

eDottedLine™
A Quick Start Guide

Version 1.2

1 Introduction

eDottedLine is an exciting new product that integrates DocuSign's world-class, on-demand, e-signature technology with Microsoft Outlook. It enhances your DocuSign experience by allowing you to leverage the features and conveniences of Outlook as you transact e-signatures. Outlook is, after all, the most natural context for performing e-signature transactions. Features include a simple-to-use wizard interface, three modes of DocuSign sophistication, including full support for your online templates, and synchronization of your Outlook Contacts and Tasks with just a single button click.

This guide assumes you are already familiar with DocuSign's technology and its processing model. You should know what an envelope is and how online templates are used, for example. If these concepts are unfamiliar to you, then please consult DocuSign's online product tutorials first, before reading further.

2 Product Registration & Downloading

You must register yourself as an eDottedLine user prior to installing the product. This is a strict prerequisite. Registration is easy: simply go to <http://www.atware.com/esignup.php>, enter your name and email address into the respective form fields and then enter the displayed reCaptcha™ words. Please note: Your email address **MUST** match the SMTP address of your Outlook mailbox. If it does not, the product will not work after it is installed on your system, as explained on the webpage. Sample registration input is shown in Figure 1.

Name:

Email:

Verify




Figure 1. eDottedLine Product Registration

After pressing the Submit button, an email message is sent to the SMTP address you provided. This message contains the URL where you may download your copy of eDottedLine.

3 Installation

The link contained within your product registration email message takes you to the eDottedLine product download page (<http://www.atware.com/getdocusign.html>). This page contains a single link to a self-extracting, product installation program. Depending upon your browser, you will be asked to either save or open the file named DocuSign for Outlook.msi. The prompt displayed by Firefox is shown in Figure 2.

Before proceeding further, it is best to exit Outlook if it is currently running. If you forget to do this, don't worry; you will be prompted to do so at the conclusion of the installation process.



Figure 2. Accessing the Installation Program

When you run this file, you might see a security warning as the one shown in Figure 3. This again depends upon the identity and version of your browser. Simply acknowledge the warning by pressing the Run button. Bear in mind, additional warnings might be encountered when installing on Windows 7.

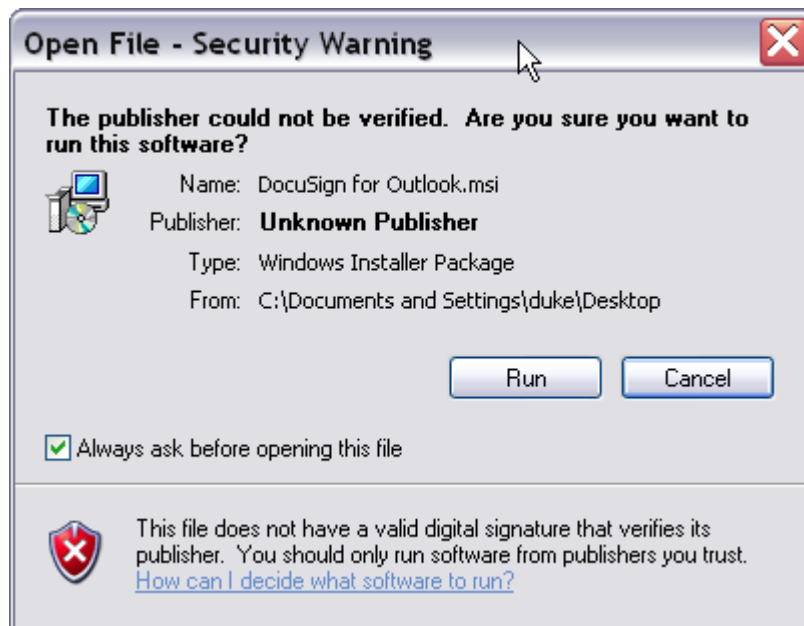


Figure 3. Digital Signature Security Warning

The DocuSign for Outlook.msi program, being a Microsoft Installer file, presents the standard interface used for most Windows applications. The first page of this user interface will look as shown in Figure 4.

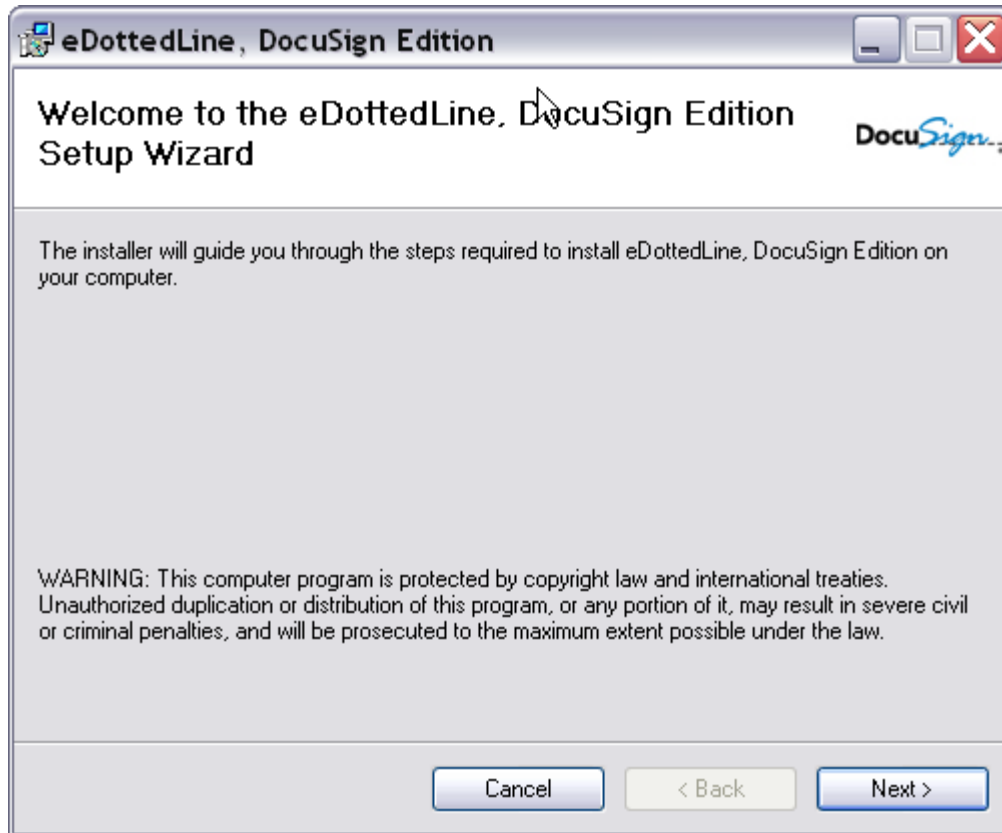


Figure 4. Running the Installer

Continually press the Next button to proceed through the installation. As you go, you will be required to do two things:

- 1) Confirm the product folder, which defaults to C:\Program Files\@Ware\eDottedLine, DocuSign Edition\. You can change this location if you desire.
- 2) Accept the terms of the License Agreement. Please review these terms carefully.

Upon completing this process, eDottedLine will be ready to use the next time you start Microsoft Outlook.

4 Verifying the Installation

After installing any Windows application, it is always prudent to verify that the product is functioning properly. The way to do this for eDottedLine is as follows:

1. Start Outlook.

2. Execute the Tool/Options menu command from Outlook's main window. You should see a DocuSign tab within this user-interface. Click on this tab to ensure that the interface displays properly, as shown in Figure 5. You may want to take this opportunity to enter and verify your DocuSign account credentials. Press the Test Credentials button after providing these values. Click the OK button.
3. Click on either your Outlook Contacts or Tasks folder. You should see a *DocuSync-It* toolbar button on Outlook's main window, as shown in Figure 6.

If any of the above steps do not yield the expected result, please contact customer support at eDottedLine@atware.com.

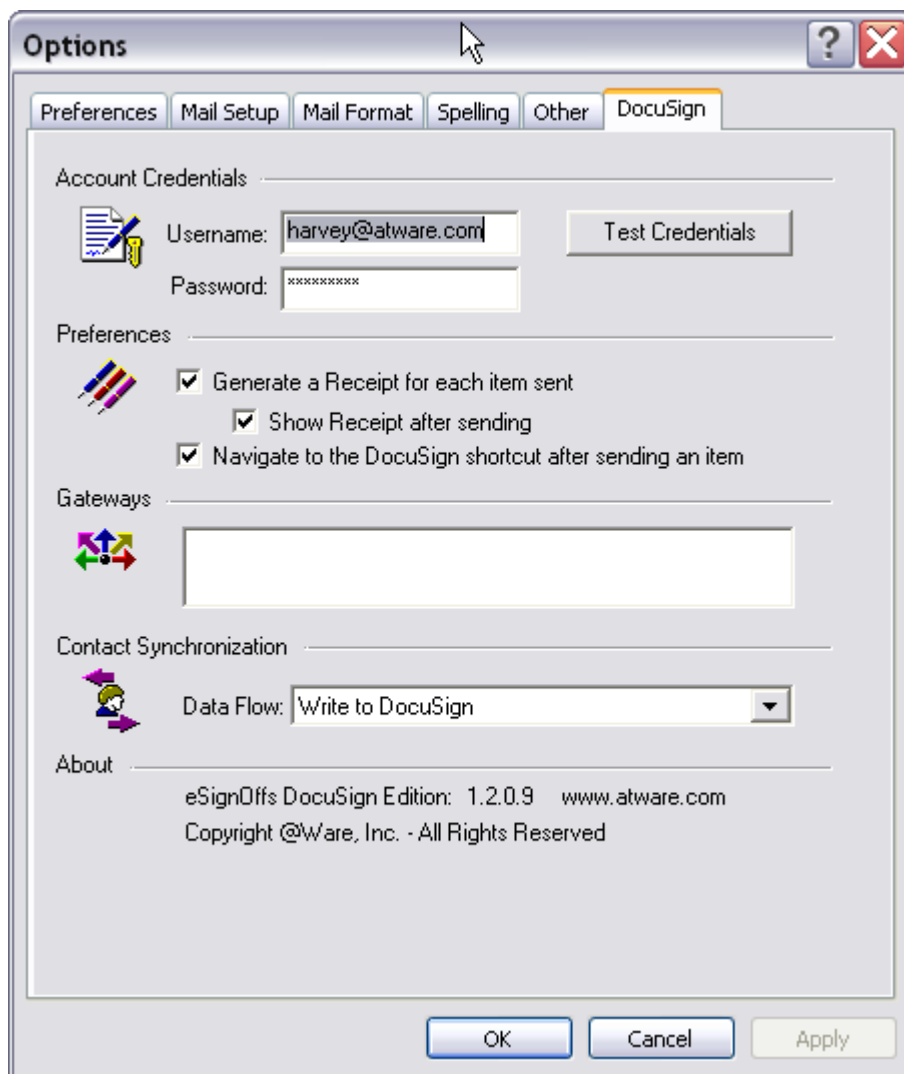


Figure 5. DocuSign Options

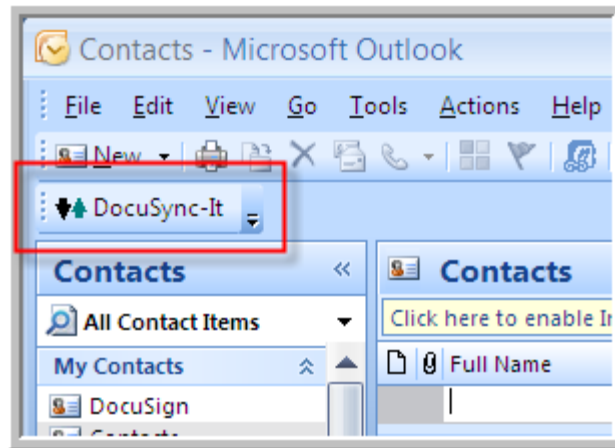


Figure 6. The DocuSync-It Button

5 Sending your first Envelope

Sending out your first e-signature envelope is an exciting proposition. The exact details of this process vary in three important ways, depending on the complexity of your legal agreements and the circumstances of the transaction.

- **Free-Form Signing:** This mode is ideal for very simple legal agreements. Sometimes referred to as tab-less signing, the envelope you send out does not carry any indications of where signatures are to be positioned within the document (i.e., no sticky tabs). Instead, recipients are responsible for positioning their own signatures as they sign.
- **Browser Tagging:** This mode is ideal for more complex agreements that are sent out on a relatively infrequent basis. As the eDottedLine wizard guides you through the transaction, your browser is launched to allow you to define and position all of the sticky tabs for your document. DocuSign's web console interface is used for this purpose.
- **Online Templates:** This mode is designed for the DocuSign power users. With templates, you can prepackage your legal agreements and store them online. These templates are made available through the eDottedLine wizard interface, which yields a powerful and an extremely efficient, point-and-click experience.

The presence or absence of an attachment determines which mode is available to you. If your email has at least one attachment, then free-form signing and browser tagging are made available. If, on the other hand, your email has no attachments, then the online template mode is assumed.

All three of the above transaction modes are described further in what follows.

5.1 Free-Form Signing

If you have a very simple agreement to send out, then you should consider using free-form signing. Free-form signing means your document is sent out without any indication of where signatures are to be placed; in other words, the document is sent without sticky-tabs. Each recipient is responsible for positioning his or her own signature as they sign. The intent is to simplify and expedite the creation of e-signature envelopes. Obviously this type of agreement should be extremely simple, to the extent there is very little chance a recipient will incorrectly apply a signature.

Take the following steps to invoke this mode.

1. Start Outlook.
2. Compose a new email message.
3. Address this email to those individuals who are to participate in the e-signature process. If you will be signing, then be sure to include yourself as a recipient.
4. Add an appropriate subject and body to your email.
5. Insert your legal agreement as an attached file.
6. Find and press the *DocuSign-It* button within the email item's toolbar. If you are running Outlook 2007 or later, this button appears on the *Add-Ins* tab of the new mail item.

The above sequence will lead you to the eDottedLine wizard interface, as shown in Figure 7.

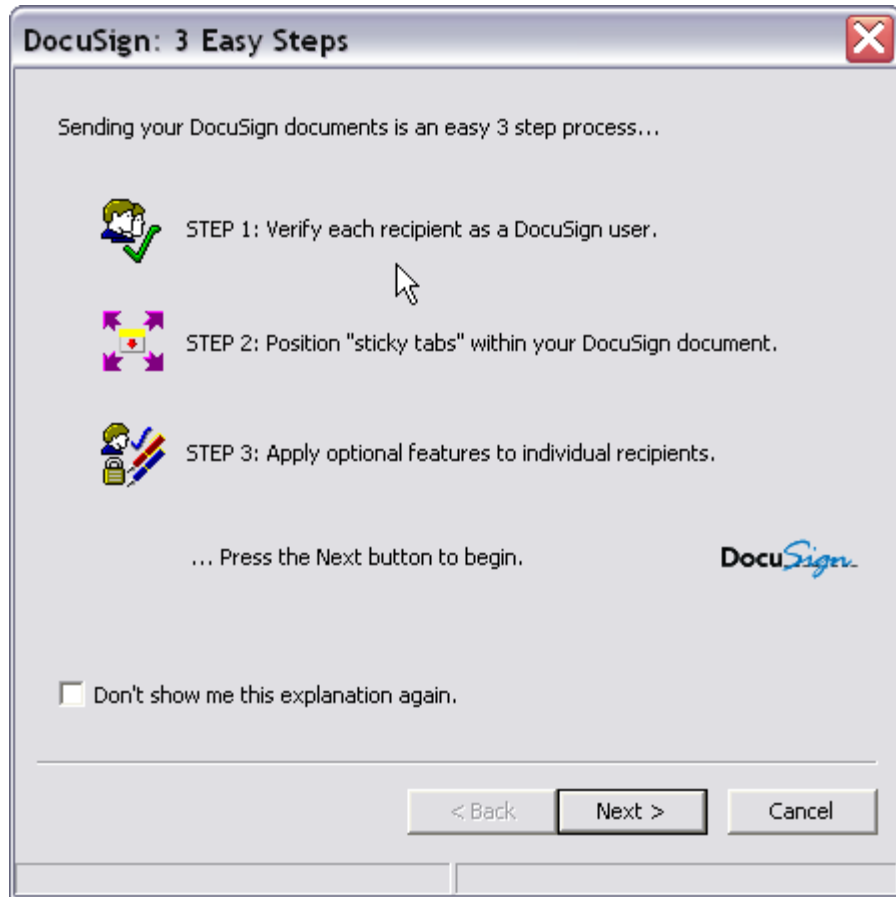


Figure 7. The eDottedLine Wizard

This first page of the wizard is purely explanatory, as it describes the DocuSign transaction as a 3 step process.¹ Recipient identities are resolved in step 1. Signatures are positioned in step 2. Various options are applied in step 3. The existence of a file attachment within your email message determines this sequence. As you shall see in section 5.3, if your email message does not have an attachment, the online template sequence is presented, which is slightly different.

Upon pressing *Next*, the *Verify DocuSign Recipients* page is displayed. This interface allows you to resolve the identities of your email recipients, as shown in Figure 8.

¹ Notice the *Don't show me this explanation again* option. Checking this box suppresses this page for subsequent transactions, which increases the efficiency of the workflow.

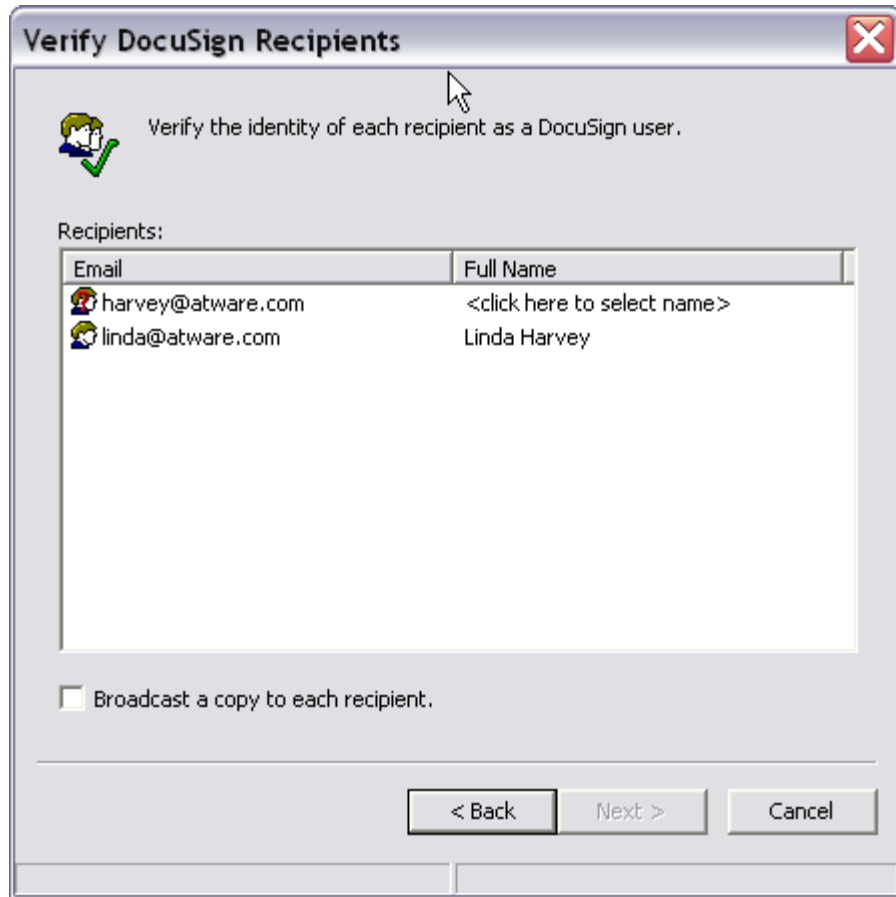


Figure 8. Resolving Recipients

Resolving recipient identities is an important concept given the legal implications of executing an agreement. In the above example, the recipient Linda Harvey requires no resolution since she has a name that either (a) matches an existing DocuSign user or (b) that is considered a new DocuSign user. The other recipient does require resolution, however. In this particular case, the address harvey@atware.com is a registered DocuSign user; however, this email address is associated with two distinct names. As such, the user must select which name applies by clicking where indicated. This highlights the fact that DocuSign accommodates users who share email addresses.²

After pressing *Next*, the *Signature Locations* page is displayed as shown in Figure 9. This is where you make our decision to use either free-form signing or browser tagging. An explanation is provided within the interface, so the appropriate choice for your particular needs should be clear.

² which is not that uncommon.

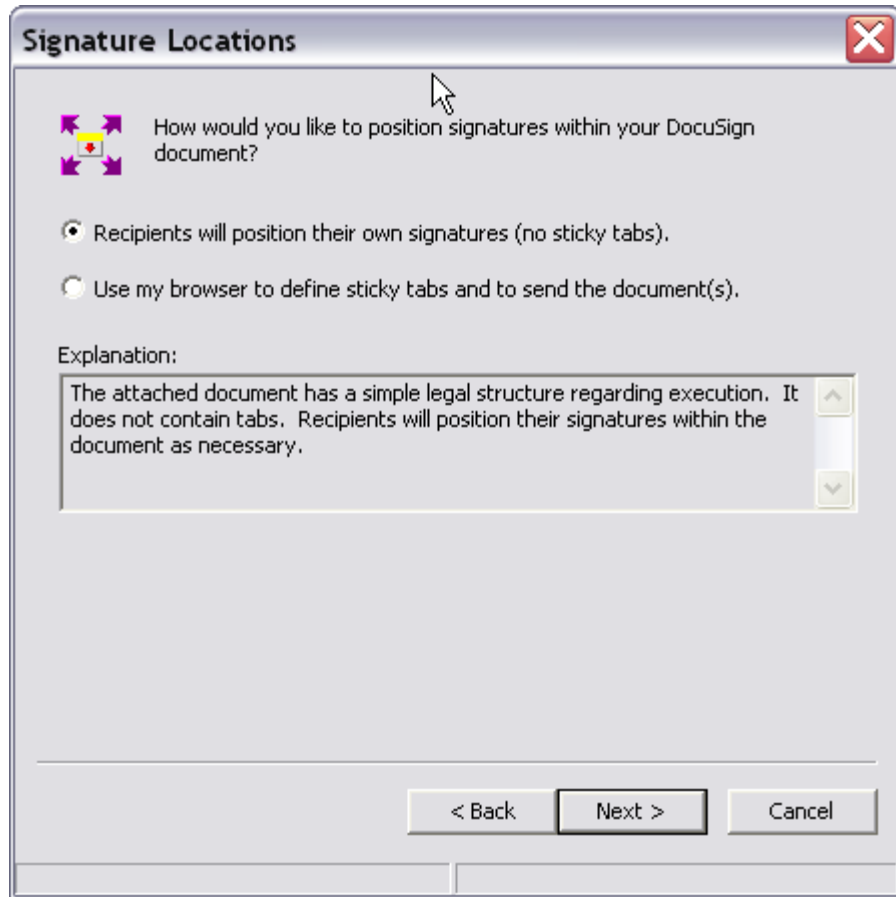


Figure 9. Signature Locations

Upon pressing *Next*, the third and final *Options* page is displayed, as shown in Figure 10. Through this interface, you may assign specific options to individual recipients – like access codes - and you may assign specific options to the envelope as a whole – like an expiration date. All of these options reflect those available through the DocuSign web console. Please refer to DocuSign’s online tutorials for further details.

Upon pressing *Finish*, your envelope is injected up to DocuSign, which notifies the recipients as you would expect. The DocuSign service takes over at this point to coordinate the e-signature transaction. An Outlook Task receipt is generated to allow you to subsequently monitor this transaction; please refer to sections 6 and 7 for further details.

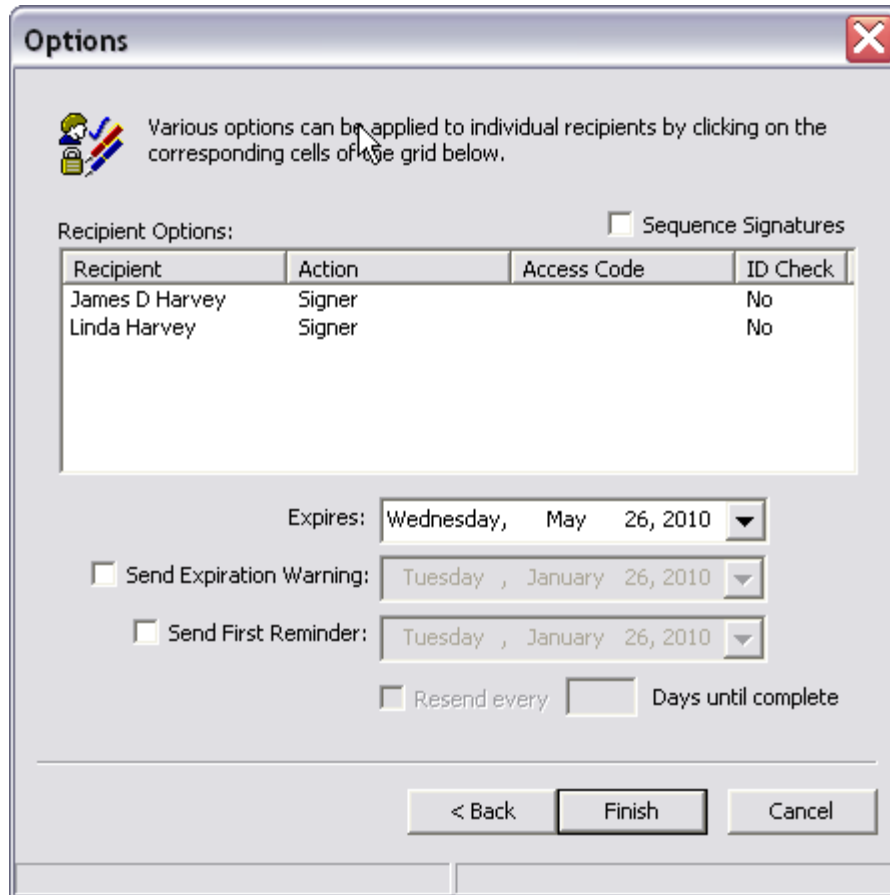


Figure 10. Options

5.2 Browser Tagging

If your agreement is more complex than the free-form signing case, then you should consider browser tagging. In this mode, your web browser is launched at the appropriate moment to allow you to place stick tabs within your document. If you have used DocuSign's web console, then you already know how easy this is. In fact, this is the exact same interface used in this case.

To use browser tagging, perform the exact same steps described at the beginning of section 5.1. When you get to the *Signature Locations* step of the wizard (see Figure 9) choose the second option (*Use my browser...*). Everything will proceed as it did in the free-form signing case, right up until you press the *Finish* button. Then, you'll see dialog windows similar to those shown in Figure 11.

The topmost dialog asks if you would like to launch your browser to define your stick tabs and to send your document. If you answer *No*, then your envelope will be saved under your *Drafts* folder of your DocuSign account. If you answer *Yes*, then your default browser will be launched to the corresponding envelope URL, allowing you to drag-and-drop sticky tabs within the document you just created.

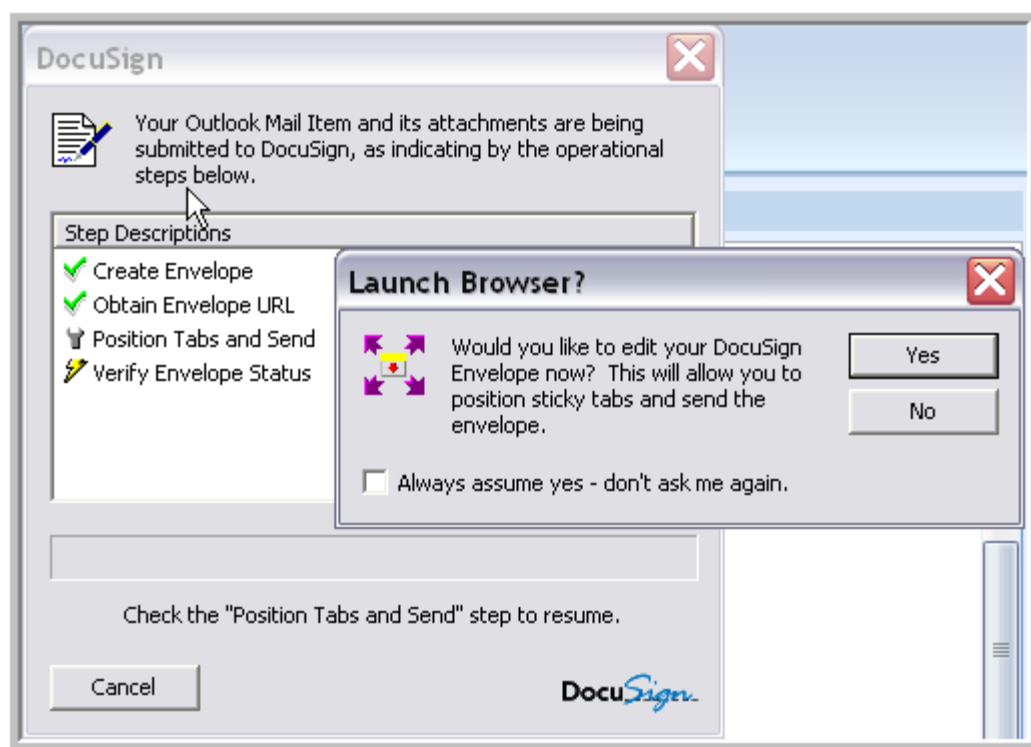


Figure 11. Browser Tagging

There are two important things to bear in mind:

1. After you define your stick tabs using your browser, please remember to Send the document as well!
2. After you have sent the document using your browser, return to the DocuSign dialog and check the *Position Tabs and Send* step, as instructed. This allows the process to complete and returns you to your Outlook session.

Naturally, a Task receipt is generated at the conclusion of this procedure.

5.3 Online Templates

One of the most wonderful and powerful features of the DocuSign technology is its online templates. Templates allow you to pre-package your envelopes to promote re-usability, efficiency and reliability. With regard to that latter, the increase in reliability stems from the fact that the potential for user errors is decreased. Once you formulate and use a template successfully, it can be re-used with the same degree of success. For example, you can rest assured that all your sticky tabs have been defined and positioned as you intend.

If your legal agreement is more complex and/or you find yourself sending out this same agreement frequently, then online templates are the answer. The procedural steps for using this mode are the same as the previous two cases, with one very important difference – you do not include your legal agreement as a file attachment. Instead, this file comes from your online template. Thus, the steps to invoke this process are:

1. Start Outlook.
2. Compose a new email message.
3. Address this email to those individuals who are to participate in the e-signature process. If you will be signing, then be sure to include yourself as a recipient.
4. Add an appropriate subject and body to your email.
5. Find and press the *DocuSign-It* button within the email item's toolbar. If you are running Outlook 2007 or later, this button appears on the *Add-Ins* tab of the new mail item.

Just as in the previous two modes, the eDottedLine wizard guides you through the transaction; however, the sequence is slightly different. First, you are asked to select an online template. This has occurred because your email does not have a file attachment; so it is assumed you'll be using a template as your legal agreement. As you select this template, its structure is shown, giving you some insight into the template's structure. This can come in handy if you have lots of online templates. You can see what roles are required and what sticky tabs are associated with each role (see Figure 12)

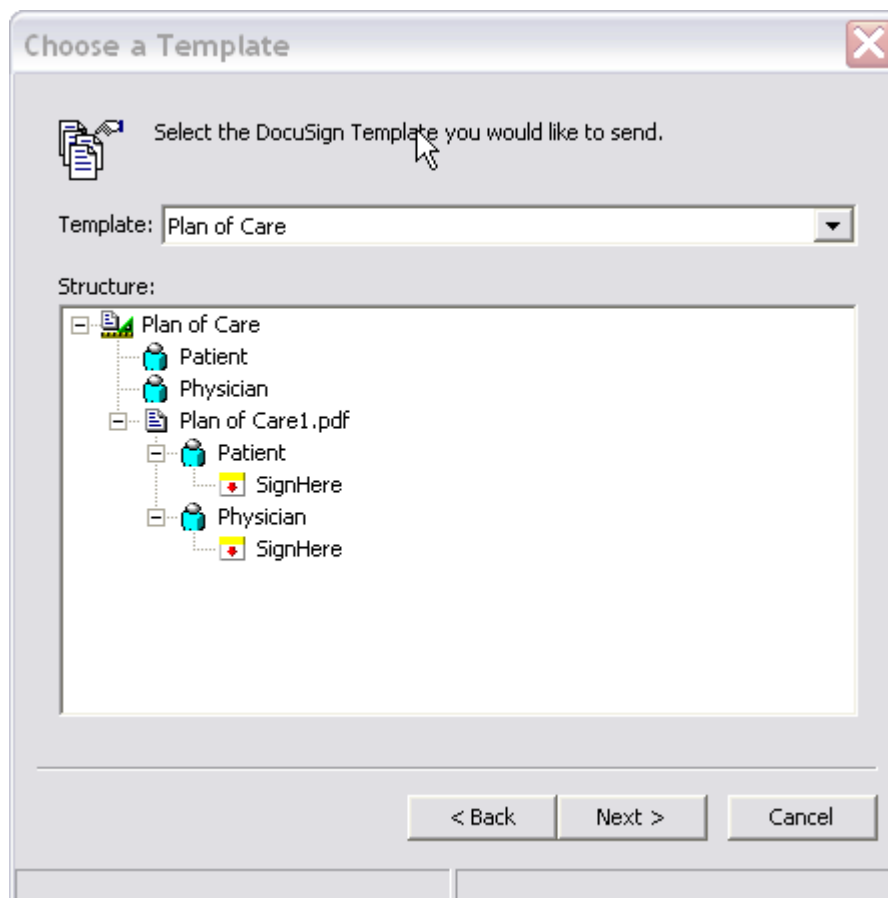


Figure 12. Selecting a Template

When you're asked to resolve your recipients in the second step, you will also have to assign a role to each one. The template uses these roles to bind the recipients to the

appropriate sticky tabs. In Figure 13, the Plan of Care template requires two roles (*Physician* and *Patient*) and a recipient is assigned to each one.

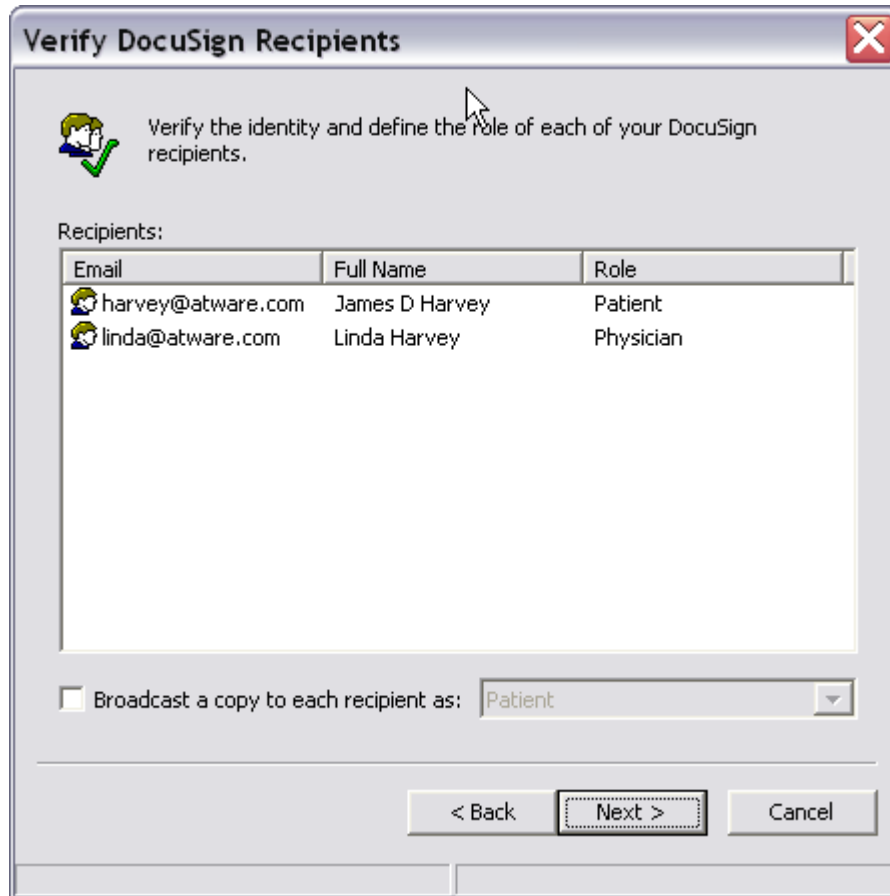


Figure 13. Assigning Roles

After assigning your recipients to their respective roles, the transaction is carried out exactly as before.

6 Receipts and Sent Items

As mentioned in each of the above scenarios, an Outlook Task receipt is created for each e-signature transaction you initiate. These tasks have several very important characteristics.

1. The due date of each task matches the expiration date of the corresponding DocuSign envelope. This allows you to benefit from Outlook notifications since warnings of impending envelope expirations will be generated.
2. By synchronizing a receipt, its Completion Status is updated to reflect the signing status of the corresponding DocuSign envelope. For example, if all the individuals required to sign a given envelope have done so, then the task is marked complete. This gives you an embedded dashboard view of your outstanding e-signature transactions.

3. When a synchronized receipt is deemed complete (i.e., all required signatures have been applied), a final copy of the signed document(s) is downloaded and attached to the task. This gives you an automatic archive of your esignature transactions. Please refer to section 7 for more details about synchronization.

Along with your task receipts, for each e-signature envelope you send, a *Sent Item* is created to preserve the details of the transaction. This includes an attached copy of the original email message and a link to take you directly to the corresponding envelope within DocuSign.

Your task receipts and your sent items are made available through the Outlook Shortcuts Bar, as shown in Figure 14.

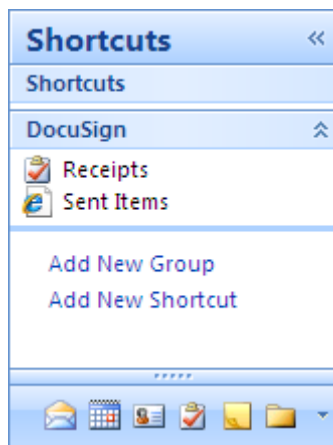


Figure 14. DocuSign Shortcuts

The *Receipts* shortcut takes you to your default Outlook Tasks folder and the *Sent Items* shortcut takes you to a folder within your file system that contains a copy of each e-signature email.

7 Synchronization

eDottedLine provides a synchronization feature that is enormously convenient – it is easy to use and its benefits are obvious. To talk about this feature in the singular is a bit misleading, for it has two separate facets. You can synchronize your Outlook Contacts with your DocuSign Address Book and you can synchronize your Outlook Task receipts with their corresponding envelopes. Each facet serves a distinctly different purpose. So it is really two features in one.

There are points of commonality, however. For example, both forms employ the same user interface and both operate over Outlook items in the same manner. To the latter point, you can focus your synchronization operations on specific Contacts/Tasks, or you can synchronize all of these items at once. It is your choice to make.

7.1 Synchronizing Contacts

To synchronize your Outlook Contacts with your DocuSign Address Book, do the following:

1. Start Outlook
2. Navigate to your Contacts folder
3. Select the individual Contacts you wish to synchronize, or select none to synchronize them all.
4. Press the DocuSync-It button.

A progress dialog will appear and your Contacts will be synchronized. There is only one noteworthy consideration. It relates to how much control you want to exercise over the reading and writing of records. Execute the *Tools/Options* menu command in Outlook and click on the *DocuSign* tab. Notice the *Data Flow* setting under the *Synchronize Contacts* section, shown in Figure 15. You can adjust this value to restrict the data flow direction, if you so desire.

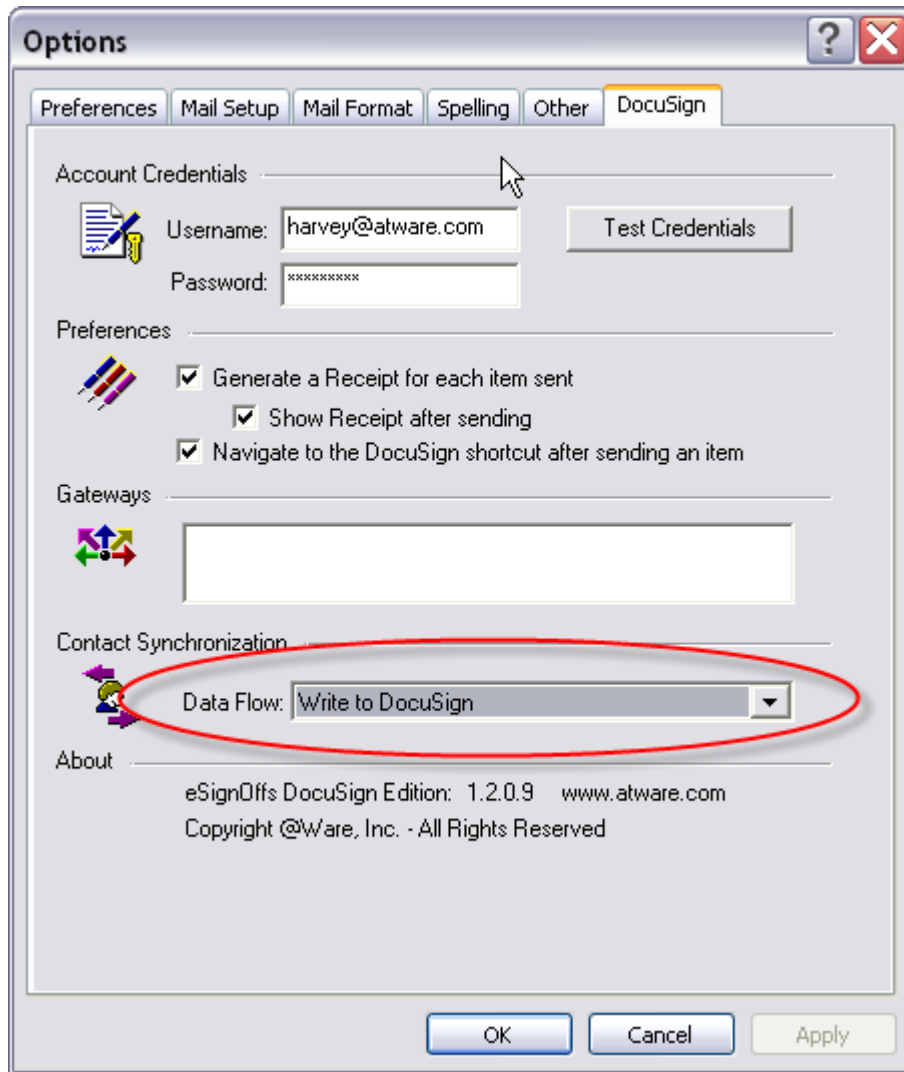


Figure 15. Contact Synchronization Data Flow

7.2 Synchronizing Task Receipts

Task receipt synchronization works the exact same way – either select only those tasks you wish to synchronize, or select no particular task to synchronize them all. The benefit of synchronizing your tasks receipts is three fold:

- Synchronizing updates the respective *Percent Complete* and the *Completion Status* fields. It does this by interrogating the signing status of each respective envelope, which reports those individuals who have signed and those who have not. In this way, your task receipts give you a dashboard view of our envelope transactions.
- When a synchronized task is deemed complete, a final copy of the signed document(s) is downloaded and attached to the receipt. Each receipt is a complete record of an signature transaction, therefore.

- Synchronizing your task receipts pre-validates future Outlook Task notifications. If a task receipt due date is about to expire, then so too is the corresponding envelope. The Outlook notification alerts you to this fact, which affords you the opportunity to address the matter before the expiration!

8 Advanced Features

There are several advanced features not discussed in this Quick Start Guide. Such features include:

- e-signature broadcasting,
- sender-filled custom fields,
- gateways
- and more.

This omission does not mean these features are less important than those presented in his guide. To the contrary, these advanced features are quite innovative and extremely powerful. They are more advanced, however, and it is the purpose of this guide to familiarize you with the more fundamental aspects of the product – to get you started quickly. For more information about these advanced features, please refer to the product videos described in section 9.

9 Product Videos

All of the features described in this document are presented through product videos up on @Ware's website. You'll find these at <http://www.atware.com/docudrama.html>. Through these videos, you get a very clear and comprehensive view of how to use eDottedLine, including its advanced features. It is highly recommended that you take advantage of these. Each is fairly short, around three to four minutes long.