# UNCW Graduate Capstone/Thesis Form Maintenance Documentation

Developed by Forms R Us

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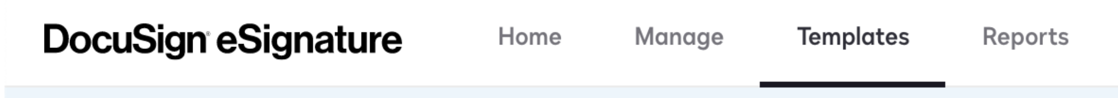
# Downloading & Saving Templates

If you plan on using a DocuSign template that was stored / made on a different account the easiest way to transfer them is to download the .zip file and save the file to the new account.

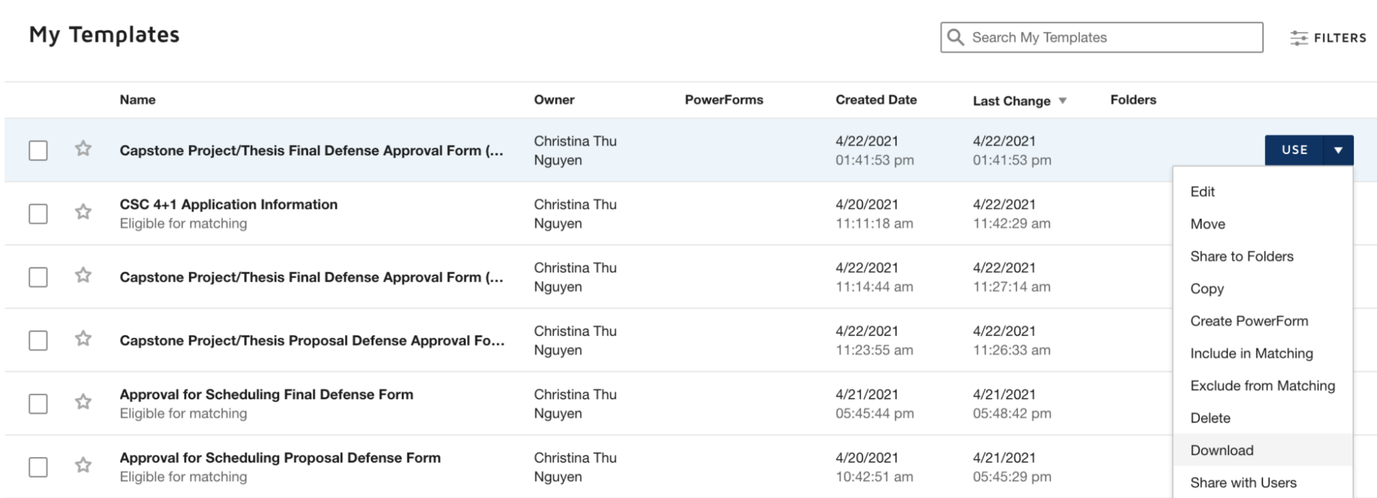
When saving templates to a different account, all documents, fields, and routing information will stay the same, allowing you to immediately use the template upon uploading.

## Downloading Templates

1. Open up the “Templates” tab at the top of the page.



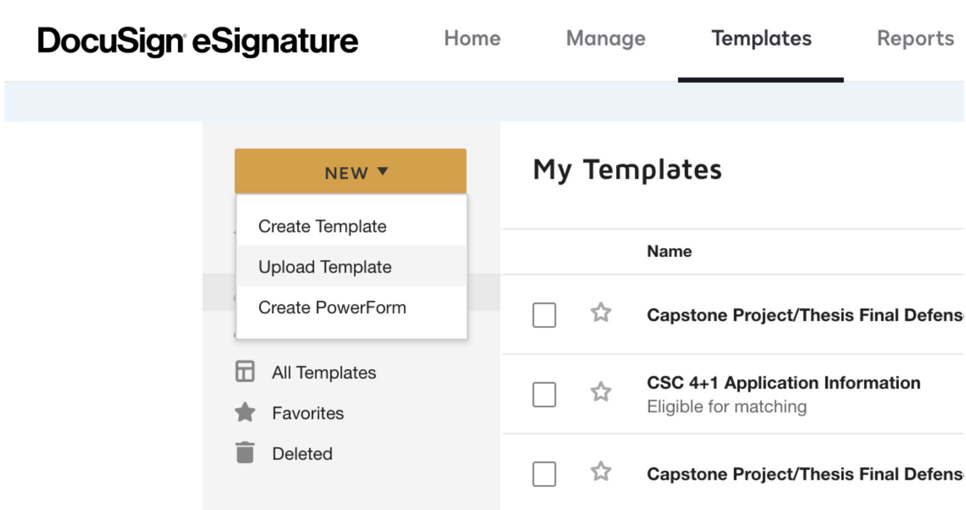

2. Click on the menu button beside “Use” of your desired template and select “Download”. A .zip file will be saved to your computer. *(Note: Do not unzip this file. Make sure that the file downloaded is not a .JSON as well.)*



## Saving Templates

3. To save the template, log into the account that you plan on using the template on and open the "Templates" tab again.

4. Open up the "New" menu and select "Upload Template". Locate the .zip file on your computer and save to DocuSign. You may now use the template




*Note: If you are planning on uploading multiple templates, it is best if you repeat Step 4 and upload each template individually. If you try to select multiple templates and upload them at once, an error will occur.*

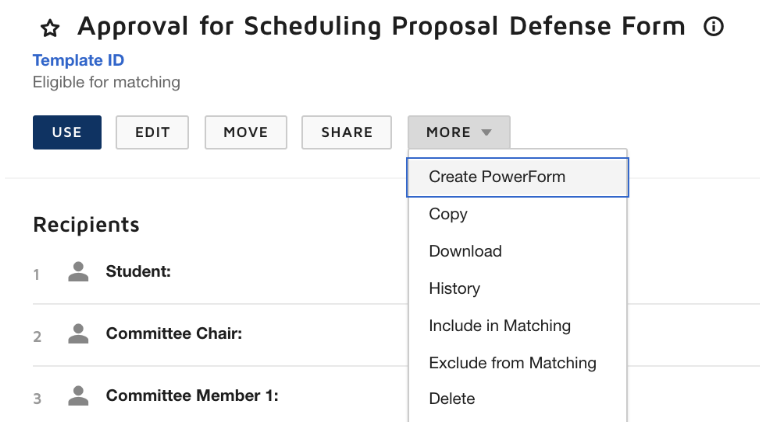
# Using PowerForms

Powerforms allows you to create self-service web forms from existing DocuSign templates. Users are easily able to open, fill out, and submit forms easily and without the need of a DocuSign account. PowerForms can exist as a link and/or be embedded into a web page so that you can allow appropriate access to your forms.

## Creating a PowerForm

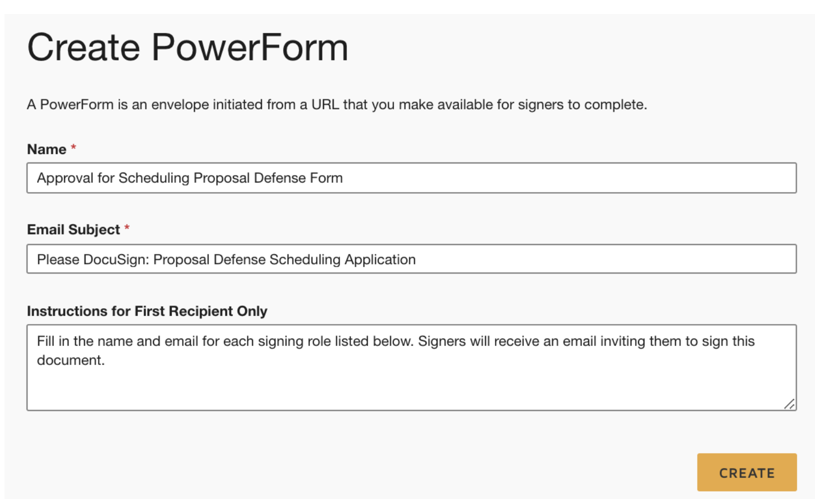
1. Open up the template that you plan on using to create your PowerForms with.

2. Under “More” select “Create PowerForm”

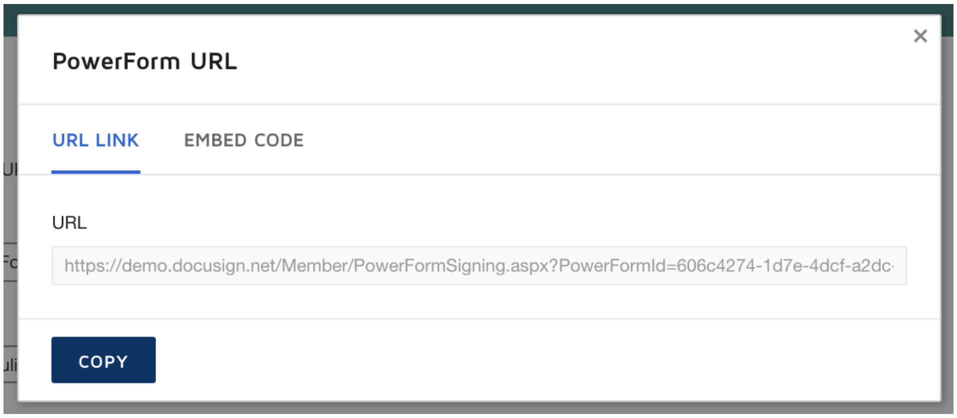



3. The following page will allow you to review and edit the PowerForm before its creation. Edit the title, email subject, and instructions as needed.

4. Press “Create” to create your PowerForms

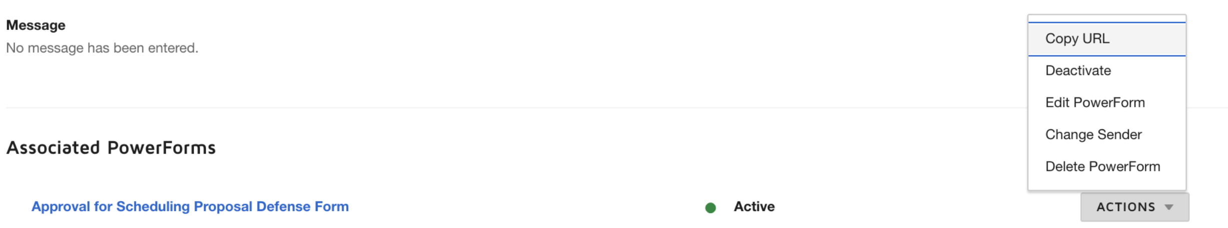


5. Copy the link and place in your email / website / etc. so that users are able to access and fill out your form.




# Edit an Existing PowerForm

1. Open up the template from which the PowerForm was created from.
2. Head to “Associated PowerForms” at the bottom of the page.
3. Under “Actions” you are able to copy the form URL, deactivate the form from taking any more submissions, edit the PowerForm (see Steps 3-4), change the sender, or delete the PowerForm.




4. Save and close.

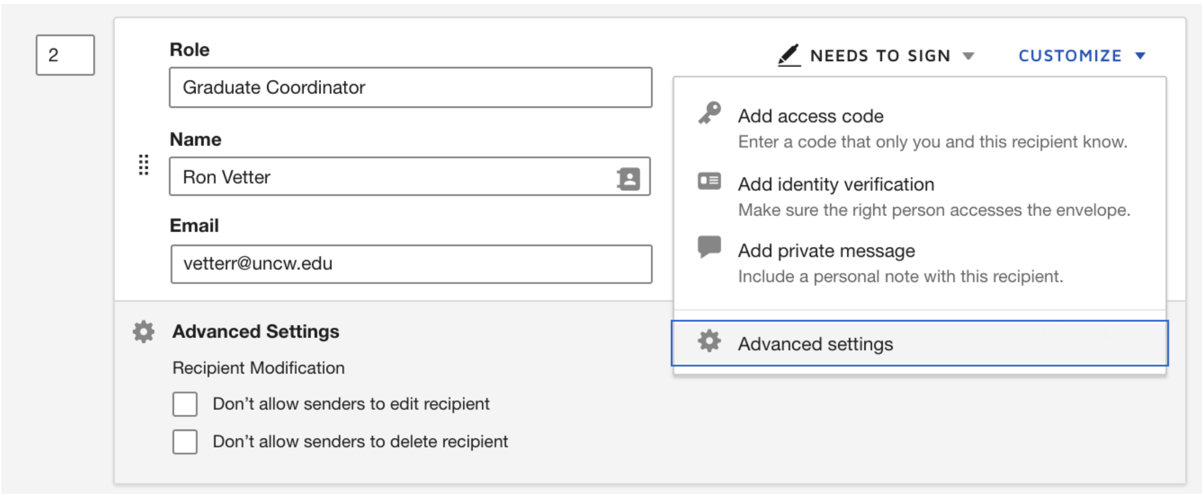
## PowerForms Signer Information Page

Depending on the form and where it needs to get routed to, you may want to consider if you want to restrict the user from editing the document's recipients, or allow them access to edit or fill them in manually. The PowerForm Signer Information Page will show up before the user can access the form, allowing them to review the document's recipients.

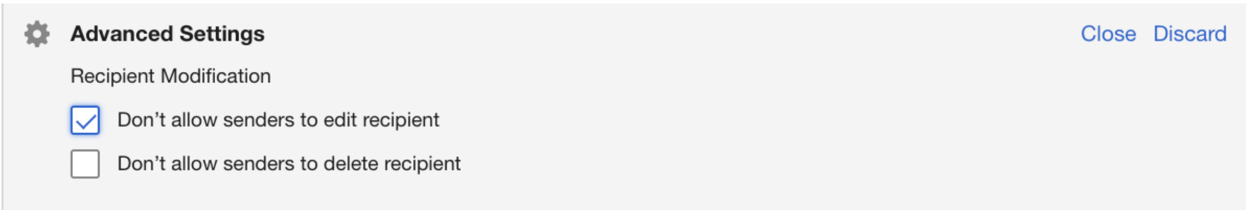
## Restricting Recipient Information

If your document has routing recipients that are the same for each form submission and does not need to be changed or edited by the student, follow these steps below to restrict any edits to these recipients.

1. Open up your template and press the "EDIT" button.
2. Scroll down to the "Add Recipients" section of the page and on the recipient that you would like to restrict editing on, select "Customize" and "Advanced Settings".




3. Here you can have the option to choose to prevent the sender from editing and/or deleting the recipient.

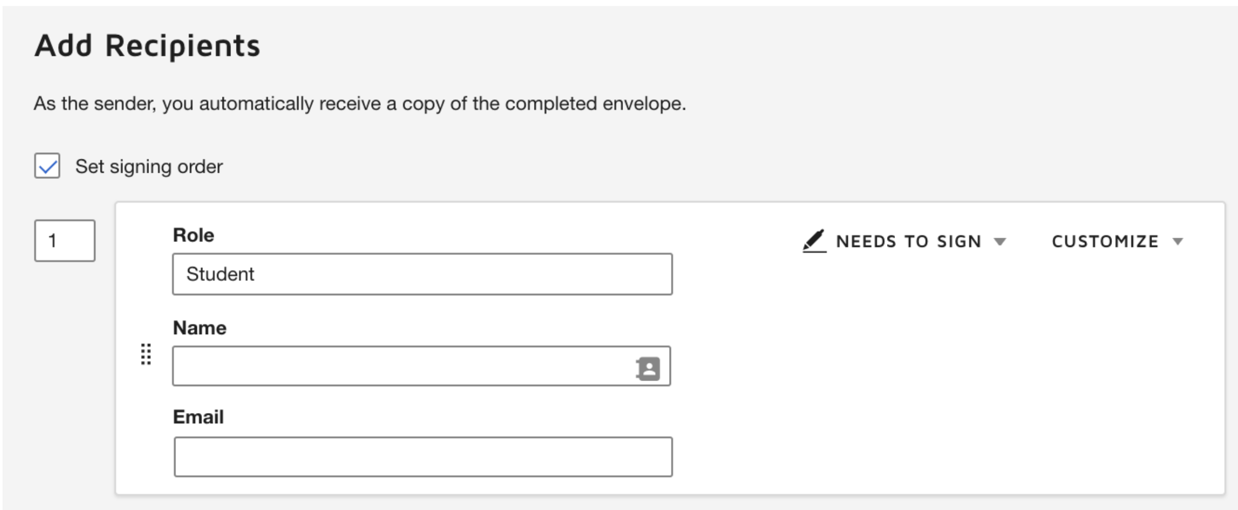



4. Save and close.

## Bypassing the Signer Information Page

If your form does not need any input from the student on who to route the document to, you can bypass the signer info page and open up directly to the form. To do so follow these steps.

1. Open up your template and press the “EDIT” button.
2. Scroll to the “Add Recipients” section of the page.
3. Check “Set Signing Order”.
4. For the first recipient, set the role but do not enter any information for their name and email. Make sure that their required action is set to “Need To Sign”.

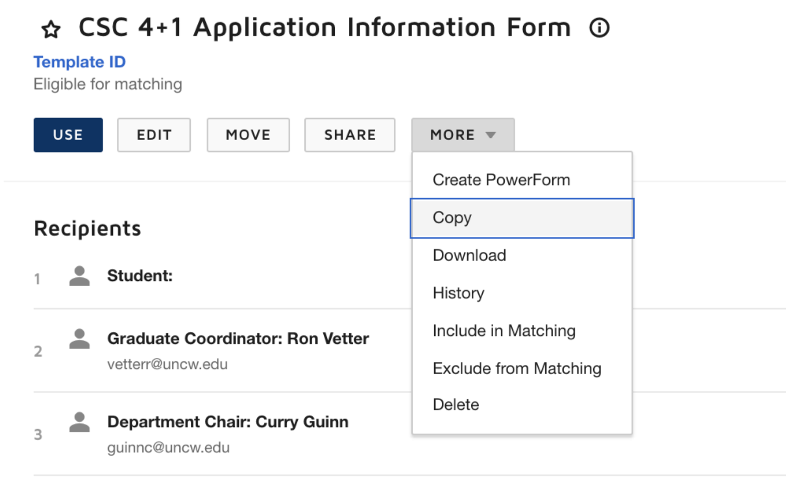



5. Repeat step 3 from the “Restricting Recipient Information” above for the rest of the recipient. Make sure that “Don’t allow senders to edit recipient” is selected for the rest of the recipients.
6. Save and close.
7. Clicking on the powerforms link should now open up directly to the form instead of the Powerforms Signer Information Page.

# Replacing Templates

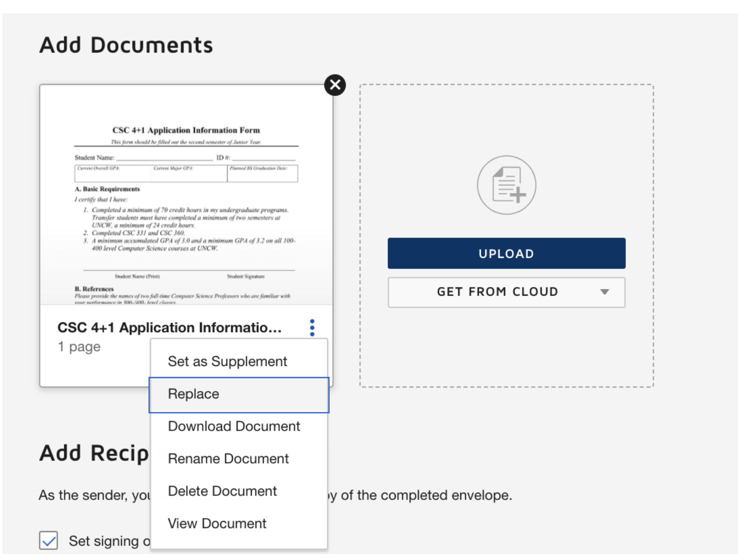
If you need to make any minor updates to the template outside of DocuSign (editing the Word doc, pdf, etc.) but would like to keep all existing fields and routing information, use the Replace Document feature to do so easily. For example, if you were to find a typo in an existing template and would like to correct it.

1. Make the change in your Word document and save to your computer.
2. Open up the template that you would like to update. Open up the "More" menu and select "Copy" to create a new copy of the entire template.




Note: This step is not necessary but recommended in the case of any mistakes. You may also want to rename the old/new template to differentiate between the two.

3. Open up the new template and select "Edit".
4. Under "Documents" open up the sub menu and select "Replace".



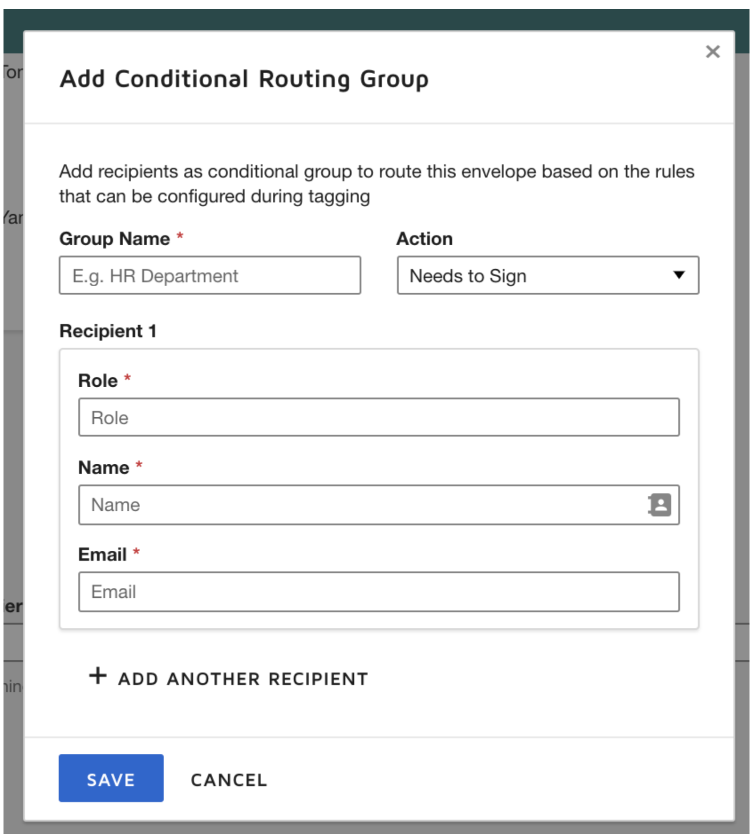
5. Select “Next” at the bottom of the page and make any adjustments to the fields as necessary.
6. Save and close.

# Conditional Routing

Conditional routing allows you to route your document based on how specific fields are filled by the student. The number of routing groups should be equal to the total number of possible signatures needed.

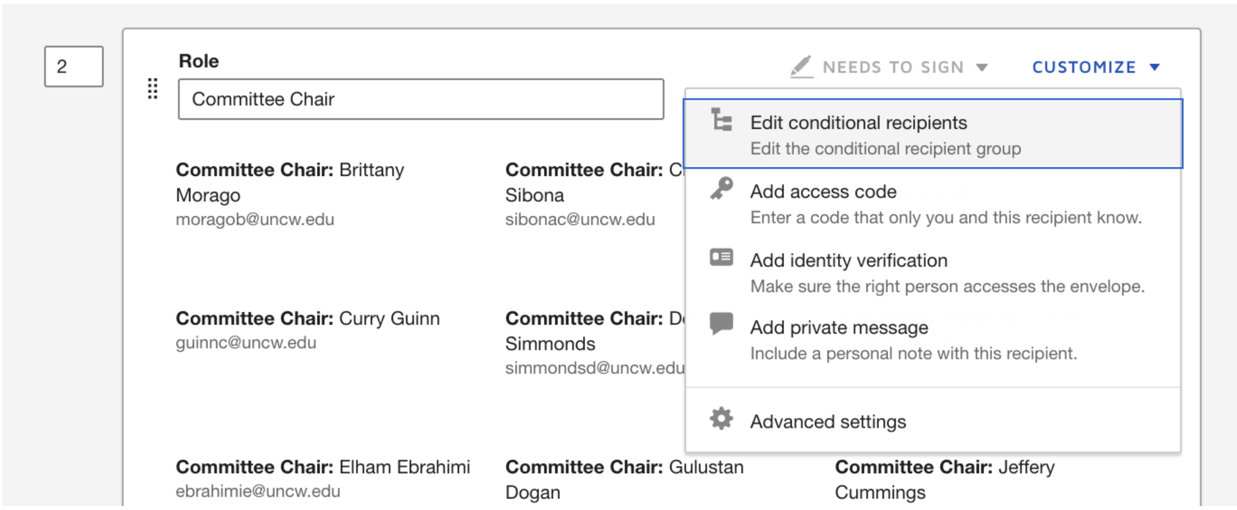
## Adding a New Conditional Recipient

1. Open the template you would like to use conditional routing with. Select “Edit”.
2. Under “Add Recipients”, select “Add Conditional Recipient”.
3. Fill out the “Group Name” and select the appropriate action needed.
4. Select “Add Another Recipient”. Add as many possible recipients as needed and fill out their information.



# Editing an Existing Conditional Recipient

1. Open the template you would like to use conditional routing with. Select “Edit”.
2. Go to the recipient group you would like to edit. Select “Customize”, then “Edit Conditional Recipients”

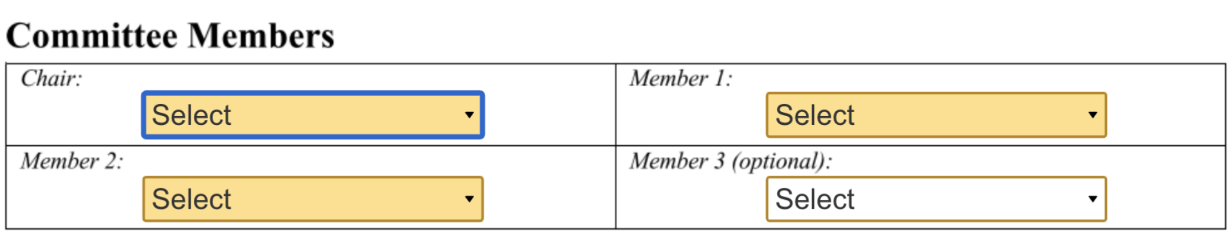



3. Make any changes/addtions/deletions as needed.
4. Save and close.

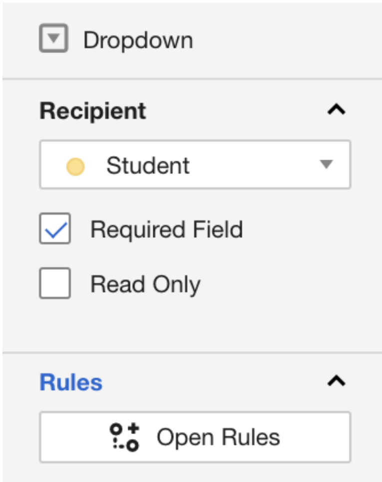
# Adding / Editing Rules for Conditional Routing

Docusign rules uses boolean logic to determine where to route the document if the right conditions are met. For these next coming examples I will be working with a dropdown list of MSCSIS staff members to determine how the document will be routed. If you are editing rules to reflect changes in faculty, make sure to add/delete their name as an option for each dropdown list.

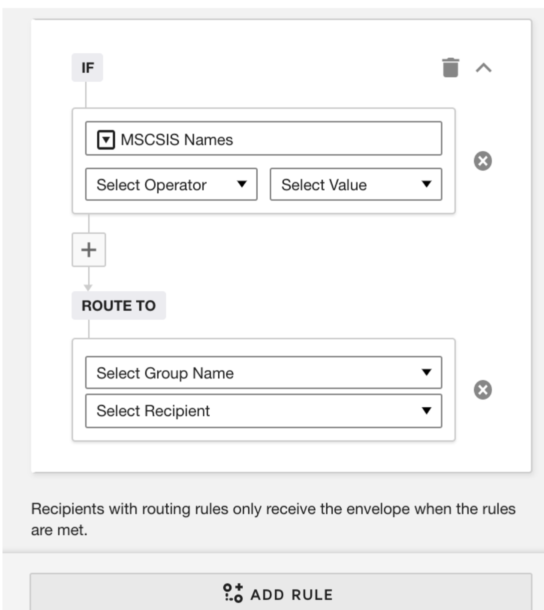
1. Open and Edit the template.
2. Select the field that you would like to use to determine the conditional recipient.

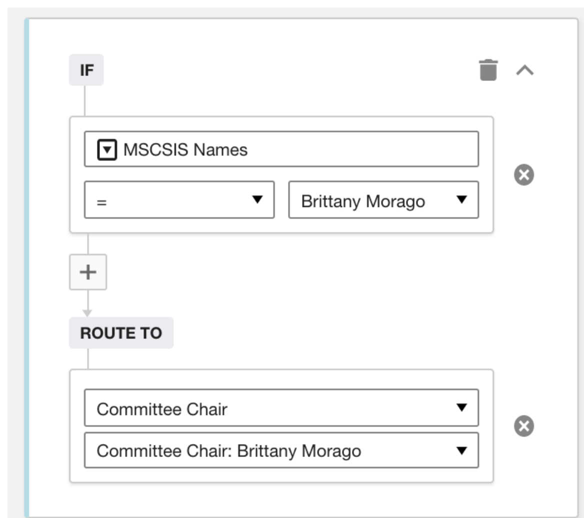


3. In the side menu that pops up, select the “Open rules” option.




4. Select “Add Rules”. A new rule will be added. Fill out the options appropriately.




   Note: “MSCSIS Names” is the name of the field that I have selected. (Previously saved and named under Custom Fields. This field will vary.
5. Repeat step 4 above as many times as necessary. For each field you will need to add a ***rule for each possible recipient,*** meaning that if the document could be possible routed to 5 different people based on that field, then you will need to add 5 separate rules.
6. Repeat steps 4-5 as many times as necessary for each field that will be determining conditional routing.