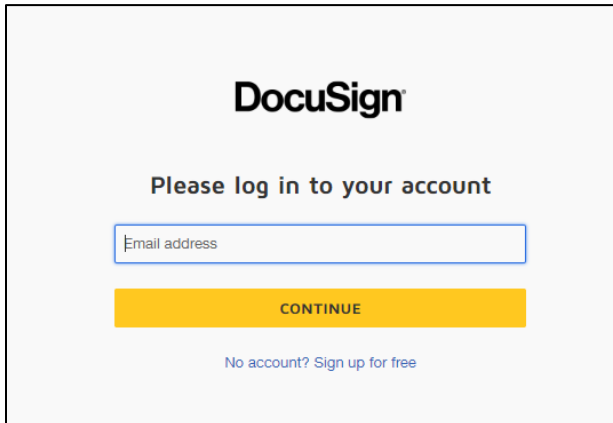


DocuSign – First Steps

DocuSign is a platform that provides electronic signature technology and digital transaction management services for facilitating electronic exchanges of contracts and signed documents.

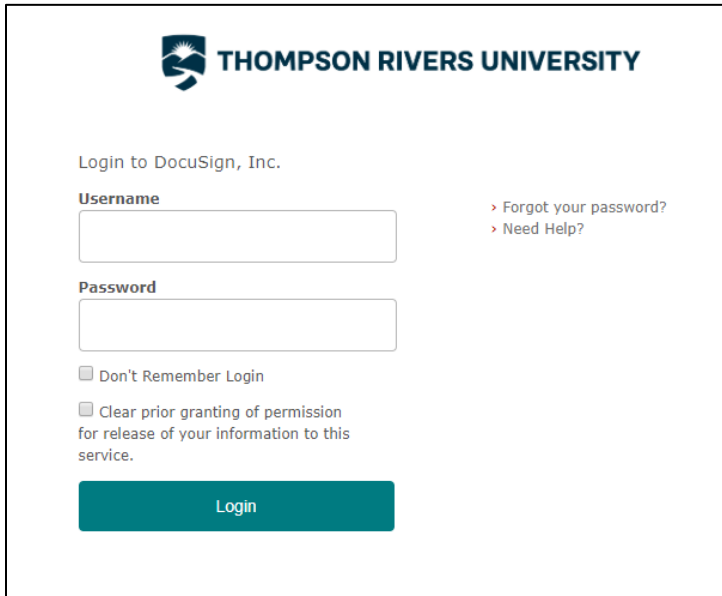
Before creating your first envelope, use the following checklist to ensure you have all the resources that you will need.

1. Sign in to DocuSign <https://account.docusign.com/#/username>
 - a. using your TRU email address and click continue



The image shows the DocuSign login interface. At the top, the DocuSign logo is displayed. Below it, the text "Please log in to your account" is centered. There is a text input field labeled "Email address". Below the input field is a yellow button labeled "CONTINUE". At the bottom, there is a link that says "No account? Sign up for free".

- b. Using your TRU logon and password



The image shows the DocuSign login page for Thompson Rivers University. At the top left is the TRU logo and the text "THOMPSON RIVERS UNIVERSITY". Below this, it says "Login to DocuSign, Inc.". There are two input fields: "Username" and "Password". To the right of the input fields are two links: "> Forgot your password?" and "> Need Help?". Below the input fields are two checkboxes: "Don't Remember Login" and "Clear prior granting of permission for release of your information to this service.". At the bottom is a teal button labeled "Login".

NOTE: Never give anyone your login information to sign on your behalf. It is a breach of TRU's Responsible Use of Information Technology Facilities and Services Policy (see section I(2)) to share login credentials.

[\[https://www.tru.ca/shared/assets/Responsible_Use_of_IT_Facilities_and_Services5626.pdf\]](https://www.tru.ca/shared/assets/Responsible_Use_of_IT_Facilities_and_Services5626.pdf)

2. Get to know DocuSign (Page 14): <https://docs.docusign.com/supportdocs/pdf/ndse-user-guide.pdf>
3. Ensure that you have the correct permission settings (submit an [ASAR](#) to change permission setting)
 - a. Viewer
 - b. Sender – are able to **see and use** templates
 - c. Super User – are able to **create** templates
 - d. Admin
4. For further learning set up an account with DocuSign University:
<https://dsu.docebosaas.com/customers/learn>
5. DocuSign support: <https://support.docusign.com/en/home>
6. Get familiar with the TRU DocuSign sharepoint page, it contains release notes, documentation, announcements: <https://one.tru.ca/sites/DocuSign/SitePages/Home.aspx>
 - a. In particular, refer to TRU's [Basic User Guide](#)