

QUICK GUIDE

DOCUSIGN



SEND A DOCUMENT FOR E-SIGNATURE

Documents must be in Word, Excel, or PDF format. They must be saved to the contract or VCO supporting documents page with the document source My computer.

- From the contract or VCO Supporting documents page, select one or more documents with the document source *My computer*, and then click the **Send** for signature icon.

Title	File/Link	Document type	Subtype	Approval status	DocuSign Status	Approved/Rej...	Approved/Rej...	Executed d...	Effective d...
Test	Z60001229_1901_VCO_DocuSign_2021...	Executed change o...		Not started	Not applicable			12/19/2021	
DocuSign - DocuSign	Project Site Map.docx	Signed document		Not applicable	Signed				

- Review the Names in the Assigned section of the wizard. If you want to add additional recipients, find their names in the Unassigned section, and then click the **Add** icon. All signees in the Assigned section have ad-hoc signee tags that can be placed on the document in DocuSign.

Send for signature - Startup Electrical Specialist - Gadiel Torres

DocuSign recipient: 260001229_1901_VCO_DocuSign_2021-Dec-08 17:30:36.pdf

Assigned recipients dictate who will receive an email to sign the document. Signing order can be assigned based on the order of needed signatures.

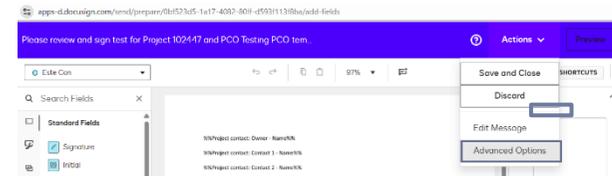
Assigned	Recipient	Name	Company	Title	Email	Signing or...
	DocuSign 1					1
	DocuSign 2					2

Unassigned	Recipient	Name	Company	Title	Email
	DocuSign 3				
	DocuSign 4				
	DocuSign 5				

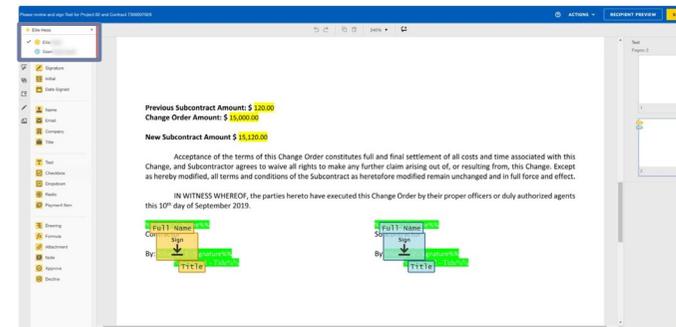
Buttons: Cancel, Next, Send

- Review the values in the Signing order column. The numbers in the column specify the order in which the recipients are sent the document for eSignature.
- If recipient information is missing from the Assigned section, update the information as needed.
- Click **NEXT**.

- If your DocuSign administrator has configured Advanced Options, you can optionally expand the Actions menu, and then select Advanced Options.



- Enter an email subject line and message to the recipients, and then click **Send**. A DocuSign window opens with the documents you chose.



- All names from the Assigned section of the wizard are shown in a drop-down list in the upper left pane. Select the name of the person you want to add, and then select Signature, Initial, or Date Signed, and then click the place in the document.
- Click **SEND**.
- The last step of the eSign status on the Supporting documents tab now shows the sender of the envelope with the annotation *Receives a copy*.

eSign status: Sent

Sent by: Marianne

eSign status	Company	Name	eSign status	Modified on
Signed			Sent	03/13/2025 09:52 am
Sent			Created	03/13/2025 09:51 am
Completed		Marianne (Receives a copy)	Pending	03/13/2025 09:51 am

Buttons: Void eSignature, Correct

◆ DOCUSIGN SETUP

1. From the New issue page or the issue log, click the **Add issue** icon. The Add new issue dialog box opens.
2. Enter the issue name and issue start date. You can also optionally enter a description of the issue.
3. Click **Add**.

	NEW ISSUE 3	ISSUE LOG	PCO
			
	Issue ID...	Issue name	Issue approval status
<input type="checkbox"/>	<u>3</u>	<u>Cracked weld</u>	Not applicable
<input type="checkbox"/>	<u>2</u>	<u>Concrete issue</u>	Not applicable
<input type="checkbox"/>	<u>1</u>	<u>Steel alignment is...</u>	Not applicable

Add new Issue

*Issue name

*Issue start date 
Hint: Date of the start of impact

Description

Format **B** *I* U     

NEED SOME MORE HELP?



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