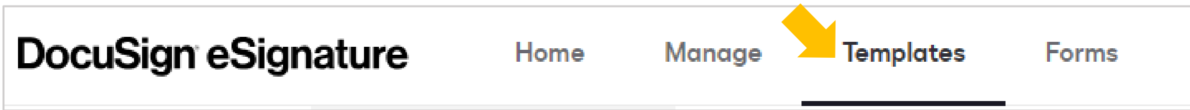
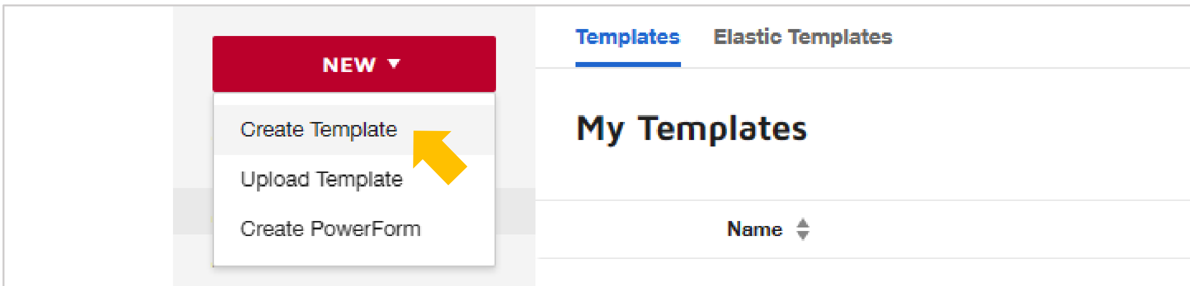
# CREATE A DOCUSIGN TEMPLATE

1. Login to DocuSign via my.AState (Digital Forms) or directly (https://app.docusign.com/home)

2. Go to **Templates** on the top navigation bar




3. Select "**New**" then "**Create Template**"




4. Enter a template name and (optional) description

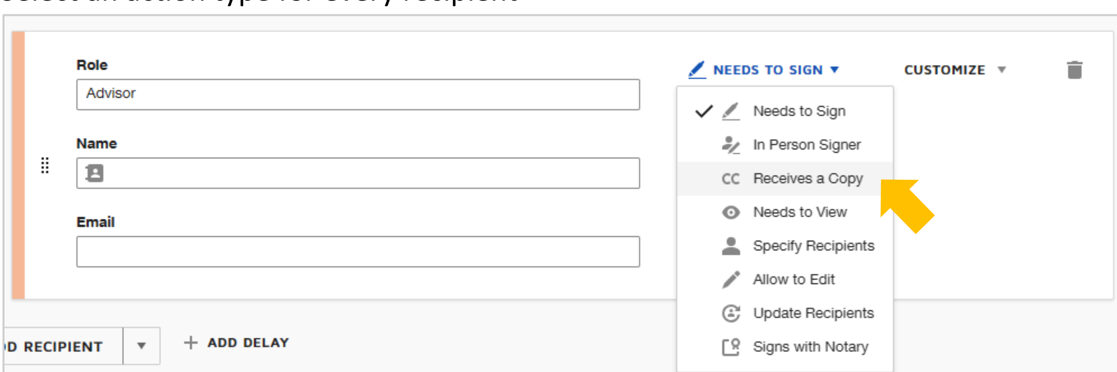
5. Upload a PDF version of the form for which you're making a template

6. Enter the recipient information and add additional recipients as needed

   a. Check "**Set signing order**" to have the form go to recipients in a specific order

   b. Enter a **Role** for every recipient (this is required to use the template in a PowerForm)

   c. Select an action type for every recipient




      i. **Needs to Sign**: must complete the required fields assigned to them

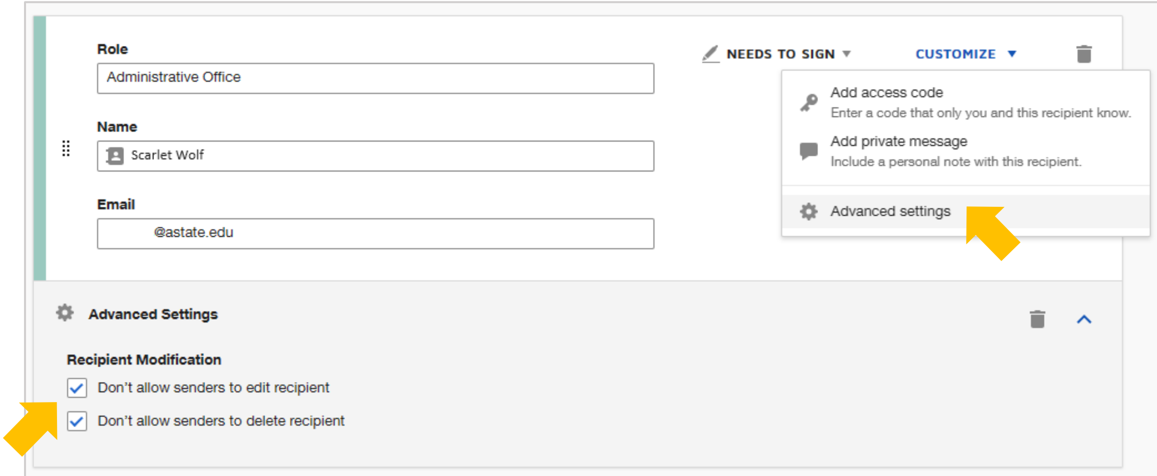
      ii. **Receives a Copy**: receives a copy with no further action required
      *Note: These recipients receive a copy of the document as it is in the signing order*
      *Ex. The form will not include fields completed by a signer after this recipient in the signing order*

      iii. **Needs to View**: must open and view the document (no required fields assigned)
      *Note: The form is only marked complete once these recipients have viewed the document*

   d. Leave **Name/Email** blank if the recipient will be different from submission to submission

   e. Enter **Name/Email** for recipient roles that remain the same for every submission
   *Note: If entering either, both Name and Email are required to use the template in a PowerForm*

f. Go to “**Customize**” then “**Advanced settings**” to edit the settings for each recipient

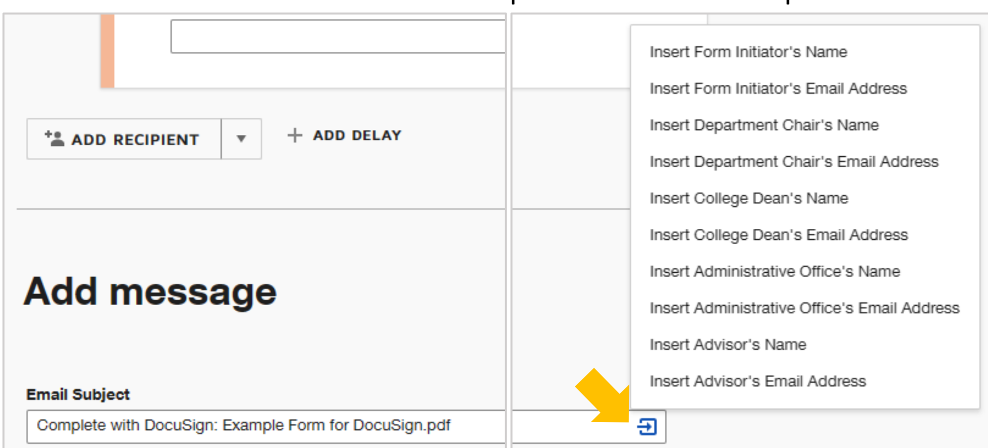



i. Check “**Don’t allow senders to edit recipient**” if the Name/Email should not be changed
*Ex. The form must be sent to a specific person in an administrative office at a specific email address*

ii. Check “**Don’t allow senders to delete recipient**” if the role is required to sign the form
*Ex. The form requires a department chair signature, so the Department Chair role should not be deleted*

7. Edit the **Email Subject** line for the emails sent to recipients (optional)

a. Select the insert icon to add the user input of one of the recipient fields to the Email Subject



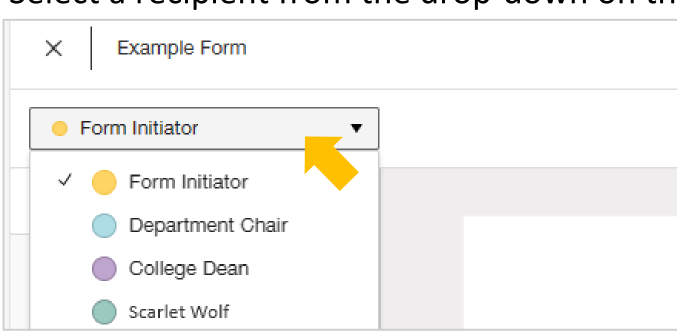

*Ex. Selecting “Insert Advisor’s Name” will add the advisor name entered by the form initiator to the Email Subject*

8. Add message text to the **Email Message** (optional)

9. Change the **Frequency of reminders** (optional)

10. Select “**Next**”

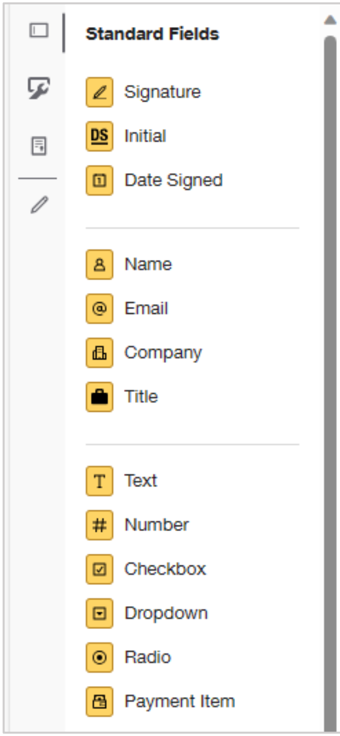
11. Select a recipient from the drop-down on the top left



## 12. Add fields to the form for the selected recipient

*Note: Assigned fields will be the same color listed before the recipient's name in the drop-down.*

a. Select a field type on the left and place it on the form to add the field to the form




i. **Signature**: recipient adopts an eSignature and signs form

ii. **Initial**: recipient adopts an eSignature and initials form

iii. **Date Signed**: automatically populates current date

iv. **Name**: automatically populates recipient's name

v. **Email**: automatically populates recipient's email address

vi. **Text**: recipient enters free text (unless validation is set)

vii. **Number**: recipient enters a number (includes currency)

viii. **Checkbox**: recipient selects one or more options

ix. **Dropdown**: recipient selects one option

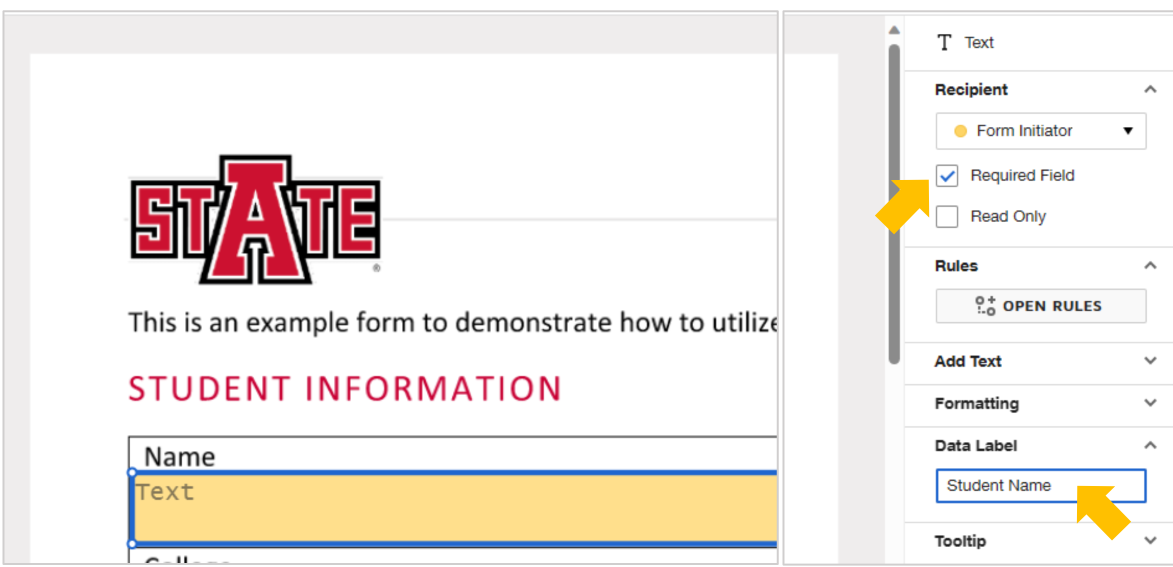
x. **Radio**: recipient selects one option

xi. **Attachment**: recipient attaches a document or file

xii. **Approve**: alternative to an eSignature

xiii. **Decline**: declining voids the document

b. Check "**Required Field**" on the right if the field is required to be completed
*Note: Required fields are solid-colored. Non-required fields are outlined in color.*




c. Enter a **Data Label** or **Group Label** for every field added to the form

i. Enter **Radio Button Values** and **Checkbox Values** where applicable

d. Add **Validation** for the field if needed

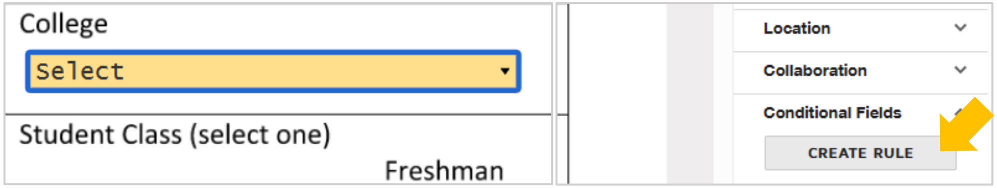
e. Add **Options** for the field if needed

f. Add rules for **Conditional Fields** as needed

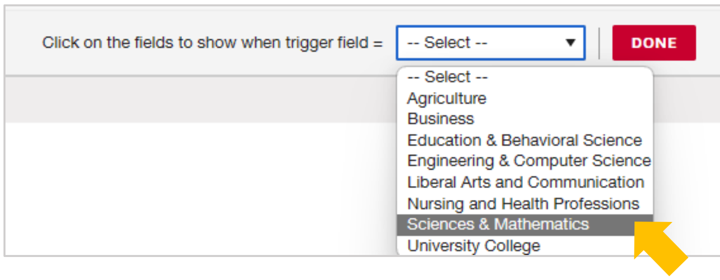
*Note: All fields included in a conditional rule are required to be added to the form before the rule is created*

*Ex. The drop-down options displayed for "Department" are conditional based on the option selected for "College"*

i. With the first field selected, go to "**Conditional Fields**" then "**Create Rule**"



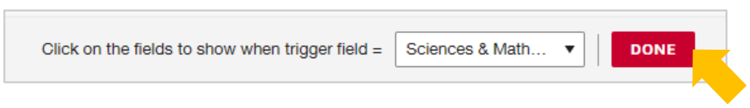

ii. Choose the option that triggers the conditional field from the drop-down




iii. Select the field that will display when the option above is selected

*Note: The first field is highlighted in blue. The selected field will change from solid-colored to striped.*


iv. Select "**Done**"



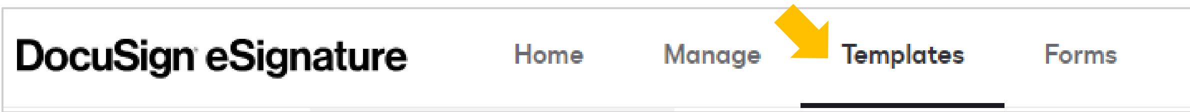

13. Select "**Save and Close**"

## TEMPLATE MANAGEMENT

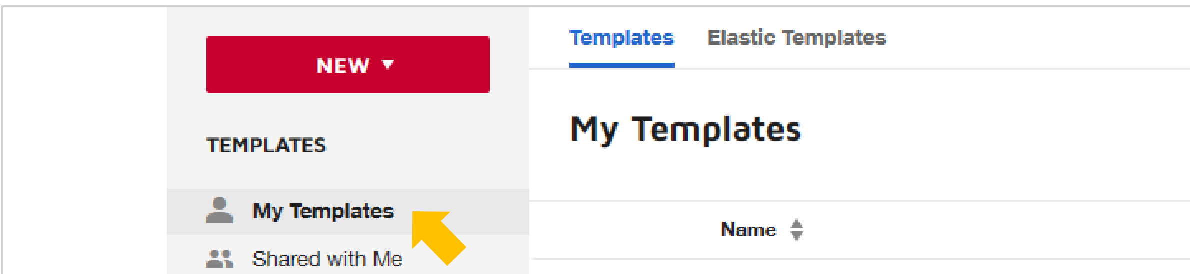
A template must be owned by or shared with you in order to edit the template.

To view your templates

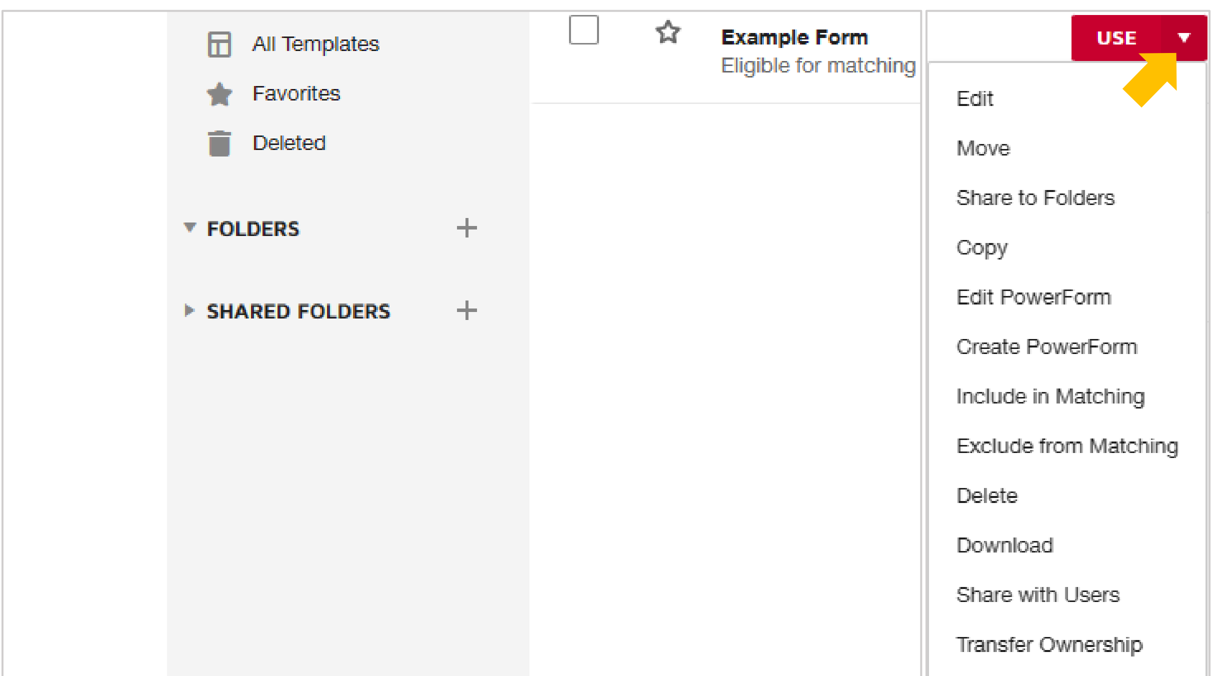
1. Go to **Templates** on the top navigation bar




2. Select “**My Templates**” or “**Shared with Me**” on the left




Use the arrow button to open a list of actions you can take on a template.




a. **Edit**: make changes to a template’s recipients, fields, etc.
*Note: a template must be owned by or shared with you in order to edit the template*

b. **Create PowerForm**: use the template to create a PowerForm

c. **Share with Users**: share the template with other users

d. **Transfer Ownership**: give ownership of the template to a different user
*Note: If you’ve created the template for a different user or department, transfer ownership to them*