

DocSeal User Guide

Step-by-step instructions for routing an internal paper for signature.

1. Sign in

Open the console at /login and sign in with your work email. Accounts are created by an administrator (or automatically, on first Microsoft sign-in, if your organization allows it) - there is no self-service sign-up.

2. Start a new approval

From the dashboard, choose **New approval**. Give the paper a **Subject** and, if it helps signers understand what they are being asked to approve, a one-line **Message**.

3. Upload the document

Use the **Upload PDF** button, or drop a PDF straight onto the dropzone. Form fields and any document JavaScript are flattened on intake, so nothing in the file can change after signing. Password-protected PDFs are not accepted - print to a new PDF first and upload that instead.

4. Build the approval chain

Add each signer in order - Preparer, Reviewer, Endorser, Approver, or any role label that fits the paper. Signers are emailed one at a time: the next person is only notified once the person before them has made a decision. Everyone in the chain must be an internal employee; an external party (client, vendor, auditor) belongs in DocuSign instead.

Use the 2-step / 3-step / 4-step presets to start from a common shape, then edit names, emails and roles as needed. Add an optional note to any signer if there is something specific they should know before they decide.

5. Place signature and other fields (optional)

This step is optional - skip it entirely and every signer's signature is appended as one clean summary page at the end of the document instead.

To place fields directly on the document:

- Choose which signer you are placing fields for, from the "Placing for" dropdown.
- Pick a field from the palette - Signature, Initial, Date, Name, Position - or add a custom Inputs field (Text, Number, Checkbox, Dropdown, Radio).
- Click, or drag it, onto the document, exactly where it belongs. Use the page selector above the document to place fields on any page, not only the first.

- Drag a placed field to move it, or drag its corner handle to resize it. Click the small remove mark on a field, or select it and press Backspace/Delete, to remove just that one placement.

Signature, Initial, Name, Position and Date are always independent, separately placed fields - they are never bundled into a single box, on screen or in the final PDF.

6. Send

Review the recipient count and link policy, then choose **Sign & send for approval** to email the first signer immediately, or uncheck **Send immediately** to save the paper as a draft you can send later.

7. What a signer sees

Each signer receives a single-use, single-recipient link that expires after the configured number of days. They confirm the untickable consent statement, then sign by drawing, typing, or uploading an image of their signature, answer any fields you have asked for, and approve or reject with optional remarks. Nothing about the document is shown to a signer before their turn in the chain.

8. When the chain finishes

Once every signer has approved, the signatures are merged into the original PDF and a PAdES seal is applied, so any edit made after that point is visible. The append-only, hash-chained audit record - the consent statement's exact wording, timestamps, IP addresses, and every decision - is available as portable JSON alongside the sealed PDF, from the document's page.

What counts as a signature here

- **Intent** - an untickable consent statement, with the exact wording stored in the audit record.
- **Identity** - the link is tied to one email address and must be confirmed before the document appears.
- **Tamper evidence** - append-only, hash-chained audit events, plus a PAdES seal on the final PDF.
- **Portability** - the audit record is exported as JSON next to the file, not left in an app log.

Deliberate limits

- Internal signers only. A client, vendor or any external party needs DocuSign instead.
- No qualified electronic signature (eIDAS QES or equivalent) - that tier legally requires a licensed provider.
- Not for notarial acts, deeds requiring witnessing, or anything needing a wet-ink signature.
- Get your own legal counsel to sign off before treating this as a DocuSign replacement internally.