

QUICKGUIDE

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.

Actions	HEADER	LINE ITEMS	SCHEDULE OF VALUES	VENDOR CHARGE UNDER LSC	BACK CHARGES	PAYMENT FORMS	PAYMENT PROGRESS	SUPPORTING DOCUMENTS	WORKFLOW ASSIGNMENTS
								Start approval	Approve
	Title	FileLink	Document type	Subtype	Approval status	DocuSign Status	Approved/Rej.	Approved/Rej.	Executed d.
	Test	7400001229_1901_VCO DocuSign_2021	Executed change		Not started	Not applicable			12/16/2021
	DocuSign - DocuSign	Project Site Misc.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 - Gadriel Torres

DocuSign recipient: 7400001229_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.

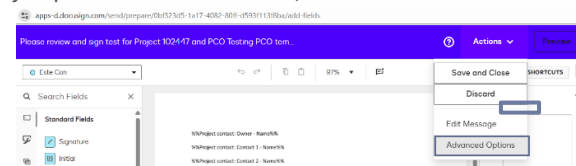
Recipient	Name	Company	Title	Email	Signing or...
DocuSign 1					
DocuSign 2					

Recipient	Name	Company	Title	Email
DocuSign 3				
DocuSign 4				
DocuSign 5				

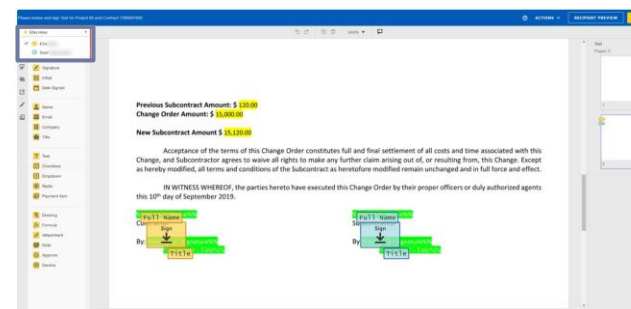
Cancel Next Send

- 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		FileLink: 20 2 All tags in one docu.	
eSign status	Company Name	eSign status	Modified on
Sent		Sent	03/13/2025 09:52 am
Signed			
Sent		Created	03/13/2025 09:51 am
Not applicable			
Completed	Marianne (Receives a copy)	Pending	03/13/2025 09:51 am
Sent			
Signed			

Void eSignature Connect

◆ 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








02/15/2023




Hint: Date of the start of impact

Description

Format

B *I* U       

 Add multiple Issues

Cancel

Add

NEED SOME MORE HELP?



Learn more in our Knowledge Library
learn.ineight.com



Take a course at InEight U
university.ineight.com