

DocuSign Setup

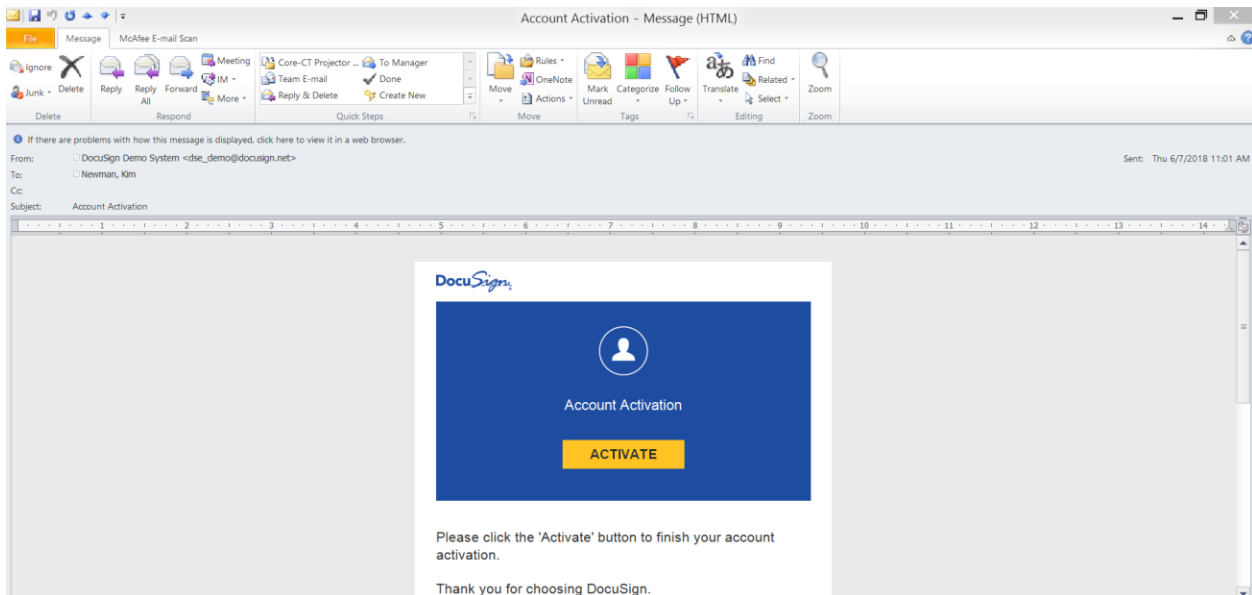
DocuSign Setup

- DocuSign is an external software package used to capture electronic signatures in the Supplier Contract Management module
- To utilize this package, each contract administrator will need to be setup inside the State's DocuSign account for proper access.

DocuSign User Set Up Process Overview

1. The agency security liaison requests the CT_F_A_DS_SENDER role be added to the user.
2. The user receives an email notification from DocuSign to activate the new individual DocuSign account.

Click the **ACTIVATE** button in DocuSign Account Activation Email.



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

3. The user receives confirmation from CORE-CT that the account is setup.

The agency contract admin (creator) will receive email notification when all the signers have completed signing a contract document through DocuSign.

Managing Envelopes 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.

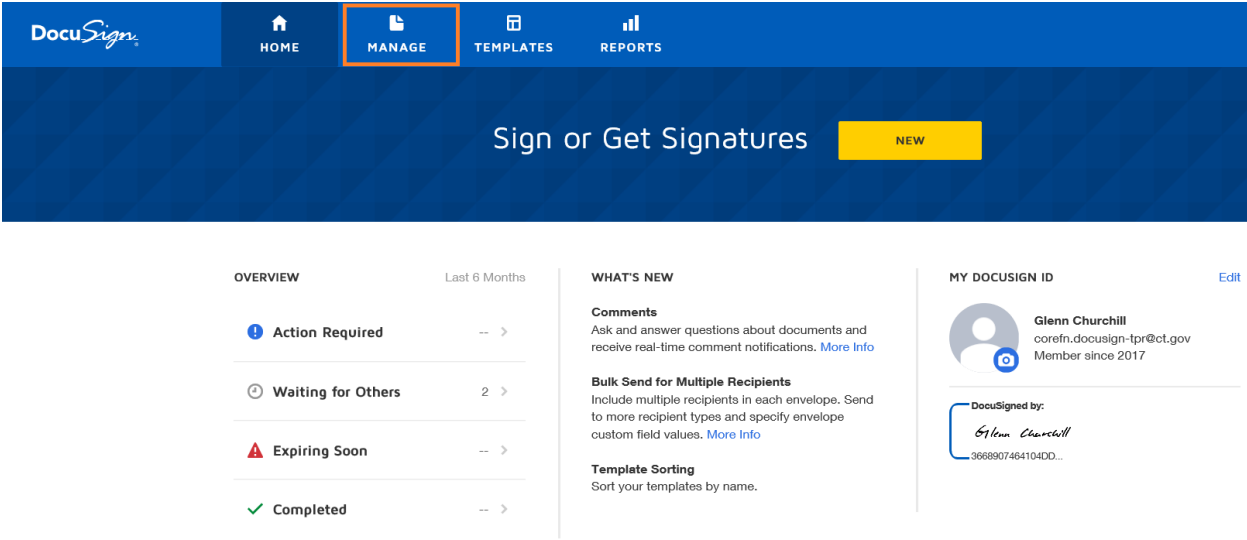


Login to the DocuSign application

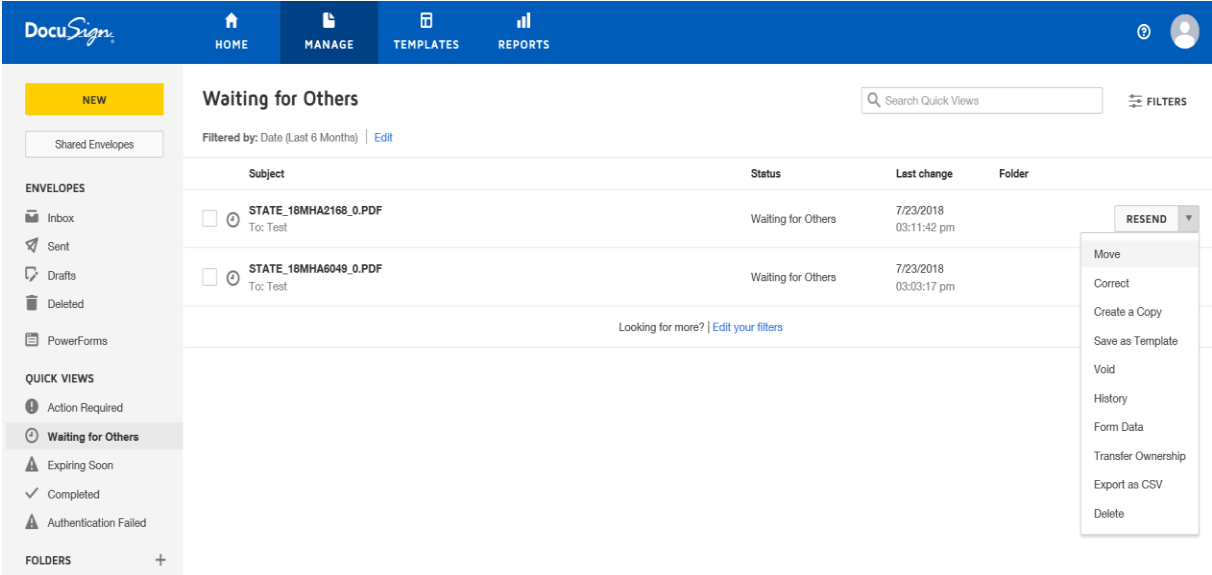
Go to the Manage tab

In this example, there are two documents "Waiting for Others"

Clicking on "Waiting for Others" will show the list of documents



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



STATE_18MHASBC01JCCSS_0.PDF ⓘ

Last change on 8/8/2018 | 12:44:13 pm
Sent on 8/8/2018 | 11:32:37 am

✓ Completed

MORE ▾



Recipients

📄 SIGNING ORDER

✓ External new assigned thomaschen2612@yahoo.com Private Message: 1 test reassigned	✍️ Signed on 8/8/2018 11:37:31 am Signed in location
✓ external original thomas.y.chen@accenture.com	CC Copy Received on 8/8/2018 11:34:39 am
✓ Thomas Chen thomas.chen@ct.gov 2	✍️ Signed on 8/8/2018 12:44:13 pm Signed in location

Message

No message has been entered.

Click the Signing order link to see Signing order diagram.

The screenshot shows the document interface with a 'Signing Order Diagram' pop-up window. The diagram illustrates the signing process:

- SENT BY:** TC
- 1:** EA and EO
- 2:** TC
- COMPLETED:** ✓

A 'CLOSE' button is visible at the bottom of the diagram pop-up.



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

The screenshot shows a document titled "STATE_18MHASBC01JCCSS_0.PDF" with a status of "Completed". A dropdown menu is open under the "MORE" button, listing actions: Forward, Create a Copy, History, Form Data, Transfer Ownership, and Export as CSV. The document details include a "SIGNING ORDER" section with two entries: "Signed" on 8/8/2018 at 11:37:31 am and "Signed" on 8/8/2018 at 12:44:13 pm. Below this is a "Copy Received" entry on 8/8/2018 at 11:34:39 am. The "Recipients" section lists "External new assigned" (thomaschen2612@yahoo.com) and "Thomas Chen" (thomas.chen@ct.gov). A "Message" section at the bottom states "No message has been entered."

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

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

This screenshot is similar to the previous one but includes a PDF preview on the right side. The preview shows a document with 40 pages, with the first three pages visible. The interface elements are the same as in the previous screenshot, including the document title, status, signing order, and recipient list.

Envelope Sharing Between Account Users

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

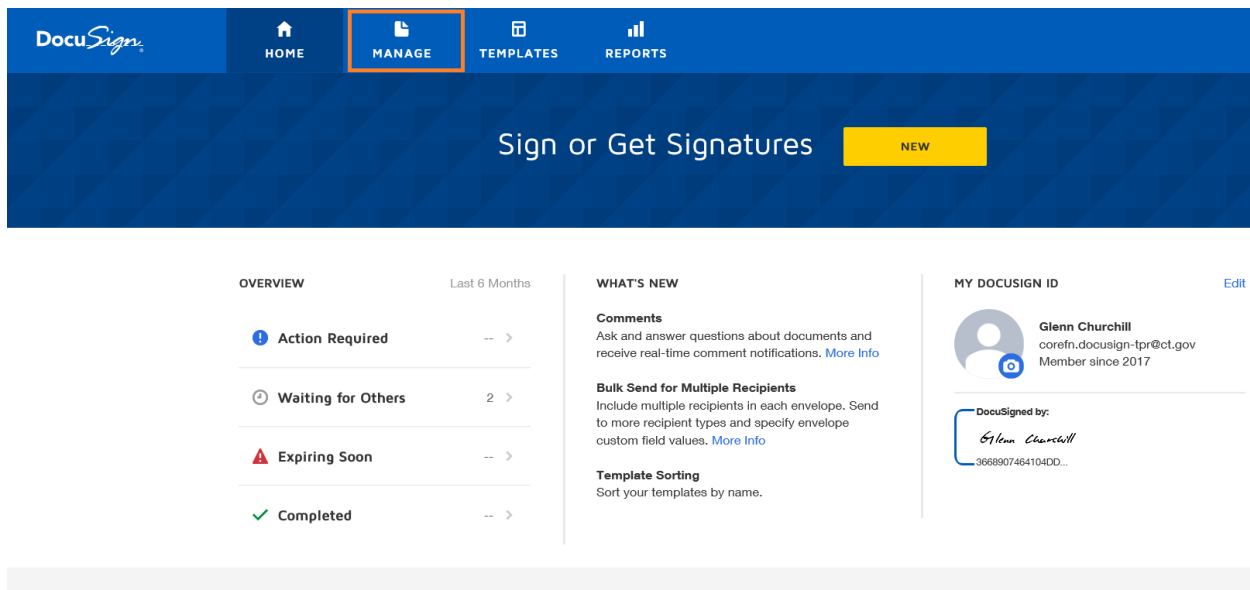
The ability to share envelopes between your account users is helpful for scenarios such as coverage during a leave of absence, delegated management of DocuSign transactions, or other collaborative workflows.

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.

For assistance in setting up Envelope Sharing, please log a Footprints ticket.

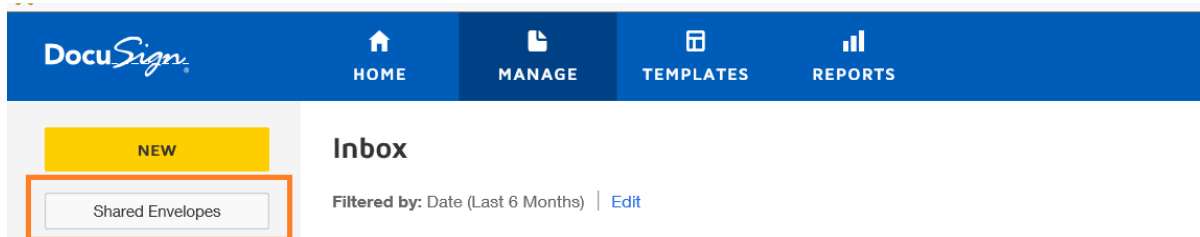
View the Envelope of another user

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



The screenshot shows the DocuSign application interface. The top navigation bar is blue with the DocuSign logo on the left and four tabs: HOME, MANAGE (highlighted with an orange box), TEMPLATES, and REPORTS. Below the navigation bar is a dark blue banner with the text "Sign or Get Signatures" and a yellow "NEW" button. The main content area is divided into three columns. The left column is titled "OVERVIEW" and shows a list of envelope statuses: "Action Required" (1), "Waiting for Others" (2), "Expiring Soon", and "Completed". The middle column is titled "WHAT'S NEW" and contains sections for "Comments", "Bulk Send for Multiple Recipients", and "Template Sorting". The right column is titled "MY DOCUSIGN ID" and shows the user's profile information: Glenn Churchill, corefn.docusign-tpr@ct.gov, Member since 2017. Below the profile information is a "DocuSigned by:" section with a signature and the ID 3668907464104DD...

3. Click the Shared Envelopes Button.



The screenshot shows the DocuSign application interface with the "MANAGE" tab selected. The top navigation bar is blue with the DocuSign logo on the left and four tabs: HOME, MANAGE, TEMPLATES, and REPORTS. Below the navigation bar is a dark blue banner with the text "Sign or Get Signatures" and a yellow "NEW" button. The main content area is divided into three columns. The left column is titled "OVERVIEW" and shows a list of envelope statuses: "Action Required" (1), "Waiting for Others" (2), "Expiring Soon", and "Completed". The middle column is titled "WHAT'S NEW" and contains sections for "Comments", "Bulk Send for Multiple Recipients", and "Template Sorting". The right column is titled "MY DOCUSIGN ID" and shows the user's profile information: Glenn Churchill, corefn.docusign-tpr@ct.gov, Member since 2017. Below the profile information is a "DocuSigned by:" section with a signature and the ID 3668907464104DD... The "Shared Envelopes" button is highlighted with an orange box.

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.

DocuSign HOME MANAGE TEMPLATES REPORTS ⓘ

Envelopes belonging to Thomas Chen. [Return to my envelopes](#)

Shared Envelopes

ENVELOPES

- Inbox
- Sent
- Deleted
- PowerForms

QUICK VIEWS

- Action Required
- Waiting for Others
- Expiring Soon
- Completed
- Authentication Failed

FOLDERS

Action Required

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

checkbox	Subject	Status	Last change	Folder
<input type="checkbox"/>	STATE_19MHA1014PSA01_0.PDF To: external new, TC +1 more	Needs to be Signed	8/17/2018 05:33:33 pm	
<input type="checkbox"/>	STATE_18DDS5153CSPOS01_0.PDF To: new external, External original 1 +1 more	Needs to be Signed	8/8/2018 04:44:32 pm	

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