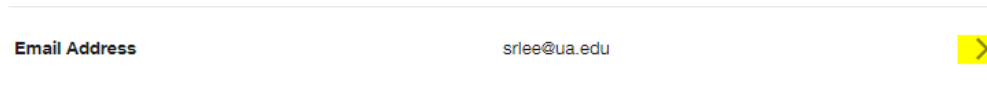


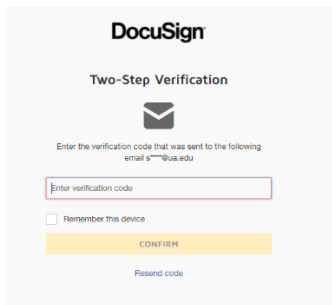
## Step 1: DocuSign Existing User Account Setup

If you have already created a free account with DocuSign using your UA email address, you **MUST** remove your UA email from that account and replace with an alternate email address as there has been a new UA DocuSign account created with your UA email. **This is a required to prevent any issues with account duplication.**

- Log into DocuSign <https://na2.docusign.net/>.
- Go to the Profile (circle/bubble on upper right of page).
- Select "Manage Profile".
- Select the Right pointing arrow next to 'Email Address'.

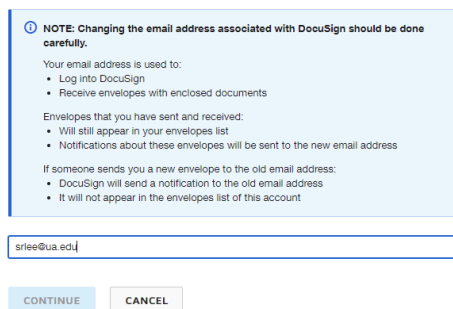


- You will need to log in to your DocuSign account again using your UA email account.
- Request a verification code be sent to your UA email account.
- Enter that verification code when prompted and select "CONFIRM".



- A message will pop up letting you know how this account name change will impact you.

### < Change Your DocuSign Email Address



- Add the new e-mail address and select "CONTINUE".
- You will receive a new verification code in the UA email account.
- Enter that verification code when prompted.
- You will receive the following message.

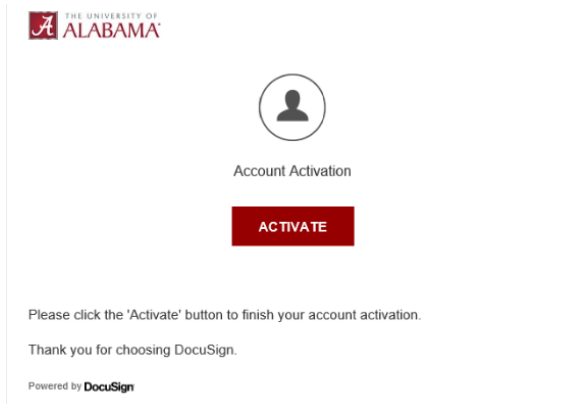


- You will receive an email in the new e-mail account regarding the change.
- Log out. Log back in using new credentials. All templates and envelopes should be available as before.

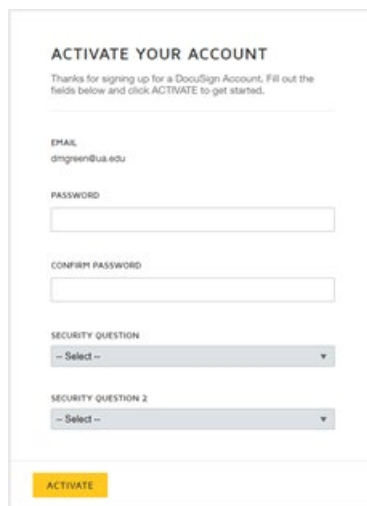
## Step 2: DocuSign New User Account Setup

If you have **NOT** created a DocuSign account using your UA email address, please follow these instructions to set up your account.

When your new DocuSign account has been created, you receive an email like the following.



- Click **Activate**  
The DocuSign activation dialog box appears.

A screenshot of the "ACTIVATE YOUR ACCOUNT" dialog box. The title is "ACTIVATE YOUR ACCOUNT". Below the title, it says "Thanks for signing up for a DocuSign Account. Fill out the fields below and click ACTIVATE to get started." The form contains several fields: "EMAIL" with the value "dmgreen@ua.edu", "PASSWORD" (empty text input), "CONFIRM PASSWORD" (empty text input), "SECURITY QUESTION" (dropdown menu showing "-- Select --"), and "SECURITY QUESTION 2" (dropdown menu showing "-- Select --"). At the bottom of the form is a yellow button labeled "ACTIVATE".

- Click **Activate**
- It will prompt you to re-enter your login information and bring you to the *Home Page*.

# DocuSign eSignature General Navigation Instructions

## Home Page (summary of envelopes processed)

The screenshot shows the DocuSign eSignature Home page. At the top, there are navigation tabs: Home, Manage, and Reports. A user profile for Susan Lee Skelton is shown with a 'DocuSigned by:' signature. Below this, a summary for the last 6 months displays: 5 Action Required, 21 Waiting for Others, 0 Expiring Soon, and 21 Completed. A large dashed box in the center contains the text 'Drop documents here to get started' and a red 'START' button.

## Select the Manage tab

### Select Inbox

The Inbox only shows envelopes (*General Authorization Forms*) for which you were a recipient in the routing queue.

The screenshot shows the 'Manage' tab in DocuSign eSignature, specifically the 'Inbox' view. The left sidebar contains navigation options: 'NEW', 'Shared Envelopes', 'ENVELOPES' (with sub-items: Inbox, Sent, Drafts, Deleted, Bulk Sends, PowerForms), and 'QUICK VIEWS' (with sub-items: Action Required, Waiting for Others, Expiring Soon, Completed, Authentication Failed). The main area displays a table of envelopes in the inbox, filtered by 'Date (Last 6 Months)'. The table has columns for Subject, Status, and Last Change. Each row includes a 'SIGN' or 'DOWNLOAD' button.

| Subject  | Status                   | Last Change           |
|--|--------------------------|-----------------------|
| <b>Please DocuSign: Staff Telecommuting Agreement.docx</b> Cathy Rainey<br>To: Cathy Rainey, Cathy Rainey +1 more    | 2/3 done<br>Need to Sign | 9/28/2021 11:33:09 am |
| <b>Please DocuSign: Leave Request Form.pdf</b> Susan Lee Skelton<br>From: Susan Lee                                  | Completed                | 9/28/2021 11:29:15 am |
| <b>Please DocuSign: UA Only4.doc, UA Only3.docx</b><br>To: Susan Lee Skelton   | 0/1 done<br>Need to Sign | 9/27/2021 11:43:08 am |
| <b>Please DocuSign: Staff Telecommuting Agreement Pilot.docx</b><br>To: Susan Lee Skelton, Susan Lee Skelton +3 more | Completed                | 9/27/2021 10:16:06 am |
| <b>Please DocuSign: Staff Telecommuting Agreement Pilot.docx</b><br>To: Susan Lee Skelton, Susan Lee Skelton +3 more | 0/5 done<br>Need to Sign | 9/27/2021 10:04:00 am |
| <b>Please DocuSign: Staff Telecommuting Agreement Pilot.docx</b><br>To: Susan Lee Skelton, Susan Lee Skelton +3 more | 0/5 done<br>Need to Sign | 9/27/2021 09:58:07 am |

## Select Sent

The Sent box will show documents that you initiated yourself.

The screenshot shows the 'Sent' envelope list in the DocuSign eSignature interface. The interface includes a top navigation bar with 'DocuSign eSignature', 'Home', 'Manage', and 'Reports'. A search bar is located at the top right of the envelope list. The list is filtered by 'Date (Last 6 Months)'. The table below shows the following envelopes:

| Subject  | Status                         | Last Change           | Actions  |
|--|--------------------------------|-----------------------|----------|
| ✓ Please DocuSign: Blank TA timesheet.pdf Ashley Bumgardner<br>To: Ashley Bumgardner, John Mittenhal +1 more                     | Completed                      | 9/30/2021 09:38:48 am | DOWNLOAD |
| ⊙ Please DocuSign: Blank TA timesheet.pdf Ashley Bumgardner<br>To: Ashley Bumgardner, John Mittenhal +1 more                     | Waiting for Others<br>0/3 done | 9/30/2021 08:42:30 am | RESEND   |
| ✗ Please DocuSign: Blank TA timesheet.pdf Ashley Bumgardner<br>To: Ashley Bumgardner, John Mittenhal +1 more                     | John Mittenhal Declined        | 9/29/2021 03:51:54 pm | COPY     |
| ⊙ Please DocuSign: Leave Request Form.pdf Monica Watts<br>To: Monica Watts, Ryan Bradley +4 more                                 | Voided                         | 9/29/2021 01:58:51 pm | COPY     |
| ✓ Please DocuSign: Retiree_Benefits_Continuation_Form_Vision.doc.pdf Thomas Carl Wilson<br>To: Thomas Carl Wilson, Sandra Abrams | Completed                      | 9/29/2021 12:15:00 pm | DOWNLOAD |
| ✓ Please DocuSign: Retiree Benefits Continuation Form Dental.doc Thomas Carl Wilson<br>To: Thomas Carl Wilson, Sandra Abrams     | Completed                      | 9/29/2021 12:10:33 pm | DOWNLOAD |

Use the Search box to look for an envelope containing a specific person who is in the routing queue.

Enter some or all of the person's name for which you are searching.

This screenshot shows the 'Sent' envelope list with a search filter overlay. The search bar contains the text 'Search Sent and Folders'. The filter overlay includes the following options:

- Include envelope custom fields
- Status: All
- Date: Last 6 Months
- Buttons: APPLY, RESET

If the status is "Waiting for Others", you can click on that hyperlink and the entire routing queue and individual status for each signer will be displayed.

This screenshot shows the routing queue for an envelope with the status 'Waiting for Others'. The envelope is titled 'Please DocuSign: Blank TA timesheet.pdf Ashley Bumgardner'. The routing queue is as follows:

| Recipients                                    | Current | Status   |
|---|---------|--|
| 1 Ashley Bumgardner<br>abumgardner@cba.us.edu | CURRENT | Needs to Sign<br>Viewed on 9/30/2021   08:42:30 am |
| 2 John Mittenhal<br>jmitten@cba.us.edu        | WAITING | Needs to Sign                                      |
| 3 Clarinda<br>clarinda@cba.us.edu             |         | CC Receives a Copy                                 |

To perform various actions on an individual envelope, click the dropdown to the right of the envelope name. (some options here will not be available to all users)

| Last Change ▾            |                    |
|--------------------------|--------------------|
| 9/30/2021<br>09:38:48 am | <b>DOWNLOAD</b> ▾  |
| 9/30/2021<br>08:42:30 am | Print              |
| 9/29/2021<br>03:51:54 pm | Move               |
| 9/29/2021<br>01:58:51 pm | Forward            |
| 9/29/2021<br>12:15:00 pm | Copy               |
| 9/29/2021<br>12:10:33 pm | Save as Template   |
|                          | History            |
|                          | Form Data          |
|                          | Transfer Ownership |
|                          | Export as CSV      |
|                          | Delete             |
|                          | <b>DOWNLOAD</b> ▾  |

Senders can void/delete their own submissions. If you want them to be able to do this, click on the dropdown to the right of the envelope subject and select the action.