

DocuSign Users Table

This table holds a record for each Agiloft user who will send documents to DocuSign by creating the envelope and clicking the Send button. Each record must have a valid DocuSign login to enable sending.

Use Case

The DocuSign Administrator and DocuSign Users, or Senders, must be set up at the DocuSign website first. The user must also exist in the People/Employees table in Agiloft. To set up the DocuSign User in Agiloft, click New in the DocuSign Users action bar to bring up the screen below:

The screenshot shows a web form titled "DocuSign User". At the top, there are "Save" and "Cancel" buttons, and a breadcrumb "DocuSign User". The form contains the following fields:

- *Login: dsides
- *Full Name: Dennis Sides
- DocuSign User Name(Email): dennis.sides@agiloft
- Access Granted: No
- DocuSign Password: [masked with dots]

Below the fields is a blue text block: "User must be authorized to send envelopes/documents. If you are self-registering, please type in your DocuSign User Name(Email) and Password(it wont be stored locally) to grant access. If you are DocuSign Account Administrator you can grant access to other users by typing in their User Name/Email and leaving the password field blank." Below this text is an orange button labeled "Grant Access to DocuSign". At the bottom of the form, there are "Save" and "Cancel" buttons and navigation arrows.

Look up the user by typing their name or login into the fields and using the lookup tool.

- **Full Name** – the user's Full Name in Agiloft must match the name input at DocuSign.
- **DocuSign User Name (Email)** – must match the email address input at DocuSign.
- **DocuSign Password** – must match the password input at DocuSign and be manually filled in.

Then click the Grant Access to DocuSign action button to finish adding the DocuSign user.

DocuSign Users (senders) will have account records on both Agiloft and DocuSign. DocuSign Recipients (signers) are not required to have Agiloft or DocuSign account records.

Every person who sends out documents for signature, called DocuSign Users in Agiloft and Users with Sender Permissions in DocuSign, must have a user record in the following places:

- The People/Employee table of Agiloft
- The DocuSign Users table
- The Users table of the company's account at DocuSign

A successfully created DocuSign User record will look like the screenshot below:

Status: DocuSign User #5 successfully created..

DocuSign User

[Edit](#) [Close](#) DocuSign User << >>

*Login	cmerritt	*Full Name	Craig Merritt
DocuSign User Name(Email)	craig.merritt@agiloft.com	Access Granted	Yes

[Revoke Access](#)

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At this point, the person is set up to send documents for e-signing through Agiloft and DocuSign.