Transcripts: LOGGING IN

<Happy music>

Logging into DocuSign is easy.
Let’s get started.

To log in, go to DocuSign.com

Select log in.
Enter your email address and select continue.

Select Company Log in.

Enter your NetID, password, and select Sign in.
**How-To Steps: LOGGING IN**

1. Go to DocuSign.com
2. Select Log in
3. Enter your email address and select continue.
4. Select Company Log in.
5. Enter your NetID, password, and select Sign in.

When you see this page, you’re in! Good job!
Getting to your inbox is important. It lists all items sent to you and their status. Okay? Let's get started!
Go to DocuSign.com and log in.

Select manage.

When we select manage from the home section, we landed in the inbox. How do we know this? Well, it's highlighted.
Here is a list of everything sent to you and here is the status of each.

Now you know how to get to your inbox. Easy right!

Good job!

How-To Steps: Getting to your In Box
1. Go to DocuSign.com and log in.
2. Select Manage.
3. When we select manage from the home section, we landed in the in box. We know this because it is highlighted. If it isn’t, then select the inbox.
Transcripts: Getting to your sent box

Getting to your sent box is important. It lists everything that you sent and the status. Check it to make sure your requests are moving forward. Okay? Let's get started.

Go to DocuSign.com and log in.
When you select manage from the home section, you land in the inbox. How do we know this? It's highlighted. To get to the sent box, select sent.

Now I'm in the sent box. I know because it is highlighted. Here are items you sent and here is the status of each.
How-To Steps: Getting to your Sent Box

1. Go to DocuSign.com and log in.
2. Select Manage.
3. Select the Sent box.
Actions required means that you need to do something: approve, sign, view, or complete. And, if you don't, since it's required, a process cannot move forward. Okay? Let's get started.
Go to DocuSign.com and Log in

Logging in takes you to the home section. Your action items are listed here. You have 4 things to do. To attend to these, select action required or Manage. I'm going to select Manage.

Selecting manage from the home section sends you directly to the inbox. I can also tell that I'm in the inbox because it is highlighted.
The inbox is where everything sent to you is listed. The blue bar identifies the four items requiring your attention.

Let’s attend to the first. Select the blue button.

Select sign to go to the document.
To work on it, select continue.

Do what you need to with the document and select finish.

Good job. I am now back in the Home section, I can tell because it is highlighted. I now see that I have 3 things to attend to. This time, I am going to select Action Required.
Selecting action Required from the home page takes you to the manage section, quick view, action required box. How do you know you are there? Because it's highlighted.

You see a list that only contains the items that you need to attend to as opposed to the inbox which contains everything sent. To attend to another required action, repeat the steps just described.

How-To Steps: Action Items

1. Go to DocuSign.com and Log in
2. Selecting manage from the home section sends you directly to the in box. If it doesn’t, select the in box.
3. The blue bar identifies items requiring your attention. Select Sign in the row to attend to an item.
4. To work on it, select continue
5. Do what you need to with the document (follow the prompts) and select finish.
6. To attend to another required action, repeat the steps described.
Download a document as a PDF to save it on your computer or other location. Okay, let's get started.

Go to DocuSign.com and Log in
Select Manage

Selecting manage from the home section, takes us to the inbox. We know this because it's highlighted. This is perfect because we want to download a completed document that was sent to us and items sent to us are in the inbox.

Here is the completed document. Go ahead and select the title.
Next, select the download icon.

Check the items you want then select DOWNLOAD.

The item is downloading. Access it as you normally would.
That was easy, right? Now you know how to download.

How-To Steps: Download a document into a PDF
1. Go to DocuSign.com and Log in
2. Select Manage
3. Go to the document and select the documents title.
4. Select the download icon.
5. Check the items you want then select DOWNLOAD
6. The item downloads similar to other documents. Access it as you normally would.
Create and use folders to stay organized. Okay? Let's get started!

Go to DocuSign.com and login.

Select Manage
Folders appear in the left-hand column. We are going to create a new folder called GO animate examples. To create a new folder, select the plus symbol.

Enter the folder's name and select create.

Perfect. Here is the newly created folder.
To modify a folder, select the space next to its title.

Doing so activates options. Choose from among them and follow the prompts.

Now, how do we move documents into folders? Well, it's just like email. Simply drag a document from one folder and drop it into another.
After a document is moved, you’ll see a receipt.

So now you know how to create, modify, and move items between folders. Good job.

Thank you for watching and be sure to catch the other videos in this module.

How-To Steps: Create and Use Folders

1. Go to DocuSign.com and log in.
2. Select Manage.
3. To create a new folder, select the + symbol and follow the prompts.
4. To modify a folders, select the space next to the folder and follow the prompts.
5. Drag and drop contents into folders.
Checking the status of items you send is important to ensure that your requests are progressing. Okay? Let’s get started.

Go to DocuSign.com and login.

Select manage.
You are now in the manage section, and in the inbox. This is where you want to be to check status of something that was received. In this example, let’s check the status of a request that we sent. Sent requests appear in the sent box. Select it.

You are in the Sent box. How can you tell? Well because it is highlighted. Here are items you sent and here is the status of each.

The first item is complete. The second isn't. I can tell that Norma Chicago and Tiney McKnight are in the workflow. But who has it?
Place your cursor over the words waiting for others.

So we’re waiting for Norma Chicago.

To get more details, select the document’s title.
Now you can tell in what order who needs to do what. As we already know, Norma needs to sign. Let’s her a reminder through DocuSign. Select RESEND.

You know an email was sent because a confirmation appeared. Select Manage to go back to the list.

Let’s look at a more complicated example. This one. The last document has many more people in the workflow. Do you remember how to find details about the workflow? Right. Select the document’s title.
Now we can see everyone who is involved with the document, who did something, and when.

Select manage to go back to the list.

Excellent. Good job.
How-To Steps: Checking the Status

1. Go to DocuSign.com and log in.
2. Select Manage.
3. Navigate to the folder where the document is housed. Look at the status column and beneath the title of the document. Both locations will provide information.
4. To learn more about the status, select the document’s title. If a document is not complete, you may have the option of sending the next person in the workflow an email reminder.