

DocuSign Users Table

This table holds a record for each Agiloft user who can send documents to DocuSign. Each record must have a valid DocuSign login to enable sending.

Use Case

The DocuSign Administrator and DocuSign Users, or Senders, must have existing DocuSign logins. The user must also exist in the Employees table in Agiloft. To set up the DocuSign User in Agiloft:

1. Click New in the DocuSign Users action bar. This brings up the DocuSign User tab.
2. Look up the user by typing their login or name into the Login or Full Name fields, respectively. You can also find users with the look-up icon.
3. Once you've located the user, fill in the remaining fields:
 - **Authenticate:** by default, the "With username" option is selected but it can be changed to another user. If JWT is selected, only the DocuSign User ID appears. This field should contain the APU Username value that you can access from DocuSign. For more information, visit the [DocuSign Integration](#).
 - **DocuSign User Name (Email):** visible if "With username" is selected. It must match the email address input in the user's existing DocuSign account.
 - **DocuSign Password:** visible if "With username" is selected. It must match the password input in the user's existing DocuSign account and be manually filled in.
 - **As DocuSign User:** visible if "As another user" is selected. Use the lookup tool to locate all the users with DocuSign access
4. Click Grant Access to DocuSign to finish adding the DocuSign user.

DocuSign Users, or senders, have account records on both Agiloft and DocuSign. DocuSign Recipients are not required to have Agiloft or DocuSign account records, even though they are the signature you require.

Users who sends out documents that require signatures are called 'DocuSign Users' in Agiloft, but are called 'Users with Sender Permissions' in DocuSign. These users must have a user record in the following places:

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

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

Automation

In the standard system demo, the DocuSign user table contains two rules. These rules are accessed by expanding the DocuSign Users table in the left pane, selecting Setup DocuSign Users, and then selecting the Rules tab:

1. **Revoke Access to DocuSign:** This rule revokes the Access to DocuSign for a user and then removes that user from DocuSign User group.
2. **Add to DocuSign User group:** This rule adds the user to the DocuSign User group.

Ownership

DocuSign Users records are owned by the user whose Login field in DocuSign User record matches the Login field in the People table.