

DocuSign for SharePoint 2013 — v2.1.0

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Overview

DocuSign for SharePoint 2013 allows users to sign or get signatures from any SharePoint 2013 document library. This guide provides information on installing, sending, and signing documents from SharePoint 2013.

Note: The DocuSign for SharePoint 2013 application is only available for Microsoft SharePoint 2013 and can only be installed by SharePoint administrators. If you already have a DocuSign account, the Account-Wide Rights and Send on Behalf Of (API) features must be enabled for your account.

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Installing DocuSign for SharePoint 2013

The DocuSign for SharePoint 2013 solution is available on the [DocuSign website](#).

Installation Guidelines and Requirements

- During the deployment the SharePoint farm is unavailable to users. We recommend deploying during non-business hours.
- DocuSign for SharePoint 2013 uses the Secure Store Service. The Secure Store Service must be configured and started when installing DocuSign for SharePoint. If the Secure Store Application is not started and configured the app may appear to be installed but it will not work. See the Microsoft TechNet article [Configure the Secure Store Service in SharePoint 2013](#) for information on configuring and starting the service.

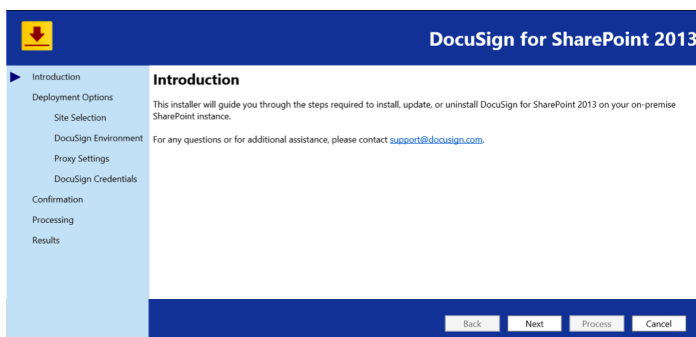
Note: DocuSign for SharePoint 2013 does not support SharePoint 2013 Foundation because the Secure Store Service is not included.

- DocuSign for SharePoint 2013 requires .NET 4.5 or higher.
- DocuSign for SharePoint 2013 only supports the use of ports 80 and 443. DocuSign for SharePoint 2013 does not support the use of custom ports.
- DocuSign for SharePoint does not support a hybrid configuration in which the customer does not host and administer the SharePoint farm.
- DocuSign for SharePoint will only install if there is at least one site to activate.

Installing DocuSign for SharePoint 2013

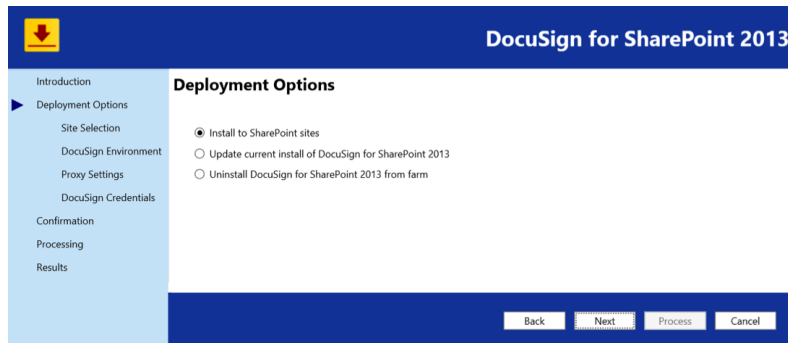
As an administrator or site collection owner, follow these steps to install DocuSign for SharePoint 2013:

1. Extract the .zip file to a folder on to your SharePoint server.
2. Open the folder and double-click on the file **DocuSignForSharePoint2013.Installer.exe**. This starts the DocuSign for SharePoint 2013 install wizard.



3. Follow the steps outlined in the Install Wizard:

- a. Choose your deployment option – you can either install the application, update a current install of DocuSign for SharePoint 2013, or uninstall DocuSign for SharePoint 2013. Since you are installing the solution, choose **Install to SharePoint sites**.



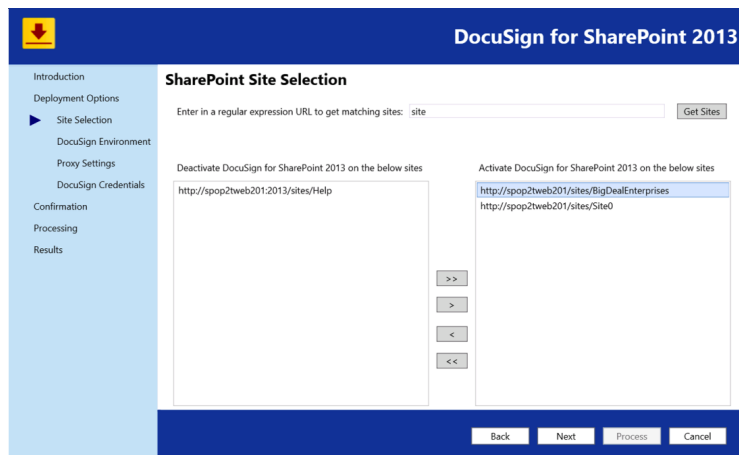
- b. Then, enter in a regular expression to retrieve the desired sites from your SharePoint 2013 farm.

For example, if you are looking for a site that contains the URL *test*, enter */test* into the regular expression URL text box.

SharePoint Site Selection

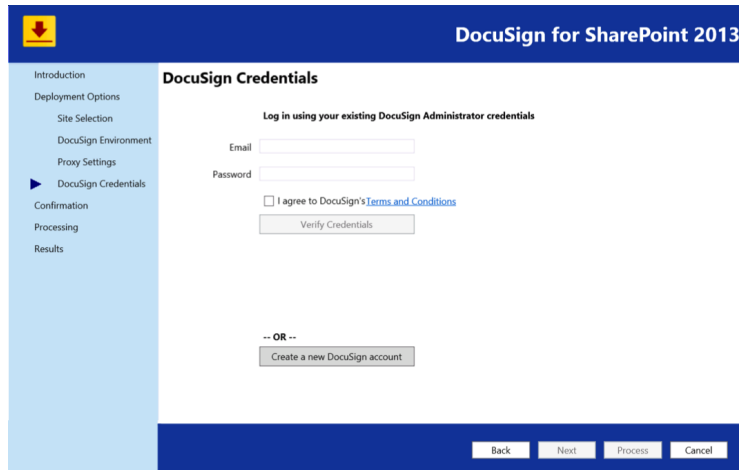
Enter in a regular expression URL to get matching sites:

Move the sites you want to install DocuSign for SharePoint 2013 on from the left-hand list to the right-hand list.



- c. Set the DocuSign environment, either DEMO or Production, you want to use. This will be the environment setting for all of the site collections selected in the previous step.
- d. Now you can enter your DocuSign credentials to configure your DocuSign account on

behalf of all of your SharePoint 2013 users. Enter in your DocuSign account credentials or click **Create a new DocuSign** account to create a new account.



- Please note that your DocuSign account must have **Account Wide Rights** and **Send on Behalf of** enabled.
 - The new account is a free trial of DocuSign with an unlimited number of users and 50 free transactions (document sends).
- a. If you need to connect to a proxy server, include the proxy settings. If not, click **Next** to skip this step.
 - b. Review your settings on the confirmation screen and click **Process**.
 - c. A screen displaying all of the sites the DocuSign for SharePoint 2013 solution was installed on is shown.
4. The DocuSign actions are now visible underneath the DocuSign tab for all document libraries in the selected site collection(s).

Important: Please note that there must be direct connectivity out to the Internet from the SharePoint servers where the solution is installed.

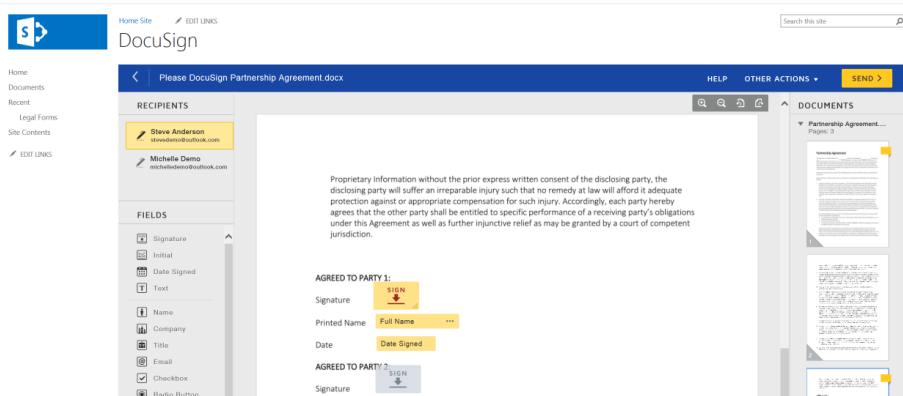
Sending Documents using DocuSign for SharePoint 2013

With DocuSign for SharePoint 2013, you can send documents out for signature directly from the ribbon bar in a SharePoint 2013 document library.

1. Go to a SharePoint 2013 library and select one or more documents.
2. On the ribbon, in the DocuSign tab, click **Get Signatures**.

Alternatively, you can click the document menu, click ... and select **Get Signatures**.

3. The DocuSign sending application opens within the SharePoint frame.
4. Add fields and send your documents.



5. Done! You have successfully sent documents out for signature using DocuSign.

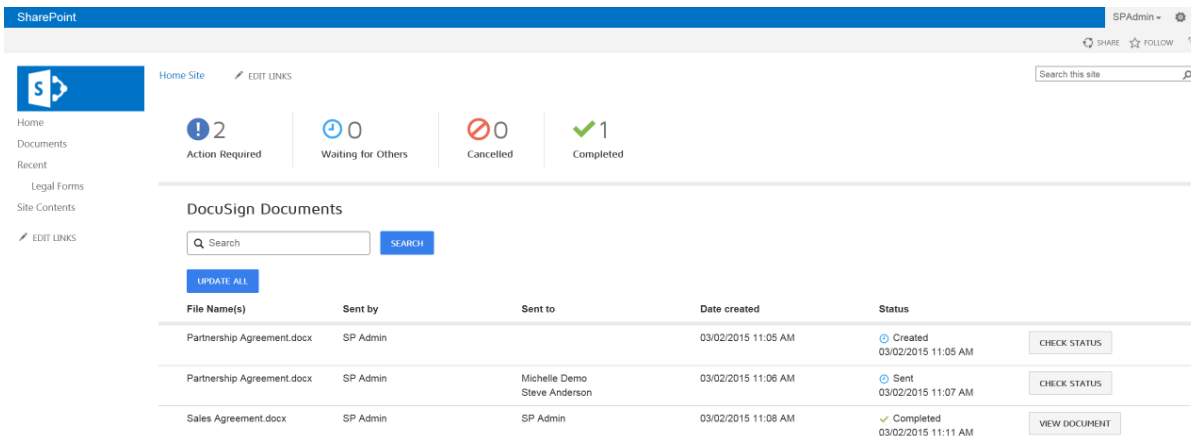
Checking the Status of Sent Documents

1. Go to the SharePoint 2013 document library and select one or more documents. On the document ribbon, in the DocuSign tab, click **Check Status**. This displays a list that shows the statuses for the documents you have sent.

The possible values are: Draft, Waiting for Others, Completed, Declined, and Cancelled.

To update the status of all the documents, click **Update All** at the top of the page.

Note: Because SharePoint 2013 is on premise, DocuSign is unable to automatically update documents and statuses. You must click **Update All** to get the status of all the documents.



2. For documents with a status of Completed, a PDF file with the signed document is stored in a DocuSign folder within the originating document library or in the library or folder designated by

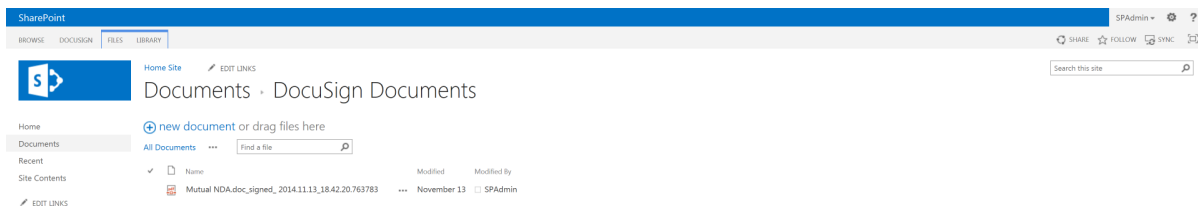
your SharePoint administrator. You can click the **View Document** button to open the PDF file or you can navigate to the appropriate folder to access the signed document.

Signing Documents with DocuSign for SharePoint 2013

With DocuSign for SharePoint 2013, you can sign documents in a SharePoint 2013 document library directly from the ribbon bar.

1. Go to a SharePoint 2013 library and select one or more documents.
2. On the document ribbon, in the DocuSign tab, click **Sign**.
Alternatively, you can click on the document menu, click ... and select **Sign with DocuSign**.
3. The free-form signing experience opens within the SharePoint frame.
4. Sign the document:
 - To add a signature, initial, or other information to the document, click the pen button to show the tagging palette.
 - Click on the tag you want to place and then drag and drop the tag at the appropriate location in the document.
5. After you have placed all of the tags in the document, click the **Finish** button to complete your document signing.
6. Done! You have successfully signed the documents with DocuSign.

The signed document is saved as a PDF file in the DocuSign Documents sub-folder in the originating document library or in the library or folder designated by your SharePoint administrator. Open the folder to access the signed PDF.



FAQ

Note: If your question isn't covered by these FAQs, please check the [DocuSign for SharePoint Support Center page](#) for additional support information.

What is the difference between "Get Signatures" and "Sign" with DocuSign?

- Get Signatures 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 Get Signatures with DocuSign lets you address and tag the document for sending.

If I am an admin of SharePoint 2013 and would like to upgrade to a paid DocuSign account, what do I do?

- Please contact our sales team at sales@docusign.com or 1.877.720.2040.

I'm not the Administrator or Site Collection owner for my SharePoint 2013 account, can I still install DocuSign for SharePoint?

- No, only the Administrator or Site Collection owner can install this application.

How do I change the DocuSign environment that my DocuSign for SharePoint 2013 application is pointing to?

- Click **Settings** in the DocuSign ribbon bar, which takes you to the Admin Settings screen. Click **Edit** next to Environment. This brings up a dialog where you can select the desired DocuSign environment. Note that this action also removes the system-wide login. Click **Save** to save the changes.

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 get signatures or sign 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 Preferences in the Classic DocuSign web application, clicking Features and, under the Manage Account heading, clicking Password Strength.

Who can see the status of documents sent from a document library?

- Everyone with rights to the SharePoint document library can see the status of documents for that document library – regardless of whether the user is the sender or the recipient.

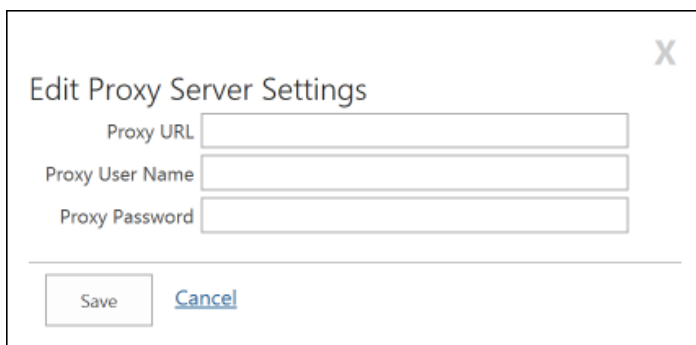
I have installed DocuSign for SharePoint, but I not sure of the activation status for all my SharePoint sites. Is there an easy way to tell the status for my sites?

- In the extracted DocuSign for SharePoint 2013 solution, click on **DocuSignForSharePoint2013.Installer.exe**. In the **Deployment Options** step, select **Update**

current install of DocuSign for SharePoint 2013. In the **Site Selection** section, you will see the list of the active sites on the list on the right side of the screen.

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, navigate to your documents. Select a document, and in the document ribbon click Settings. On the settings page, next to the **Proxy Server** line item, click **Edit**. In the dialog box, 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 **Save**.



The image shows a dialog box titled "Edit Proxy Server Settings" with a close button (X) in the top right corner. It contains three text input fields: "Proxy URL", "Proxy User Name", and "Proxy Password". Below the fields are two buttons: "Save" and "Cancel".

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 **Get Signatures** or **Sign**, 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 document.
 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.

When I try to sign a document I get the error message “There was an error getting the DocuSign account information. Error: There are no addresses available for this application.” What should I do?

- Your Secure Store Service is not configured or is not running. See the Microsoft TechNet article [Configure the Secure Store Service in SharePoint 2013](#) for information on configuring and starting the service.

How do I uninstall DocuSign for SharePoint 2013?

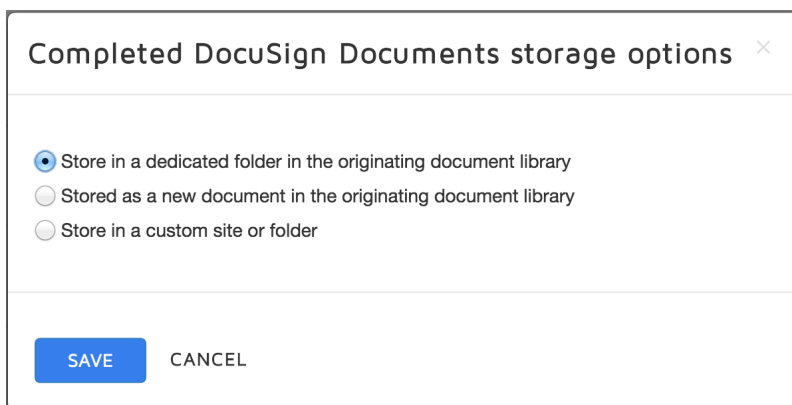
- In the extracted DocuSign for SharePoint 2013 solution, click on **DocuSignForSharePoint2013.Installer.exe** in the folder. In the **Deployment Options** step, select **Uninstall DocuSign for SharePoint 2013**. Click **Next** and then click **Process** on the confirmation screen.

How do I update my install of DocuSign for SharePoint 2013 to the latest version of the app?

- In the newest download of the extracted DocuSign for SharePoint 2013 solution, open the folder and click on **DocuSignForSharePoint2013.Installer.exe**. In the Deployment Options step, select **Update current install of DocuSign for SharePoint 2013**. Click **Next** and follow the steps in the installer. Your DocuSign credentials and DocuSign statuses will remain intact in SharePoint 2013.

How do I change the location in which signed documents are stored?

- Click **Settings** in the DocuSign ribbon bar, which takes you to the Admin Settings screen. Click the **Edit** option adjacent to Completed DocuSign Documents. This brings up a Completed DocuSign Documents storage options dialog box, where you can select the storage location for signed documents. There are three options available:



Completed DocuSign Documents storage options

Store in a dedicated folder in the originating document library

Stored as a new document in the originating document library

Store in a custom site or folder

SAVE CANCEL

The first, and default, option is for the documents to be stored in a dedicated DocuSign documents folder in the document library from which the DocuSign action was initiated.

The second option is to store the signed document as a document in the same document library from which the DocuSign action was initiated.

The third option is to store the signed document as a document in a site or folder. You can choose the site or folder from the list in the dialog. This action is only available for SharePoint administrators.

After selecting your option, click **SAVE** to save the change.

How do I change the naming convention of signed documents?

- Click **Settings** in the DocuSign ribbon bar, which takes you to the Admin Settings screen. Click the **Edit** option adjacent to Signed document naming convention. This brings up a dialog where you can select how signed documents are named. This action is only available for SharePoint administrators.

For More Information or Assistance

For more information or assistance, visit [DocuSign Support](#), the [DocuSign Community](#), docusign.com, or contact DocuSign Support.

Release Notes

The following features were included as a part of DocuSign for SharePoint 2013 v2.1.0:

- Added Secure store. DocuSign for SharePoint 2013 now stores user credentials in the secure store for SharePoint in order to support multiple servers.
- Corrected some minor issues.
- June 4, 2015 Update - added that .NET 4.5 or higher is required for installing DocuSign for SharePoint 2013.