



UTEP

DocuSign®

Testing Phase

Agenda

- DocuSign Testing
- Let's Get Started!
 - How To Access DocuSign
 - Live Demo
- Post Development Notes

Testing In DocuSign

- DocuSign Demo
 - DocuSign Demo is a test environment where forms are developed
 - We use Demo to avoid the charge of envelopes
 - All envelopes sent will not be valid contracts, used for demonstration purposes only
- What to Test:
 - Test & validate form functionality
 - Test & validate workflow
 - Test & validate email verbiage
- Departments will be expected to test their form within 3 to 5 business days
- Sign Off Phase
 - Department gives green light
 - Developer migrates form from DEMO to PRD
 - Test once in PRD
 - Form is handed off to department

Let's get started!

Post Development

- Manage your form in DocuSign
 - Keep track of envelope usage
 - Void incomplete forms
 - Re-route as needed
- Download completed forms for document retention on a monthly basis
 - DocuSign is not designed for document storage
 - **Strongly recommend** to store documents in Content repository
 - If your department does not have a Content repository, please submit a Helpdesk ticket
- Submit Helpdesk ticket for support or questions
 - helpdesk@utep.edu

Thank You!