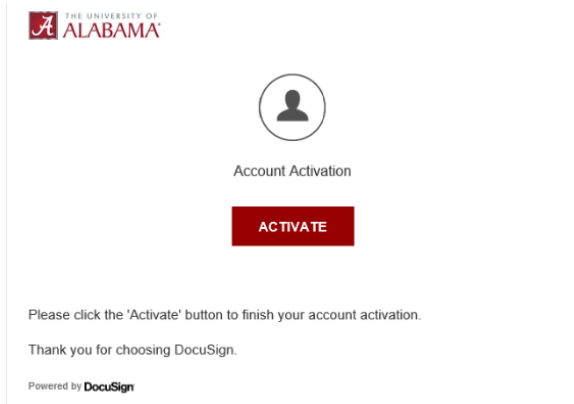


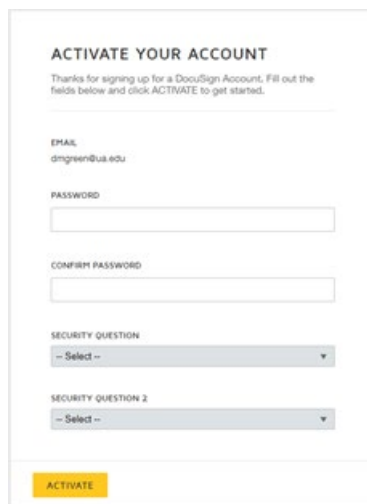
DocuSign New User Account Setup

If you have **NOT** created a DocuSign account using your UA email address, please follow these instructions to set up your account. Please contact dmgreen@ua.edu with any questions.

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



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

The image shows a "ACTIVATE YOUR ACCOUNT" dialog box. It contains the following fields: "EMAIL" with the value "dmgreen@ua.edu", "PASSWORD" (empty text input), "CONFIRM PASSWORD" (empty text input), "SECURITY QUESTION" (dropdown menu with "-- Select --"), and "SECURITY QUESTION 2" (dropdown menu with "-- Select --"). At the bottom left, there 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
Please DocuSign: Staff Telecommuting Agreement.docx Cathy Rainey To: Cathy Rainey, Cathy Rainey +1 more	2/3 done Need to Sign	9/28/2021 11:33:09 am
Please DocuSign: Leave Request Form.pdf Susan Lee Skelton From: Susan Lee	Completed	9/28/2021 11:29:15 am
Please DocuSign: UA Only4.doc, UA Only3.docx To: Susan Lee Skelton	0/1 done Need to Sign	9/27/2021 11:43:08 am
Please DocuSign: Staff Telecommuting Agreement Pilot.docx To: Susan Lee Skelton, Susan Lee Skelton +3 more	Completed	9/27/2021 10:16:06 am
Please DocuSign: Staff Telecommuting Agreement Pilot.docx To: Susan Lee Skelton, Susan Lee Skelton +3 more	0/5 done Need to Sign	9/27/2021 10:04:00 am
Please DocuSign: Staff Telecommuting Agreement Pilot.docx To: Susan Lee Skelton, Susan Lee Skelton +3 more	0/5 done 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 To: Ashley Bumgardner, John Mittenhal +1 more	Completed	9/30/2021 09:38:48 am	DOWNLOAD
⊙ Please DocuSign: Blank TA timesheet.pdf Ashley Bumgardner To: Ashley Bumgardner, John Mittenhal +1 more	Waiting for Others 0/3 done	9/30/2021 08:42:30 am	RESEND
⊗ Please DocuSign: Blank TA timesheet.pdf Ashley Bumgardner 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 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 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 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 applied. The search box contains the text 'Ashley Bumgardner'. The filter is active, and the results are filtered to show only envelopes containing that name. The table below shows the filtered results:

Subject	Status
✓ Please DocuSign: Blank TA timesheet.pdf Ashley Bumgardner To: Ashley Bumgardner, John Mittenhal +1 more	Completed
⊙ Please DocuSign: Blank TA timesheet.pdf Ashley Bumgardner To: Ashley Bumgardner, John Mittenhal +1 more	Waiting for Others
⊗ Please DocuSign: Blank TA timesheet.pdf Ashley Bumgardner To: Ashley Bumgardner, John Mittenhal +1 more	John Mittenhal Declined

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. The envelope is titled 'Please DocuSign: Blank TA timesheet.pdf Ashley Bumgardner'. The status is 'Waiting for Others'. The routing queue is as follows:

Order	Recipient	Status	Action
1	Ashley Bumgardner abumgardner@cba.us.edu	CURRENT	Needs to Sign Viewed on 9/30/2021 08:42:30 am
2	John Mittenhal jmitten@cba.us.edu	WAITING	Needs to Sign
3	Clairinda clairinda@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 09:38:48 am	DOWNLOAD ▾
9/30/2021 08:42:30 am	Print
9/29/2021 03:51:54 pm	Move
9/29/2021 01:58:51 pm	Forward
9/29/2021 12:15:00 pm	Copy
9/29/2021 12:10:33 pm	Save as Template
	History
	Form Data
	Transfer Ownership
	Export as CSV
	Delete
	DOWNLOAD ▾

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.