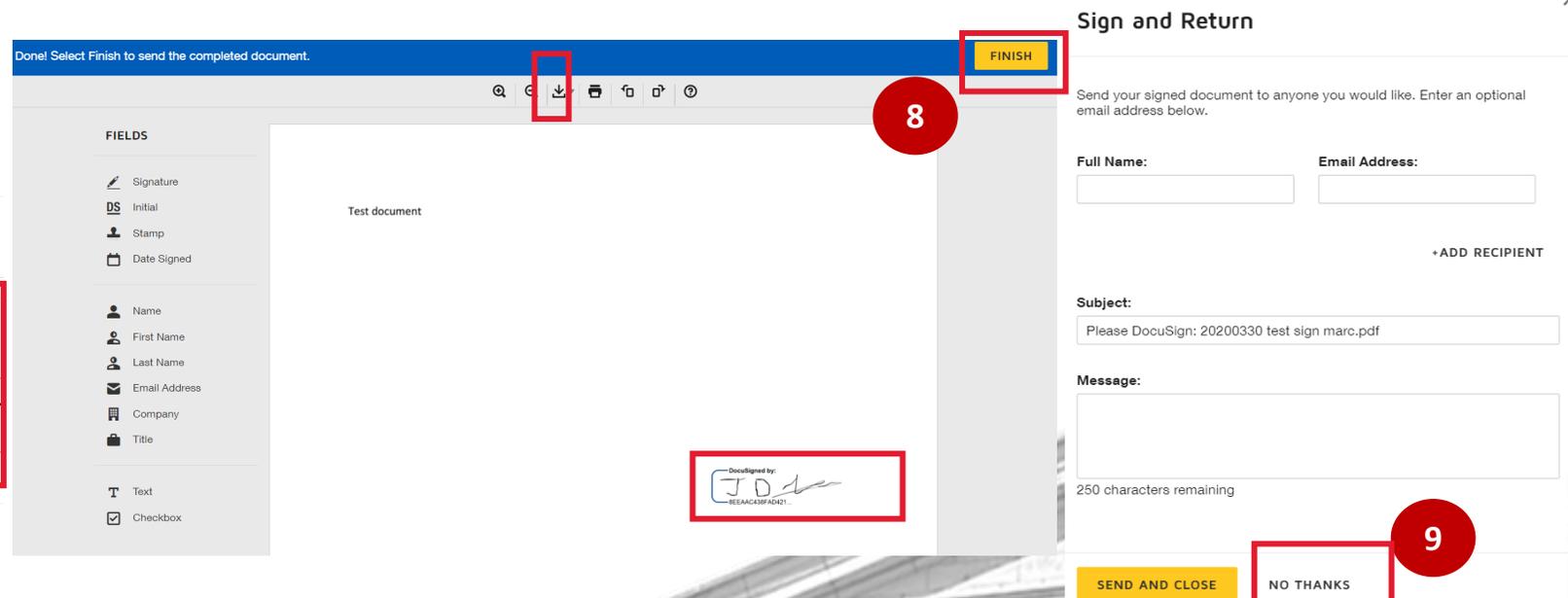
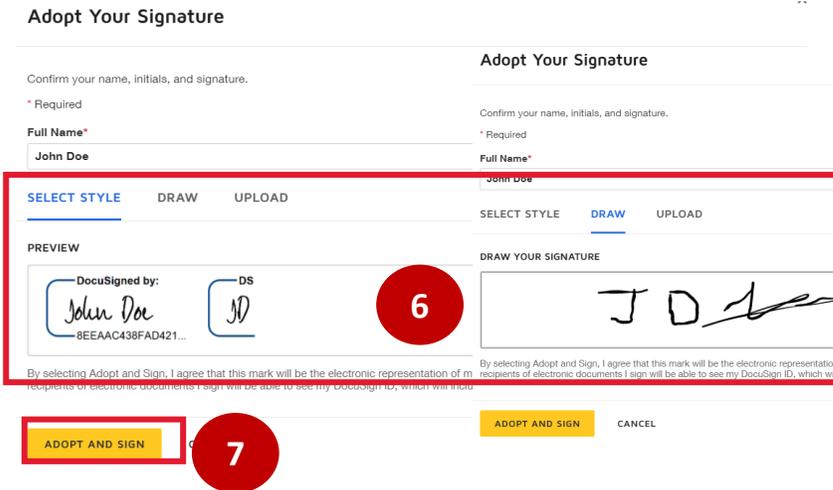
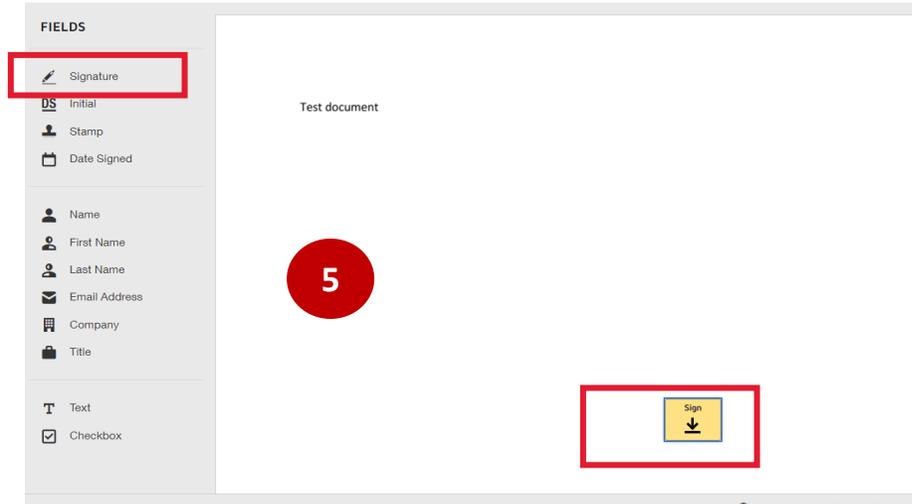
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DocuSign Quick User Guide: Sender



Sign a Document 2/2

5. Click on **Signature** and select **location** for your Signature.
6. Select your signature. You can choose among **Select style**, **Draw** or **Upload** to upload a file that has your signature.
7. Click **Adopt and Sign**.
8. You can preview the document as well as download the signed document. Click **Finish** to complete the process.
9. You can share your signed document with additional recipient. If not, click **No thanks**.



DocuSign Quick User Guide: Sender



Send an envelope 1/2

1. Click on **Start** and then **Send an Envelope**.
2. Click on **Upload** and **Select the document** you want to add to the envelope.
3. **Add recipients** to the envelope. You can customize signing order and/or if the recipient needs to sign.
4. You can customize the email message to all your recipients. Click **Next**.

1 START ▼

- Send an Envelope
- Sign a Document
- Use a Template
- Create a PowerForm

2 UPLOAD

USE A TEMPLATE

GET FROM CLOUD ▼

3

As the sender, you automatically receive a copy of the completed envelope.

Set signing order

1	Name *	MRS A	Needs to Sign	CUSTOMIZE ▼
	Email *	@gmail.com	In Person Signer	
			CC Receives a Copy	
2	Name *	MR B	NEEDS TO SIGN	CUSTOMIZE ▼
	Email *	@gmail.com		
3	Name *	Mr C	CC RECEIVES A COPY	CUSTOMIZE ▼
	Email *	@gmail.com		

4

Message to All Recipients

Email Subject *

Please DocuSign: 20200330 test sign marc.pdf

Characters remaining: 56

Email Message

Enter Message

Characters remaining: 10000

NEXT

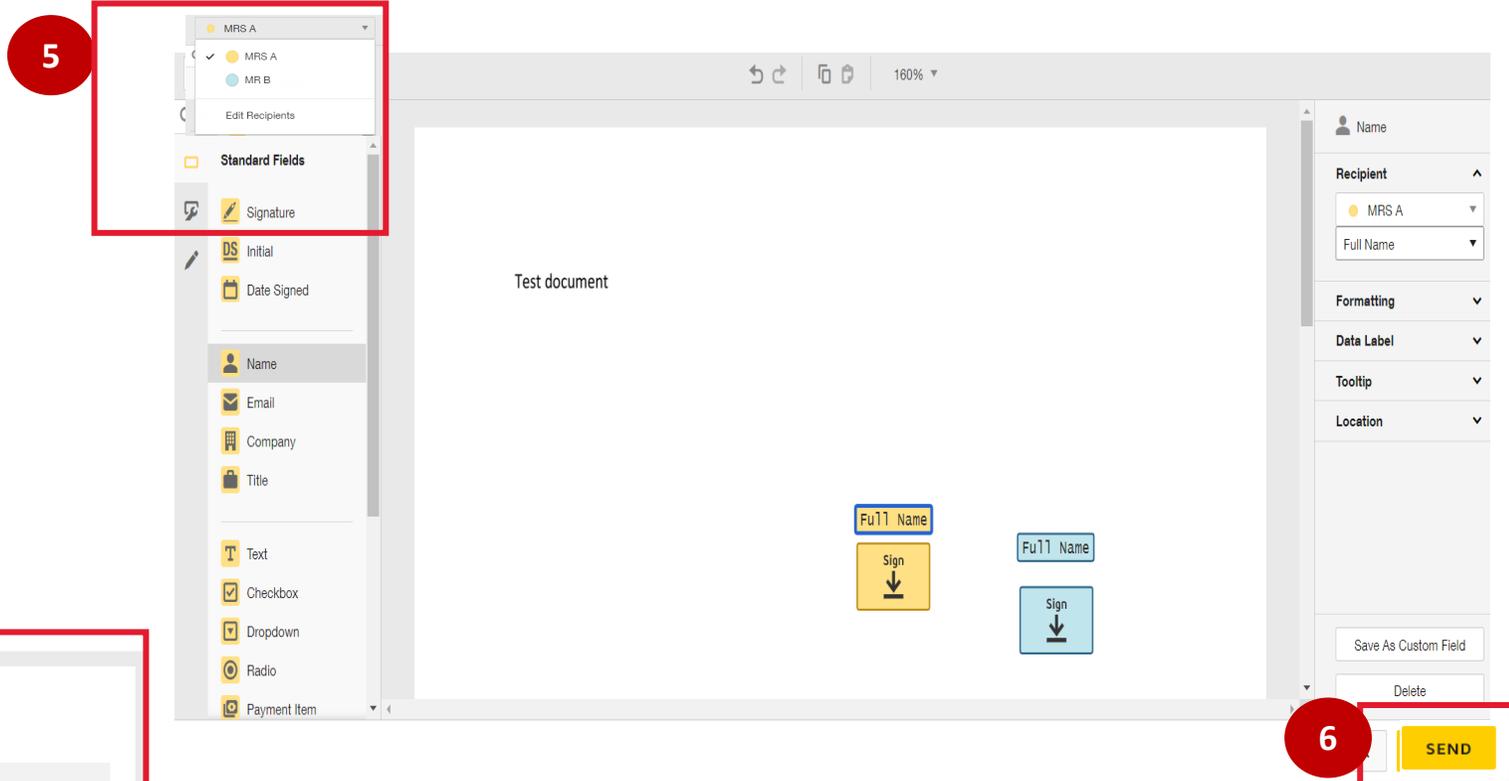


DocuSign Quick User Guide: Sender



Send an envelope 2/2

5. Select **recipient**, click on **Signature** and select **location** for your Signature for the respective recipient.
6. Click **Send** to send the envelope to your recipients for their signature. Your recipients will receive an email requesting their signature.
7. You will receive an email with the signed document once your recipients have signed and sent you the documents.

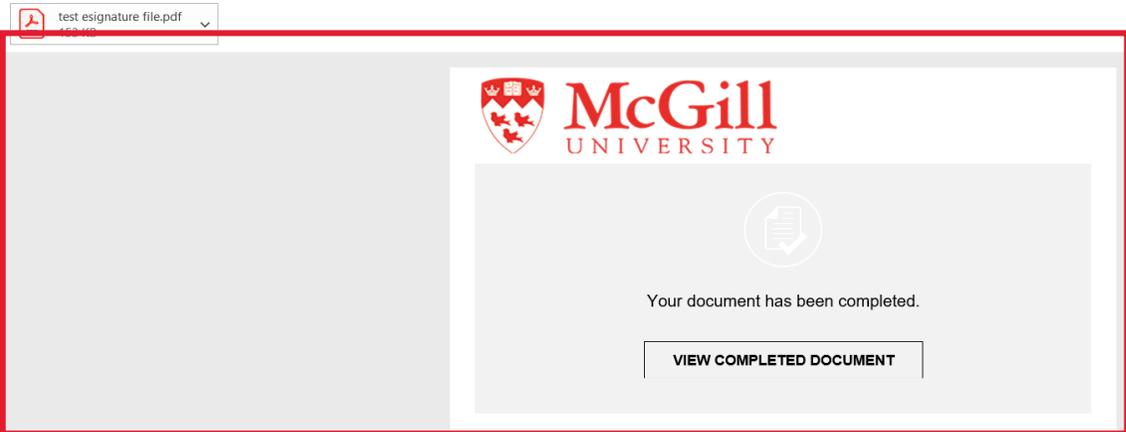


The screenshot shows the DocuSign 'Send' interface. On the left, a sidebar contains a list of fields: Name, Email, Company, Title, Text, Checkbox, Dropdown, Radio, and Payment Item. A red circle with the number '5' highlights the 'Signature' field in this sidebar. The main area displays a 'Test document' with two signature fields, each labeled 'Full Name' and containing a 'Sign' button. On the right, a recipient selection panel shows 'MRS A' selected. At the bottom right, a red circle with the number '6' highlights the yellow 'SEND' button.

Completed: Please DocuSign: test esignature file.pdf

DocuSign Demo System <dse_demo@docusign.net>
To [redacted]

7



The screenshot shows an email notification from McGill University. The header includes the McGill University logo and name. The main content area features a document icon and the text 'Your document has been completed.' Below this, a button labeled 'VIEW COMPLETED DOCUMENT' is highlighted with a red border.

DocuSign Quick User Guide: Sender



Download the certificate of completion

1. Click on **Manage** and then **select the document**.
2. Click on the **Download icon**.
Note : Click **Signed in location** if you want to see location of where the document was signed (only if the recipient has authorized the location feature) .
3. Select **Certificate of Completion** and click **Download**.
4. On the certificate of completion, you can see some information such as **email address of the recipient, signature, IP address** or **timestamp**.

nature Home **Manage** Templates

Inbox 1

Filtered by: Date (Last 6 Months) | Edit

Subject

Please DocuSign: paymentrequest_form_0125_2021_save
To: marc signataire

Please DocuSign: test esignature file.pdf
To: [redacted]

2

SIGNED ORDER

DOWNLOAD

Select which files you want to download:

- All 2 files
- Document 1 PDF
- Certificate of Completion 1 PDF**

3 Combine all PDFs into one file

DOWNLOAD

CANCEL

4

Signer Events

John Doe
[redacted]@mcgill.ca
Security Level: Email, Account Authentication
(None)

Signature

DocuSigned by:

[redacted]
Signature Adoption: Drawn on Device
Using IP Address: 142.157.151.76

Timestamp

Sent: 4/21/2021 12:53:10 PM
Viewed: 4/21/2021 12:53:21 PM
Signed: 4/21/2021 12:56:46 PM
Freeform Signing

Signed

on 4/21/2021 | 03:56:46 pm

Signed in location