

DocuSign eSignature for SharePoint Online v3.5.0.2

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Overview

DocuSign eSignature for SharePoint Online version 3.5.0.2 allows users to sign or send documents for signature from a SharePoint Online library. This guide provides information about installing, sending and signing documents from SharePoint Online.

Important:

There are two new **Account settings** in this release:

- **Copy Document Metadata** - When this option is enabled, the metadata from a source document is copied to the signed version when it is written back to SharePoint.
- **Document Naming Convention** - Allows customers to use custom fields as well as fields like document name, recipient name, date signed, or to name documents based on your organization's methodology.

See [Account Settings - DocuSign eSignature for SharePoint](#) for detailed information.

Install DocuSign for SharePoint Online

Supported Browsers for DocuSign for SharePoint Online:

- IE11, Edge (current version), Chrome (current version), Firefox (current version)

DocuSign for SharePoint Online supports the following languages for sending and signing:

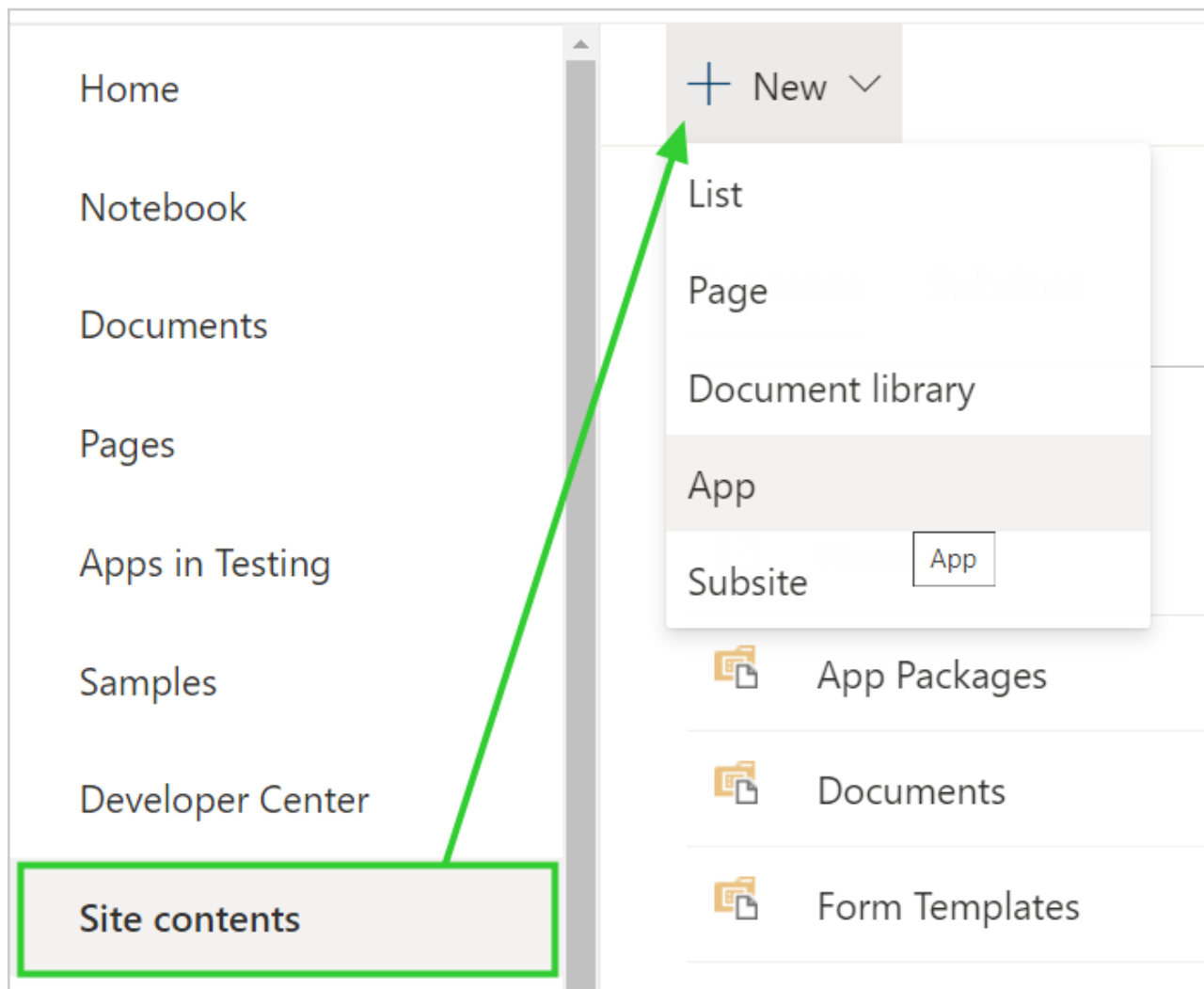
Chinese (Simplified), Chinese (Traditional), Dutch, English, French, German, Italian, Japanese, Korean, Portuguese (Brazil), Portuguese (Portugal), Russian, and Spanish

Important: DocuSign for SharePoint Online can only be installed and configured by a SharePoint Online administrator or Site Collection owner.

DocuSign for SharePoint Online is available from the SharePoint Store. As an administrator or site collection owner, follow these steps to install DocuSign for SharePoint Online:

1. Go to Site Content

2. Click + **New** and then **App**



3. In the SharePoint Store, select **DocuSign for SharePoint Online**.

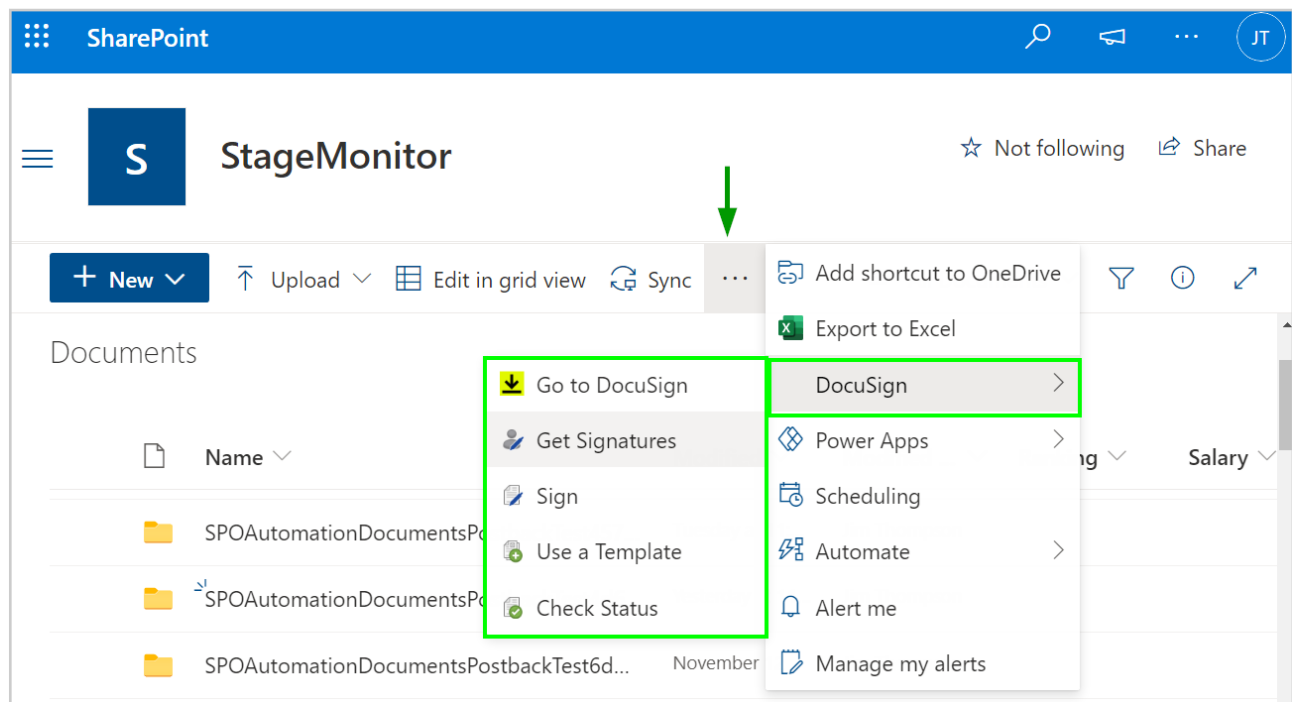
4. You are prompted to trust DocuSign for SharePoint Online. Click **Trust It** to complete the installation.

5. DocuSign for SharePoint Online has now been installed successfully.

SharePoint administrators can change the account settings for DocuSign for SharePoint online. Refer to [DocuSign for SharePoint Account Settings](#) for more information.

Note: DocuSign for SharePoint Online must be installed separately for each site.

6. The DocuSign actions are visible under the **DocuSign** tab for all document libraries in that Site Collection.



Send Documents using DocuSign for SharePoint Online

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

1. Go to a SharePoint Online document 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 then select **Get signatures with DocuSign**.
3. DocuSign opens in a new browser window.
4. The selected documents are automatically included in the new envelope, and you can add or delete documents
5. Add one or more recipients, who may be signers or people who receive a copy of the completed agreement.
6. Add the email subject and an optional message to the envelope
7. Add signing fields to the document, for example signature, initials, date or the signer's name
8. Review your envelope and click **SEND**

9. For a detailed explanation of the sending process, see [How do I send a DocuSign document?](#)

Note: If this is the first time you are using DocuSign to send or sign from SharePoint Online, you are asked to log in with an existing account or to create a new DocuSign account.

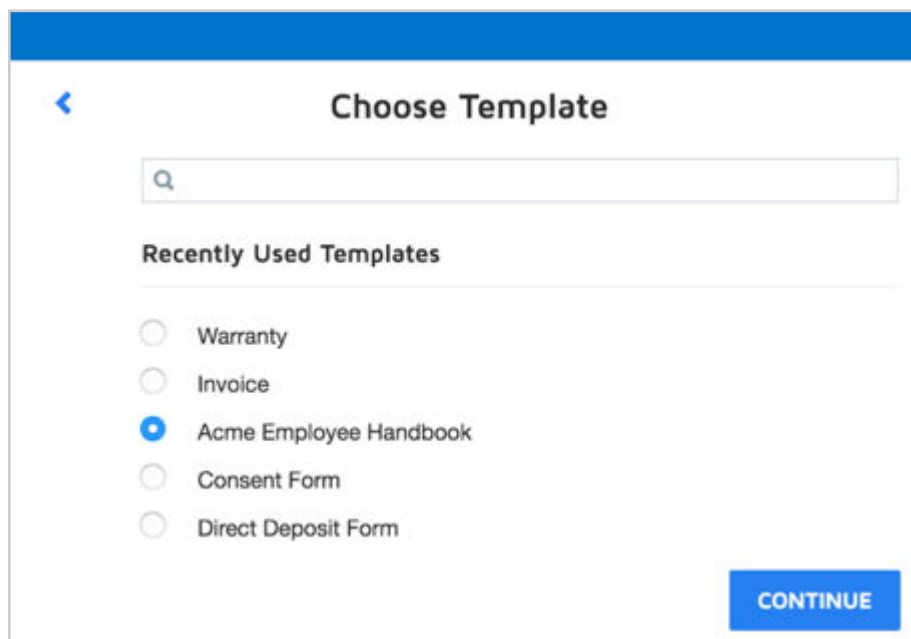
If you choose to **Log In** with your DocuSign account. If an account has Single Sign On (SSO) enabled, you can use your company credentials to log in.

Send with a Template from DocuSign for SharePoint Online

Templates help streamline the sending process when you frequently send the same or similar documents, or send documents to the same group of people. Templates have standard documents, with set recipients and recipient roles, and signing fields. A template can include multiple files and can be sent to one or more recipients. Templates can also contain the signing instructions for the document.

If templates are enabled for your account, you can send documents using a template from DocuSign for SharePoint Online. The basic workflow is described below, but see [Working with Templates](#) for more detailed information.

1. Go to a SharePoint Online document library, and click **Use a Template** on the DocuSign tab.
2. The template selection screen appears with a list of recently used templates.









3. From the list, select the template you want to send, or use the search field to find a template.
4. Click **Continue**. This opens a DocuSign window.
5. In the DocuSign window, follow the sending process below:

6. Add one or more recipients, who may be signers or people who receive a copy of the completed agreement.
7. Add the email subject and an optional message to the envelope
8. Add signing fields to the document, for example signature, initials, date or the signer's name
9. Review your envelope and click **SEND**
10. For a detailed explanation of the sending process, see [How do I send a DocuSign document?](#)

Check the Status of Sent Envelopes

Follow these steps to check the status of sent envelopes:

1. Go to the SharePoint Online document library and click **Check Status**. This displays a dashboard showing the status for each sent envelope from the document library
 - The possible status values are: Draft, Waiting for Others, Completed, Declined, and Canceled
 - These statuses are automatically updated
2. For envelopes with a status of *Completed*, a PDF file with the signed agreement is stored in the specified folder, which is commonly the DocuSign folder in the originating library. You can also choose a different location for completed envelopes
3. To view the envelope, navigate to the completed folder in SharePoint to view the completed agreement and click **View** to open the PDF file.

New App Manifest on SPO - PREVIEW				
 0	 1	 0	 1	
Action Required	Waiting for Others	Cancelled	Completed	
DocuSign Documents				
<input type="text" value="Search"/> <input type="button" value="SEARCH"/>				
File Name(s)	Sent by	Sent to	Date created	Status
Partnership Agreement.docx	Lani Crunch	Steve Anderson	02/05/2015 1:45 PM	 Waiting for others checked 02/05/2015 1:46 PM <input type="button" value="OPEN"/>
Santos23 Sales Order Form-Bra...	Lani Crunch	Lani Crunch	02/05/2015 1:46 PM	 Completed checked 02/05/2015 1:47 PM <input type="button" value="VIEW"/>

Sign Documents with DocuSign eSignature for SharePoint Online

With DocuSign eSignature for SharePoint Online, you can sign agreements directly from the ribbon bar in a SharePoint Online document library.

1. Go to a SharePoint Online document library and select one or more documents.

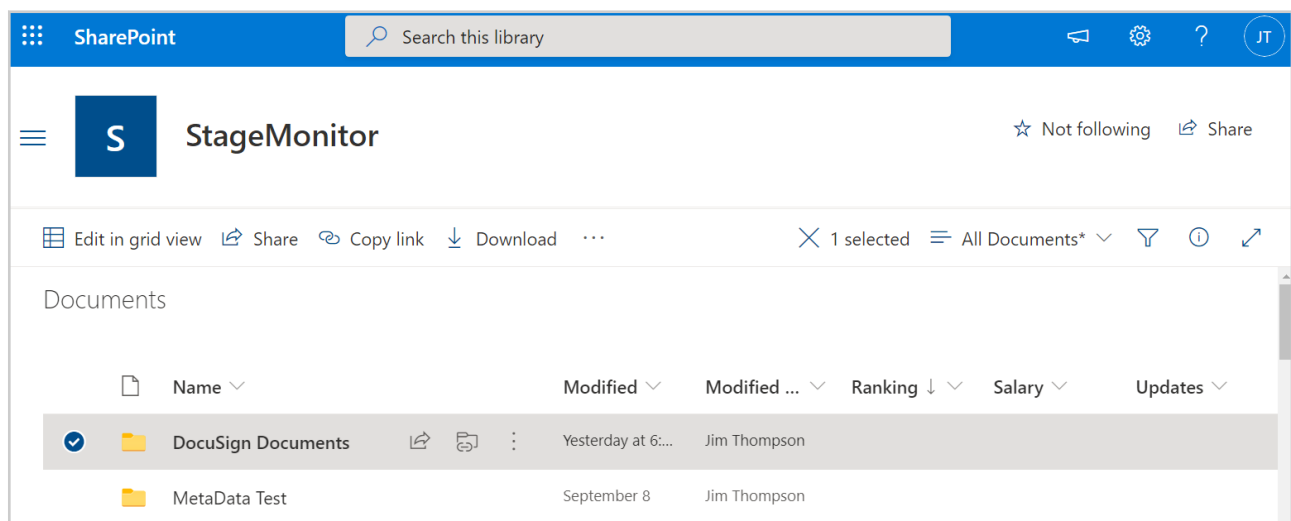
2. On the document ribbon, in the DocuSign tab, click **Sign**.

Alternatively, you can click the document menu, click ..., and then click **Sign with DocuSign**.

3. This opens a DocuSign window, where you can review and sign the agreement.

- To add a signature, initial, or other information to the document, first click CONTINUE to review and sign the document.
- Click the field you want to place and then drag and drop the field at the appropriate location in the document.
- **Sign the document** and click

4. When you are done, the signed agreement is saved as a PDF file in the DocuSign Documents folder in the document library, or in the location you have previously chosen.



Account Settings - DocuSign eSignature for SharePoint

This section provides information about the account settings for DocuSign for SharePoint online. Only SharePoint administrators can view or change these settings.

To access the account settings, under the **DocuSign for SharePoint Online** application, navigate to the DocuSign Account Settings screen. There are two new settings in this release:

- **Copy Document Metadata** - copies metadata from a source document to the completed agreement when it is saved back to SharePoint
- **Document Naming Convention** - adds a new Custom option for customizing file names

StageMonitor

About DocuSign for SharePoint

With DocuSign for SharePoint Online, you can sign or get signatures on documents stored in a SharePoint Online Document Library

If you need assistance go to the [Quick Start Guide](#) or, visit [Help and Support](#)

DocuSign Account Settings

Environment	Demo	EDIT
Certificate of Completion settings	Include a certificate of completion with all signed documents	EDIT
Completed DocuSign documents	Stored in a dedicated folder in the originating document library	EDIT
Signed PDF Settings	Download as combined PDF	EDIT
Signed document naming convention	Custom	EDIT
Signed document version settings	New document	EDIT
Guided Sending Settings	Prepare Document	EDIT
Copy Document Metadata	Enabled	EDIT
SharePoint URL	https://docusigntest001net.sharepoint.com/sites/StageMonitor/	
Version	3.5.0.22634	

CONTINUE TO SHAREPOINT

The account setting options are:

- **Environment:** This sets which DocuSign environment your DocuSign for SharePoint Online installation is using. This can allow testing or demonstrations of the installation before going live on the DocuSign production environment.
- **Certificate of Completion settings:** This sets whether a Certificate of Completion is attached to signed documents. A Certificate of Completion 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.
- **Completed DocuSign documents:** This sets where completed documents are stored.
 - 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 for the signed document to be stored as a new 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.
- **Signed PDF settings:** This sets how signed documents are saved.

To change the setting click **EDIT**. This opens the Signed PDF Settings dialog box with two options:

- **Download as combined PDF** - All the sent and signed documents are saved as a single combined PDF file. This is the default setting.
- **Download as separate PDFs** - Each sent and signed document file is saved as a separate PDF file. The settings for the signed document naming convention and completed DocuSign documents storage location are applied to each file.
- **Signed document naming convention:** This sets the naming convention for completed documents. These are the options:
 1. The document name followed by the date and time the document was signed (default)
 2. The document name followed by recipient name(s) and the date and time the document was signed
 3. The document name followed by sender's name and the date and time the document was signed
 4. A custom set of token strings, using the document name and any of the available tokens listed below (NEW)

Signed Document Naming Convention ×



The following characters are not allowed: # * : < > ? / |

- ☐ Append document name + "_signed_" + timestamp
- ☐ Append document name + "_signed_" + recipient name(s) + timestamp
- ☐ Append document name + "_signed_" + sender name + timestamp
- ☒ Custom naming convention

%f_signed_%date

Available Tokens:

%f	Document name
%e	Envelope ID
%rn	Recipient name (first & last)
%rid	Recipient ID
%re %re1	First recipient e-mail
%d %d1	First document name
%t	Template name (only available when a template is used)
%es	E-mail subject
%date	Date envelope completed/signed
%ecf[...]	Envelope custom fields (ex: %ecf[ListId])




Looking for more naming options? Send a note to sharepointfeedback@docusign.com.

Note that the first three options include the **document name** plus the text **_signed_** followed by other tokens. For example, if the document is *agreement.pdf*, the first three options will return results similar to:

- *agreement.pdf_signed_2020.11.09.13.30.03*
- *agreement.pdf_signed_John Doe2020.11.09.13.30.03*
- *agreement.pdf_signed_Bob Brown2020.11.09.13.30.03*

- **Signed Document version settings:** This sets whether a signed document is saved as a new file or as a new version of the original document.
- **Guided Sending Settings:** This sets what page users see when sending a document:

- The first option is Prepare, where senders see the DocuSign prepare page where they can add documents and recipients to the envelope being sent (step 12 of the [Sending Documents procedure](#)). This is the default.
- The second option is Preview, where senders see the Add Fields page where they drag and drop DocuSign fields for each recipient.
- The third option is Enable recipient and message entry, where senders are asked to enter recipients, an email subject, and email message (steps 4 - 10 of the Sending Documents procedure) before the sender is taken to the DocuSign web application prepare page (step 12 of the Sending Documents procedure).
- **Copy Document Metadata (NEW):** By default, document metadata is removed prior to sending it to DocuSign. When this option is enabled, the metadata from the source document is copied to the signed version when it is written back to SharePoint. **Note:** the *current* metadata state of the source document is copied to the signed version, including any modifications or deletions that may have occurred since the document was sent.

Documents		metadata			
	Name ▾	Modified ▾	Modified ... ▾	Ranking ▾	Salary ▾
	Employee1.docx	August 26	John Johnson	100	\$750,000.0
	Metadata Update.docx	September 3	John Johnson	100	\$50,000.0
	Republic.docx	September 3	John Johnson	100	\$50,000.0

FAQ

What happens when I create a DocuSign account?

- A free DocuSign account is created. If you run out of sends, contact your system administrator to upgrade your account to a paid DocuSign account.

If I am an admin of Office 365 and would like to upgrade to a paid DocuSign account, what do I do?

- Contact our sales team at sales@docusign.com or 1.877.720.2040.

What is the difference between "Send" 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.

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

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

What permissions must I have to be able to use DocuSign for SharePoint Online?

- You must have Contribute permission for the Site where DocuSign is installed.

How do I change the DocuSign environment to which my DocuSign for SharePoint Online application is pointing?

- Under the **DocuSign for SharePoint Online** application, navigate to the Admin Settings screen. Next to **Environment**, click **Edit**. This brings up a dialog box where you can select the desired API environment. This action also removes the system-wide login. Click **Save** to save the changes.

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

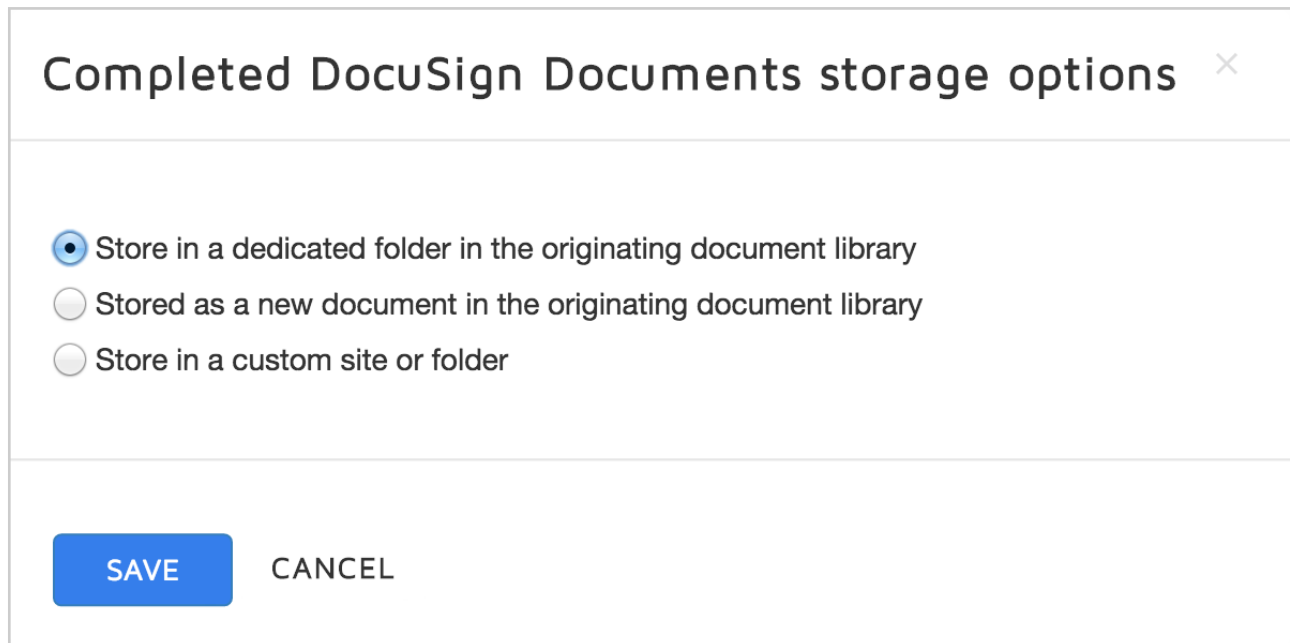
- Under the **DocuSign for SharePoint Online** application, navigate to the Admin Settings screen, then to Completed DocuSign Documents, and click **Edit**. This opens the Completed DocuSign Document storage options dialog with three options:

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 for the signed document to be stored 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.

A screenshot of a dialog box titled "Completed DocuSign Documents storage options" with a close button (X) in the top right corner. The dialog contains three radio button options: "Store in a dedicated folder in the originating document library" (which is selected), "Stored as a new document in the originating document library", and "Store in a custom site or folder". At the bottom of the dialog are two buttons: "SAVE" (in blue) and "CANCEL".

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

How do I change the naming convention for signed documents?

- Under the **DocuSign for SharePoint Online** application, navigate to the Admin Settings screen, then to Signed document naming convention, and click **Edit**. This opens the dialog box where you can select how signed documents are named. This action is only available for SharePoint administrators.

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.

How do I uninstall DocuSign for SharePoint Online?

- Under **Site Contents**, click the ... icon next to DocuSign for SharePoint Online. Click the **REMOVE** link, and then click **OK** when prompted for confirmation. All DocuSign statuses will be deleted from DocuSign for SharePoint Online.

I love this! How do I write a review for DocuSign for SharePoint Online?

- Go to the SharePoint Store and find the DocuSign for SharePoint Online listing. Next to details, click **Reviews**. Click **See more and rate**, and then **Write your own review**. Thanks for your feedback!

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 and updates were included as part of DocuSign for SharePoint Online v3.3:

- Updated the options in the Guided Sending Settings. Added a third option and renamed another:
 - Prepare document (default)
 - Preview document (in previous version this was Disable recipient and message entry)
 - Enable recipient and message entry
- Added the ability to disable Office 365 login.