

Getting Started with DocuSign

DocuSign is the electronic system used to route, approve, and execute construction related documents at The University of Alabama. While these basic instructions are intended to help you become familiar with DocuSign, please contact any of the UA Construction Contracts & Compliance members if you have questions or need additional assistance.

Currently, the following types of documents are executed through DocuSign:

- Owner/Designer Agreement
- Professional Service Provider Agreement
- Amendment to Agreement
- Construction Contract
- Change Order with eCORAF
- PJO for Standing Contracts

The topics listed below are covered on the following pages. Click a topic to advance to that section:

1. [How to Open and Complete a Document](#)
2. [How to Sign and Finish](#)
3. [How to Save to Finish Later](#)
4. [How to Assign to Someone Else](#)
5. [How to Attach a Document](#)
6. [How DocuSign Routes an Envelope](#)
7. [How to Check the Status](#)
8. [How to Make a Copy](#)

1. How to Open and Complete a Document

- a. You will receive an email with the DocuSign link provided.

Note: Save this initial email for accessing the document later. No account is needed to use DocuSign and this first email notification is your key to accessing a document at any time during the routing process whenever you want to check the status.

- b. Open the email then click the “Review Documents” button.



(Image 1)

- c. If this is the first time you have used DocuSign, you will be prompted to check a box indicating you have read the Electronic Records and Signature Disclosure and that you agree (Image 2).



(Image 2)

- d. Once you have read the information, check the box indicating your approval then click “Continue” to open the document (Image 3).



Please Review & Act on These Documents

 **Leigh Ann Huguley**
University of Alabama - TEST

 **THE UNIVERSITY OF ALABAMA**[®]
Powered by **DocuSign**

 Please read the [Electronic Records and Signature Disclosure](#).
☐ I agree to use electronic records and signatures.

CONTINUE OTHER ACTIONS ▾

DocuSign Envelope ID: E5083DF5-EC10-4CA0-A212-F8F2C8EFFED8

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
1301 2nd Ave, Suite 2000 • Seattle • Washington 98101 • (206) 219-0200
www.docusign.com

CONTRACT AGREEMENT FOR CONSTRUCTION

THIS AGREEMENT, entered into this day of by and between
THE BOARD OF TRUSTEES OF THE UNIVERSITY OF ALABAMA, a corporation, the party of the first
part (hereinafter called the Owner) and ,
party, of the second part (hereinafter called the Contractor).

WITNESSETH that the Owner and the Contractor, in consideration of premises and of the mutual

(Image 3)

- e. The document will appear on the screen and you will see the fields you are to fill in outlined by red boxes and/or a yellow signature tag. Click the “Start” tag (Image 4) and DocuSign will automatically advance you to the first field to be completed.



Please review the documents below. OTHER ACTIONS ▾



 **START**

DocuSign Envelope ID: E5083DF5-EC10-4CA0-A212-F8F2C8EFFED8

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
1301 2nd Ave, Suite 2000 • Seattle • Washington 98101 • (206) 219-0200
www.docusign.com

CONTRACT AGREEMENT FOR CONSTRUCTION

THIS AGREEMENT, entered into this day of by and between
THE BOARD OF TRUSTEES OF THE UNIVERSITY OF ALABAMA, a corporation, the party of the first
part (hereinafter called the Owner) and ,
party, of the second part (hereinafter called the Contractor).

WITNESSETH that the Owner and the Contractor, in consideration of premises and of the mutual
covenants, considerations, and agreements herein contained, agree as follows:

(Image 4)

- f. The “Start” tag will change to “Fill In” and a tool tip will appear (Image 5) giving you direction as to what information you are to enter.

Enter text

OTHER ACTIONS ▾

DocuSign Envelope ID: E5083DF5-EC10-4CA0-A212-F8F2C8EFFED8

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
1301 2nd Ave, Suite 2000 • Seattle • Washington 98101 • (206) 219-0200
www.docusign.com

CONTRACT AGREEMENT FOR CONSTRUCTION

Enter day of month (i.e., 12th, 21st, etc.)

FILL IN

THIS AGREEMENT, entered into this day of by and between
THE BOARD OF TRUSTEES OF THE UNIVERSITY OF ALABAMA, a corporation, the party of the first
part (hereinafter called the Owner) and
party, of the second part (hereinafter called the Contractor).

WITNESSETH that the Owner and the Contractor, in consideration of premises and of the mutual
covenants, considerations, and agreements herein contained, agree as follows:

(Image 5)

Note: Anytime you hover the mouse over a box, the tool tip will be displayed.

- g. Once the information has been entered you may either hit the enter key or the tab key to advance to the next field. DocuSign will continue advancing you to the next field until all fields have been completed. If you inadvertently miss a field, DocuSign will continue to direct you through the fields until they have all been completed. When all fields have been completed, a red Finish button will appear (Image 7).

Back to Top

2. How to Sign and Finish

- a. DocuSign will direct you to any signature tags assigned to you. Click to sign.

Note: If this is the first time you've signed a document in DocuSign, you will be given the option to select how you want your signature to appear (Image 6). If you do not like the default option, click "Change Style" and choose another.

Adopt Your Signature

Confirm your name, initials, and signature.

Full Name: Leigh A. Huguley

Initials: LAH

Select Style Draw

PREVIEW

DocuSigned by: Leigh A. Huguley DBB6DD05EF334B7...

DS LAH

Change Style

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

(Image 6) Follow the on screen directions and click on your style preference.

- b. Click "Finish" (Image 7). When the "Finish" button has been selected, DocuSign will automatically send the document to the next signer so you do not need to do anything further to continue routing.



(Image 7)

Note: You are not finished completing the document until you click the red "Finish" button that appears at the bottom right corner of the screen. If you have entered everything and do not see a Finish button (Image 7), click on the "Next" tag on the left of the document to go back through each field to see which one you may have missed. The "Finish" button is DocuSign's confirmation to you that all fields have been completed. DocuSign will not advance the document to the next signer until you have clicked the "Finish" button.

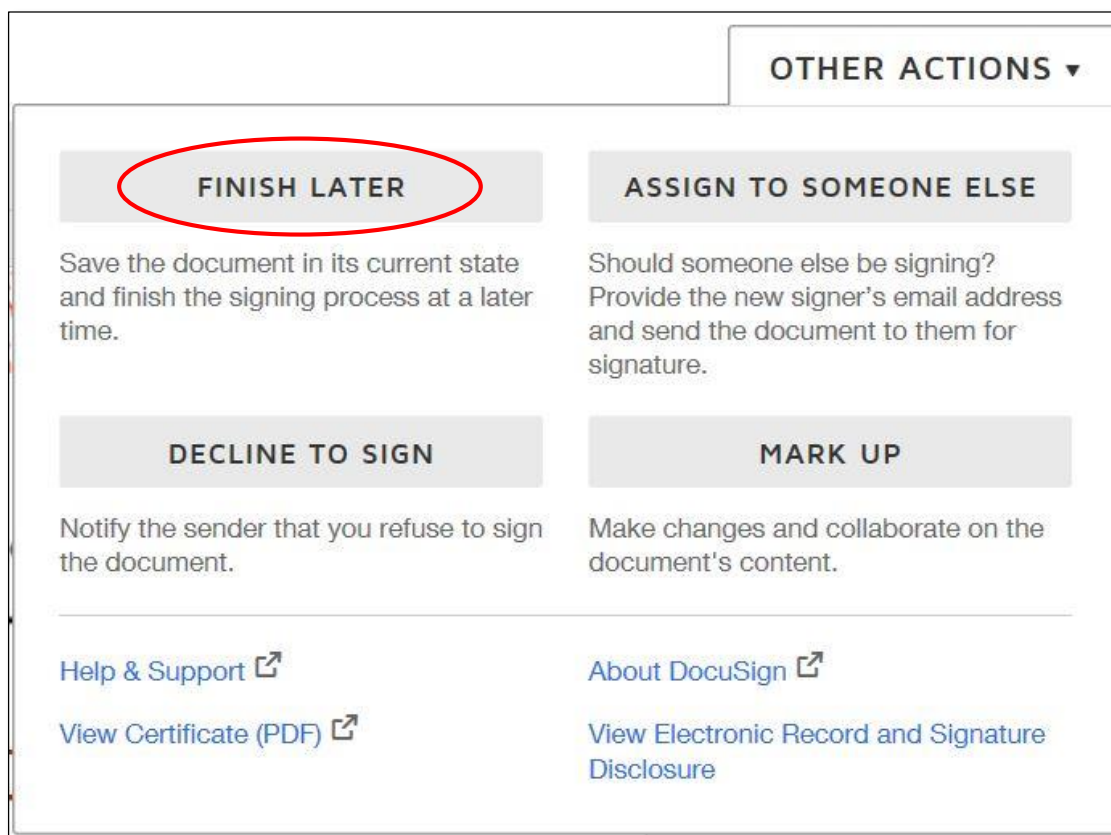
3. How to Save to Finish Later

- a. If you have begun entering information and need to stop before finishing, you may save the document to be completed later. If you close the document without saving your information, all information entered will be lost. To save your information, locate and click the “Other Actions” button on the right of the screen (Image 8).



(Image 8)

- b. Click the “Finish Later” option from the drop down (Image 9). When you are ready to return to the document to complete it, go to the email notification you initially received and saved from Step 1. a., and click the “Review Documents” button (Image 1).



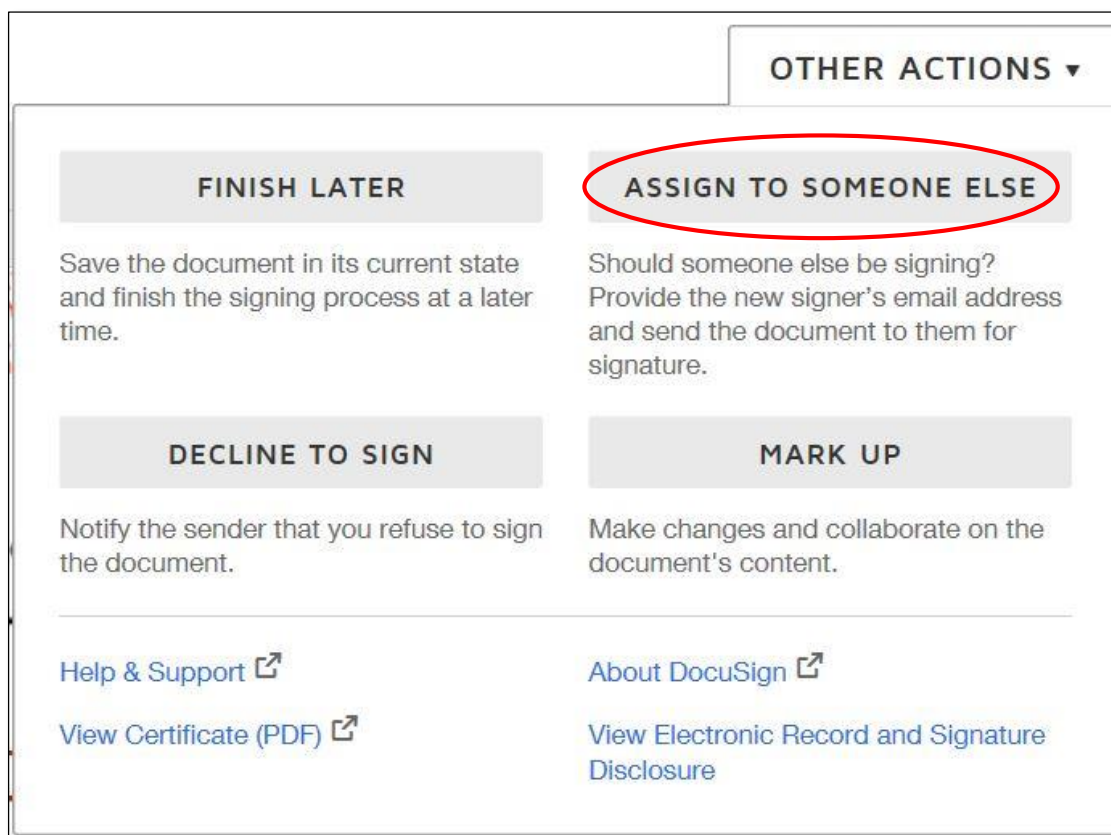
(Image 9)

4. How to Assign to Someone Else

- a. If you have received a document that should be completed or signed by someone else in your company, you have the option to "Assign to Someone Else". This will change the fields and signature tags that were initially assigned to you to whomever you designate and their name will appear on the document instead of yours.

Note: Do not forward the DocuSign email to someone else to complete.

- b. Go to the "Other Actions" button at the top right of the screen (Image 8), then select "Assign to Someone Else" (Image 10). Follow the on screen instructions for entering the email address and name.

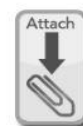


(Image 10)

Back to Top

5. How to Attach a Document

- a. If additional documentation is required to be added to the document, an attachment tag will appear for you to click and upload from your computer (Image 11). Follow the onscreen instructions for uploading.



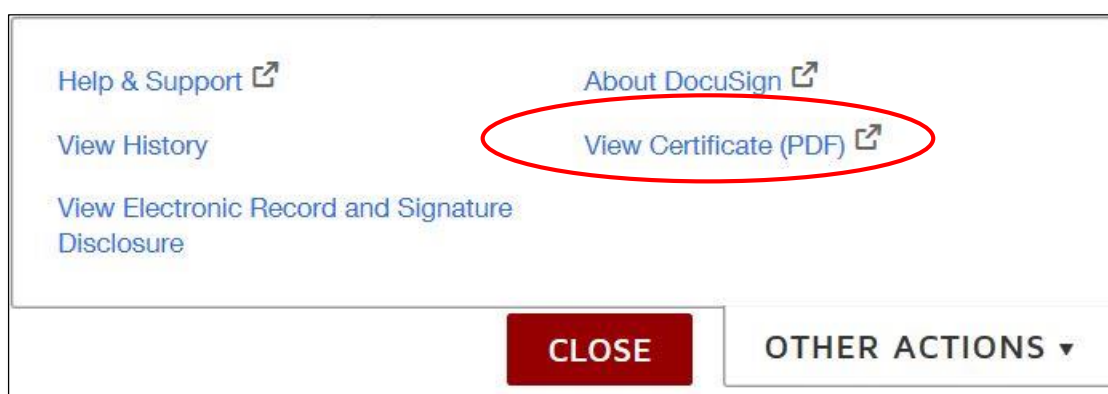
(Image 11)

- b. If you need to add additional documentation and an attachment tag is not included in the document, contact either the UA Project Manager or the UA Contract Administrator to have the attachment tag added. You will be instructed to save your work by clicking the “Other Actions” tab and choosing “Finish Later” (see Step 3). The tag will be added by UA, and then you will be instructed to reopen the envelope and continue.

Back to Top

6. How DocuSign Routes an Envelope

- a. DocuSign automatically routes an envelope from one signer to the next based on the assigned routing order. When a signer clicks the “Finish” button, DocuSign automatically routes the document to the next signer.
- b. To see the list of signers and the routing order, go to the original notification email you received from DocuSign. Click the “Review Documents” button (Image 1) and once the envelope is opened, click the “Other Actions” button (Image 8) on the right of the screen. Select “View Certificate” from the list of Actions (Image 12). Scroll through the page to see the list of signers. The names are listed in the assigned routing order.



(Image 12)

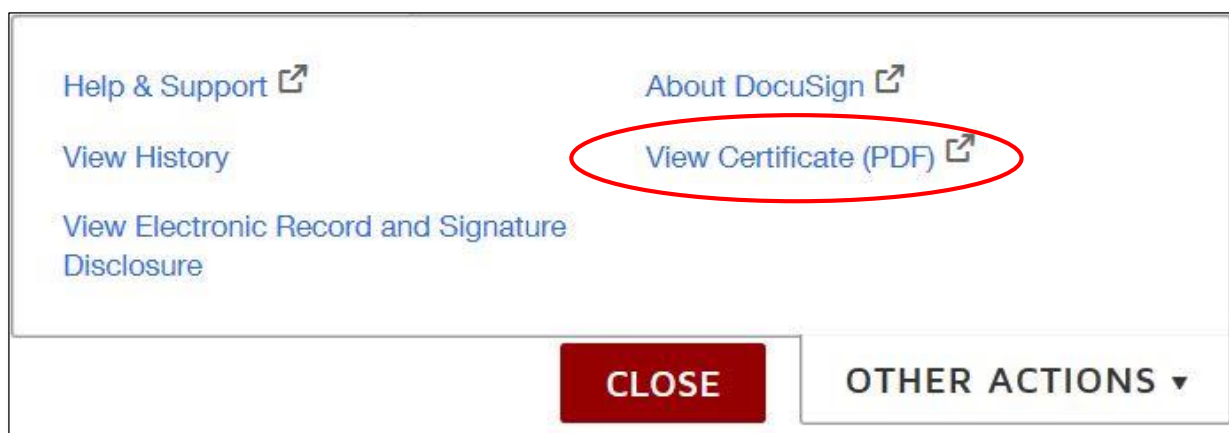
Back to Top

7. How to Check the Status

- a. After you have signed the document and DocuSign has routed the envelope to the next recipient, you have the ability to check the status at any time. This can be helpful if it is taking a while for the document to be executed.

Note: Once all signatures have been obtained and the document is complete, DocuSign will send a notification email to all recipients.

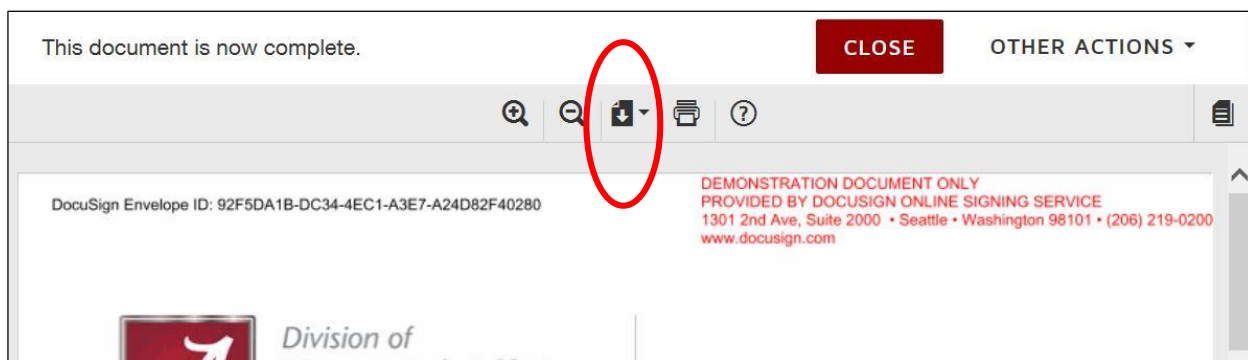
- b. To check the status, open the original email notification you received and saved from Step 1., a.
- c. Click the “Review Documents” button in the email (Image 1).
- d. Once DocuSign opens the envelope, click the “Other Actions” button (Image 8) on the right side of the screen.
- e. Click “View Certificate” (Image 12). The routing list will appear and beside each signer’s name will be the date and time the envelope was sent and received. Based on the date and time information displayed, you will see who currently has the envelope. You will also see the remaining recipients waiting to sign and/or receive a copy of the document.



(Image 12)

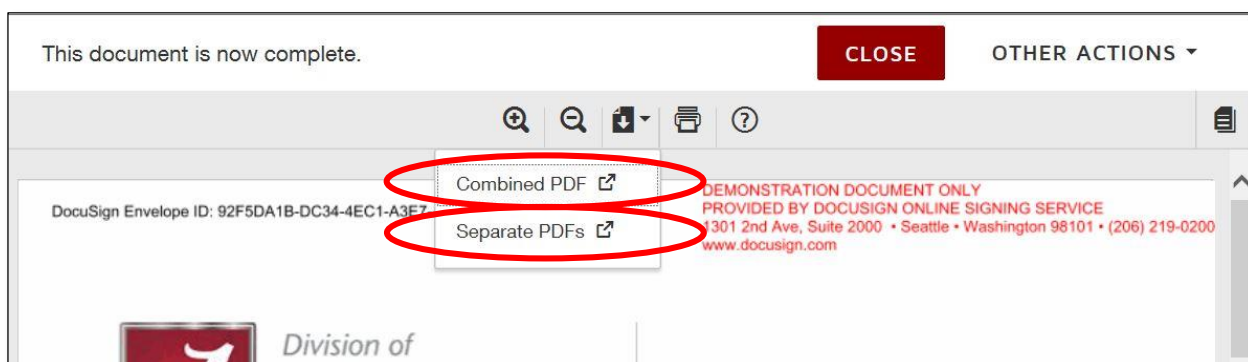
8. How to Make a Copy

- a. A copy can be made of a document at any time, either before or after it has been executed. To make a copy, click the Review Document button (Image 1) in the email notification from DocuSign.
- b. Locate and click on the download button at the top of the screen (Image 13).



(Image 13)

- c. Select by clicking one of the two options: Combined or Separate (Image 14).



(Image 14)

- If Combined is selected, the document will download as one complete PDF document.
 - If Separate is selected, the document will download into separate PDFs based on the number of parts that comprise the document. For example, a typical Construction Contract is comprised of at least five parts: 1) Cover Letter, 2) Contract, 3) Vendor Disclosure Statement, 4) Performance and Payment Bonds, and 5) E-Verify page.
- d. Whichever option you select, a PDF will be generated and you will then follow your usual procedure for saving a document to your computer.

Back to Top