

# Using DocuSign with TrialWorks

Version 11 and higher

DocuSign® provides a service for electronic signatures removing the need to overnight, fax or email documents. Recipients can sign documents anywhere from any device. Documents are encrypted, and a complete audit trail is maintained. DocuSign requires a user to have an account. Automating the placement of the executed document to the Additional link of the TrialWorks, DocuSign request requires the TWService installation.

## Setting Up DocuSign

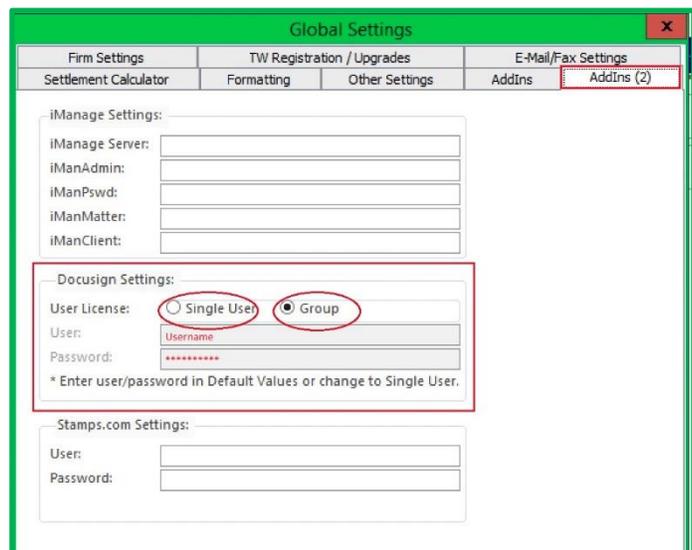
Enter User Credentials

Click on Settings > Global Settings > AddIns (2) > DocuSign Settings

Enter the Username and Password

If a single account, the user only needs to enter credentials in Global Settings as it is only one account. Single mode uses the credentials entered in Global Settings to both send the request and download the signed document.

If group account (multiple accounts), enter the admin account credentials and users will need to also enter their credentials in User Default Values. Group mode uses the credentials in User Default Values to send the request but uses the credentials in Global Settings to download the signed document.



The screenshot shows the 'Global Settings' window with a green title bar. The 'E-Mail/Fax Settings' tab is active, and the 'AddIns (2)' sub-tab is selected. The 'DocuSign Settings' section is highlighted with a red box. It contains the following fields:

- iManage Settings:**
  - iManage Server: [Text Box]
  - iManAdmin: [Text Box]
  - iManPswd: [Text Box]
  - iManMatter: [Text Box]
  - iManClient: [Text Box]
- DocuSign Settings:**
  - User License:  Single User  Group
  - User: [Text Box] (containing 'Username')
  - Password: [Text Box] (containing '\*\*\*\*\*')
  - \* Enter user/password in Default Values or change to Single User.
- Stamps.com Settings:**
  - User: [Text Box]
  - Password: [Text Box]

## TrialWorks LLC

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<http://www.trialworks.com>  
[training@trialworks.com](mailto:training@trialworks.com)



For single accounts, leave on single to type in username and password then click Global Settings.

SET DEFAULT VALUES

PLEASE SELECT THE FOLLOWING TRIALWORKS SYSTEM WIDE DEFAULTS FOR THIS USER.

User Settings and Help | Case List Filters | Template Settings | Calendar and Contact Settings | Global Settings (Read Only) | Other

Management Settings:

User: [ ]  
Password: [ ]  
 Use Windows Authentication

Auto Terminate msaccess.exe Settings:

Delay in seconds: [ 30 ]

The current msaccess.exe process will be automatically terminated (30) seconds after TrialWorks closes.

DocuSign Settings:

User: [ emmanuel@trialworks.com ]  
Password: [ testingpassword ]

\* Enter user/password in Global Settings.

Document Versioning:

Compare Tool Command: [ ]

Command must include the variables <Doc1> and <Doc2>. TrialWorks will replace those variables with the actual path to the documents being compared.  
EXAMPLE:  
"C:\Program Files\Workshare\Compare\DeltaVw.exe" /original-<Doc1> /modified-<Doc2>"  
\* Leave blank to use Microsoft Word as the compare tool.

Stamps.com Settings:

User: [ ]  
Password: [ ]

OK

## Creating Documents using DocuSign

TrialWorks integrates with DocuSign using the Ancillary(Miscellaneous), Correspondence, Discovery, Memo(Documents) and Pleadings tabs in TrialWorks.

Choose the document type you wish to create by clicking on that tab. Click the green plus icon to create the document.

Correspondence

**Detail Info**

Date: 10/25/2017 To: Hill, Eric  
Author: Patrice Gimenez Cc: [ ]  
Party: Ray Ganske Bcc: [ ]  
Category: Data Review From: [ ]  
Sent/Received: [ ] Status Note: [ ]

**Templates**

Category: EMMANUEL  Multiple Templates  
Template: DocuSign Bookmarks FULL  
Caption: [ ]  
Insurance: [ ]  
Client: Ray Ganske Other Party: [ ]  
 Write to All Attorneys on Service List

**Subject**

Data Review

**Extra Info v**

Create Correspondence Docket Print Envelope Certified Mail **Send via DocuSign**

**Links**

Link: [ ]  
Additional: [ ]  
More: [ ]

Add... Edit... Delete...

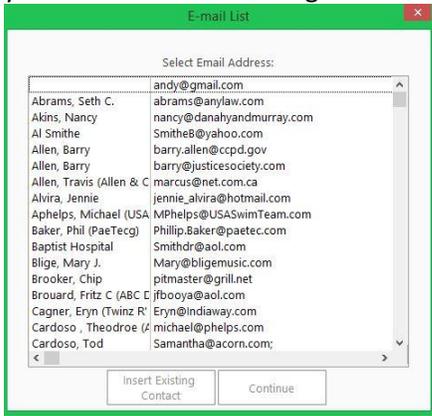
Complete the desired fields in the detail window to properly create the document. Author, Party Name, Document Category, Title or Subject, and TO: CC: or BCC on Correspondence



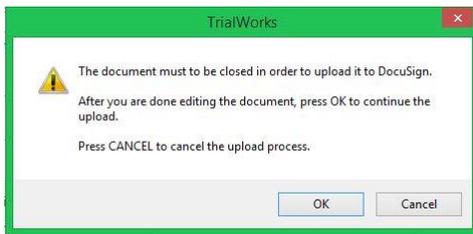
Choose a Template Category and your DocuSign template. Documents to be sent through DocuSign require special bookmarks for signatures, make sure to include them to enable electronic signatures.

Click the Button to Send via DocuSign

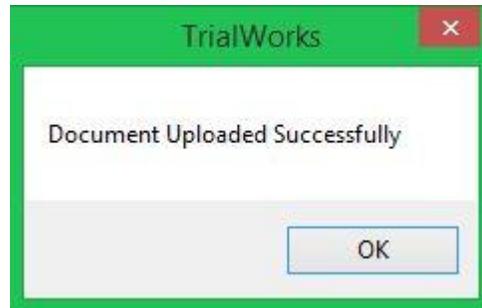
Select the Recipients by clicking the name(s). This List is populated from the Contacts Tab of the Case. If you document includes signatures for multiple parties, you can include them.



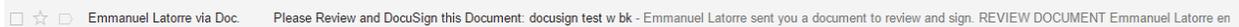
Complete any edits necessary in the document and Save and Close it. You may receive a message to remind you to close the document to complete the DocuSign upload.



Once the document merges, you will receive confirmation that the document uploaded successfully.



Recipient receives an email advising them that they have a document from you via DocuSign



When they open the email, they select Review Document





Emmanuel Latorre sent you a document to review and sign.

**REVIEW DOCUMENT**

**Emmanuel Latorre**

[emmanuel@trialworks.com](mailto:emmanuel@trialworks.com)

Please Review and DocuSign this document. Thank you.

**Do Not Share This Email**

This email contains a secure link to DocuSign. Please do not share this email, link, or access code with others.

**Alternate Signing Method**

Visit [DocuSign.com](http://DocuSign.com), click 'Access Documents', and enter the security code:  
89D00751CEF4409EA780C3E191396EAE1

**About DocuSign**

Sign documents electronically in just minutes. It's safe, secure, and legally binding. Whether you're in an office, at home, on-the-go – or even across the globe – DocuSign provides a professional trusted solution for Digital Transaction Management™.

**Need Help?**

Visit our [Support Site](#) or contact us at [service@docusign.com](mailto:service@docusign.com).

[Download the DocuSign App](#)

This message was sent to you by Emmanuel Latorre who is using the DocuSign Electronic Signature Service. If you would rather not receive email from this sender you may contact the sender with your request.

When the document opens, the Recipient must acknowledge and agree to sign the document electronically

Please Review & Act on These Documents DocuSign

Emmanuel Latorre  
Lawex Corp

Please Review and DocuSign this document. Thank you.

Please read the [Electronic Records and Signature Disclosure](#)

I agree to use electronic records and signatures.

**CONTINUE**    OTHER ACTIONS ▾

The Document must be bookmarked for the electronic signature

Recipient selects Start and are prompted to *SIGN* the document



**START**

DocuSign Envelope ID: 9969D787-6E48-4074-9037-4A929C7B492E

DEMONSTRATION DOCUMENT ONLY  
 PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE  
 1301 2nd Ave, Suite 2000 • Seattle • Washington 98101 • (206) 219-0200  
 www.docusign.com

**SIGN**

others in representation of the client, the attorneys are entitled to be reimbursed for such amounts as have been reasonably advanced on behalf of the client.

Dated this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

**ATTORNEY/CLIENT PRIVILEGED INFORMATION**

(1- client initials) (3- client initials)  
 (2- client initials) (4- client initials)

4

After selecting Sign > Recipient is prompted to Adopt Your Signature

- Recipient should Confirm Name, Initials, and Signature and has the option to change the Font Style
- Select Adopt and Sign

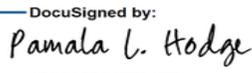
### Adopt Your Signature

Confirm your name, initials, and signature.

**Full Name**  **Initials**

[Select Style](#) [Draw](#)

**PREVIEW**

DocuSigned by:  
  
 1B7C65E847F94D7...  [Change Style](#)

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

**ADOPT AND SIGN** **CANCEL**

You can also include fields to enter dates and additional text fields. Always check the DocuSign Available Bookmarks list.

- Completing the required fields, click Finish after signing the document.

Done! Click Finish to send the completed document.

**FINISH** **OTHER ACTIONS**

DocuSign English (US) Terms Of Use & Privacy Copyright © 2015 DocuSign Inc.



The recipient can select Other Actions to:

Finish Later **OR** Print & Sign **OR** Assign to Someone Else **OR** Decline to Sign

<b>FINISH LATER</b> Save the document in its current state and finish the signing process at a later time.	<b>PRINT &amp; SIGN</b> Print the document and sign in ink. Then either scan and upload or fax back the document.
<b>ASSIGN TO SOMEONE ELSE</b> Should someone else be signing? Provide the new signer's email address and send the document to them for signature.	<b>DECLINE TO SIGN</b> Notify the sender that you refuse to sign the document.

[Help & Support](#) [About DocuSign](#)  
[View History](#) [View Certificate \(PDF\)](#)  
[View Electronic Record and Signature Disclosure](#)

After selecting Finish, the Recipient is prompted to save document

### Save a Copy of Your Document

Sign up for a FREE DocuSign account today and sign all your documents electronically.

Email  
phodge9404@gmail.com

Password

Confirm Password

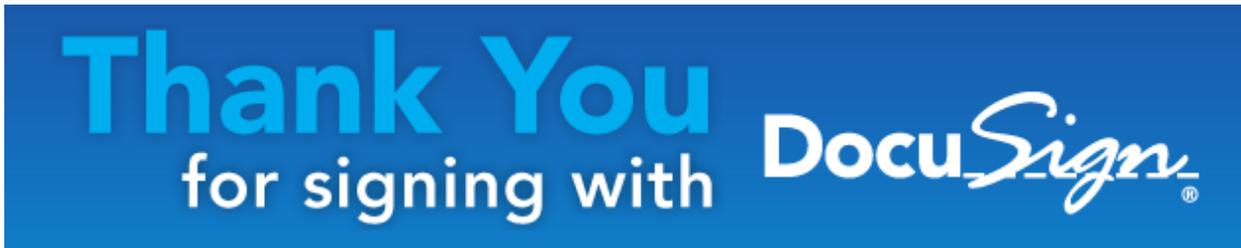
[By clicking SIGN UP, you agree to DocuSign Terms and Conditions](#)

**Electronically sign any document.**  
**Get signatures from others.**  
**Sign on the go with DocuSign Mobile!**

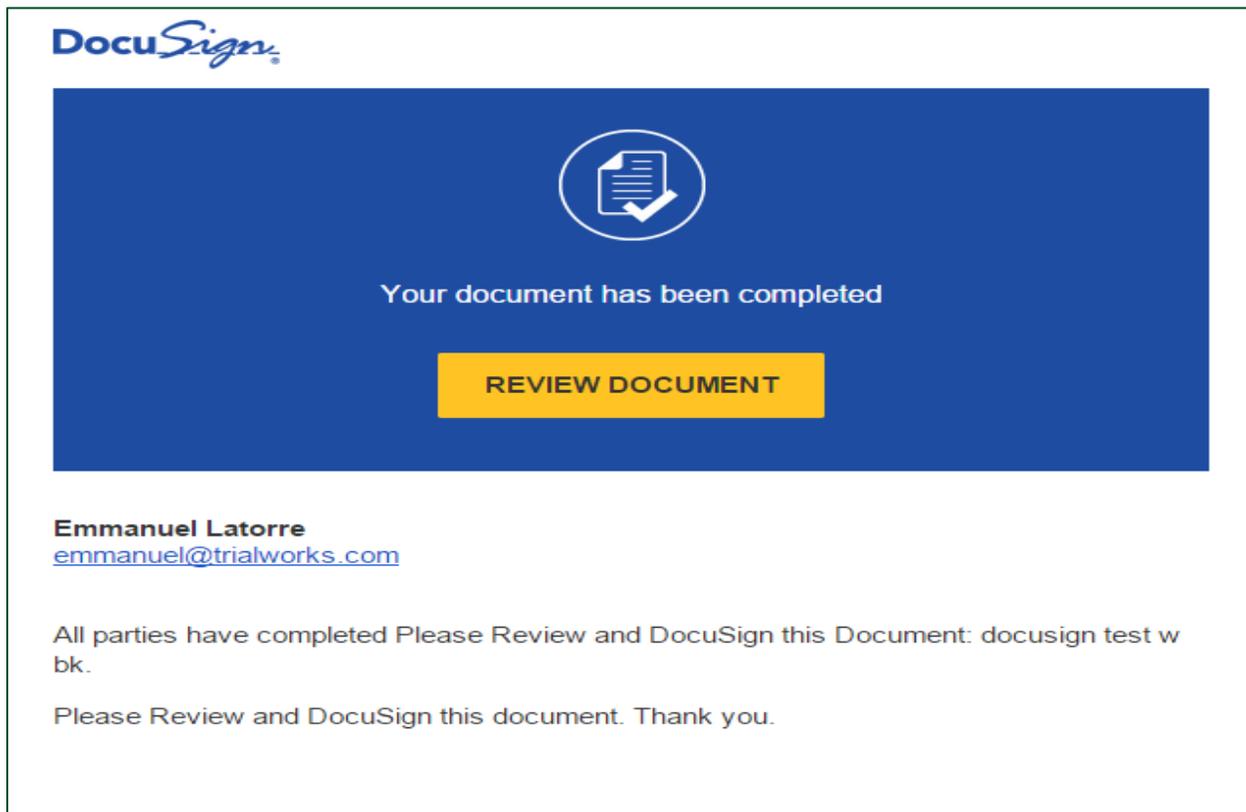
**SIGN UP** **NO THANKS**



Once the Document is Signed/Finished the Recipient receives confirmation for DocuSign that the Document has been signed



Sender and Recipient(s) will receive an email that the document has been signed by the Recipient(s) and have the ability to review the completed Document



The signed Document will be uploaded to the specific tab attached to the Word version of the document.

*It can take up to 15 minutes for the signed document to be download from DocuSign to TrialWorks*



Users can check the Status of outstanding DocuSign documents from the User Tools Menu choosing DocuSign Status



A list of requested documents appears showing a Status of Sent or completed

DocuSign Status							
Date	Description	Tab	DocuSign Sta	Link	Additional	Author	Case Name
10/28/2017	Client Settlement Doc	Correspo	Sent	<a href="#">Client Se</a>		Patrice Gimenez	AAA MICHAEL PHELPS
10/27/2017	Insurance Affidavit	Correspo	Sent	<a href="#">Insuranc</a>		Patrice Gimenez	AAA MICHAEL PHELPS
10/18/2017	Evidence Release	Ancillary	Sent	<a href="#">Evidenc</a>		Patrice Gimenez	Gimenez, Miguel Auto.
10/02/2017	Testing DocuSign fror	Correspo	Completed	<a href="#">Testing</a> , <a href="#">Testing Docu</a>		Seth Gram	Wells, Harrison
08/15/2017	Test Item	Correspo	Sent	<a href="#">Test lter</a>		Eric Hill	DocuSign
08/15/2017	Testing Docu Sign	Correspo	Sent	<a href="#">Testing</a>		Eric Hill	DocuSign
05/16/2017	DocuSign Bookmarks	Correspo	Sent	<a href="#">DocuSig</a>		Seth Gram	Wells, Harrison
04/14/2017	test123123	Ancillary	Sent	<a href="#">test123</a>		Emmanuel Lat	AAA MICHAEL PHELPS
04/14/2017	TEST TEST TEST	Ancillary	Sent	<a href="#">TEST TE</a>		Emmanuel Lat	AAA MICHAEL PHELPS
01/12/2017	DocuSign test multi r	Ancillary	Sent	<a href="#">DocuSig</a>		Patrice Gimenez	TW Tech Tips & Reminc
01/12/2017	DocuSign Bookmarks Intake		Sent	<a href="#">DocuSig</a>		Emmanuel Lat	Latorre, Emmanuel J.
01/12/2017	test 2	Memo	Sent	<a href="#">test 2</a>		Emmanuel Lat	AAA MICHAEL PHELPS

Record: 1 of 74 | No Filter | Search

### Common Errors

You must include DocuSign bookmarks in your document to use the DocuSign Service. If you receive a message that the document doesn't include a valid DocuSign bookmark, recreate the document using a template created with the DocuSign Available Bookmarks.

You must also choose a recipient with an email address to deliver the document to. Make sure to edit the contact to include an email address prior to creating the document.



# DocuSign Available Bookmarks

SignAbove – use this bookmark to add a complete signature of for the recipient

InitialAbove – use this bookmark when you need to have individual pages or paragraphs initialed

DateAbove – use this bookmark to have the recipient date their signature

TextAbove – use this bookmark to include additional text within your document

When you need signatures from multiple parties, use the bookmarks above adding 1, 2 or 3. Be consistent with all the related fields

Recipient 1	SignAbove1	InitialAbove1	DateAbove1	TextAbove1
Recipient 2	SignAbove2	InitialAbove2	DateAbove2	TextAbove2
Recipient 3	SignAbove3	InitialAbove3	DateAbove3	TextAbove3

