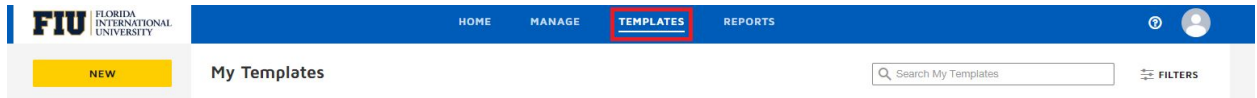
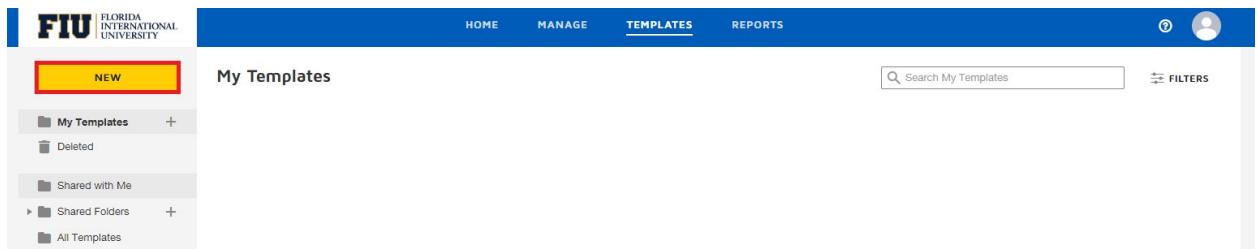


Creating DocuSign Templates

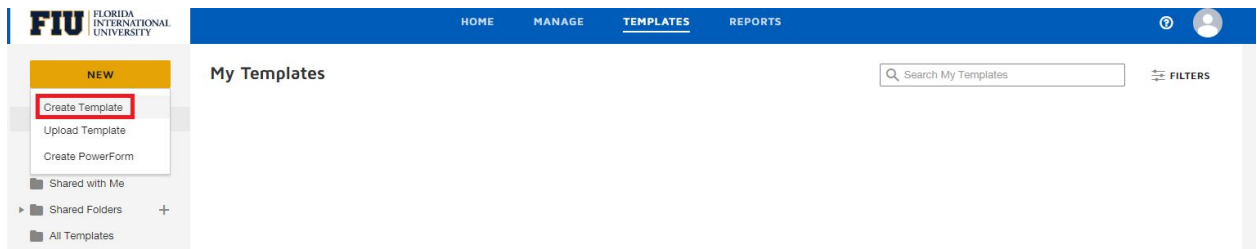
1. Ensure you are in the **Templates** tab



2. Click **New**



3. Click **Create Template**

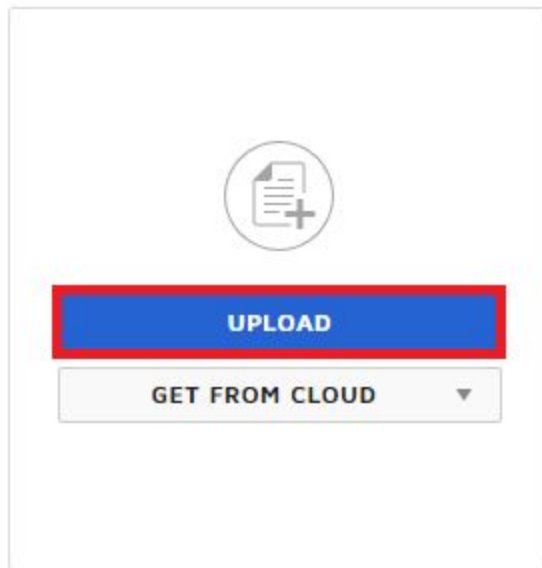


4. Give a name to the Template as well as a brief description.

A screenshot of the FIU DocuSign 'Create Template' form. The top navigation bar is blue with white text for 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. The 'TEMPLATES' tab is highlighted. Below the navigation bar, there is a yellow 'NEW' button. A dropdown menu is open from the 'NEW' button, showing options: 'Create Template', 'Upload Template', and 'Create PowerForm'. The 'Create Template' option is highlighted with a red rectangle. The left sidebar shows a list of folders: 'My Templates', 'Deleted', 'Shared with Me', 'Shared Folders', and 'All Templates'. The main content area is titled 'My Templates'. The form has a section titled 'Template Name and Description' with two text input fields. The first field contains the text 'Department of Roary - Roary's First Template'. The second field contains the text 'This is Roary's first template!'. There is a green 'G' icon in the bottom right corner of the second field.

5. Click **Upload** to upload a document. DocuSign accepts most Document, Image, Presentation, and Spreadsheet file formats. It is recommended that each file not exceed 5 MB in size and cannot exceed 25 MB in size.

Add Documents to the Envelope



6. Add the Recipient information to the appropriate fields. If you want to have more than one recipient, click **Add Recipient**. If you have more than one recipient and you want the document to be sent and then signed in a specific order check the **Set Signing Order** checkbox and set the appropriate order with the number fields to the left of each recipient. Templates, unlike standard envelopes, can have their recipients' fields set up in two ways.

- a. Method One: If the Template being created is being sent commonly to a specific address or set of addresses it is advised to fill in the **Name** and **Email** fields with that information. For organizational purposes you can fill in the **Role** field as well but it is not required for the document to function.

Add Documents to the Envelope

Envelop Example Document

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Employee Signature	Supervisor Signature
Print Name	Print Name
Date	Date

Demonstration Test Form.pdf
1 page



UPLOAD

GET FROM CLOUD ▼

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

☐ Set signing order

Mascot - Method One

Roary the Panther

test01@fiu.edu



 **NEEDS TO SIGN** ▼ **MORE** ▼

 **ADD RECIPIENT**

- b. Method Two: If the Template being created will be sent to varying addresses OR will be used as a Powerform (which would be an unknown address) it is advised to fill in the **Role** area only and leave the **Name** and **Email** fields blank.

Add Documents to the Envelope

DocuSign Example Document

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Employee Signature _____ Supervisor Signature _____
 Print Name _____ Print Name _____
 Date _____ Date _____

Demonstration Test Form.pdf
1 page



UPLOAD

GET FROM CLOUD ▼

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

☐ Set signing order

Mascot - Method Two

NEEDS TO SIGN ▼ MORE ▼

Name

Email

ADD RECIPIENT

7. Fill out the **Email Subject** and **Email Message** areas. This can be edited later on when using the template to send an envelope but it can save users of the template time if you prefill most of it out with placeholder text.

Message to All Recipients

☐ Custom email and language for each recipient

Email Subject *

Roary's First Template

Characters remaining: 78

Email Message

Dear Recipient,
 We hope this message finds you well. Join us in congratulating Roary on creating their first DocuSign template!
 Regards,
 Template User

Characters remaining: 9850

Advanced Options | [Edit](#)

- Recipients can change signing responsibility
- Incomplete envelopes expire 120 days after send date
- Recipients are warned 3 day(s) before request expires

8. Click **Next**

Message to All Recipients

☐ Custom email and language for each recipient

Email Subject *

Roary's First Template

Characters remaining: 78

Email Message

Dear Recipient,
We hope this message finds you well. Join us in congratulating Roary on creating their first DocuSign template!
Regards,
Template User

Characters remaining: 9850

Advanced Options | [Edit](#)

- Recipients can change signing responsibility
- Incomplete envelopes expire 120 days after send date
- Recipients are warned 3 day(s) before request expires

SAVE AND CLOSE

NEXT

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9. Apply your fields and settings just as you would when sending a normal envelope. The only difference is that you may be assigning the fields based on the Role of a signer rather than their specific name or email.

Department of Roary - Roary's First Template

Mascot - Method Two

100%

Signature

Initial

Stamp

Date Signed

Name

Email

Company

Title

Text

Checkbox

Dropdown

Radio

Formula

Attachment

Note

Approve

Decline

DocuSign Example Document

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Employee Signature

Supervisor Signature

Print Name

Date

Signature

☒ Required Field

Formatting

Data Label

Tooltip

Location

Sender Permissions

Save As Custom Field

Delete

BACK

SAVE AND CLOSE

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10. When you have set up your document appropriately, click either instance of **Save And Close**. It is important to note that when users will use your template they will be able to reposition and edit these fields as needed before they send it.

Department of Roary - Roary's First Template

Mascot - Method Two

100%

Search Fields

Standard Fields

- Signature
- Initial
- Stamp
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Checkbox
- Dropdown
- Radio
- Formula
- Attachment
- Note
- Approve
- Decline

DocuSign Example Document

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Employee Signature

Supervisor Signature

Print Name

Date

Print Name

Date

Signature

☒ Required Field

Formatting

Data Label

Tooltip

Location

Sender Permissions

Save As Custom Field

Delete

BACK

SAVE AND CLOSE

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SHORTCUTS | FEEDBACK