## CONTENTS

Account Management ........................................................................................................... 2

The DocuSign® Console ..................................................................................................... 2

The Home Tab ..................................................................................................................... 3

Envelope Status .................................................................................................................... 4

Docusign® ID Card (Optional) ............................................................................................ 4

The Manage Tab .................................................................................................................. 5

Folders .................................................................................................................................. 5

The Send Tab ....................................................................................................................... 6

The Dashboards Tab ............................................................................................................. 6

Managing your Submission ................................................................................................. 7

Tracking Your Submission ................................................................................................. 7

Editing Signers ................................................................................................................... 7

Deleting Signers .................................................................................................................. 8

Sending Copies .................................................................................................................... 9

Logging Out of the Console ............................................................................................... 9

Support ............................................................................................................................... 10
ACCOUNT MANAGEMENT

This guide will show you how to access and manage your DocuSign® account. It will also provide information on features that were not previously presented. To log into DocuSign®:

Open your Internet browser and navigate to https://www.DocuSign®.net/

Click on the Login button and enter your Email Address and Password in the spaces provided. If you do not have a DocuSign® account, you may create one on your own or you may ask RAS to create one for you.

Click on the Log In button.

When you log in to the console for the first time, you are taken to the Getting Started page. This page may be a bit misleading for your goals. Instead, click on the Home tab to the top of the window.

THE DOCUSIGN® CONSOLE

In this section, the general parts of the DocuSign console will be discussed.
1. **Navigation Panel:** The navigation panel is shown on the left side of your console when the Manage or Dashboards tabs are selected. The navigation panel is used to select and display various types of information. The selected information is shown in the Results Panel.

2. **Results Panel:** The results panel is the main working area for the console. This is the area where information is shown and where you work with envelopes and other items.

   **Important!**
   Please note that the ‘subject’ and ‘from’ fields of each submission are going to be the same. Use the ‘sent’ field to distinguish one submission from another. You may also open an item to see which one it is.

3. **Detail Panel:** When an envelope is selected in the Results Panel, information about that envelope is shown in the Detail Panel. The information shown depends on the selected Detail Panel tab. The Detail Panel tabs are:
   - **Summary:** This is the default tab. It shows when the envelope was sent or created and provides a quick view of the envelope’s progress by showing the status of envelope recipients.
   - **Document:** This tab provides a view of the documents in the selected envelope. If the envelope is completed, this view shows the information and signatures in the documents. You cannot take any actions on the documents from this view.
   - **Dashboard:** This tab is only available when a report is selected from the Dashboard section in the navigation panel. This tab provides a view of the report associated with the current Results Panel view.

**THE HOME TAB**

Here, you can see a summary of all of the activity on your account. You may also edit your DocuSign® ID Card (optional).

**Important!**
The “Start A New Envelope” and “Sign A Document Now” buttons are not applicable for the submission of documents to RAS.
ENVELOPE STATUS

The Envelope Status gives an overview of your activity. The numbers show how many envelopes fit the given category.

Click on any category to display a list of envelopes related to it. In most cases, submitters will be interested in those “Out For Signature,” while signers will be interested in those “Awaiting my Signature.”

Awaiting my Signature: For Signers, these envelopes were routed to you for review and approval. For Submitters, these envelopes were sent back to you for requested changes.

Expanding Soon: This category is not applicable for the purpose of this guide.

Out For Signature: These envelopes were created by you and are currently awaiting signature from someone within the routing structure. It is possible that an item may show here if it is awaiting your own signature.

Completed: These envelopes have successfully completed the routing process. The proposal has been submitted to the sponsor by your Research Administrator.

DOCUSIGN® ID CARD (OPTIONAL)

A DocuSign® ID card is automatically created for anyone with a DocuSign® account. This ID card stores general information about you and links that information to your signature. Individuals who click on your signature will see your ID card.

You may set what information is shared when someone clicks on your signature.

If you choose to edit your ID card, you will have the ability to add a photo, manage your signature, or edit the privacy settings of the ID card.

This feature is totally optional and will not impact the routing process itself.
THE MANAGE TAB

The Manage tab is the tab most used by submitters, but can also be used by signers. It provides access to envelope folders and search folders associated with your account. The folders, with envelopes, are shown in the navigation panel when the Manage tab is selected. This tab also allows submitters to make changes to their submission while it is working through the routing process. The folder sections are described below.

FOLDERS

Folders are found to the navigation menu. They act as pre-determined filters for envelopes. When one is selected, the envelopes that fall into that filter are displayed.

ENVELOPES

- **Inbox:** This folder includes envelopes that have been sent to you for review or edit.
- **Sent Items:** This folder includes envelopes you have sent for review or edit.
- **Draft:** This folder contains envelopes that you have started, but have not sent. Drafts are only held for 30 days before they are automatically deleted.
- **Deleted Items:** This folder has envelopes that have been deleted. Envelopes in this folder are held for 30 days before being deleted from the system permanently. During those 30 days, items can be restored to their original folder.

SEARCH FOLDERS

These folders contain pre-set envelope filters. The filters are common envelope searches, including your Most Recent search, and when selected shows envelopes that meet the filter search criteria in the Results Panel.

TEMPLATES

This section is not applicable for the purpose of this guide.
THE SEND TAB

This tab is not necessary for the purpose of submitting a document to RAS.

To submit a proposal to RAS, go to: http://www.howard.edu/research/researchers/proposal_submission.html and click the ‘here’ link.

THE DASHBOARDS TAB

The Dashboards tab provides access to visual reports of your account.

When you initially click the Dashboards tab, all the visual reports are shown in the Results Panel. You can scroll through the reports and select items directly from the reports.

There are several report filters available in the console, which provide quick access to commonly requested envelope information. Each of the report filters are described below:

- **Overview**: This option shows all the visual reports and reporting options.

- **Out For Signature**: This option shows a list of envelopes that have been sent, but not signed by everyone, in the Results Panel, with a bar chart aging report showing the number of days since an envelope was sent for signature in the Detail Panel. Optionally, you can show the aging report for envelopes awaiting your signature.

- **Completed Envelopes**: This option shows a list of envelopes that are completed in the Results Panel and a bar chart ‘Time To Complete’ report showing the number of days between sending an envelope and completing the envelope in the Detail Panel.

- **Envelopes Status**: This option shows a list of envelopes that have been sent in the Results Panel and a pie chart showing the status of the envelopes in the Detail Panel.
MANAGING YOUR SUBMISSION

This section of the guide will show submitters how to manage their submissions after they have been sent for review. There are a few features that are available to a submitter that makes tracking submissions and editing signers very easy.

TRACKING YOUR SUBMISSION

Signers are asked to sign a document within 2 business days or receipt. A submitter has the ability to see where a submission is in the routing structure at any given time. It is also possible to see if a signer has even viewed a submission.

From the Home tab, click on Out For Signature.

In the Results Pane, find the envelope that you would like to track and click on it.

Review the information in the Details Pane.

At this point, you may contact a signer if they are taking too long to sign a document. In some cases, the signer will be unavailable and an alternate signer may be provided.

EDITING SIGNERS

In cases where an alternate signer is given, a submitter may replace the contact of the current signer to that of the alternate signer.

From the Manage tab, click on the envelope that has the signer that you wish to change.

While the cursor is on the selected envelope, a small upside-down triangle will appear at the right.

Click on the triangle to open a dropdown list. Select ‘Correct’ from that list.
Scroll down to the ‘Recipients and Routing’ section.

You may now change the email address and name of the signer(s) that you wish to change. Only signers who have yet to receive the submission will be available for change.

On the bottom of the screen, click on ‘Correct’ to finalize the change. If you do not wish to make any changes, click on ‘Discard Changes’ to exit this page.

DELETING SIGNERS

If a signer is unable to be contacted and there are no alternate signers provided, please let your Research Administrator know via email. Your Research Administrator will research the issue and let you know if you may delete that signer and signing position from the process.

To delete a signer, use the ‘Correct’ feature on the necessary envelope.

Scroll down to the ‘Recipients and Routing’ section. Click on the red X on the line that has information of that signer.

On the bottom of the screen, click on ‘Correct’ to finalize the change. If you do not wish to make any changes, click on ‘Discard Changes’ to exit this page.

Important!
The Department Chair and Dean are the only signers that may be deleted. DO NOT delete a signer from the process without prior approval from your Research Administrator. RAS is actively tracking submitters who delete signers as well as signers who are being deleted by submitters.
SENDING COPIES

If there is someone who needs to see the proposal at any point of the process, you may add that person.

Again, use the ‘Correct’ feature on the necessary envelope and scroll down to the ‘Recipients and Routing’ section.

Enter the email address and name of the person who you wish to add to the routing structure.

Click on the ‘Add CC’ button. DO NOT click on the ‘Add Signer’ button. Adding another signer will halt the process once the submission gets to that signer.

Once the addition has been made, you may now decide when you would like a copy of the envelope sent to that person. Use the ‘Order’ column to change the order in which the addition will receive the submission. The person that was added will receive a copy of the envelope once it has been routed to the signer with the corresponding order number.

On the bottom of the screen, click on ‘Correct’ to finalize the change. If you do not wish to make any changes, click on ‘Discard Changes’ to exit this page.

LOGGING OUT OF THE CONSOLE

It is recommended that you logout from the console when you are no longer using it.

Note: The console is configured to automatically log off inactive users after 20 minutes.

- To logout from the console, click Logout. This returns you to the DocuSign® Login screen.
SUPPORT

The Research Systems department of RAS is available to receive any questions or comments regarding DocuSign®. Please feel free to contact any of us at any time by calling (202) 806-4759 or with the email addresses below:

Scott Hodgkins
Director, Research Systems
shodgkins@howard.edu

LeeRoy Smith
Technical Support Specialist
leesmith@howard.edu