



DocuSign-SharePoint Feature User Guide

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Steps to Install the DocuSign feature in SharePoint

To install the feature, run the given setup.exe file and follow the wizard.

Step1:

Click on the provided setup.exe file and then click next

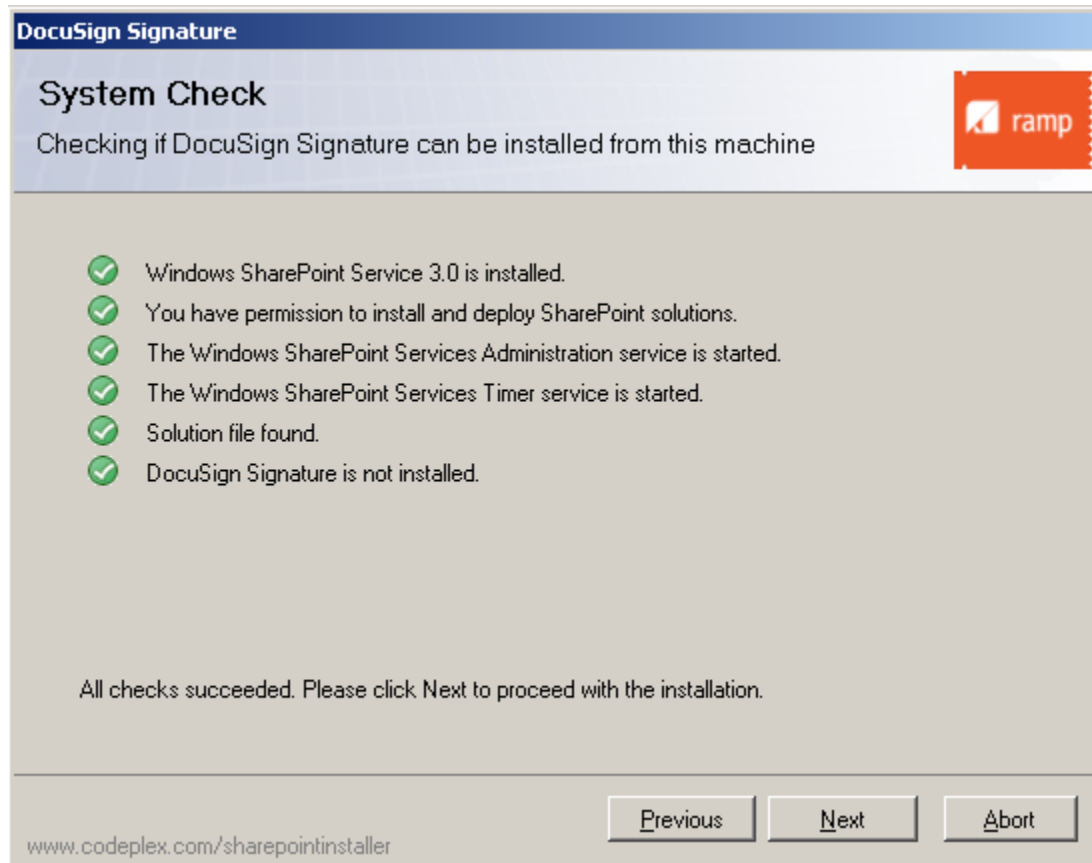


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Step2:

To start the installation process, this feature will run a check to ensure all the services and basic requirements are installed on the server as shown below.

Once all the requirements are fulfilled, click Next to continue the process.



Step3:

Read the provided End-User License Agreement and place a check mark in the box provided for **“I accept the terms in the License Agreement”**. And Click Next



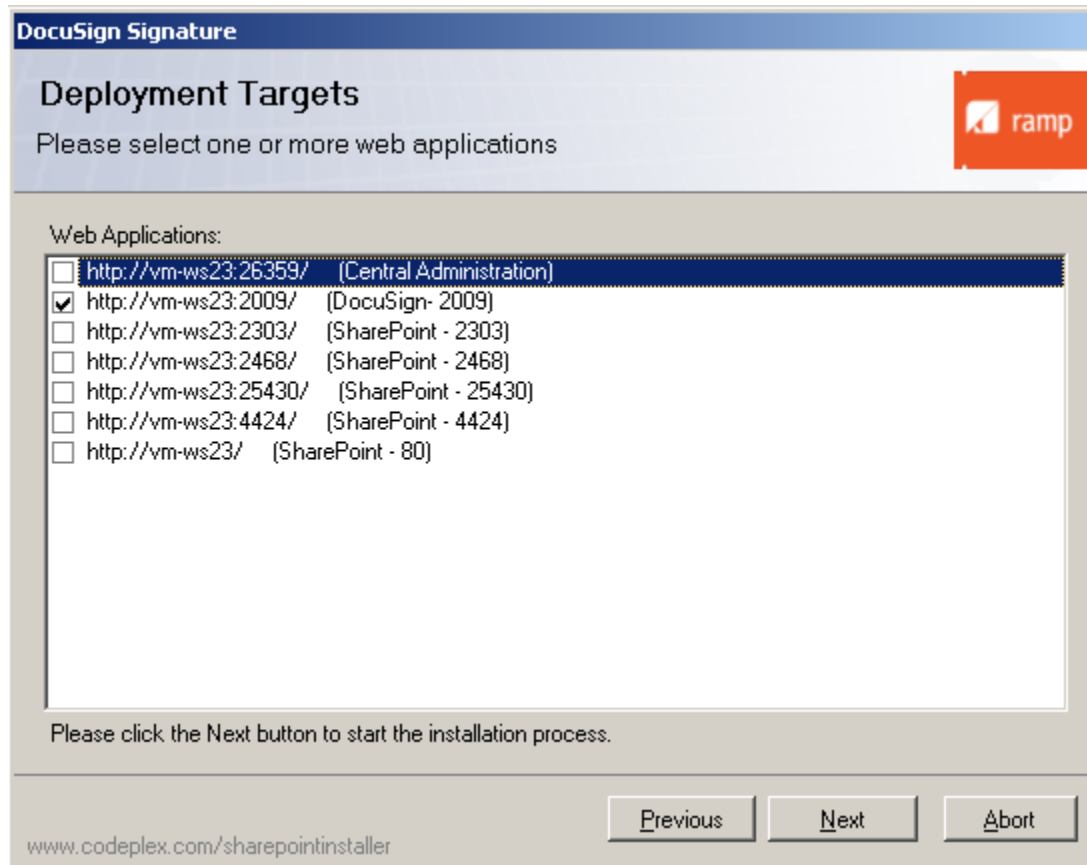
PS: The current EULA is for Microsoft Public License agreement. This will have to be replaced with DocuSign EULA.

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Step4:

In the next window, it shows all the SharePoint web applications running on the SharePoint server;

Select the SharePoint site (or sites) where this feature is to be installed and then click next to complete the installation process.

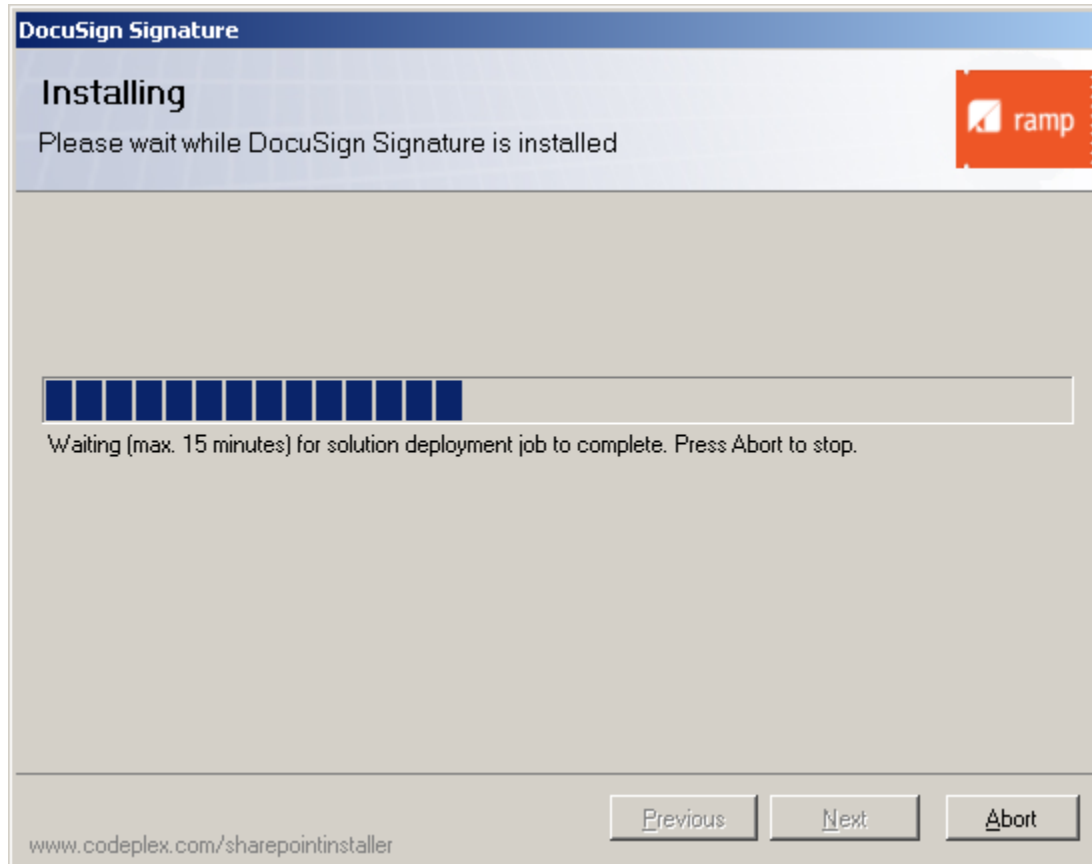


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Step5:

The installation process usually takes about 2-4 minutes depending on the number of sites this feature is being installed on.

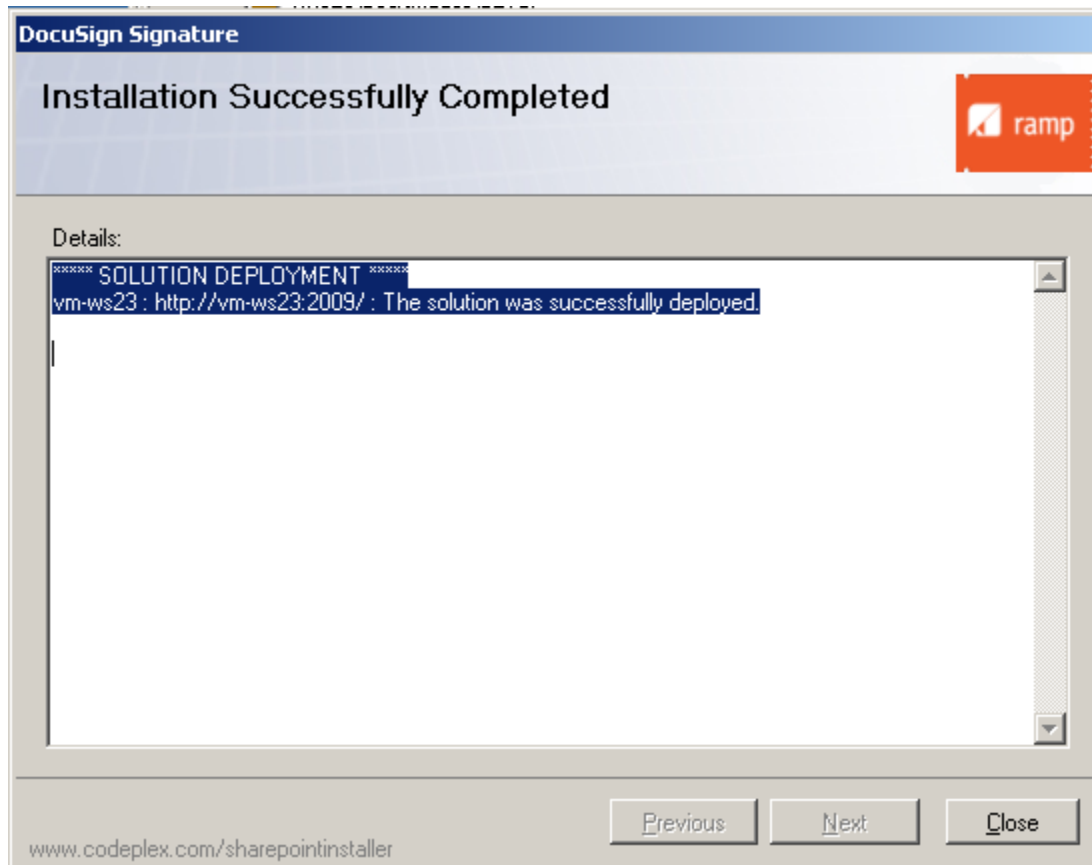
Please wait a successfully installed message **“All the operations are successful”** will be displayed. Then click next to view the details.



Step6:

The installation details for each site selected in Step:4 will be listed here.

Click Close.



Now the Feature has been successfully installed on the SharePoint server and deployed to the selected sites. The next step is to activate the feature in the site where the feature is deployed.

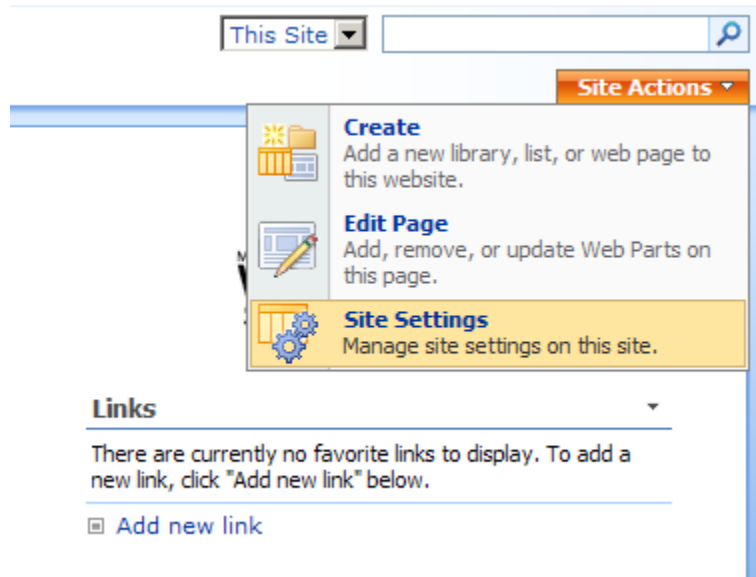
Follow the instructions provided in the next few section to activate the feature in a SharePoint site. Please note that you will have to do this for every site where the feature has been deployed.

Steps to activate the DocuSign feature in a SharePoint Site:

Step1:

Browse and open the SharePoint site where the DocuSign feature was installed with **Site Collection Administrator** Credentials.

Click on the **Site Actions** in the SharePoint site and select **Site Settings**.



Note: In a publishing site, Select **Site Actions > Site Settings > Modify All Site Settings**

Step2:

Under the “**Site Collection Administration**” section, click on the “**Site collection features**” as shown below

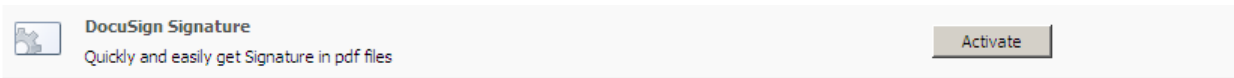
Site Collection Administration

- ▣ [Recycle bin](#)
- ▣ [Site collection features](#)
- ▣ [Site hierarchy](#)
- ▣ [Portal site connection](#)

Step3:

Now, all the features available for that site collection will be listed here. One can notice that some of them are active and some or not.

Look for the feature entry “**DocuSign Signatue**” and Click on “**Activate**” button, to activate the DocuSign Feature.



Once the feature is activated on a site collection, this feature will be available for all document libraries within that Site Collection.

If the DocuSign feature was installed on multiple site collections (or SharePoint websites), the activation process should be employed for all the sites separately.

There are certain web.config changes needed at the SharePoint site level which are listed in the next section. Once these changes are completed, the feature is ready for signing.

SharePoint Site Web.Config changes for DocuSign feature

For the DocuSign feature to send emails and to access the DocuSign webservice, needs certain information which is saved in a site's web.config file.

This information will need to be added to the web.config for the feature function correctly.

Once activated, browse to a SharePoint site's web.config file usually located at the following location.

C:\Inetpub\wwwroot\wss\VirtualDirectories\<SitePortNumber or name>

Provide the smtpServer, docuSignUserName" and "docuSignPassword" in the appsettings tag

```
<add key="smtpServer" value=" PleaseProvideYourSMTPServerHere" />
```

```
<add key="docuSignPassword" value="demo" />
```

```
<add key="docuSignUserName" value="demo@DocuSign.com" />
```

Smtp Server will be used to send the request emails

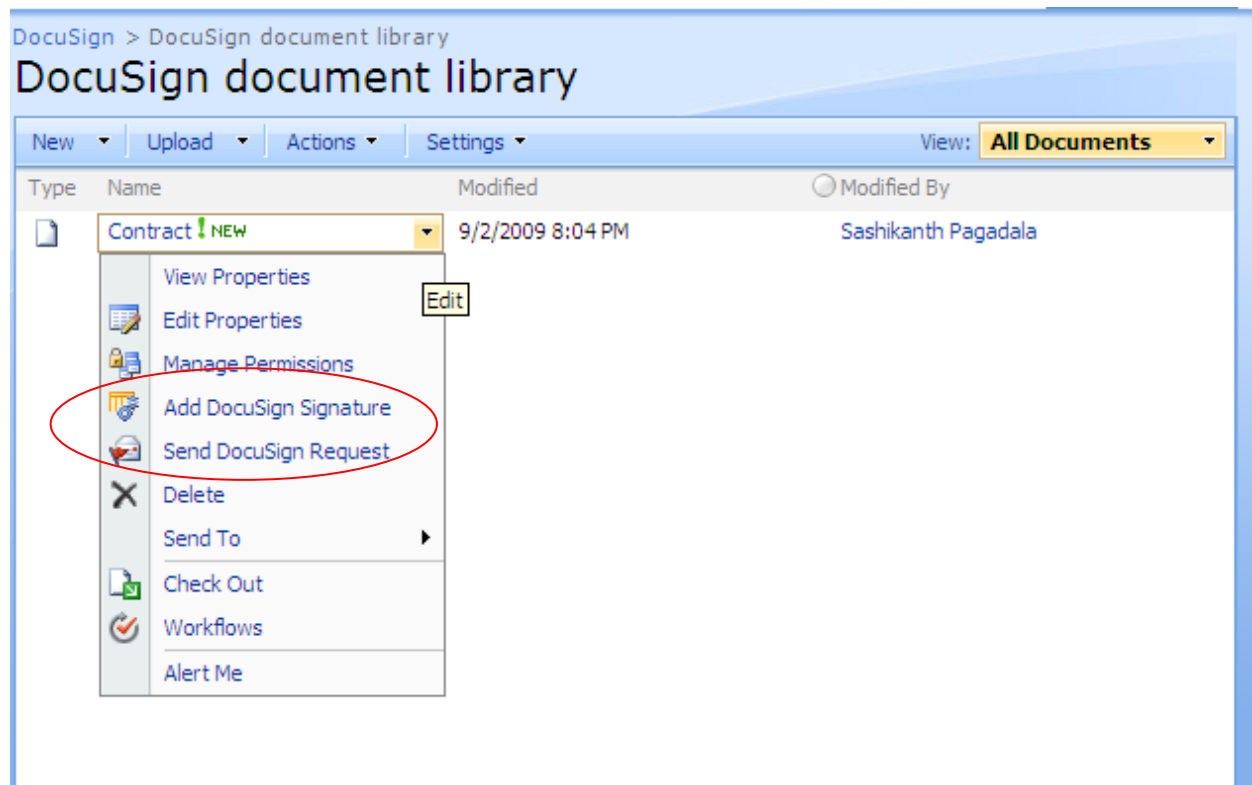
DocuSign User Name and Password are the credentials this feature will use to access the DocuSign webservice.

This information is very critical for the DocuSign features to work well in a SharePoint environment.

How to Use the DocuSign feature for signing documents

Once the feature is activated on a site collection, any PDF documents in the document libraries can be signed from the SharePoint site using this DocuSign feature.

Browse to a document library on a site where the DocuSign feature is installed and activated. Click on a document in the library to open the item context menu as shown below.



In the Item context menu, one can find two new entries highlighted in the figure above. These are the two DocuSign features for signing the documents.

- 1) **Add DocuSign Signature** – This feature enables a user to sign a document in a SharePoint library without downloading a copy or needing to login to DocuSign everytime.
- 2) **Send DocuSign Request** – This feature enables a user to send an email request to another SharePoint site user to sign a document without having to attach a copy to the email or worry about uploading the signed copy back to the document library.

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A. Send DocuSign Request:

Steps to send a signature request using DocuSign

Pick a document in the document library and select the **"Send DocuSign Request"** in the document's Context menu.

User will be redirected to a Signature Request page to provide the user alias (Any address in the Global Address List). There is a lookup available to pick a user name of the GAL.

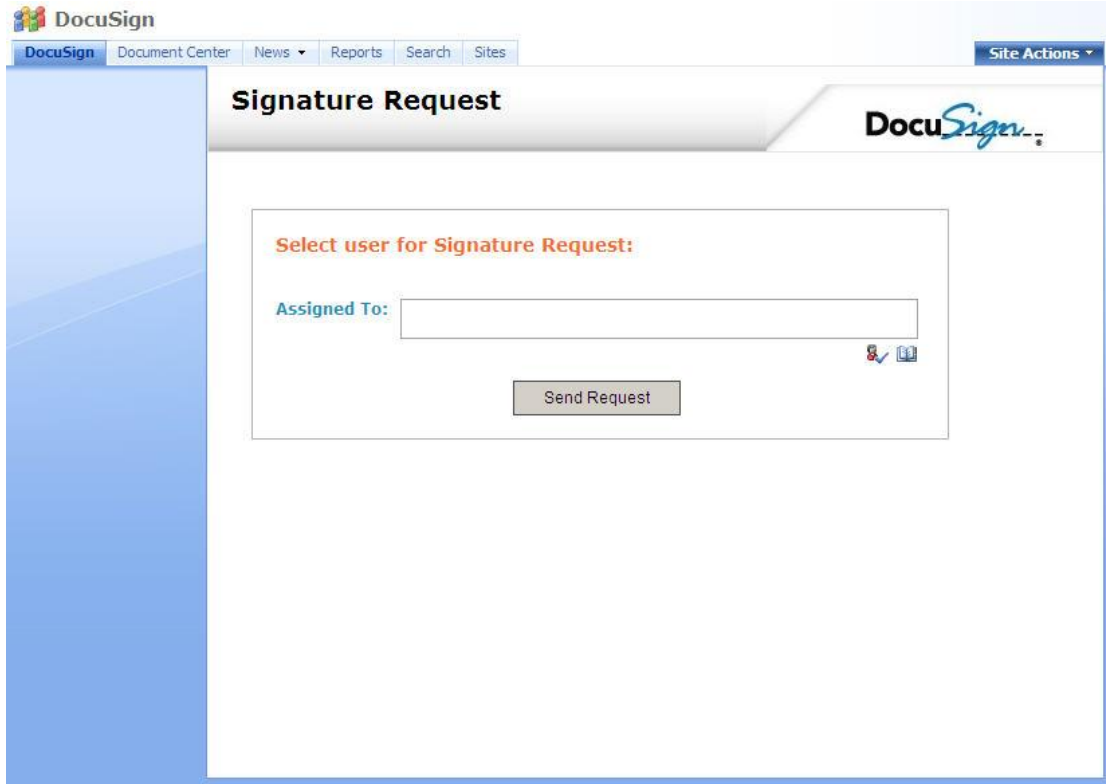


Figure SharePoint People Picker field to select the user to send the signature request. Email will be sent to the email ID on the user's profile.

Please note that the selected user should have access to the site and the document library in order to sign the document.

Once the information (user selected) is submitted, the user will be sent an email notification with a link to the document in SharePoint site and requesting to sign using secure DocuSign account as shown below.

Request for the DocuSign Signature

Rajkamal Vankayala

Sent: Thu 9/10/2009 5:43 PM

To: Sashi Pagadala

Sashikanth Pagadala,

To begin the process of reviewing and signing your documents, please click the **Review and Signing** link below.
[Review and Signing](#).

Note: Signing will not be complete until you have reviewed the agreement and confirmed your signature.

Thanks,
Rajkamal Vankayala
rajkamal.vankayala@rampgroup.com

DocuSign
The fastest way to get a signature.®

There is a provision available with this feature to keep a track of the latest signature requests submitted for a given document. (The last requested user name and date & time the request was sent will be saved in the document library. Enabling Version on the document library keeps a track of all requests)

The default status of an uploaded document in the document library is "**Pending**".



Clicking on the link in the email, user will be redirected to the DocuSign signature page in SharePoint site for signing.

The user is presented with the e-signing agreement and modify signature to get started with the signing process as shown below.

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Ready To Sign...

You will need to proceed through the following steps:

- 1 Agree to Receive and Sign Documents Electronically
- 2 Adopt your Electronic Signature
- 3 Review the Document
- 4 Click all  and  tabs
- 5 Click 'Complete Signing' when you are done


Agree to Conduct Business Electronically

CONSUMER DISCLOSURE

From time to time, Ramp (we, us or Company) may be required by law to provide to you certain written notices or disclosures. Described below are the terms and conditions for providing to you such notices and disclosures electronically through the DocuSign, Inc. (DocuSign) electronic signing system. Please read

[Print](#) ☒ **I Agree**

Adopt Your Signature

Signature:  331500D2CC6B4D5... Initials:  [Modify your Signature](#)

☒ **Adopt this signature as my signature. ***

By clicking the box, I agree that the signature and initials I have selected above will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts – just the same as a pen-and-paper signature or initial.

[Continue](#) [Cancel](#)

User can then place the **signature and initials** as and where needed in the document from the interface provided and click "**Complete Signing**".

Once the signing process is completed, the signed document will be saved back to the document library and the DocuSign status for the document will be updated in the document library.

Version will be incremented if enabled on the document library accordingly.

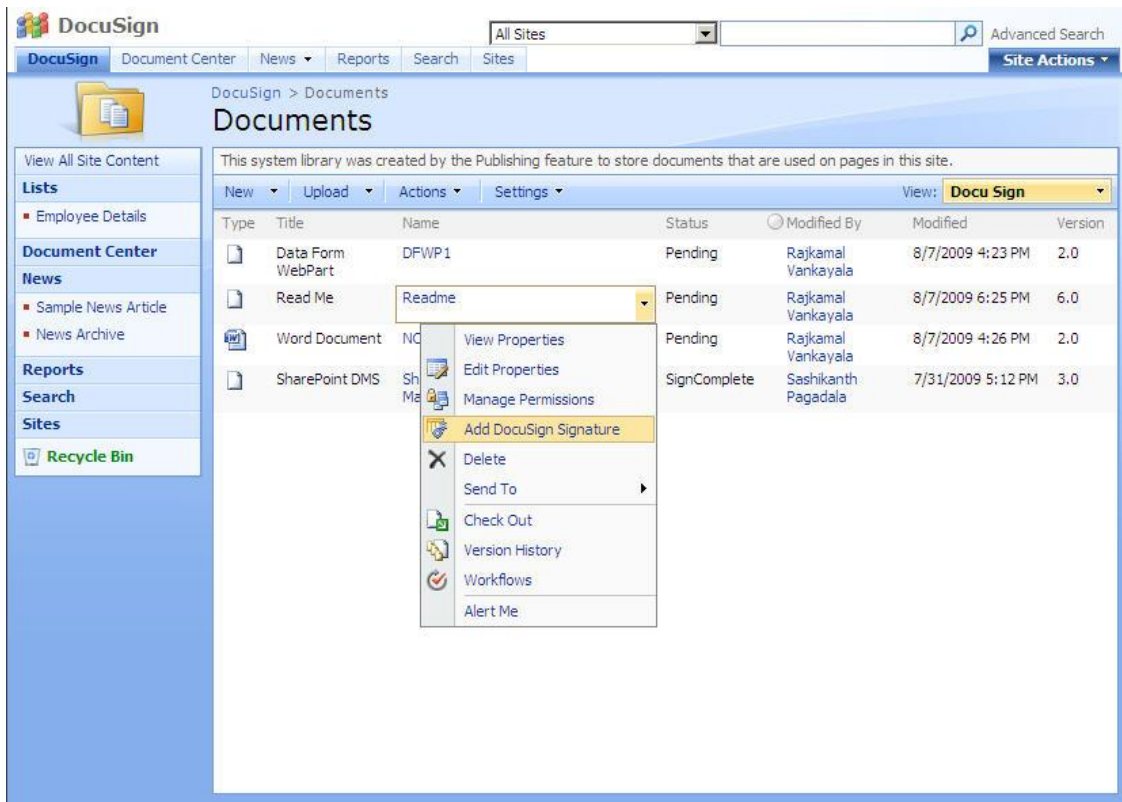
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B. Add DocuSign Signature

Open the SharePoint document library where the to-be signed pdf document is uploaded.

When a document is uploaded, the status column for the document is by default set to **"Pending"**.

Click on the document to open the SharePoint default item menu (context menu of **Name** Column of the document as shown below) and Click on **Add DocuSign Signature**.





User will be redirected to the DocuSign signature page in SharePoint site for signing.

The user is presented here with the e-signing agreement and modify signature to get started with the signing process as shown below.

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Ready To Sign...

You will need to proceed through the following steps:

- ① Agree to Receive and Sign Documents Electronically
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- ③ Review the Document
- ④ Click all  and  tabs
- ⑤ Click 'Complete Signing' when you are done



Agree to Conduct Business Electronically

CONSUMER DISCLOSURE

From time to time, Ramp (we, us or Company) may be required by law to provide to you certain written notices or disclosures. Described below are the terms and conditions for providing to you such notices and disclosures electronically through the DocuSign, Inc. (DocuSign) electronic signing system. Please read

[Print](#) ☒ **I Agree**

Adopt Your Signature

Signature:  Initials:  [Modify your Signature](#)

☒ **Adopt this signature as my signature.** *

By clicking the box, I agree that the signature and initials I have selected above will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts – just the same as a pen-and-paper signature or initial.

[Continue](#) [Cancel](#)

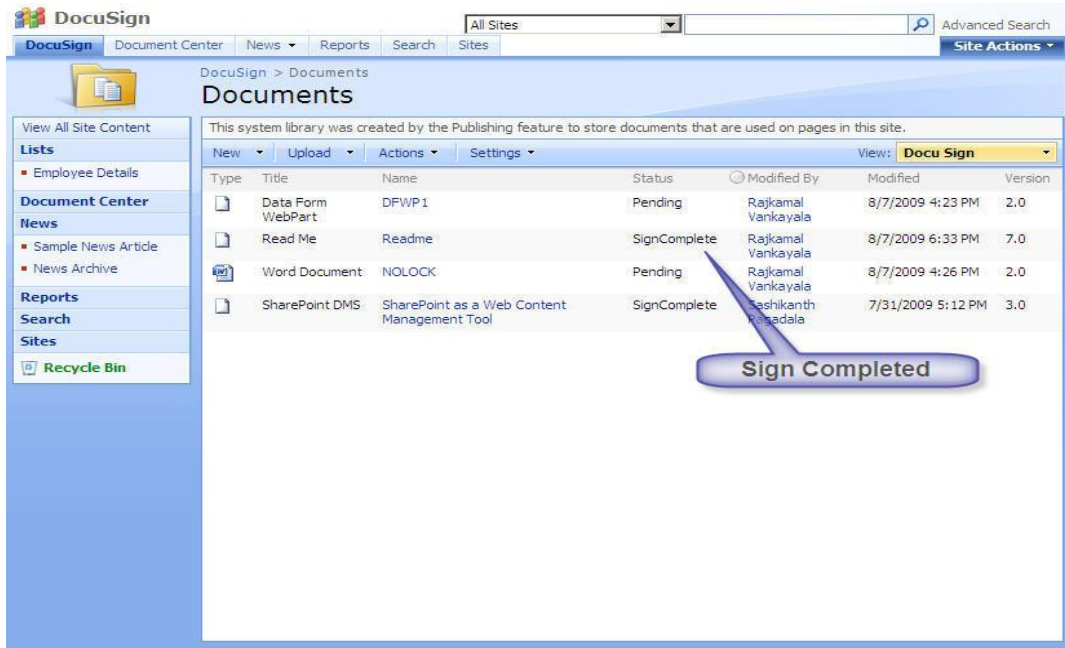
User can then place the **signature and initials** as and where needed in the document from the interface provided and click "**Complete Signing**".

Once the signing process is completed, the signed document will be saved back to the document library and the DocuSign status for the document will be updated in the document library.

The status will be "**Sign Complete**" if the sign process is completed, and if declined, the status will be "**Decline**" as shown below.

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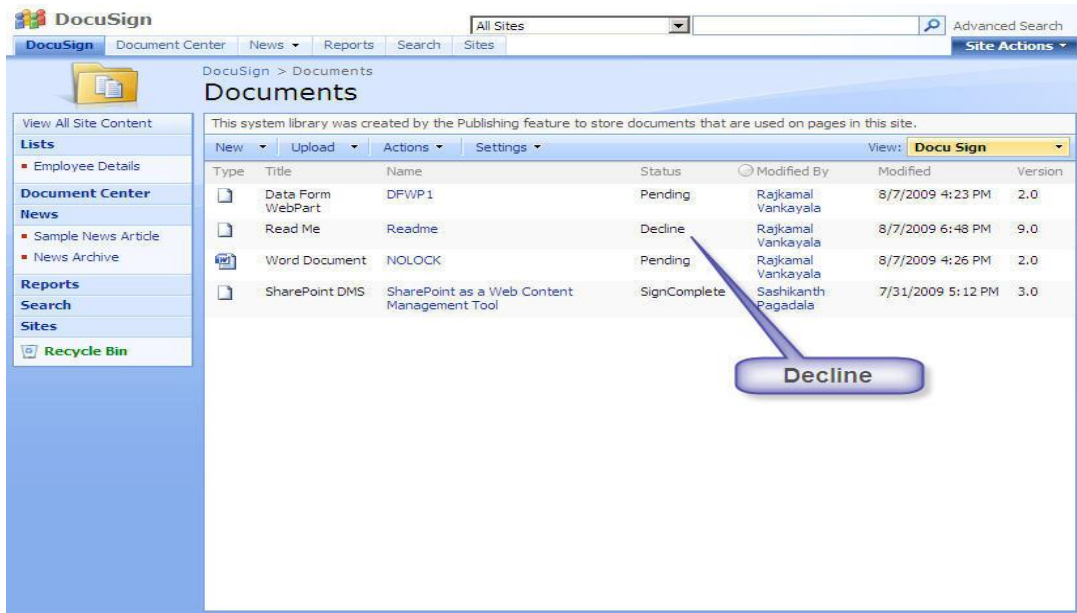
For Sign Completed:



The screenshot shows the DocuSign SharePoint interface. The left sidebar contains navigation links: View All Site Content, Lists (Employee Details), Document Center, News (Sample News Article, News Archive), Reports, Search, Sites, and Recycle Bin. The main content area is titled 'Documents' and displays a table of documents. A callout bubble points to the 'SignComplete' status of the 'Word Document'.

Type	Title	Name	Status	Modified By	Modified	Version
Data Form WebPart	DFWP1	DFWP1	Pending	Rajkamal Vankayala	8/7/2009 4:23 PM	2.0
Read Me	Readme	Readme	SignComplete	Rajkamal Vankayala	8/7/2009 6:33 PM	7.0
Word Document	NOLOCK	NOLOCK	Pending	Rajkamal Vankayala	8/7/2009 4:26 PM	2.0
SharePoint DMS	SharePoint as a Web Content Management Tool	SharePoint as a Web Content Management Tool	SignComplete	Sashikanth Pagadala	7/31/2009 5:12 PM	3.0

For Decline:



The screenshot shows the DocuSign SharePoint interface. The left sidebar contains navigation links: View All Site Content, Lists (Employee Details), Document Center, News (Sample News Article, News Archive), Reports, Search, Sites, and Recycle Bin. The main content area is titled 'Documents' and displays a table of documents. A callout bubble points to the 'Decline' status of the 'Word Document'.

Type	Title	Name	Status	Modified By	Modified	Version
Data Form WebPart	DFWP1	DFWP1	Pending	Rajkamal Vankayala	8/7/2009 4:23 PM	2.0
Read Me	Readme	Readme	Decline	Rajkamal Vankayala	8/7/2009 6:48 PM	9.0
Word Document	NOLOCK	NOLOCK	Pending	Rajkamal Vankayala	8/7/2009 4:26 PM	2.0
SharePoint DMS	SharePoint as a Web Content Management Tool	SharePoint as a Web Content Management Tool	SignComplete	Sashikanth Pagadala	7/31/2009 5:12 PM	3.0

Deactivate the DocuSign Feature

To deactivate the DocuSign Feature, Follow the same steps as provided in the Activation of the feature, find the DocuSign feature in the Site Collection Features and click on Deactivate.

The feature will be deactivated from the site and will no longer be available.

Uninstall the DocuSign Feature

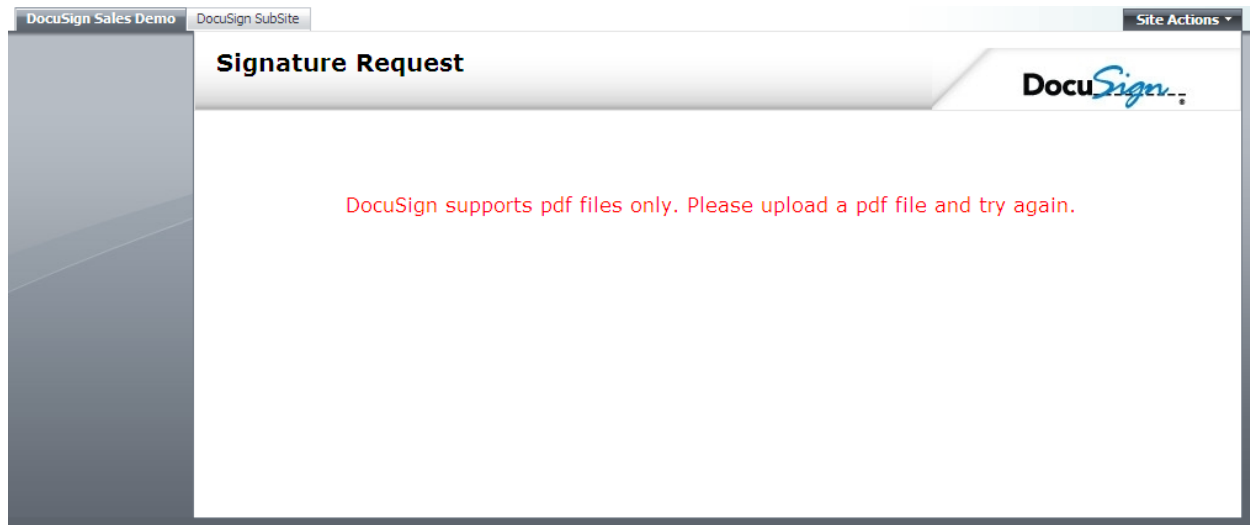
To uninstall the DocuSign feature from a SharePoint server/farm, first deactivate the feature from all the sites where the feature is currently active. Not deactivating the feature before uninstallation can lead to problems in the event, one decides to reinstall it.

Once the feature is deactivated, Run the setup file and follow the instructions provided in the wizard to uninstall.

The wizard follows the similar steps to the installation process, checks if the DocuSign feature is installed and takes the user through the uninstallation steps.

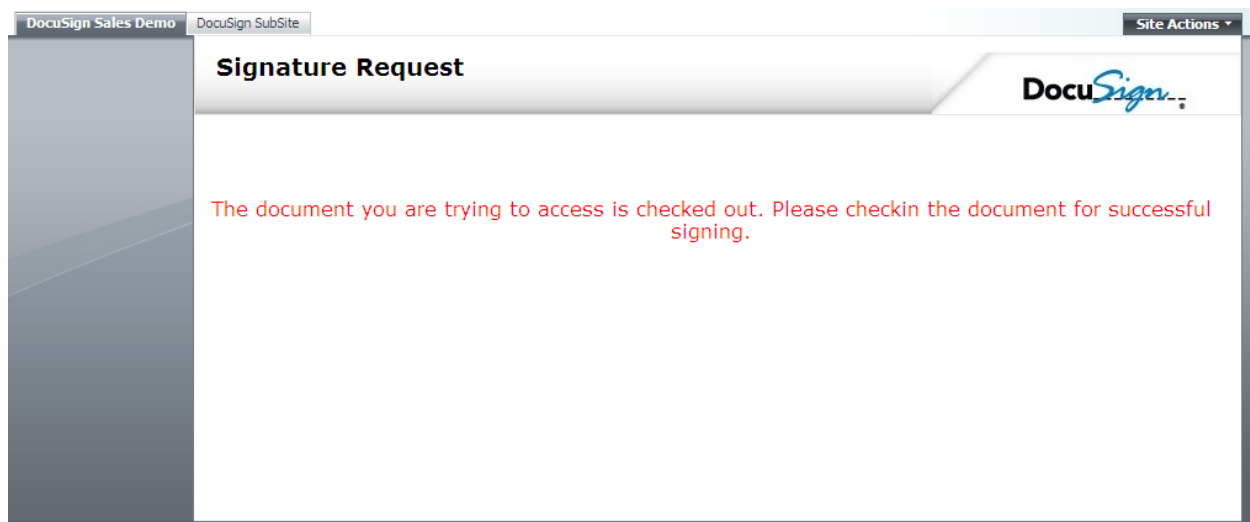
Common Exceptions and what they signify

DocuSign supports pdf files only. Please upload a pdf files and try again



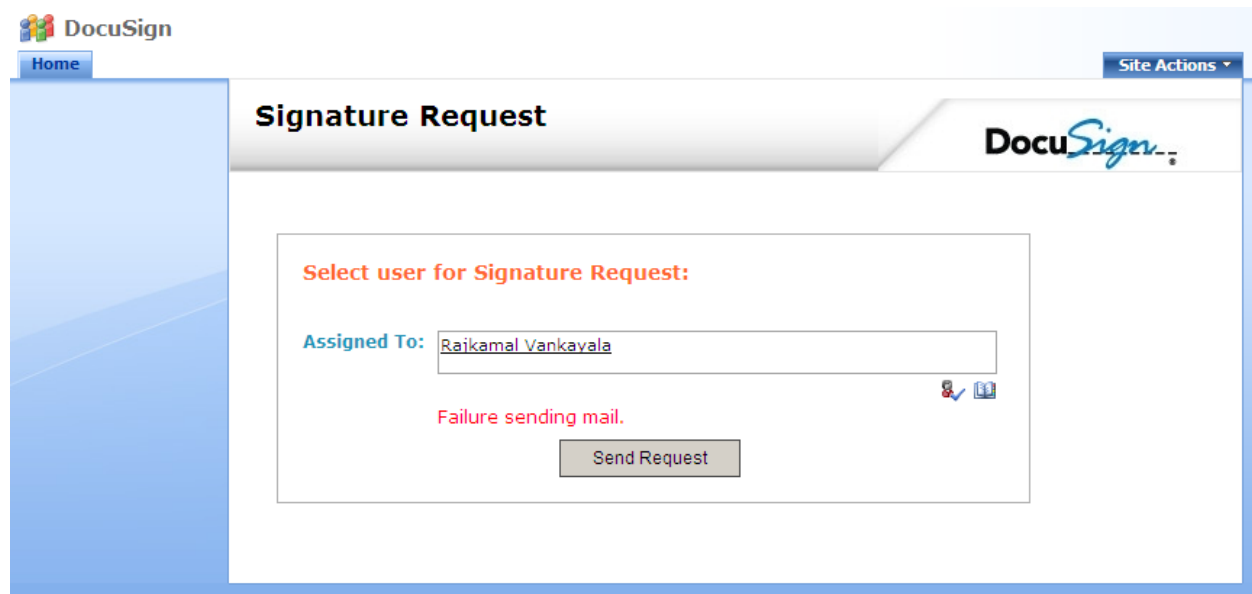
DocuSign feature can be restricted to file types (pdf only). If you try to add signature to a non-pdf file, you will get the error "**DocuSign supports pdf files only. Please upload a pdf files and try again**" as shown in the figure below

The document you are trying to access is checked out. Please checkin the document for successful signing



DocuSign feature has been restricted to the checked in files only (if the check-in/check-out option is enabled on a SharePoint document library). If a user tries to send a signature request or add the DocuSign signature to a checked out document, the following error will be thrown "**The document you are trying to access is checked out. Please checkin the document for successful signing.**" as shown below

Failure Sending mail

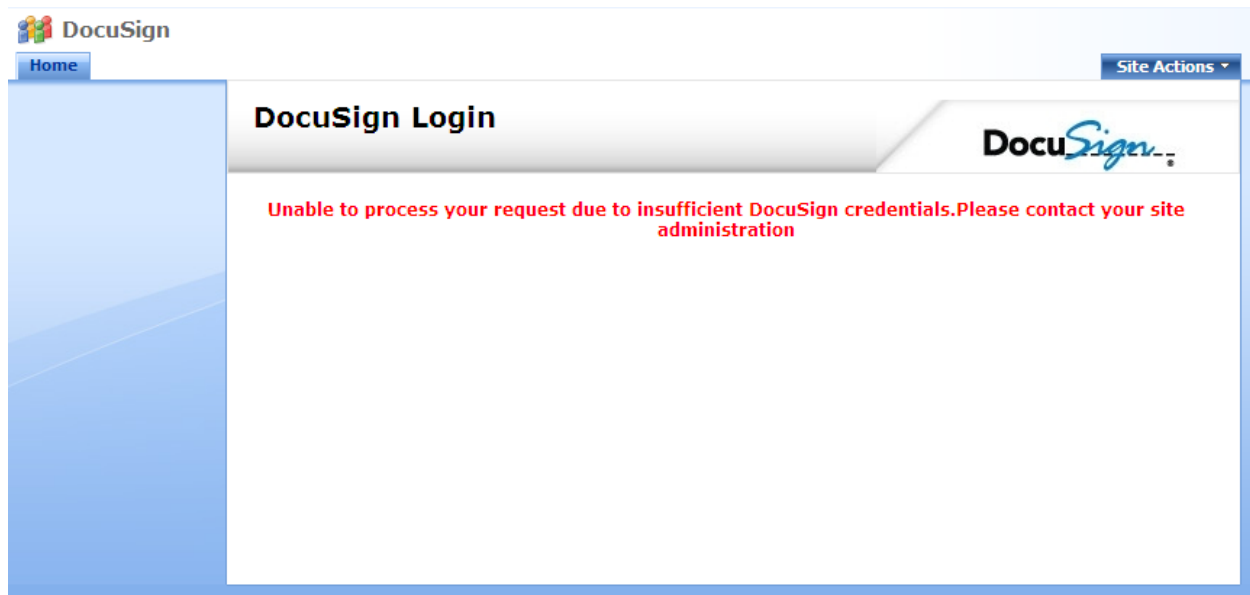


This message implies that the SMTP server is not accessible or not able to accept email requests.

Check for the following

- 1) the correct SMTP server name is available in the Site's web.config file at this location
<add key="smtpServer" value=" **PleaseProvideYourSMTPServerHere**" />
- 2) SMTP server is running properly.

Unable to process your request due to insufficient DocuSign credentials.Please contact your site administration

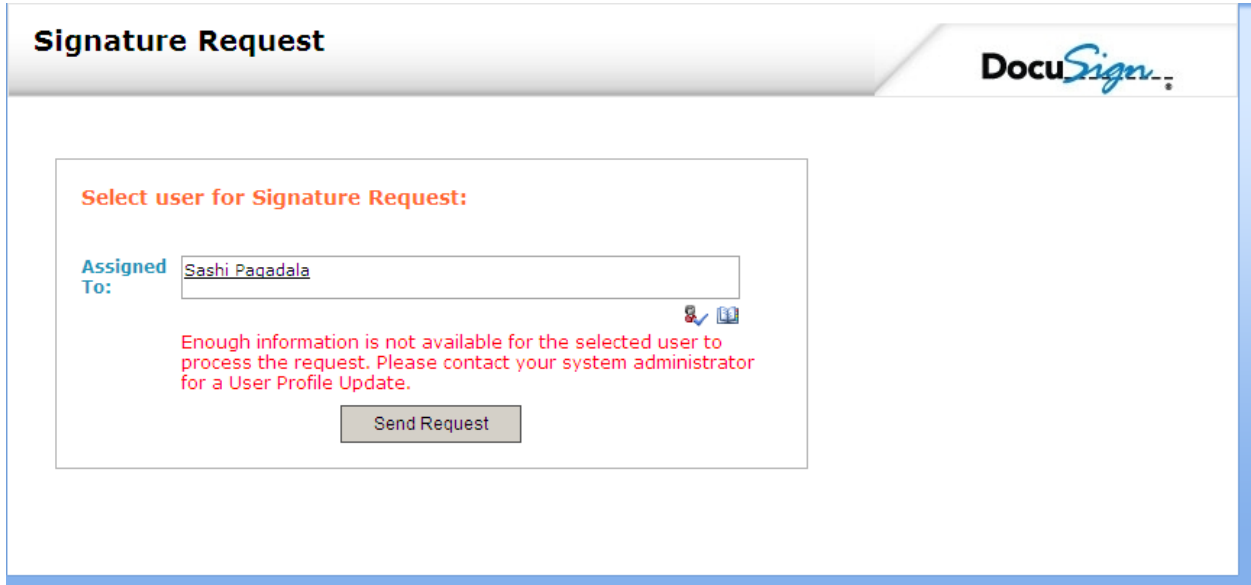


This exception occurs when a user is trying to sign a document and the DocuSign feature is not able to communicate with the DocuSign web services. The main reason could be that the DocuSign Credentials provided in the site's web.config file are not correct.

Verify the Web.config file for correct "**docuSignUserName**" and "**docuSignPassword**" value in **appsettings** tag to add the signature for document as shown below.

```
<add key="docuSignPassword" value="demo" />
<add key="docuSignUserName" value="demo@DocuSign.com" />
```

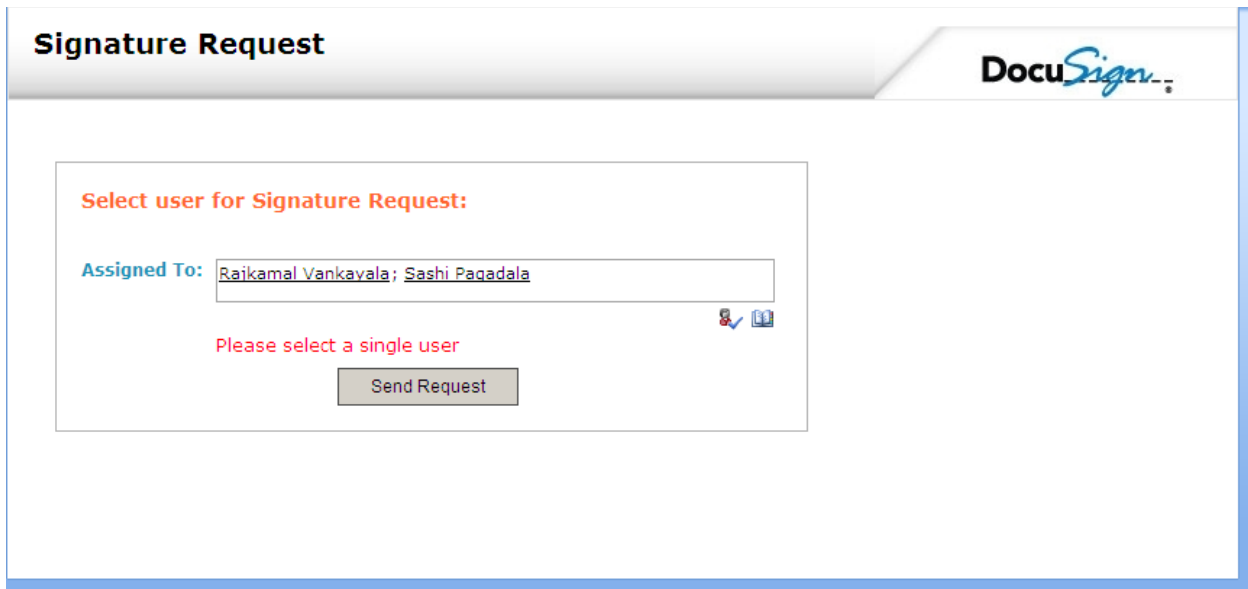
**Enough information is not available for the selected user to process the request.
Please contact your system administrator for a User Profile Update.**



The screenshot shows the 'Signature Request' page in the DocuSign interface. The page has a header with the 'Signature Request' title and the DocuSign logo. Below the header, there is a section titled 'Select user for Signature Request:'. Inside this section, there is a label 'Assigned To:' followed by a text box containing the name 'Sashi Paqadala'. To the right of the text box are two small icons: a person and a document. Below the text box, there is a red error message: 'Enough information is not available for the selected user to process the request. Please contact your system administrator for a User Profile Update.' At the bottom of the section, there is a 'Send Request' button.

This exception occurs if the user profiles for either the selected user (Assigned To) or the signed in user is incomplete. i.e.. Missing email addresses, first name or last name, etc.

Contact the System administrator to verify whether the details (email address, name, etc) are provided for the users in the active directory.

Please Select a single user

The screenshot shows the 'Signature Request' interface in DocuSign. At the top, there is a header with 'Signature Request' on the left and the 'DocuSign' logo on the right. Below the header, there is a central box containing the following elements:

- A heading: **Select user for Signature Request:**
- A label: **Assigned To:**
- A text input field containing the text: Raikamal Vankavala; Sashi Pagadala
- A red error message: **Please select a single user**
- A 'Send Request' button
- Two small icons (a person and a document) to the right of the text input field.

This exception occurs when the user selects more than one user for signature request.

This feature can support sending emails to multiple users, however, the current functionality is limited to single user.