

## Installing, Sending and Signing with DocuSign for Microsoft SharePoint® v1.5

This guide provides information on installing, sending, and signing documents for signature with DocuSign for Microsoft SharePoint. It also has information on checking the status of documents sent with DocuSign and a short list of frequently asked questions.

**Note:** The DocuSign for Microsoft SharePoint package is only available for Microsoft SharePoint 2010 and can only be installed and activated by SharePoint administrators. If you already have a DocuSign account, the **Account-Wide Rights** and **Send On Behalf Of Rights (API)** features must be enabled for your account.

Additionally, you can review the [Release Notes](#) for DocuSign for Microsoft SharePoint v1.5 at the end of this document.

### Installing DocuSign for Microsoft SharePoint

**Note:** DocuSign for SharePoint requires that a VeriSign certificate be installed as a SharePoint trusted root authority. If the certificate is not already installed, the script will install the VeriSign certificate as a trusted root authority.

#### 1. Get the DocuSign for Microsoft SharePoint Package

Find the *DocuSign for SharePoint* package in the [Partner Solutions Showcase](#).

Download the package as a zipped file to your computer.

#### 2. Install the Package

- Extract the *DocuSign for SharePoint* package to a folder on your SharePoint server.
- Start the SharePoint 2010 Management Shell as an administrator, change the directory to the folder with the *DocuSign for SharePoint* package files.

To install the DocuSign feature and activate it for all sites, run the installation by typing **.\DocuSignInstall.ps1 -action install -activate \$true**. The package is installed and the *DocuSign for SharePoint* feature is activated for each site on your SharePoint server.

**Note:** You can deactivate DocuSign for some libraries while keeping it active for others using the Library Tools. See the [FAQs](#) for more details on deactivating DocuSign for individual libraries.

You can install the package without activating the package by typing **.\DocuSignInstall.ps1 -action install -activate \$false**. However, you will need to activate the *DocuSign for SharePoint* feature for each SharePoint site. See the [FAQs](#) for information on activating DocuSign for SharePoint.

#### 3. Setting DocuSign Credentials

Your DocuSign credentials can be set when you install *DocuSign for SharePoint* or they can be set or updated any time after installation.

**IMPORTANT:** If you are installing *DocuSign for SharePoint* to route through a proxy server independent of any SharePoint site proxy configuration, the proxy server settings must be configured before setting your DocuSign credentials. See the [FAQs](#) for details on configuring your proxy server settings.

To set the DocuSign Credentials:

- From the SharePoint 2010 Management Shell as an administrator, change the directory to the folder with the *DocuSign for SharePoint* package files.
- Run the configuration by typing **.\DocuSignInstall.ps1 -action updateconfig**. You will be asked if you are adding credentials for an existing or new DocuSign account and which DocuSign environment (Production, Preview or Demo) you want to use.

**Note:** The environment setting can be changed later as needed. See the [FAQs](#) for more details on changing your DocuSign environment.

An example configuration follows. The example shows adding the credentials for all site URLs containing "jane\_doe" (Jane Doe's personal my site) to use Jane Doe's account in the DocuSign preview environment.

```
PS C:\> .\DocuSignInstall.ps1 -action updateconfig

You must specify DocuSign account credentials prior to sending envelopes.

If you specify the account credentials now, all sites that have the DocuSign feature
activated will be updated with the credentials.

If your environment requires the DocuSign feature to use a Proxy Server, configure the
DocuSign account in SharePoint after updating the settings. (See the Installation Guide
for details)

Do you want to configure a DocuSign account using an [E] existing account, [N] new
DocuSign account, or [S] skip DocuSign configuration? Default[E]:E

Enter a regular expression matching string to select the site URLs to configure (default
is all sites): jane_doe

Sites to be updated:
http://www.contoso.com/my/personal/jane_doe
Continue [C] or exit [E]? Default [C]: c

Please enter your DocuSign account credentials.
In which DocuSign environment do you want to configure the account?

[P] Production [D] Demo [V] Preview (default is "P"): V

DocuSign Login Email: jane.doe@contoso.com
Password: *****
Confirm

Is the following information correct?
Environment: preview
Login: jane.doe@contoso.com
[Y] Yes [N] No [C] Cancel (default is "Y"): y
```

## 4. Done

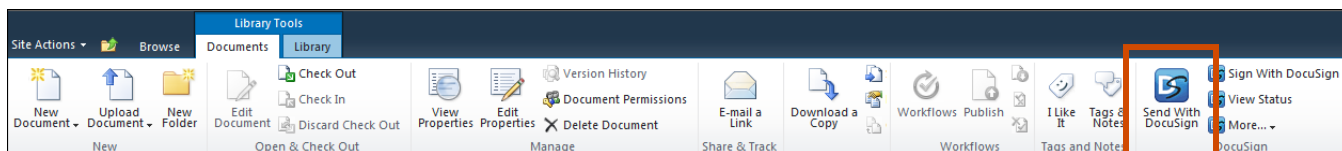
Your SharePoint 2010 users can use *DocuSign for SharePoint* to send and sign documents.

**Note:** Permissions and Broken Inheritance - when permission inheritance is broken to give a user or group Contribute permissions to a list where DocuSign for SharePoint is enabled, you must grant that user/group Contribute permissions to the "DocuSign User" and "DocuSign Envelope Status" lists.

## Sending Documents for Signature with DocuSign

### 1. Select and Send a Document(s)

- Go to the SharePoint document library and select one or more documents.

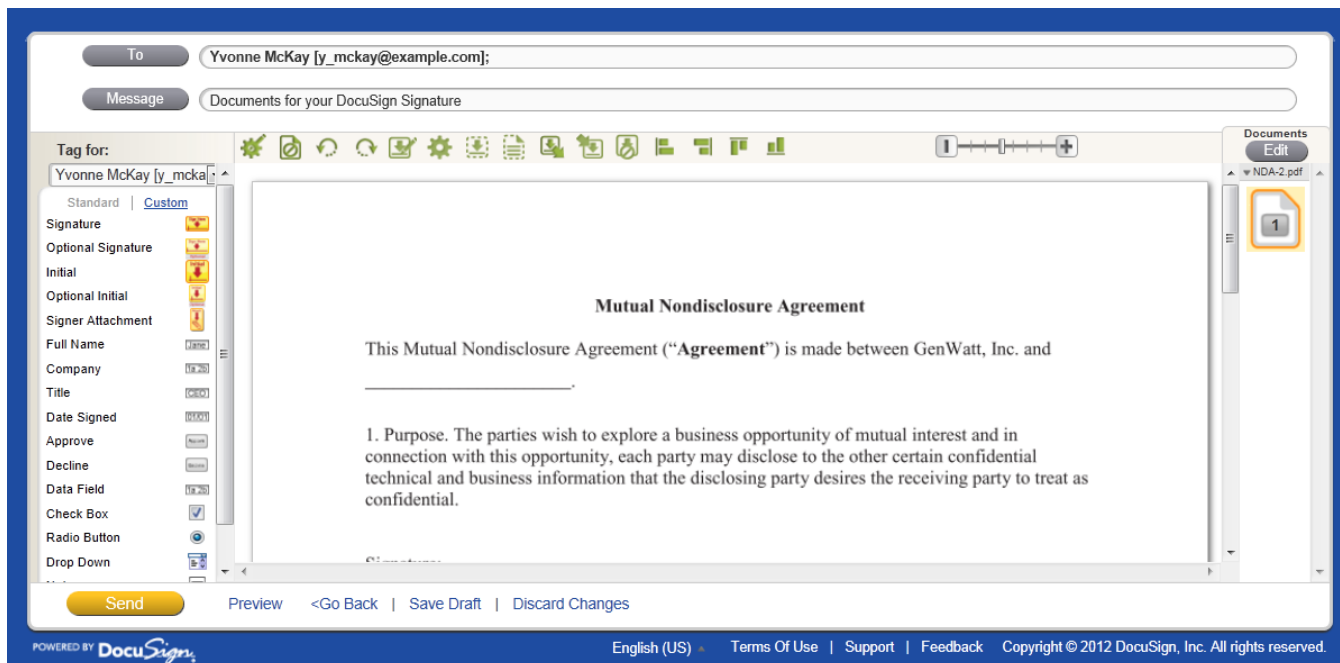


- On the document ribbon, click **Send with DocuSign**. Alternately, you can click on the document menu and select **Send with DocuSign**.

A new frame with the DocuSign tagging page opens in SharePoint and a DocuSign envelope is created.

**Note:** If this is the first time that you are using DocuSign to send or sign from this SharePoint account, the system asks for DocuSign credentials or that you create a new account. If the account has not been configured, the system will ask that you contact a SharePoint Administrator to configure the account.

### 2. Tag and Send Your Documents



- Add the name and email information for the person that should sign the document (this person is referred to as the recipient). Click the **To** button in the upper left. The Recipients and Routing dialog box is displayed.  
Type the Recipient's Email address and Name in the appropriate field. Click **Add Signer** to add the recipient to the list with a Sign recipient Action or click **Add CC** to add the recipient to the list with a Receive a copy recipient Action.  
Repeat this step to add another recipient.
- Click the **Message** button below the recipient line to edit the email subject and message for the recipients. The Email Message dialog box is displayed.

Modify the **Email Subject**, **Email Message**, and add a **Note** for individual recipients as needed. Click **Done** when you have completed editing the message information. Click the **Message** button to modify the message information.

- Click the recipient's name on the **To** line or select the recipient name in the **Tag for:** list. Drag and drop DocuSign Tags from the palette on the left onto your document.
- After adding all the tags, click **Send** to send the document for signing or click **Preview** to preview how your recipient will see the tags.

The DocuSign frame closes when the envelope is sent and you are returned to SharePoint.

**Note:** You can add more documents to the envelope by clicking **Edit** to add or remove the documents from the envelope. Refer to the *Quick Start – Sending a Document* or *DocuSign Service User Guide* on the DocuSign website for a more details about completing your envelope.

### 3. Done!

You have successfully sent the documents for signing with DocuSign.

Refer to the *DocuSign Service User Guide* on the DocuSign website for more information about sending envelopes.

## Checking the Status of Sent Documents

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### 1. Go to the DocuSign Envelope Status List

Go to the SharePoint document library and select one or more documents. On the document ribbon, click **View Status**. This displays a list that shows the envelope status for the envelopes sent by the current user.

Alternately, you can go to the SharePoint lists and open the DocuSign Envelope Status list. The list shows the all the envelopes that have been sent by all the users in this SharePoint account.

The possible Status values are: Voided, Created, Deleted, Sent, Delivered, Signed, Completed and Declined.

### 2. Updating Document Status

To check for changes in document status select one or more documents and click **Update Status**. Alternately, you can click on the document menu and select **Update DocuSign Envelope Status**.

A query is sent to the DocuSign system requesting updates for the selected documents. The information is updated in the SharePoint list.

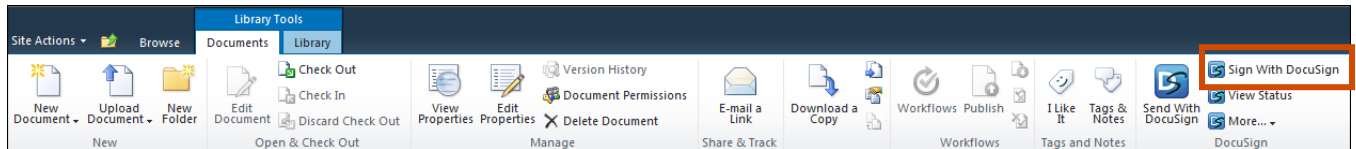
For envelopes with a Status value of Completed, a PDF file that contains all the documents in the envelope is downloaded to a DocuSign sub-folder in the original document location. You can click the **View** link to open the PDF file or you can navigate to the sub-folder to access the PDF file.

**Note:** If the folder cannot be created, the PDF file is attached to the status object in the DocuSign Envelope Status list portion of the SharePoint list.

# Signing Documents with DocuSign

## 1. Select the Document

- Go to the SharePoint document library and select the document you want to sign.

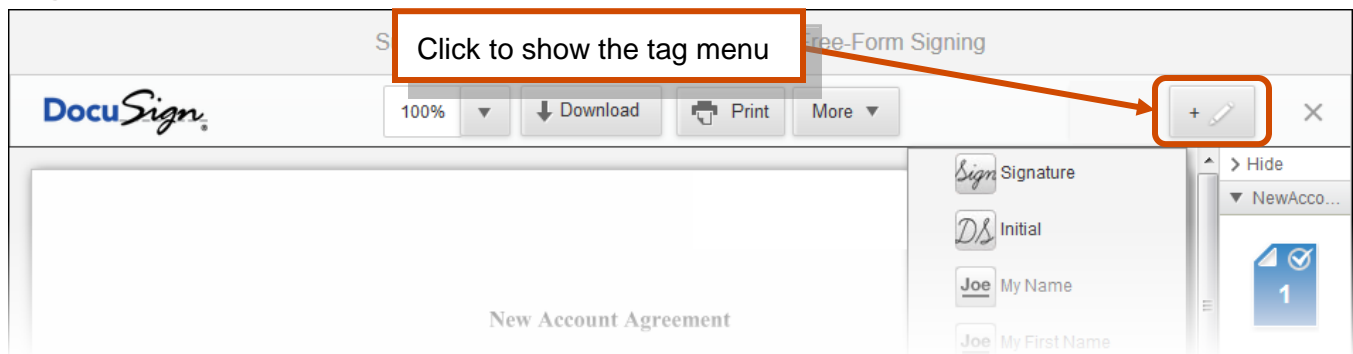


- On the document ribbon, click **Sign with DocuSign**. Alternately, you can click on the document menu and select **Sign with DocuSign**.

A new frame with the DocuSign free-form signing page opens in SharePoint.

**Note:** If this is the first time that you are using DocuSign to send or sign from this SharePoint account, the system asks for DocuSign credentials or that you create a new account. If the account has not been configured, the system will ask that you contact a SharePoint Administrator to configure the account.

## 2. Sign the Document



- To add a signature, initial or other information to the document, click the + button to show the tag menu. Click on the tag (Signature, Initial, My Name, Company, Title, Date Signed, Text, or Checkbox) you want to place and then click the appropriate location in the document to place the tag.

When you place a Signature or Initial tag, you are asked to adopt your signature. See the information below for adopting your signature.

 A screenshot of the 'Adopt Your Signature' dialog box. The title is 'Adopt Your Signature'. Below the title, it says 'Confirm your name, initials, and signature.' There are two input fields: 'Full Name' with the value 'Kevin Smith' and 'Initials' with the value 'KS'. Below these fields are two buttons: 'Select Style' (highlighted in orange) and 'Draw'. Under the 'Signature Style' section, there is a preview of a signature 'Kevin Smith' with a DocuSign ID '3143CD30CA0D40B...' and a 'Change Style' button. At the bottom, there is a disclaimer: 'By clicking Adopt, I agree that the signature and initials 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.' and two buttons: 'Adopt and Sign' (highlighted in orange) and 'Cancel'.

- Choose if you want to select a preformatted signature style or if you will draw your signature.

**Note:** Drawing a signature and initials can only be done if your browser is HTML5 capable.

If you choose to use a preformatted style, you can click **Change Style** to view and select a signature style.

The screenshot shows the 'Adopt Your Signature' window. It has a 'Full Name' field with 'Kevin Smith' and buttons for 'Select Style' and 'Draw'. Below, there's a 'Signature Style' section with a list of styles. The first style is highlighted with an orange border. Each style shows a 'DocuSigned by:' label, a signature, and a unique ID (3143CD30CA0D40B...). There are also buttons for 'Select Style' and 'Draw'.

If you choose to draw your signature, Click **Draw** to show the blocks for adding their signature or initials.

In the **Draw your signature** or **Draw your Initials** block, draw your signature/initials using a mouse or, for a touch-screens, your finger or a stylus. If you make a mistake, click **Clear** to reset the block.

The screenshot shows the 'Adopt Your Signature' window with the 'Draw' option selected. It has a 'Full Name' field with 'Kevin Smith' and an 'Initials' field with 'KS'. Below, there's a 'Draw your signature' section with a large drawing area and a 'Clear' button. At the bottom, there are 'Adopt and Sign' and 'Cancel' buttons.

- Finally click **Adopt and Sign** to adopt and save your signature information and return to the document.

The My Name, Company and Title tags might contain pre-filled information, but you can modify the information by clicking in the tag and typing the correct information.

The Date Signed tag uses the current date.

In cases where you need to place text into the document, click and place a Text box to the document. After placing the Text box, type information directly into it. You might need to resize the Text box.

The Checkbox places a checked box on the document.

- After you have placed all the tags in the document, click **Finish** to Complete Signing.

The DocuSign frame closes when the envelope is sent and you are returned to SharePoint.

### 3. Done!

You have successfully signed the document with DocuSign. The signed document is saved as a PDF file in a DocuSign sub-folder in the original document location. Open the folder to access the PDF file.



## FAQs

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### Your procedure talks about “envelopes.” What is an envelope?

- An envelope is an electronic container used to send one or more documents for signature with the DocuSign system. Envelopes can contain any number of pages or documents, and can be sent to multiple recipients.

### How many envelopes can I send from a free account?

- A new DocuSign account can send 50 envelopes for all users in the account.

### How will I know when my free account is running low on envelopes?

- The DocuSign system provides a warning when your free account is running low on envelopes.

### What is the difference between "Send with DocuSign" and "Sign with DocuSign"?

- Send with DocuSign is used when you want to send a document, or documents, to one or more people to gather signatures or information FROM those people. You, as the sender, can also be a signer on documents, but you do not have to be. Sign with DocuSign is used when you just want to sign something yourself that can be delivered to someone else.

Using the Sign with DocuSign option only takes you to the signing page in DocuSign, while the Send with DocuSign lets you address the envelope and tag the document for sending.

### I'm not the administrator for my SharePoint account, can I still install DocuSign for SharePoint?

- No, the current *DocuSign for SharePoint* module can only be installed by administrators.

### I have a Preview or Demo account with DocuSign, and I'd like to try the SharePoint Connector out on one of those services. How do I change the DocuSign service the SharePoint connector "talks" to?

- You must be a SharePoint Administrator to change the account environment setting. To change the account environment setting, follow the instructions in the [How do I change the environment FAQ](#) below.

### I have installed DocuSign for SharePoint, but I not sure of the activation status for all my SharePoint sites. Is there an easy way to tell the status for my sites?

- Yes, you can check the activation status and DocuSign credentials for your sites from the SharePoint 2010 Management Shell.

Start the SharePoint 2010 Management Shell as an administrator, change the directory to the folder with the *DocuSign for SharePoint* package files.

Run the configuration display by typing **.\DocuSignInstall.ps1 -action displayconfig**. The status of each site will be displayed. For example:

```
PS C:\> .\DocuSignInstall.ps1 -action displayconfig

Site           : http://www.contoso.com
Status          : DocuSign Configured
DocuSignLogin   : john.doe@contoso.com
Environment     : production
AccountID       : B5D39107-8743-4645-95B0-2B66514B9F6F
UserID          : 84E448FA-5327-4015-8E9B-DFFFA6CFB278

Site           : http://www.contoso.com/my
Status          : DocuSign Configured
DocuSignLogin   : john.doe@contoso.com
Environment     : production
AccountID       : B5D39107-8743-4645-95B0-2B66514B9F6F
```

```

UserID      : 84E448FA-5327-4015-8E9B-DFFFA6CFB278

Site        : http://www.contoso.com/my/personal/jane_doe
Status      : DocuSign Configured
DocuSignLogin: jane.doe@contoso.com
Environment : preview
AccountID   : 4A0FC8BC-B1AA-46DB-BB4C-2C47C7C91893
UserID      : BD8EA3A2-5809-4399-8354-155630A995A5

Site        : http://www.contoso.com/sites/SecondSite
Status      : DocuSign Configured
DocuSignLogin: john.doe@contoso.com
Environment : production
AccountID   : B5D39107-8743-4645-95B0-2B66514B9F6F
UserID      : 84E448FA-5327-4015-8E9B-DFFFA6CFB278

Site        : http://www.contoso.com/sites/wikis
Status      : DocuSign Configured
DocuSignLogin: john.doe@contoso.com
Environment : production
AccountID   : B5D39107-8743-4645-95B0-2B66514B9F6F
UserID      : 84E448FA-5327-4015-8E9B-DFFFA6CFB278

```

### I have a previous version of DocuSign for SharePoint and I want to upgrade to the newer version. How do I update my version?

- You can update DocuSign for SharePoint 2010 to a newer version by using the installation script for the latest version. Just follow the steps below:

Download and extract the *DocuSign for SharePoint* package zip file to a folder on your SharePoint server.

Start the SharePoint 2010 Management Shell as an administrator, change the directory to the folder with the *DocuSign for SharePoint* package files.

To update DocuSign for SharePoint and activate it for all sites, run the installation by typing **DocuSignInstall.ps1 -action update -activate \$true**.

To update DocuSign for SharePoint but not change the activation state for sites, run the installation by typing: **DocuSignInstall.ps1 -action update -activate \$false**. You can activate sites later.

### Do I have to give the other SharePoint users my DocuSign credential information so they can send with DocuSign?

- No. If you created a new account, it is automatically set up to allow other users in your account to send with DocuSign.

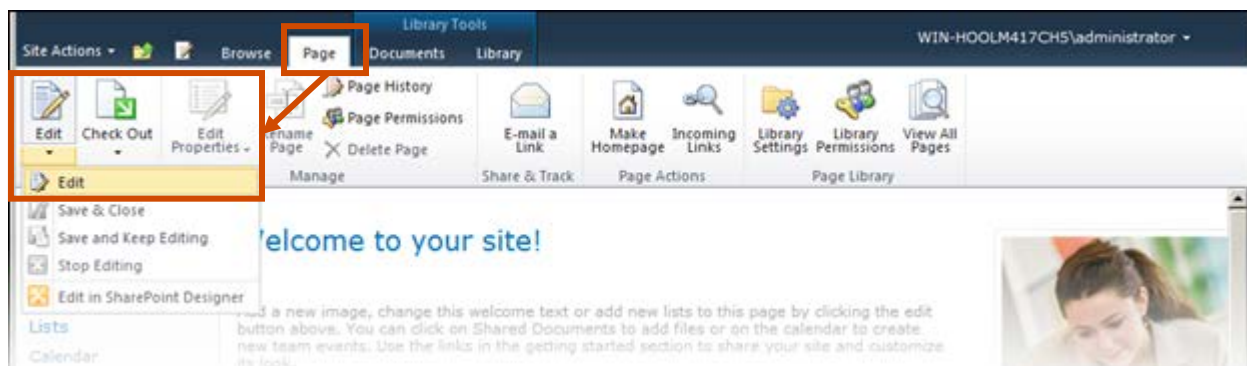
If you have an existing DocuSign account, you must enable the **Account-Wide Rights** and **Send On Behalf Of Rights (API)** features for your account. This allows the other users in your account to send with DocuSign. Additionally, if your account uses the Password Strength setting **Custom**, you must set the **Password Questions Required** option to 0. You can check your Password Strength setting by going to your Preferences, clicking Features and, under the Manage Account heading, clicking Password Strength.

### I have a document list that has DocuSign enabled on my SharePoint Home page, but the DocuSign ribbon buttons do not appear. Can I get the DocuSign ribbon buttons to show up on the Home page?

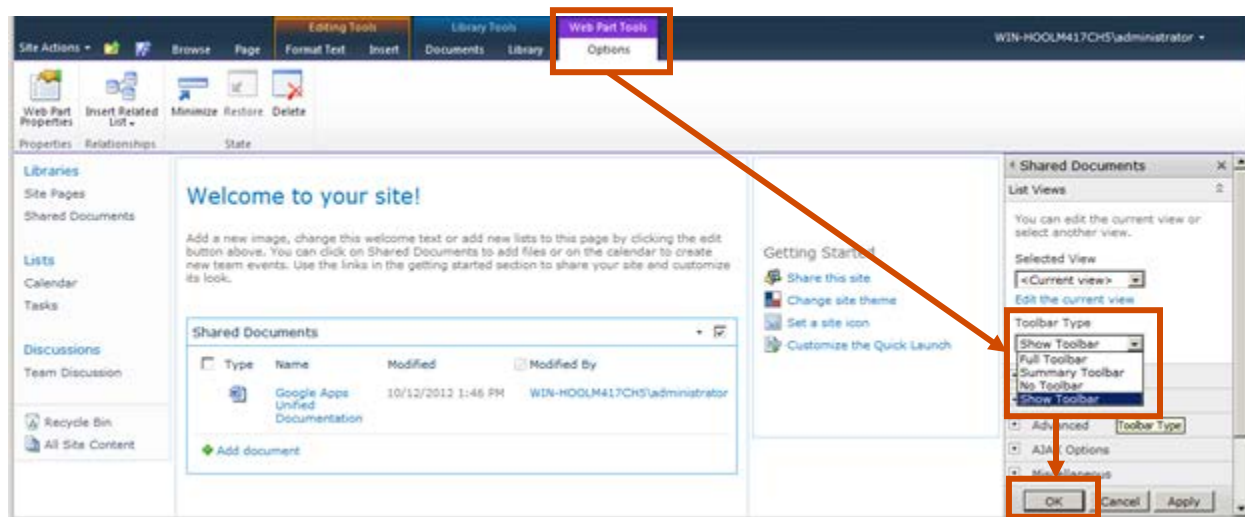
- Yes, by default, the DocuSign ribbon buttons do not appear when a document list that has the buttons enabled is included on another page, such as the site's Home page. You must change the List View settings for that page in order for the DocuSign ribbon buttons to appear. To edit a page's List View settings:



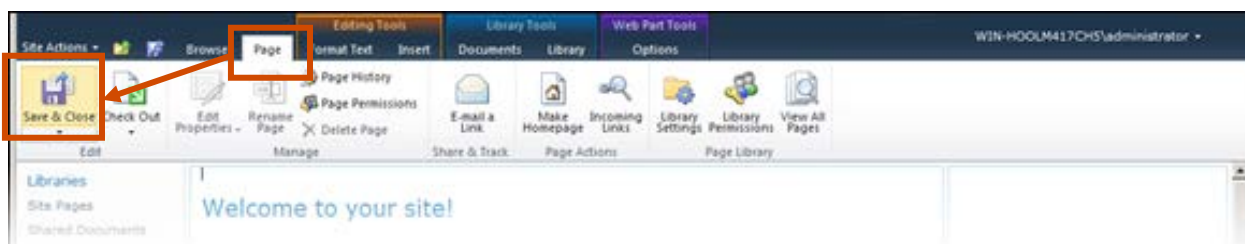
Click the **Page** tab. Click the **Edit** drop-down and select **Edit**.



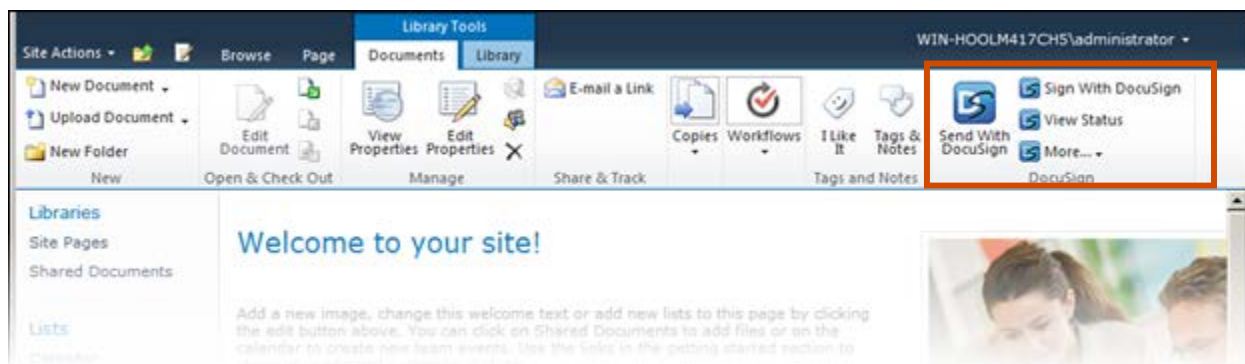
Click the **Web Part Tools** tab. On the right side, find the List Views property dialog. In the Toolbar Type list, select **Show Toolbar** to see the ribbon buttons. Click **OK**.



Click on the **Page** tab. Click **Save & Close**.

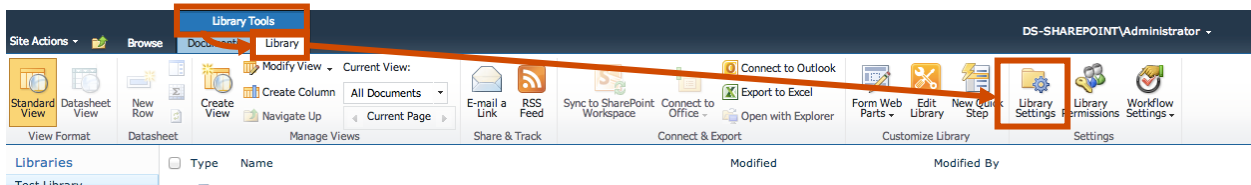


The DocuSign ribbon buttons now appear on the page.

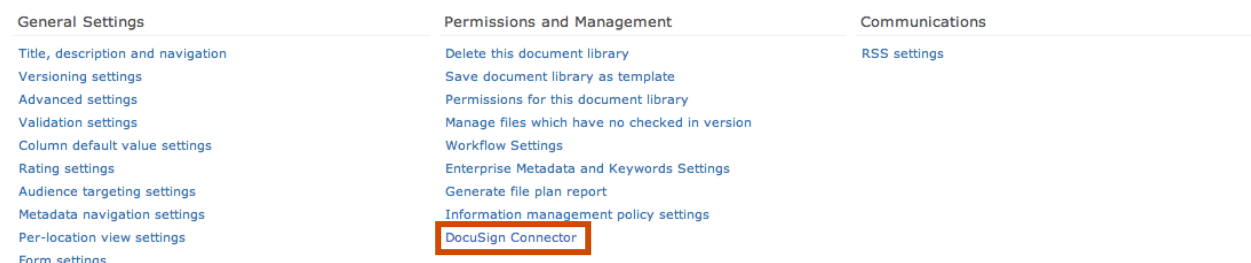


## I created a new Document Library after installing DocuSign for SharePoint, but the DocuSign ribbon buttons do not appear. How do I enable DocuSign for this new Document Library?

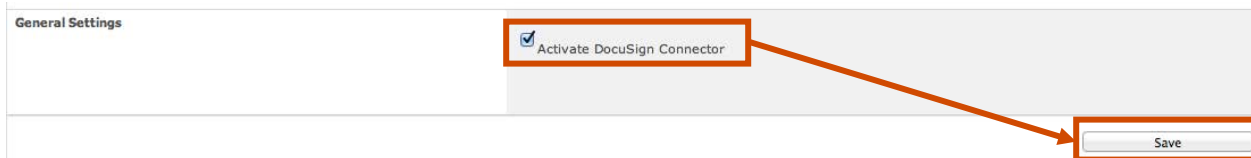
- By default, the DocuSign ribbon buttons do not appear when a new Document Library is created. To enable DocuSign for the new library; navigate to that Library, click **Library Tools**, select the **Library** tab and then click **Library Settings**.



Under the Permissions and Management heading, click **DocuSign Connector**.



Select the **Activate DocuSign Connector** checkbox and click **Save**.



The DocuSign ribbon buttons now appear for that Document Library.

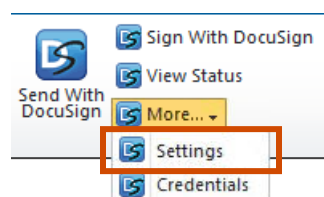
## How do I deactivate DocuSign for SharePoint?

- You must be a SharePoint Administrator to disable or enable the DocuSign feature.
- To disable the DocuSign feature for a site; go to the SharePoint Administration site, click **Site Actions** and select **Site Settings**. Under the **Site Collection Administration** heading, click **Site Collection Features**. Find the DocuSign feature and click **Deactivate**.
- To enable the DocuSign feature for a site; go to the SharePoint Administration site, click **Site Actions** and select **Site Settings**. Under the **Site Collection Administration** heading, click **Site Collection Features**. Find the DocuSign feature and click **Activate**.

## How do I attach a Certificate of Completion (CoC) to a signed document?

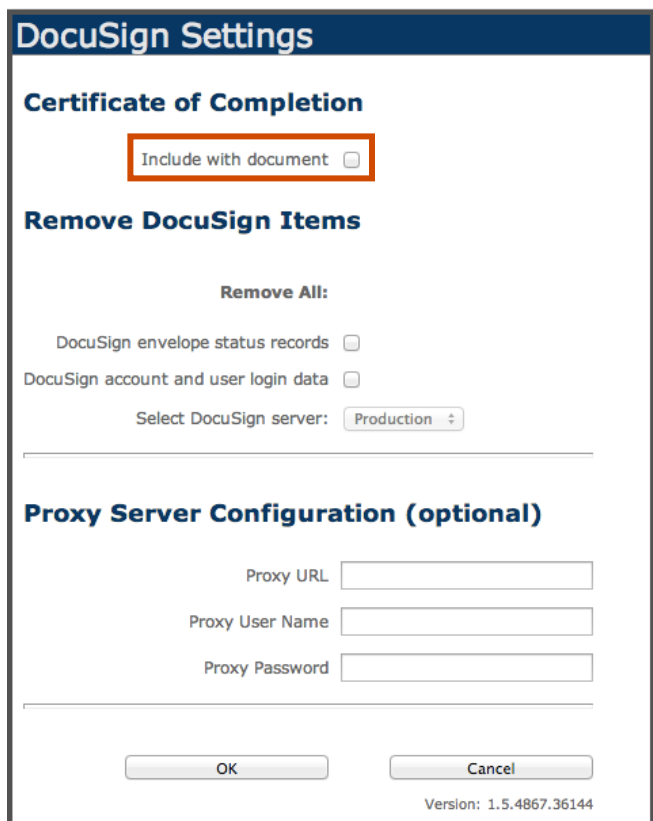
- You must be a SharePoint Administrator to change this setting. Changing this setting will affect all DocuSign for SharePoint users.

In SharePoint navigate to your documents. Select a document, in the document ribbon click **More** and select **Settings**.



In the Certificate of Completion section, select **Include with document**. When this checkbox is selected, a Certificate of Completion (CoC) is included with each completed envelope. Click **OK** to save the change.

The CoC is a document associated with every DocuSign envelope that provides proof of the signing process to all parties in the transaction. The certificate establishes who, what, when, and how documents were signed.

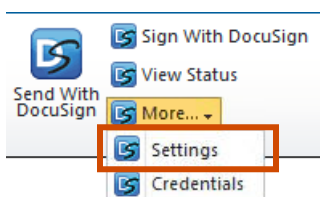


The image shows the 'DocuSign Settings' dialog box. It has a title bar 'DocuSign Settings' and a 'Certificate of Completion' section with a checkbox 'Include with document' which is highlighted with a red rectangle. Below this is a 'Remove DocuSign Items' section with a 'Remove All:' label and two checkboxes: 'DocuSign envelope status records' and 'DocuSign account and user login data'. There is also a 'Select DocuSign server:' dropdown menu set to 'Production'. The 'Proxy Server Configuration (optional)' section has three input fields: 'Proxy URL', 'Proxy User Name', and 'Proxy Password'. At the bottom are 'OK' and 'Cancel' buttons. The version number 'Version: 1.5.4867.36144' is at the bottom right.

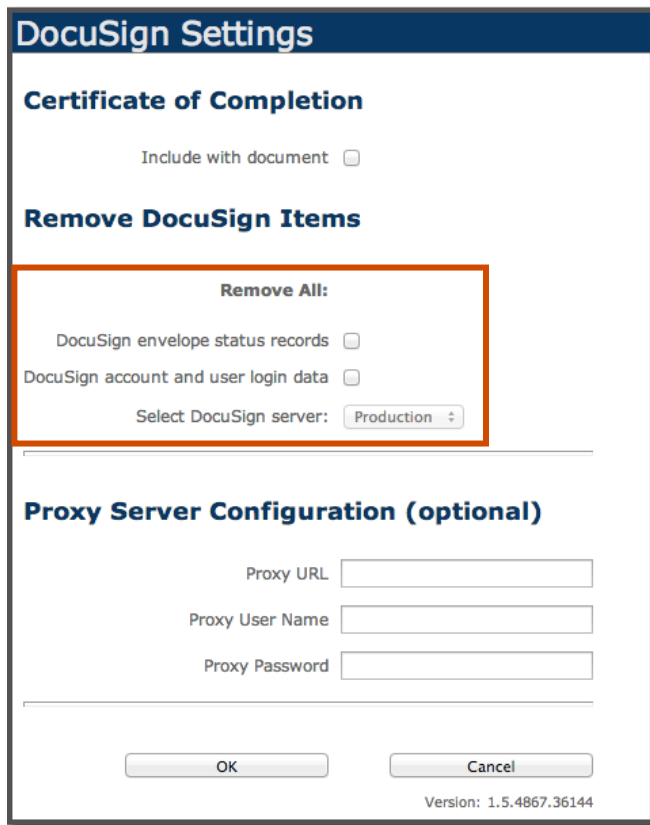
### How do I change the environment (Production, Preview or Demo) that my DocuSign for SharePoint integration is pointing to?

- You must be a SharePoint Administrator to change the environment setting. Changing the environment will affect all DocuSign for SharePoint users. Users will have to enter credentials for the new environment and they will not be able to get status for envelopes sent in the old environment.

In SharePoint navigate to your documents. Select a document, in the document ribbon click **More** and select **Settings**.



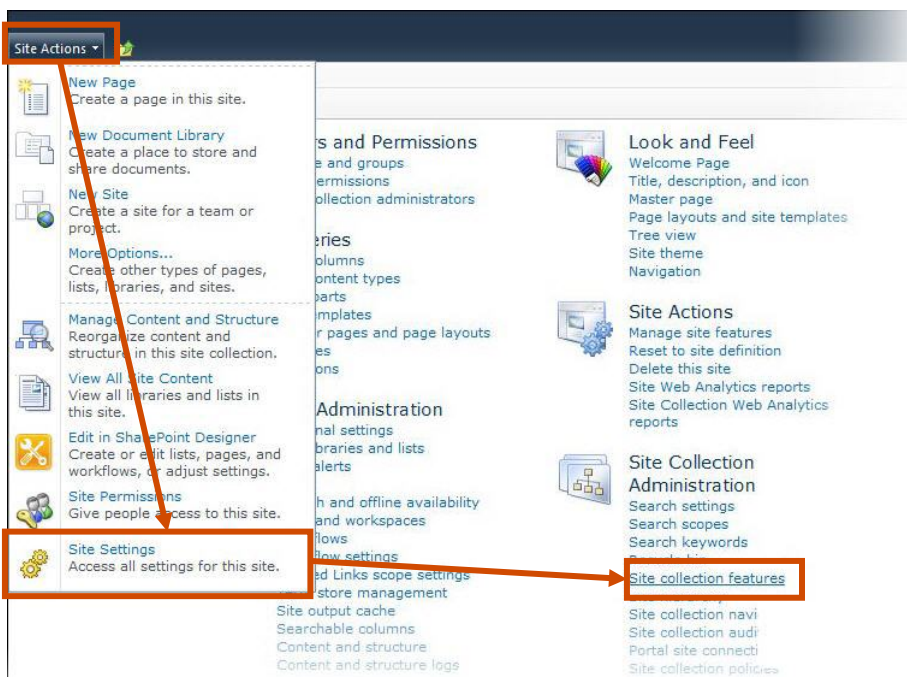
In the Remove DocuSign Items section, select to remove all **DocuSign account and user login data** and then select the DocuSign server to switch to from the **Select DocuSign server** list. Click **OK** to save the changes.



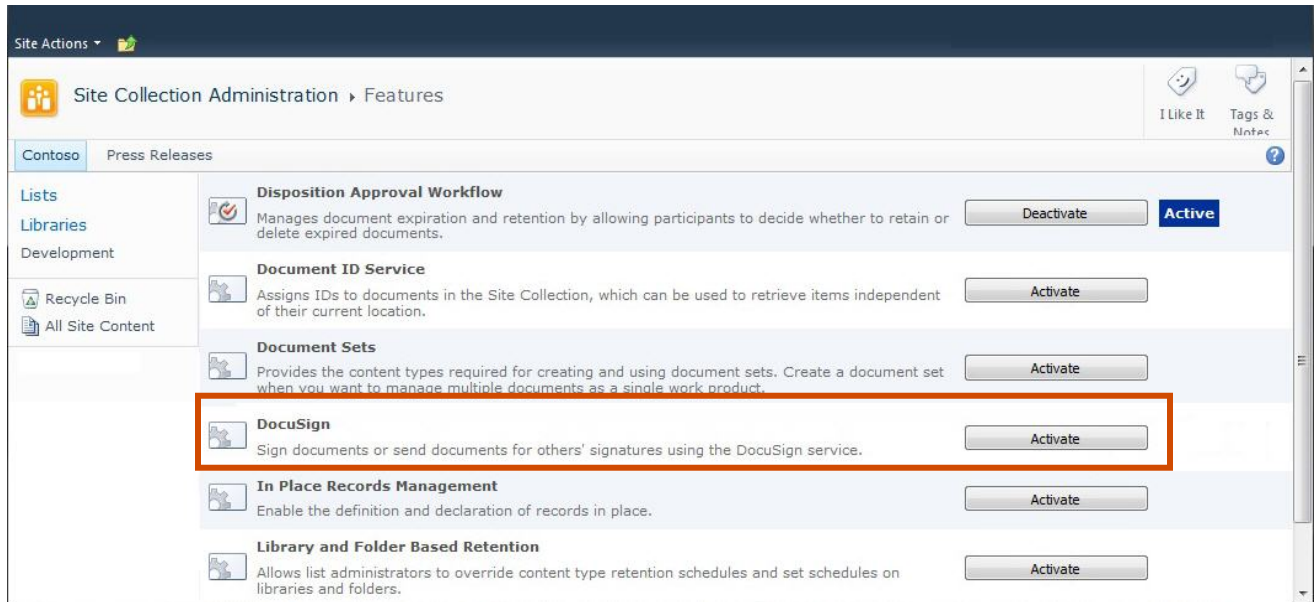
**I didn't activate DocuSign for SharePoint when I installed it. How do I activate it?**

- You can activate DocuSign for SharePoint using the following steps:

From the SharePoint Administration site, click **Site Actions** and select **Site Settings**. Under the **Site Collection Administration** heading, click **Site Collection Features**.



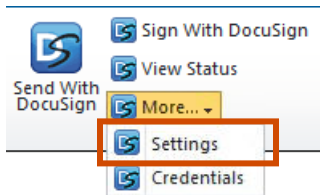
Find the DocuSign feature and click **Activate**.



**Note:** You can deactivate DocuSign for some libraries while keeping it active for others using the Library Tools. See the [FAQs](#) for more details on deactivating DocuSign for individual libraries.

**I am using a proxy server. How do I configure my proxy server settings to use DocuSign for SharePoint?**

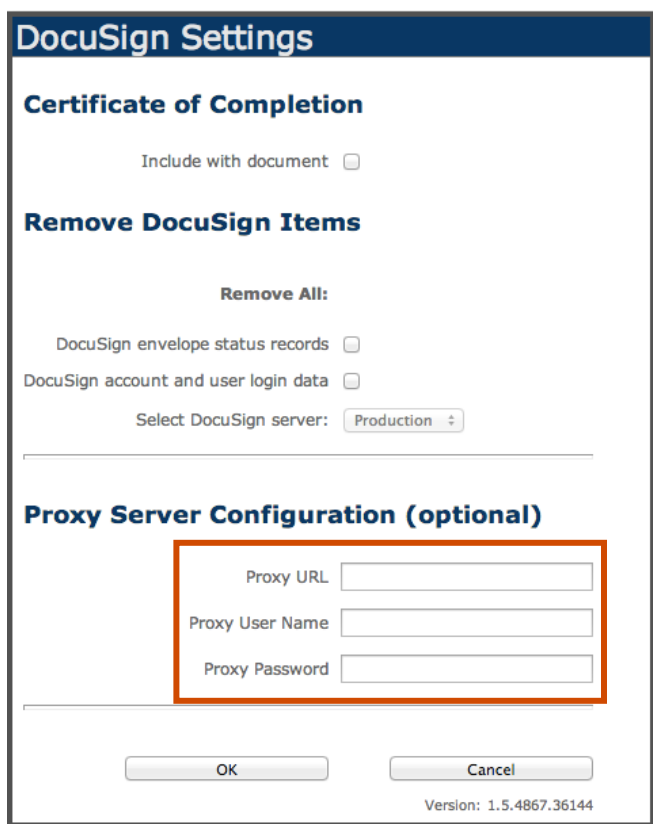
- To configure your proxy server settings, In SharePoint navigate to your documents. Select a document, in the document ribbon click **More** and select **Settings**.



In the DocuSign Settings dialog box, in the Proxy Server Configuration section type the **Proxy URL** (the URL format is validated as it is added). The **Proxy User Name** and **Proxy Password** are not required to save the information. However, if a value is entered for either Proxy User Name or Proxy Password, then all fields must be completed.



After adding the proxy server information, click **OK**.



The image shows the 'DocuSign Settings' dialog box. It has a title bar 'DocuSign Settings' and a 'Certificate of Completion' section with an 'Include with document' checkbox. Below is a 'Remove DocuSign Items' section with a 'Remove All:' label and three checkboxes: 'DocuSign envelope status records', 'DocuSign account and user login data', and a 'Select DocuSign server:' dropdown set to 'Production'. The 'Proxy Server Configuration (optional)' section is highlighted with a red box and contains three input fields: 'Proxy URL', 'Proxy User Name', and 'Proxy Password'. At the bottom are 'OK' and 'Cancel' buttons, and a version number 'Version: 1.5.4867.36144'.

**Not all of my SharePoint users have DocuSign Accounts. Can they still use DocuSign for SharePoint?**

- Yes, as long as you still have seats available for your DocuSign account. When a SharePoint user clicks Send with DocuSign, we check to see if that user exists in DocuSign (in this case a user is defined as unique username/email combination). There are three possible results:
  1. If the user does not exist as a member of any DocuSign account, DocuSign creates a new user with the user's username and email combination and adds them as a member of the current DocuSign account. The user does not add a password and does not need to know the password for the account.

**Note:** Depending on the information in a user's SharePoint profile and settings, DocuSign might display a provisioning dialog box asking the user to enter information for provisioning their account.
  2. If the user exists in the DocuSign system and exists as a member of the current DocuSign account, DocuSign uses that user information to send the envelope.
  3. If the user exists in the DocuSign system, but does not exist as a member of the current DocuSign account, the DocuSign provisioning dialog box is shown. The user must enter a unique username and email address combination that is DIFFERENT from the one they already have in the DocuSign system.



## How do I uninstall DocuSign for SharePoint?

**Note:** Uninstalling DocuSign for SharePoint deactivates the feature on all sites, uninstalls the feature and removes the DocuSign package.

- Start the SharePoint 2010 Management Shell as an administrator, change the directory to the folder with the *DocuSign for SharePoint* package files. If you did not keep the extracted package folder from your installation, you must download and extract the *DocuSign for SharePoint* package to a folder on your SharePoint server.
- Run the uninstall process by typing `DocuSignInstall.ps1 -action uninstall`.

## How do I ensure that my SharePoint user accounts are setup to work with DocuSign for SharePoint?

- Verify that there is an email address associated with each user account. If not, set up an email address for each user account. This enables DocuSign for SharePoint to create or map a corresponding user record in DocuSign.

## For More Information or Assistance

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For more information or assistance, visit the [DocuSign Community](#), the [User Guides section](#) of the [DocuSign website](#), or contact DocuSign Support.

## DocuSign for Microsoft SharePoint v1.5 Release Notes

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With DocuSign for Microsoft SharePoint v1.5, users now have the ability to attach a Certificate of Completion (CoC) to a signed envelope. The CoC is a document associated with every DocuSign envelope that provides proof of the signing process to all parties in the transaction. The certificate establishes who, what, when, and how documents were signed.

In v1.5, non-administrator users are also provisioned DocuSign accounts “behind the scenes” so that the SharePoint administrator can “set it and forget it” on behalf of all users in the organization.

A number of fixes were made for version 1.5. The bug number refers to DocuSign’s internal tracking information:

- Bug 23214 - Corrected a UI rendering issue on the SharePoint “Manage Content and Structure” page.
- Bug 22372 - Corrected an issue provisioning non-admin users to the correct SOBO account.