

DocuSign Setup Admin

DocuSign User Setup Process Overview

- 1) CORE-CT Security receives request to set up new supplier contract document creator
- 2) CORE-CT security team sets up Roles for the User
- 3) DocuSign Admin add user to the DocuSign account setup page
- 4) User receives email notification from DocuSign to activate the new individual DocuSign account
- 5) User activates account
- 6) DocuSign Admin add user to the CORE-CT's electronic signature set up page under VP1
- 7) CORE-CT Security notifies user is setup.

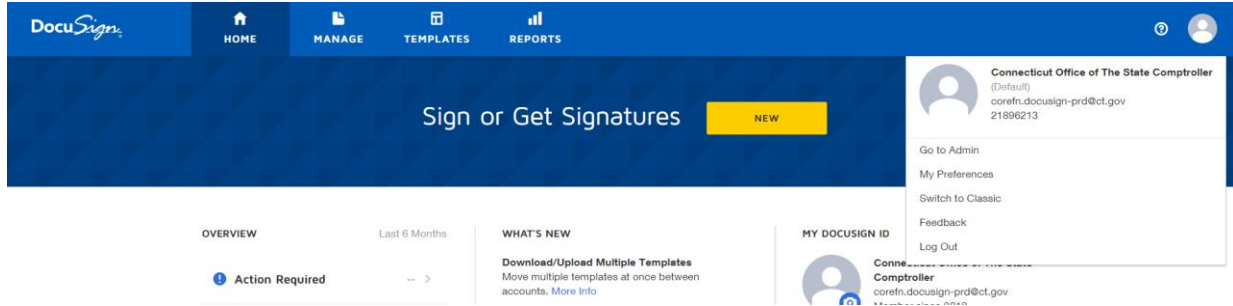
Setting up a new DocuSign user

DocuSign Admin logs in to DocuSign,

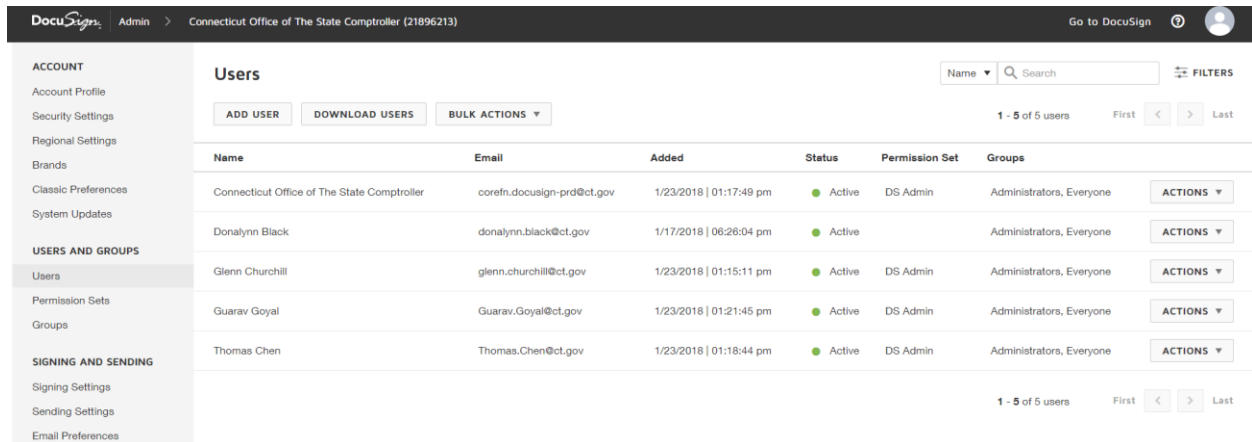
<https://account.docusign.com/#/username>

Click your profile icon on right top corner

Click Go to Admin

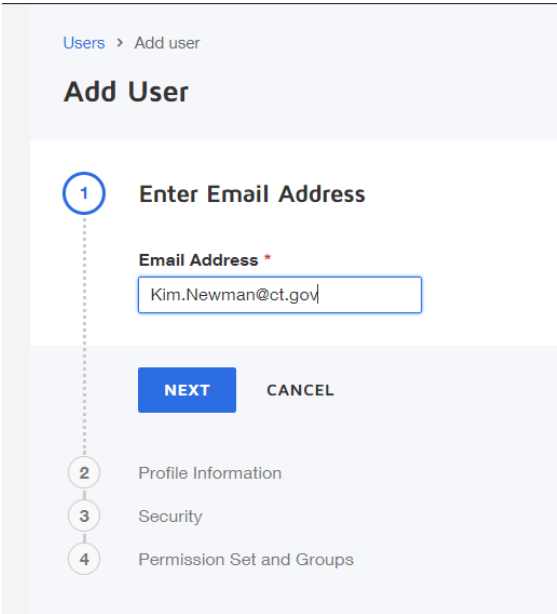


Select Users and click Add User on Page.



Add user in DocuSign

Click Next



The screenshot shows the 'Add User' wizard in DocuSign. At the top, there is a breadcrumb 'Users > Add user' and a title 'Add User'. The main heading is '1 Enter Email Address'. Below this is a label 'Email Address *' and a text input field containing 'Kim.Newman@ct.gov'. At the bottom of the wizard, there are two buttons: 'NEXT' (highlighted in blue) and 'CANCEL'. A vertical progress indicator on the left side shows four steps: 1. Enter Email Address (current), 2. Profile Information, 3. Security, and 4. Permission Set and Groups.

Add Profile Information

Click Next

Add User

✓ Email: Kim.Newman@ct.gov

2 Profile Information

Full Name * <input type="text" value="Kim Newman"/>	Address 1 <input type="text" value="55 Farmington"/>
Job Title <input type="text" value="Contract Admin"/>	Address 2 <input type="text"/>
Company <input type="text" value="State of CT"/>	City <input type="text" value="Hartford"/>
Language * <input type="text" value="English"/>	Country <input type="text" value="United States"/>
	State <input type="text" value="CT - Connecticut"/>
	Postal Code <input type="text" value="06105"/>
	Phone <input type="text"/>

NEXT **BACK** **CANCEL**

Leave the Access code blank.

Click Next

Add User

✓ Email: Kim.Newman@ct.gov

✓ Profile Information: Kim Newman, English

3 Security

For additional security, add an access code to the activation process and communicate the code to the user. The user must provide the code to activate the account membership.

Access Code

NEXT **BACK** **CANCEL**

4 Permission Set and Groups

Assign the Permission Set to user.

Add User

- Email:** Kim.Newman@ct.gov
- Profile Information:** Kim Newman, English
- Security:** No Access Code

4 **Permission Set and Groups**

Permission Set *

DS Sender

Groups

Note: There are no groups available to assign.

ADD USER **BACK** **CANCEL**

User added successfully in DocuSign.

Users

Name Search

ADD USER DOWNLOAD USERS BULK ACTIONS

1 - 5 of 5 users First < > Last

Name	Email	Added	Status	Permission Set	Groups	ACTIONS
Brian Guilmartin	Brian.Guilmartin@ct.gov	6/6/2018 10:53:02 am	Active	DS Sender	Everyone	ACTIONS
Gaurav Goyal	gaurav.goyal@ct.gov	6/6/2018 08:13:00 am	Active	DS Sender	Everyone	ACTIONS
Glenn Churchill	corefn.docusign-tpr@ct.gov	10/23/2017 05:02:12 am	Active	DS Admin	Administrators, Everyone	ACTIONS
Kim Newman	Kim.Newman@ct.gov	6/7/2018 08:01:18 am	Pending	DS Sender	Everyone	ACTIONS
Thomas Chen	Thomas.Chen@ct.gov	6/5/2018 08:28:30 am	Active	DS Sender	Everyone	ACTIONS

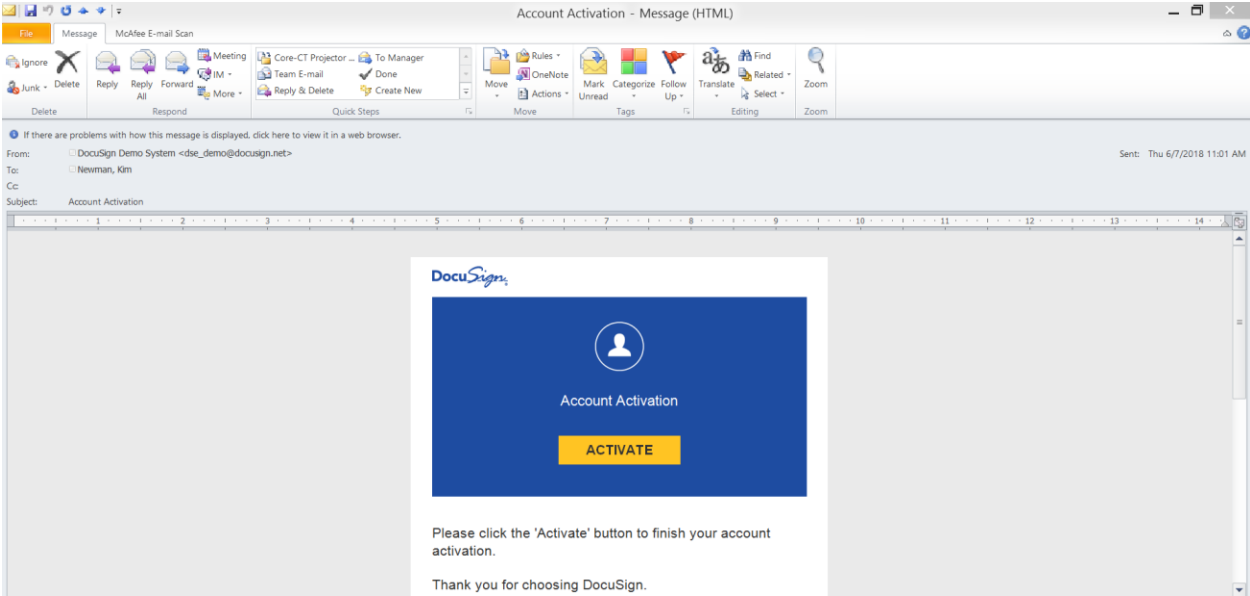
1 - 5 of 5 users First < > Last



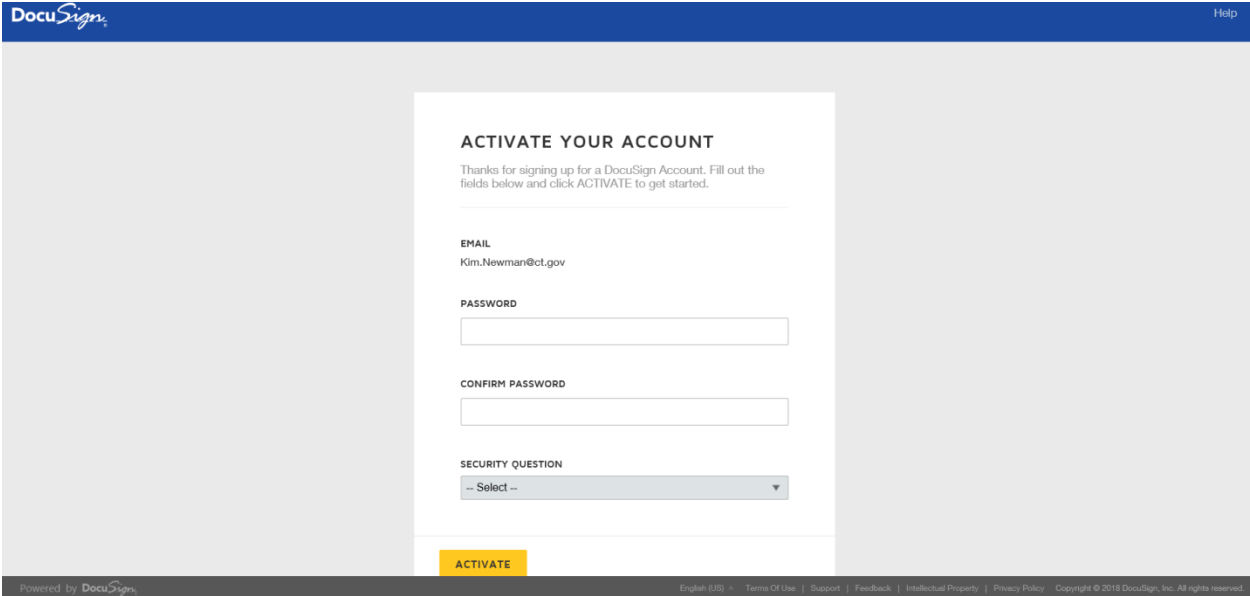
Users Steps

Activate the user Account:

User will receive an email from DocuSign, Click ACTIVATE in DocuSign Account Activation Email.



Enter PASSWORD, CONFIRM PASSWORD, and SECURITY QUESTION and click ACTIVATE. Password must be at least 6 characters long and cannot contain the characters <, > or spaces.



Account activated.

Add the user in CORE-CT

Navigation: Supplier Contracts > Supplier Contracts Setup > Electronic Signature Setup

Click the + to add a row

Enter the User

Enter the Password

Click Save

The screenshot shows the Oracle Electronic Signature Account setup interface. At the top, there is a breadcrumb trail: Favorites > Main Menu > Supplier Contracts > Supplier Contracts Setup > Electronic Signature Setup. Below this is the Oracle logo and a search bar with 'All' selected. The main heading is 'Electronic Signature Account'. The form includes the following fields: 'e-Signature Provider' (DocuSign), 'Owner' (VP1), 'DocuSign Environment' (Demo), 'Account Email' (corefn.docusign-tpr@ct.gov), 'Password', and 'Confirm Password'. A 'Verify Account Information' button is located below these fields. Below the form is a table titled 'Account Users' with 3 rows. The table has columns for 'User', 'Name', and '*Email'. The rows are: 1. ACC_CH, Accenture-Thomas Chen, thomas.chen@ct.gov; 2. ACC_GC, Accenture-Goyal Gaurav, gaurav.goyal@ct.gov; 3. ACC_NE, Accenture-Kim Newman, Kim.Newman@ct.gov. Below the table is a section for 'Default Email Settings' with a 'Message' text area. At the bottom, there are navigation buttons: Save, Return to Search, Previous in List, Next in List, Add, and Update/Display.



Envelope Sharing Between Account Users

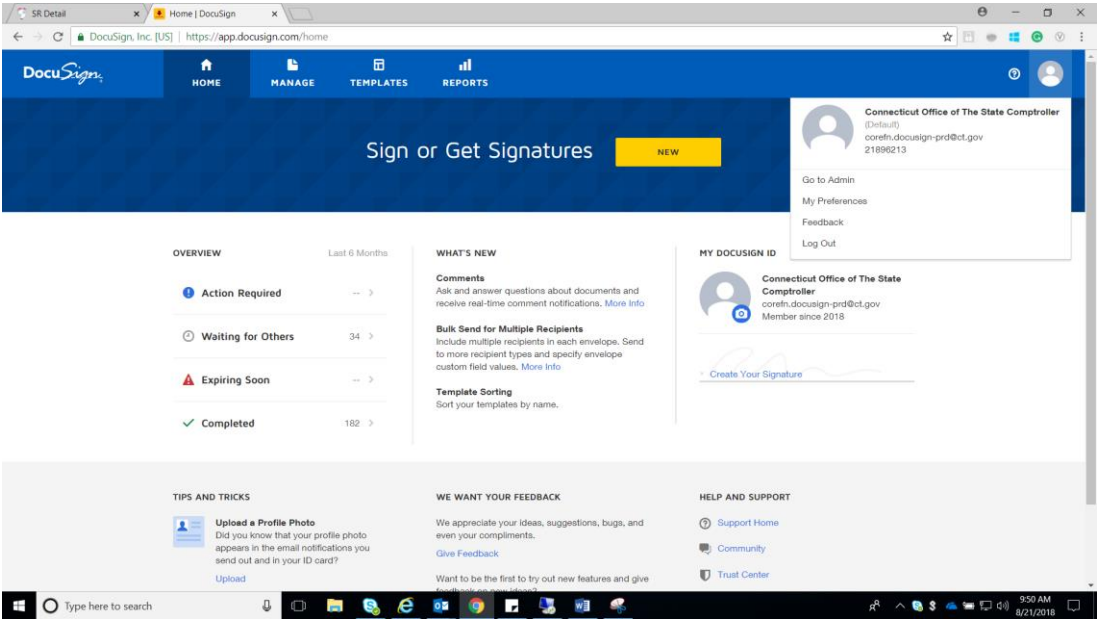
Envelope sharing permits users on the same account to see and take action on shared envelopes.

The ability to share envelopes between your account users is helpful for scenarios such as coverage during a leave of absence, delegated management of DocuSign transactions, or other collaborative workflows. As a DocuSign Administrator, you can set up envelope sharing and allow users to see and act upon envelopes belonging to another DocuSign user.

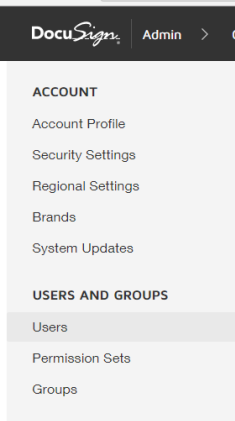
Sharing is enabled on an individual user basis. When a user's envelopes are shared, the users who were granted access can see and act on all of that user's envelopes.

Login to the DocuSign application

Click Go to Admin link.



Click on 'Users' link on left navigation pane.





Select the user from the list.
 Click Action.
 Chose option of Share envelopes with user

DocuSign Admin > Office of the State Comptroller State of CT (3918688) Go to DocuSign

ACCOUNT
 Billing and Usage
 Account Profile
 Security Settings
 Regional Settings
 Brands
 System Updates

USERS AND GROUPS
Users
 Permission Sets
 Groups

SIGNING AND SENDING
 Signing Settings
 Sending Settings
 Email Preferences
 Custody Transfer

Users Name Search FILTERS
 1 - 6 of 6 users First Last

Name	Email	Added	Status	Permission Set	Groups	ACTIONS
Brian Guilmartin	Brian.Guilmartin@ct.gov	6/6/2018 01:53:02 pm	Active	DS Sender	Everyone	ACTIONS
Brian Mckeena	Brianne.McKenna@ct.gov	8/1/2018 10:54:31 am	Active	DS Sender	Everyone	ACTIONS
Gaurav Goyal	gaurav.goyal@ct.gov	6/6/2018 11:13:00 am	Active	DS Sender	Everyone	ACTIONS
Glenn Churchill	corefn.docusign-tpr@ct.gov	10/23/2017 08:02:12 am	Active	DS Admin	Administrators, Everyone	ACTIONS
Kim Newman	Kim.Newman@ct.gov	6/7/2018 11:01:18 am	Active	DS Sender	Everyone	ACTIONS
Thomas Chen	Thomas.Chen@ct.gov	6/5/2018 11:28:30 am	Active	DS Sender	Everyone	ACTIONS

1 - 6 of 6 users

- Edit
- Reset Password
- Share envelopes with user
- Share user's envelopes
- Transfer Envelopes
- Transfer Templates

Click add user

Connecticut Office of The State Comptroller (21896213) Go to DocuSign

Users > Shared Envelopes

Envelopes shared with Guarav Goyal Search

This user can access the envelopes for the following users. This access includes the ability to act on any envelopes sent by these users, and view the details of any envelopes awaiting their signature.

ADD USERS First Last

Name	Email	Status	Actions

In the list of Users, check the users whose envelopes you want to share with the selected user.

Select users to share envelopes with Glenn Churchill

ALL SELECTED (3)

Users Name Search FILTERS
 1 - 6 of 6 users First Last

<input type="checkbox"/>	Name	Email	Added	Status	Permission Set	Groups
<input checked="" type="checkbox"/>	Brian Guilmartin	Brian.Guilmartin@ct.gov	6/6/2018 01:53:02 pm	Active	DS Sender	Everyone
<input checked="" type="checkbox"/>	Brian Mckeena	Brianne.McKenna@ct.gov	8/1/2018 10:54:31 am	Active	DS Sender	Everyone
<input type="checkbox"/>	Gaurav Goyal	gaurav.goyal@ct.gov	6/6/2018 11:13:00 am	Active	DS Sender	Everyone
<input type="checkbox"/>	Glenn Churchill	corefn.docusign-tpr@ct.gov	10/23/2017 08:02:12 am	Active	DS Admin	Administrators, Everyone
<input type="checkbox"/>	Kim Newman	Kim.Newman@ct.gov	6/7/2018 11:01:18 am	Active	DS Sender	Everyone
<input checked="" type="checkbox"/>	Thomas Chen	Thomas.Chen@ct.gov	6/5/2018 11:28:30 am	Active	DS Sender	Everyone

1 - 6 of 6 users First Last



Click ASSIGN.

The list is updated to show all the users whose envelopes you have shared with the selected user.

[Users](#) > Shared Envelopes

Envelopes shared with Glenn Churchill

This user can access the envelopes for the following users. This access includes the ability to act on any envelopes sent by these users, and view the details of any envelopes awaiting their signature.

ADD USERS		1 - 3 of 3 users	First	<	>	Last
Name	Email	Status	Actions			
Brian Guilmartin	Brian.Guilmartin@ct.gov	● Active	REMOVE			
Brian Mckeena	Brianne.McKenna@ct.gov	● Active	REMOVE			
Thomas Chen	Thomas.Chen@ct.gov	● Active	REMOVE			
		1 - 3 of 3 users	First	<	>	Last

View the Envelope of other user:

1. Login to DocuSign application.
2. Click Manage Tab

DocuSign

HOME MANAGE TEMPLATES REPORTS

Sign or Get Signatures **NEW**

OVERVIEW Last 6 Months

- Action Required -- >
- Waiting for Others 2 >
- Expiring Soon -- >
- Completed -- >

WHAT'S NEW

Comments
Ask and answer questions about documents and receive real-time comment notifications. [More Info](#)

Bulk Send for Multiple Recipients
Include multiple recipients in each envelope. Send to more recipient types and specify envelope custom field values. [More Info](#)

Template Sorting
Sort your templates by name.

MY DOCUSIGN ID [Edit](#)

Glenn Churchill
corefn.docusign-1pr@ct.gov
Member since 2017

DocuSigned by:
Glenn Churchill
3668907464104DD...

3. Click Shared Envelopes Button.

DocuSign

HOME MANAGE TEMPLATES REPORTS

NEW

Inbox

Filtered by: Date (Last 6 Months) | [Edit](#)

Shared Envelopes

4. Select The user from list, whose envelope needs to be managed

Shared Envelopes

Name	Email
<input type="radio"/> Brian Guilmartin	Brian.Guilmartin@ct.gov
<input type="radio"/> Brian Mckeena	Brianne.McKenna@ct.gov
<input type="radio"/> Thomas Chen	Thomas.Chen@ct.gov

SELECT CANCEL

5. Select the envelope and take appropriate action on it.



Managing Envelope in DocuSign

The Manage page provides a convenient workspace for all your envelope management activities:

- Access all details of your sent, received, and in process envelopes
- Use the convenient filters to find envelopes by status, sender, or date quickly and easily.
- Click the links under Quick view section to view the envelope under common category like waiting for Others, Action required, Completed etc.
- Take further action, such as sign, correct, create a copy, void, delete, or remind your recipients to sign.

Login to the DocuSign application

Go to Manage tab.

Click the document to see the status and other details about document.

Click the Signing order link to see Signing order diagram.

Message
No message has been entered.



Click on More button to take more action like forward a document, create a copy, download history of Document and transfer of ownership.

The screenshot shows a document viewer interface for a PDF titled "STATE_18MHASBC01JCCSS_0.PDF". The document status is "Completed". A "MORE" dropdown menu is open, showing options: Forward, Create a Copy, History, Form Data, Transfer Ownership, and Export as CSV. The document details include: "Last change on 8/8/2018 | 12:44:13 pm", "Sent on 8/8/2018 | 11:32:37 am", and "Envelopes belonging to Thomas Chen". The document is signed by "External new assigned" (thomaschen2012@yahoo.com) on 8/8/2018 at 11:37:31 am. It is also signed by "Thomas Chen" (thomas.chen@ct.gov) on 8/8/2018 at 12:44:13 pm. The document is copied to "external original" (thomas.y.chen@accenture.com) on 8/8/2018 at 11:34:39 am. A "SIGNING ORDER" icon is visible in the top right. The message field is empty.

On this page you can review the contract document PDF as well.

When you click the pdf document page, it will open he pdf in another window for review.

This screenshot shows the same document viewer interface as above, but with a PDF preview sidebar on the right. The sidebar shows a preview of the document with page numbers 1, 2, and 3. The document details and signing information are the same as in the previous screenshot. The message field is empty.