DocuSign®

Employee Admin Certification

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Introductions

- Name
- Role
- What do you hope to learn?
- Something interesting about yourself

Agenda

TOPICS - DAY 1
Welcome, Agenda & Icebreakers
Workflow Setup
Document Visibility
Signing Groups

Pre-class poll

- ❑ Sent a document for signature?
- ❑ Created a template?
- ❑ Created a PowerForm?
- ❑ Sent a bulk send?
- ❑ Locked a role in a workflow?
- ❑ Used a role besides sign or CC?

As a result of this training you will be able to…

- Analyze workflows and put them into DocuSign
- Demonstrate DocuSign effectively
- Expand current DocuSign knowledge
- Bolster your resume

Some DocuSign skills you will be able to wield

- PowerForms
- Bulk Send
- Authentication Options
- Signing Groups
- Document Labels
- Reporting
- Branding
- Radio Buttons
- Conditional fields
- Formulas
- IDR Match Boxes
- Repeated Fields
- AutoPlace
- Address Recipients
- Manage Envelope
- Sharing
- Custody Transfer
- Templates
- Connect
- Retrieve
- Locking Roles

Workflow Setup

Workflow Setup

- Locking Roles
- Security Options
- Different Roles
  - Need To View
  - Specify Recipients
  - Allow To Edit
  - Update Recipients
- Mark Up

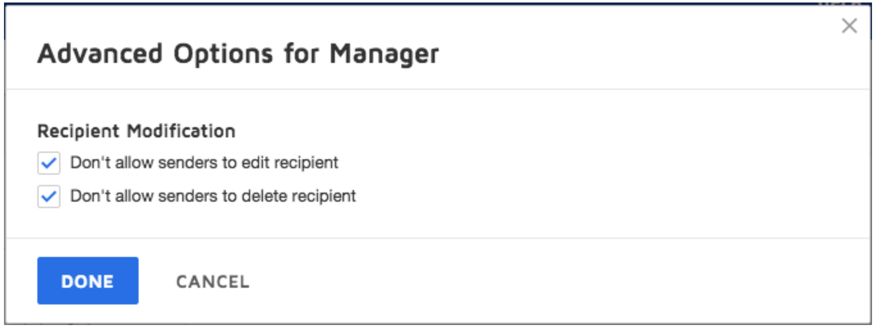
Role Locking – Edit Recipients

Can prevent senders of templates from Editing and/or Deleting Recipients.

- Eliminates human error
- Ensures greater compliance
- Hides “locked” roles in PowerForms

Edit Recipients – The sender cannot change the name or email of that role

Delete Recipients – The sender cannot delete the role out of the workflow from that template.



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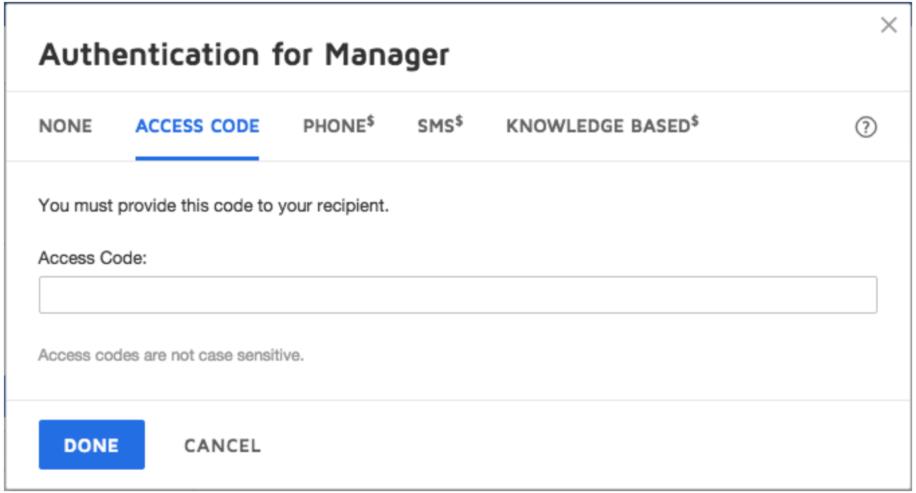
Security and Authentication Options

Provides an added layer of security and verification to your envelopes and workflow.

Access Code – No cost, sender generated option to password protect your envelopes.
* Don’t forget to give the recipient the access code

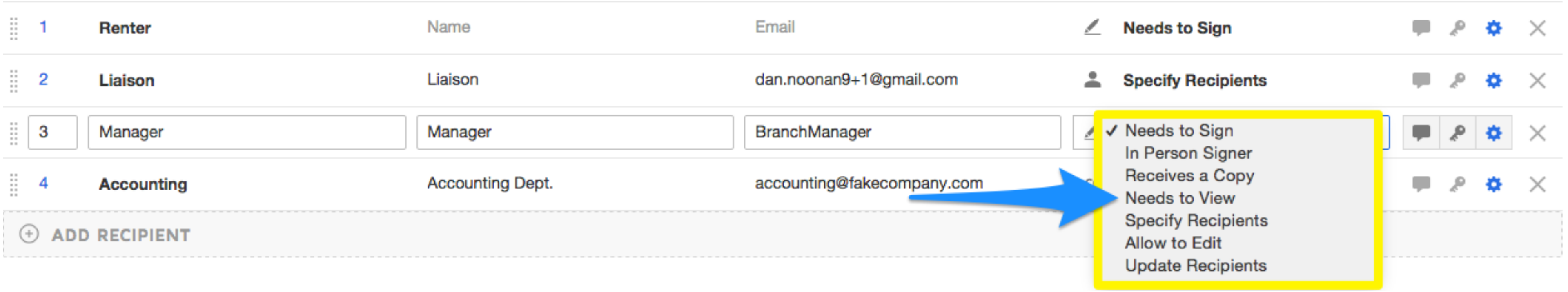
ID Check, Phone & SMS Authentication – Paid options for adding an additional layer of security to your envelopes



Recipient Action Roles: Needs to View

Similar to a CC, but this recipient must click and open the envelope so there is an audit trail of their action.

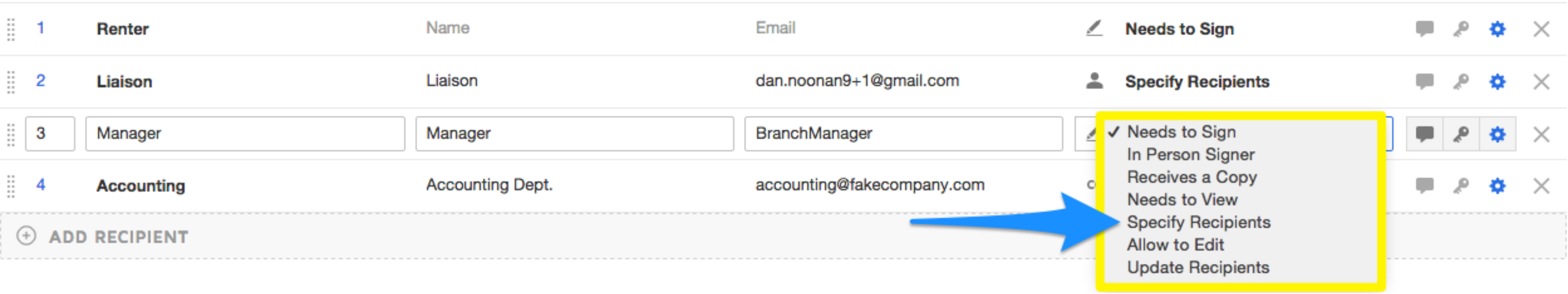
- You need to have the document viewed, though no action is needed
- You need to have proof that the document was viewed
  - Note: If the recipient does not open the envelope, the workflow will be stalled and possibly stay as “In Progress” until this recipient completes the acknowledgement.



Recipient Action Roles: Specify Recipients

This recipient can add name and email information for recipients that appear after the recipient in workflow order.

- Use case: You are sending to a signer but don’t know their name or email address. However, you do know a “liaison” that will enter the signer’s information for you
- Set the address recipient to someone you do know, and leave the actual signer blank – you tag for the signer



Different Roles: Allow to Edit

This recipient has the same management and access rights for the envelope as the sender.

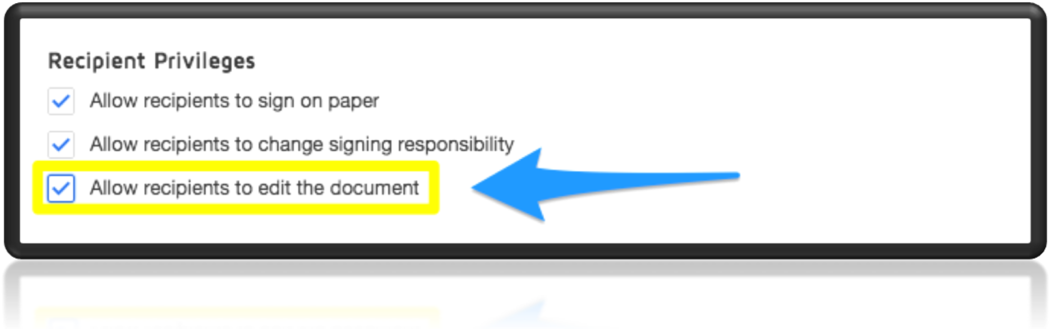
- Changes need to be made to an envelope while it is in process, and the changes need to be made by someone other than the originator
  - Use Case:
    - Adding docs that also need signature tags on them
    - Adding another signer based off dollar amounts requested)

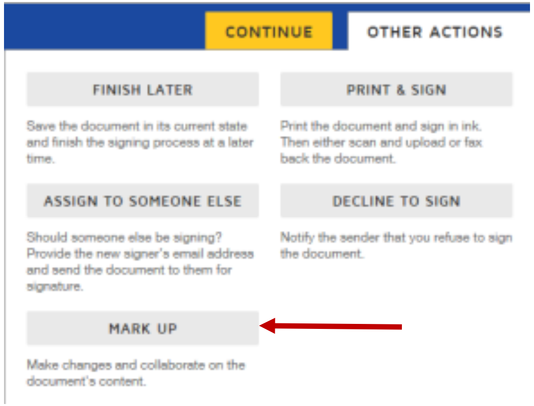
- *Have to have a DS account*

Mark Up Feature

Mark Up allows for the ability to negotiate changes to documents from within the DocuSign workflow by adding text fields that must be agreed upon by previous signers.

- **Use Case**: You have a documents and want to allow a signer to make additions or changes during the signing process.
- Any change requires approval from and must be initialed by all signers. This maintains a secure audit trail of all of the changes





Workflow Setup Activity

Workflow Set-up Activity – Momentum Insurance

There are 2 Documents for this activity

- “Insurance Story”
- “MomentumPolicyApplication”

Start by reading the story to get the context of the activity

Then create a template with the requirements on application itself

30 minutes of partner work, then we’ll go over it as a group

Momentum Policy Application Form

Problems

- Slow process between collecting information and processing the applicant
- Difficulty validating applicants
- Managing all paperwork

Document

- Insurance Application

People involved/actions

- Sales Rep
- Applicant
- Processor
- County Representative

Focus on

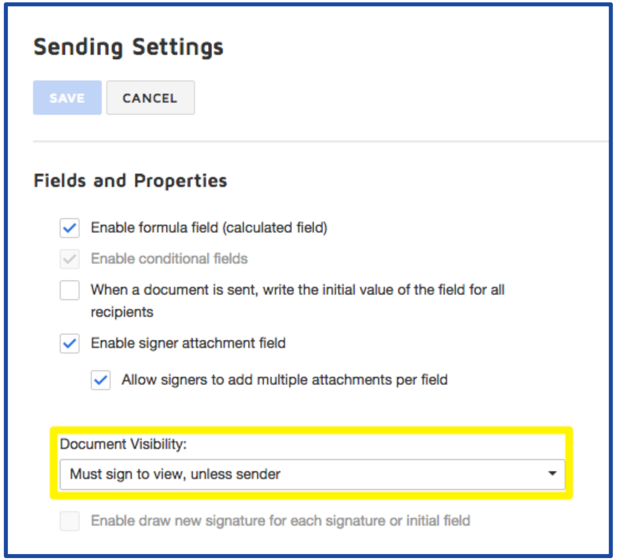
- Workflow
- Signer Actions

Document Visibility

Document Visibility

Document Visibility allows the sender to create 1 envelope with multiple documents and then limit which documents recipients can see / take action on.

- Must be enabled in features
- Can use multiple sets of Documents
- Also works for CC



Signing Groups

Signing Groups

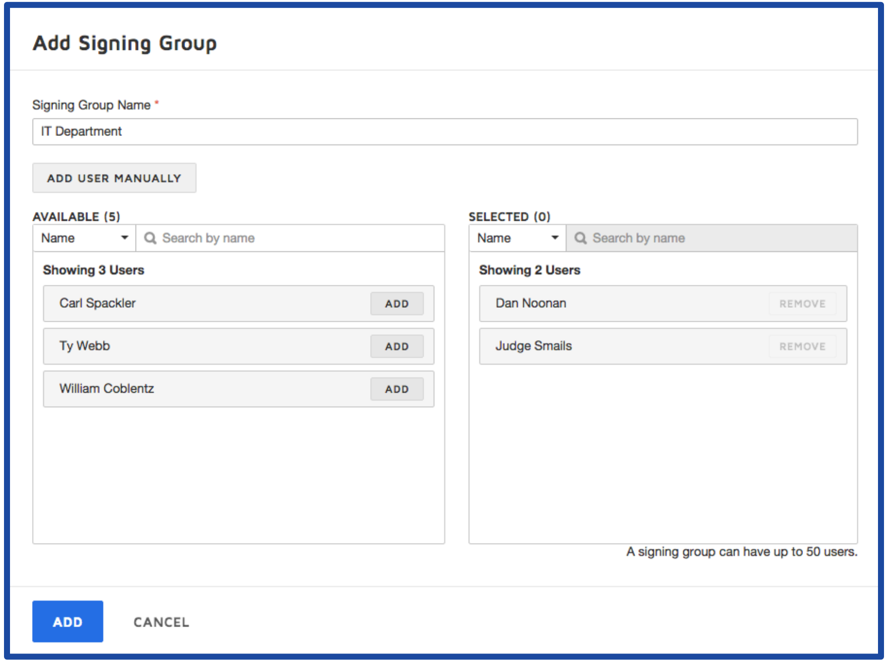
Signing Groups easily allows for a document to be sent to a group of recipients, then any member of that group can open and take action on the envelope.

Use Case: You have a employee name change request form that any one in your HR department can make the change on and sign off that it is complete. You also need know in the audit trail who in your HR department made the changes and took action on the envelope.

Signing Groups

Signing Group Features:

- **Create a distribution list in your DocuSign Account**
  - You can add contacts from your DocuSign address book or manually enter names/email
- **Do not need an active DocuSign account to be added to the Signing Group**
- **Newer feature and is available via request**



Day 2

Agenda

TOPICS
Tagging/Fielding
Advanced Tagging/Fielding
PowerForms
Bulk Send

Fielding

Advanced Fielding

- Radio buttons (vs. check boxes)
- Conditional Logic
- Text field options
- AutoPlace
- Custom Fields
- Formulas
- Approve/Decline

Radio Buttons vs Check Boxes

When adding fields to a document, there might be times when you want to let your recipient select options on the document.

Check Boxes – Optional

Use Case: Documents where you want give the recipient the option to make multiple selections or none at all.

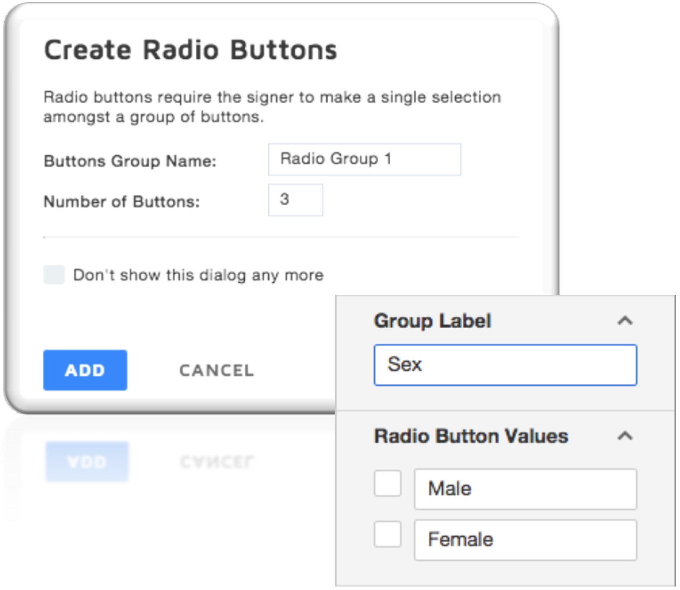
Radio Buttons – Required

Use Case: Documents where you want a recipient to choose only 1 option in a group

Radio Buttons

Place the Radio Button on your Document

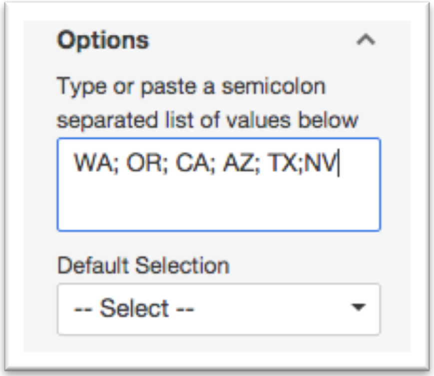
- Group Label to name the group
- Radio Button value to name your buttons.
- Select and delete to utilize less than 5 buttons

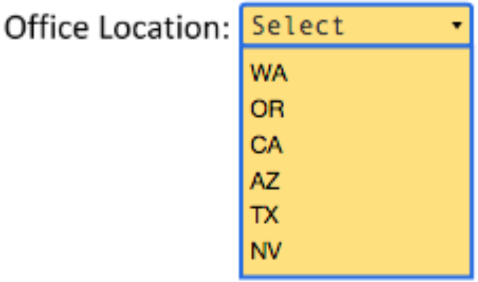


Drop Down Menu

Create a list of items for your recipient to select

- **Add Items separated by semicolon**
- **Add Values to selected items for formulas**
  - Use Case: On your order form there is a different sales tax depending on the state selected. You need to accurately calculate the total amount for order including the sales tax.



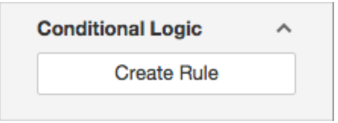


Conditional Fields

Conditional fields allow for dynamic documents by showing hidden tags to a recipient when a certain selection is made on another tag.

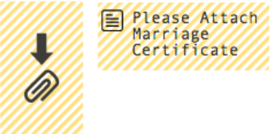
Use Case: On a health insurance form you need to distinguish any previous health conditions.

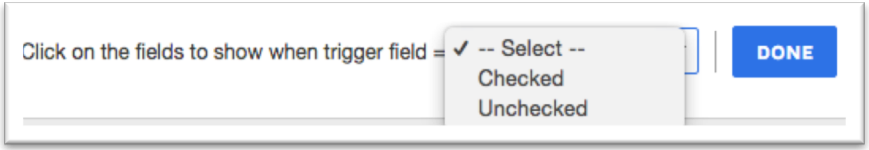
- If “Yes”: tags will appear
- If “No”: tags do not appear



Trigger Fields: These are the tags that are selected that reveal the hidden tags

- Check Boxes
- Radio Buttons
- Drop Down Menu
- Formulas
- Optional Signature/Initial





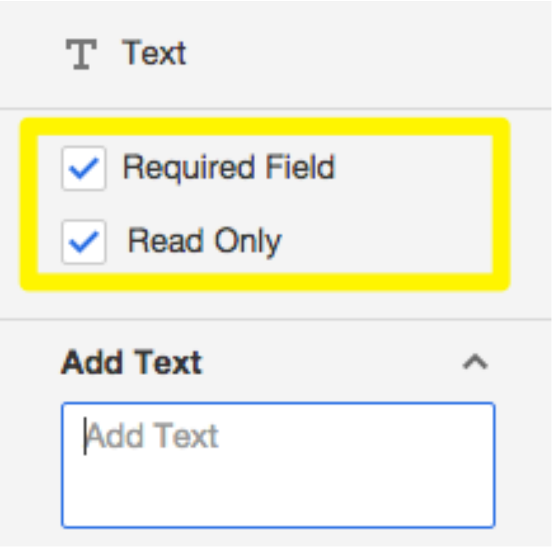
Text Field Options

The Text field is an adaptable field that allows the recipient to enter different information.

- **Optional** – Entering a value in the tag is NOT required to complete signing
- **Read Only** – Prevents the signer from editing the value entered in the tag by the sender
- **Repeating** – Eliminate Rekeying
- **Collaboration** – AKA Field Mark-up
- **Validation** - Sets the type of data/format entered in the field
- **Hide value as Asterisks** - Conceal the information a recipient enters into the Data Field

Text Field Options - Optional and Read Only

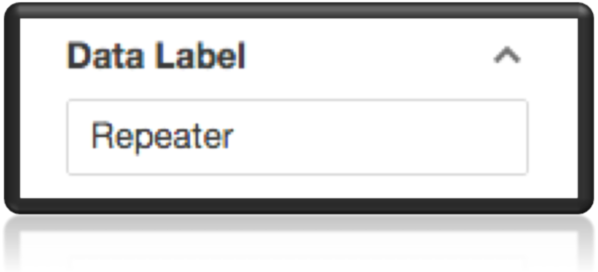
- Unchecking the required box makes the data field optional, so they aren't required to fill something in
- Checking the read only box makes it so that the information that is prepopulated into the data field cannot be edited by the signer



Text Field Options - Repeating Text Fields

This option on the tag allows the sender or recipient to enter the value into 1 field and the text gets repeated in all text boxes with the same “Label”.

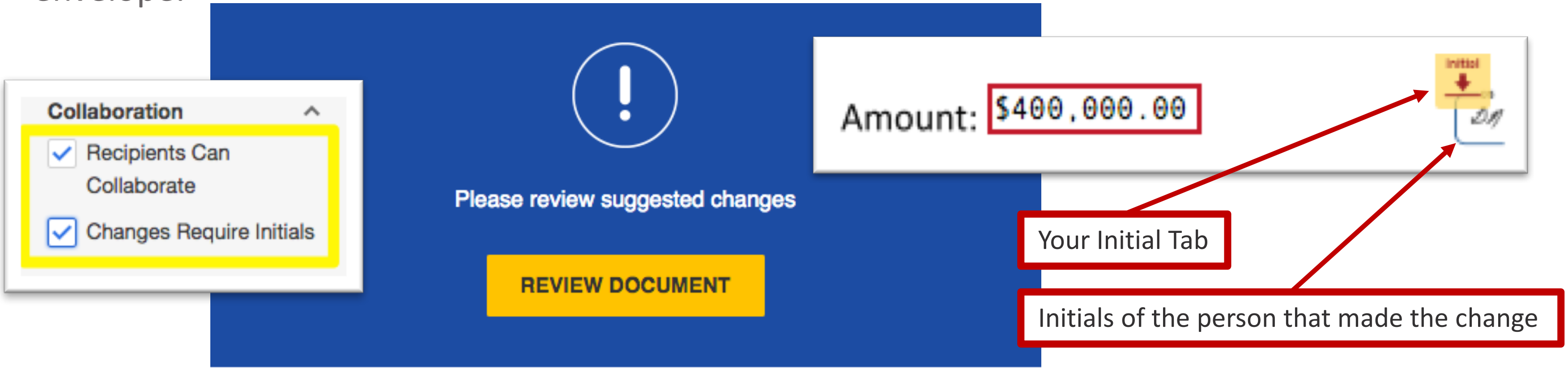
- **Use Case:** You are sending out a Real Estate contract where the full address appears 10 times through out the document
- For “Repeating Data Fields” to work the “Label” for all the Data Fields must be the exactly the same
- Data Population Scope – Document vs. Envelope



Text Field Options - Collaboration (aka Field Markup)

The Collaboration option allows Data Fields to be edited by all parties in the signing process.

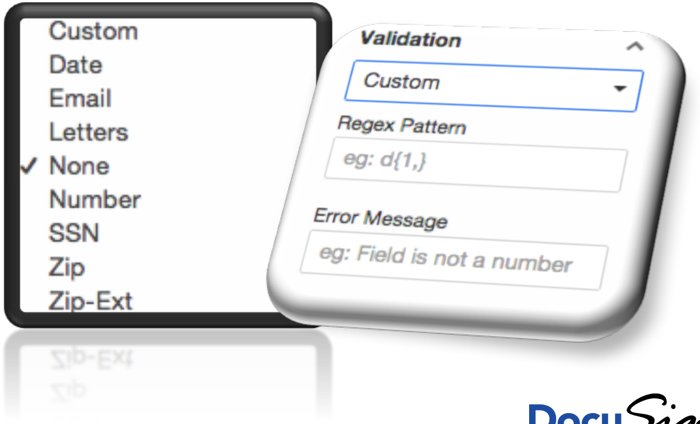
- “Recipients Can Collaborate” allow changes to be made to a field by all recipients
- “Changes Require Initial" will add an initial tag when changes have been made and require recipients that have already completed signing to review and initial the changes to complete the envelope.



Text Field Options – Validation and Custom Regex Patterns

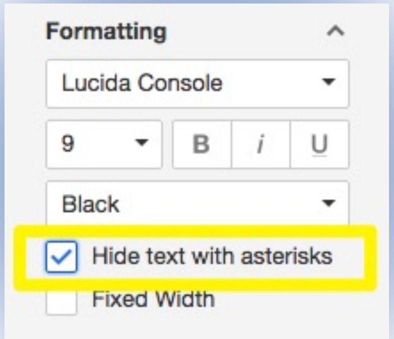
Regular Expression (Regex) is used to set the pattern that a signer must enter when completing the Data Field tag.

- **Use Case:** You send out purchase orders that require payment information to be input at the time of signing, for processing later and you want a way to make sure what the recipients are a valid credit card pattern.
- **Regex resource:** http://regexlib.com/
  - *Note this is not a DocuSign owned website



Text Fields - Hide Value as Asterisks

This feature ensures that only that recipient can view the sensitive information that a recipient enters into a document. The entered value will not be visible to the sender or other signers.



- See [Addinga Concealed Fields]() for information on adding the field
- See [Collecting Envelope Form Data]() for information on how to view and download the concealed field data

Fielding Activity #1

Advanced Fielding Activity #1 – Clinical Trials

There are 2 Documents for this activity

- "advanced tagging farnsworth pharma trials"
- "clinical trials sample doc"

Start by reading the story to get the context of the activity

Then create a template with the requirements on sign up sheet itself

30 minutes of partner work, then we'll go over it as a group

Clinical Trials

Problems

- Employee entering data in the wrong place because of contingencies
- Difficult getting paperwork back from employee in timely manner
- Managing all paperwork and placing employee in the correct trial on the correct date

Document:

- Drug Trial Survey

People involved/actions

- Employee
- Processing Team

Focus On:

- Radio buttons (vs. check boxes)
- Conditional fields

Advanced Fielding

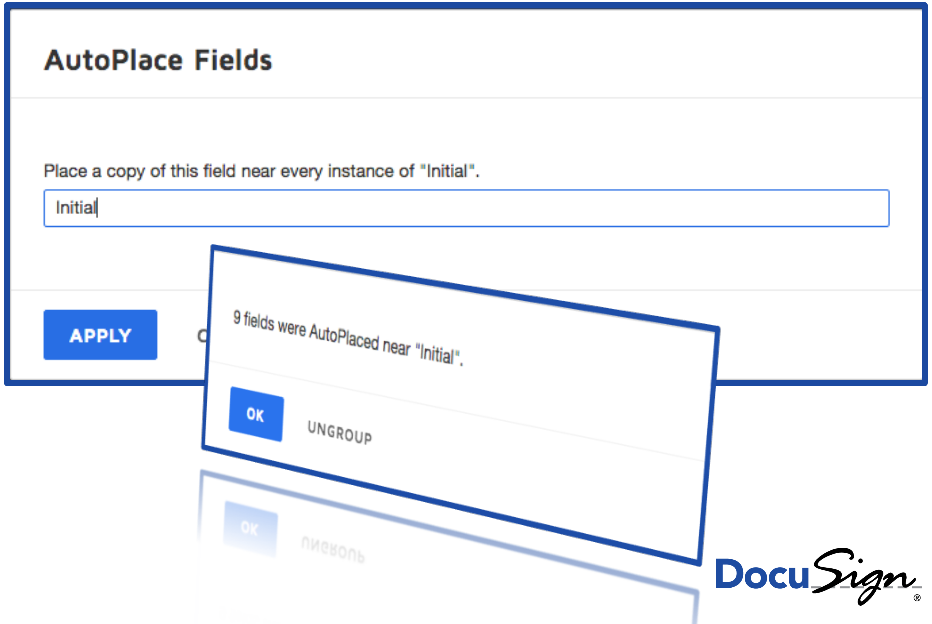
AutoPlace

Ties and auto places/anchors a tag to a certain string of text.

Use Case: You have a 28 page purchase agreement and the recipient must initial on each page that they have read that page.

Best Practices

- Use unique text for each Anchor Tag
- Utilize white text
- Save as a Custom Tag



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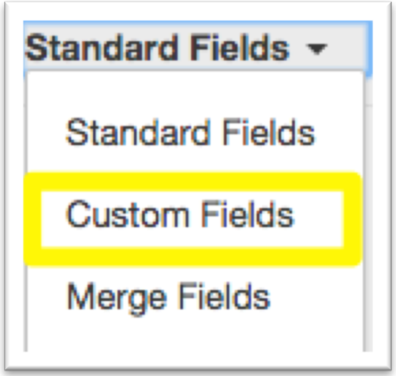
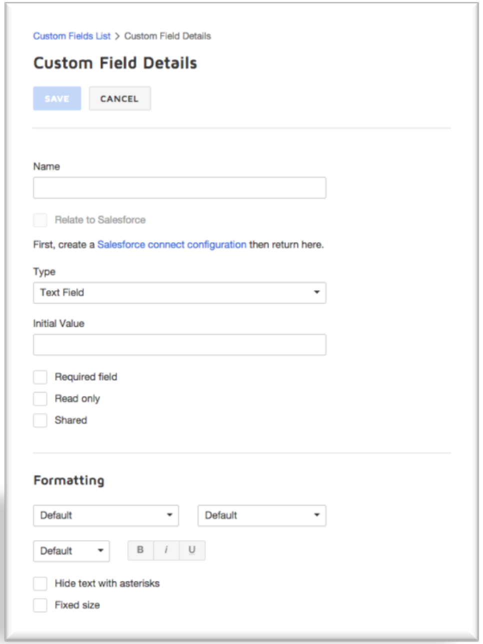
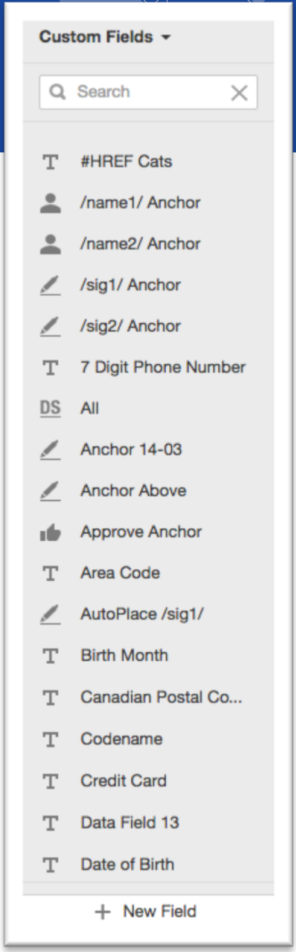
Custom Tags

Customized or modified tags that you can save and use in future documents or templates. These fields can also be shared with other users in your DocuSign account.



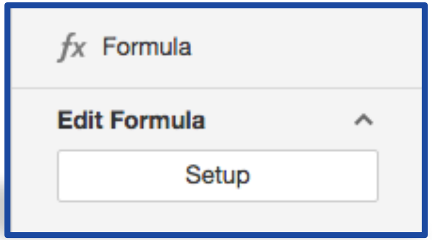


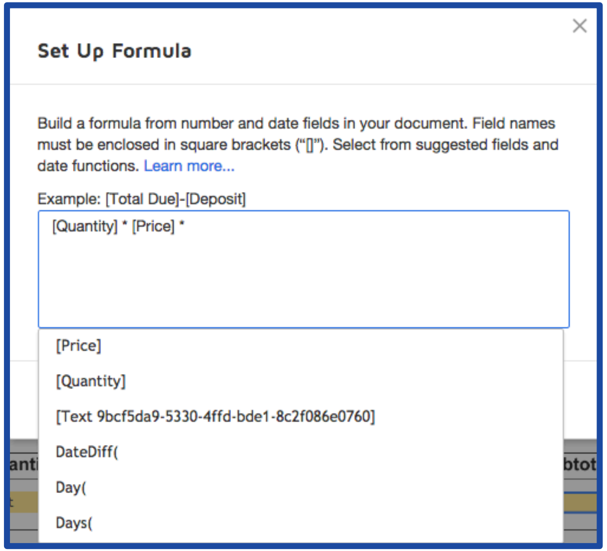


Calculated Fields (a.k.a Formula Tag)

Using Calculated Fields you can add tags with formulas that will reference other tags and calculate and display the values as recipients make changes.

- Run basic math logic on data fields: +, -, *, /
- Consult the User Guide for advanced formula features

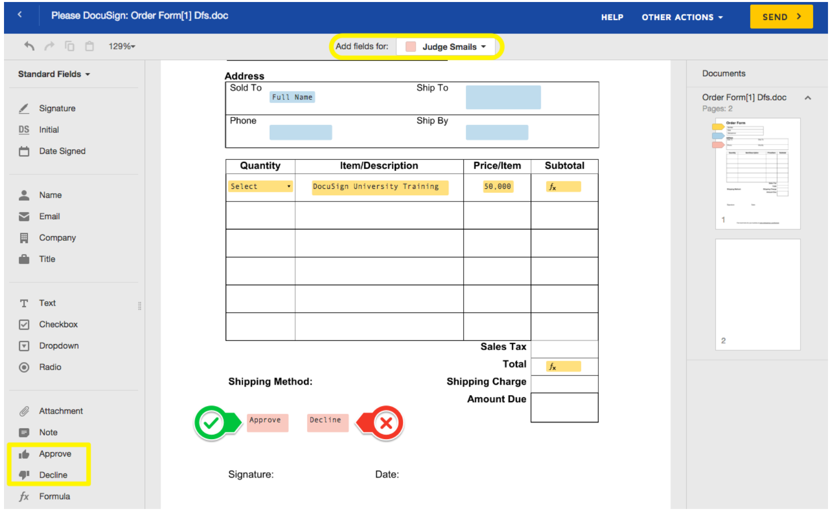




Approve & Decline

These tags give a recipient the option to approve or decline documents in an envelope without placing a signature or initials on the document.

- If the Approve option is selected the envelopes moves forward in the routing order or completes
- If the Decline option is selected the recipient must give a reason & the envelope is cancelled
- Approver role = Needs to Sign



Advanced Fielding Activity #2

Advanced Tagging Activity #2 – Isle of Arran Distillers

There are 3 Documents for this activity

- “Arran CaskPurchaseOffer”
- “Isle of Arran Checklist”
- “Isle of Arran Distillers story”

Start by reading the story to get the context of the activity

Then create a template with the requirements on sign up sheet itself

30 minutes of partner work, then we’ll go over it as a group

Isle of Arran Distillers

Problems
- Each offer sheet is unique and where customer initials can change
- Need internal people to see all documents, but the customer to only see the Purchas Offer

Documents
- Arran Cask Purchase Offer
- Isle of Arran Checklist

People involved/actions
- Salesperson
- Sales Manager
- Sales Director
- Customer
- Accounting

Focus On
- Custom tags
- Anchor Tags
- Document Visibility
- Approve/Decline
- Formulas

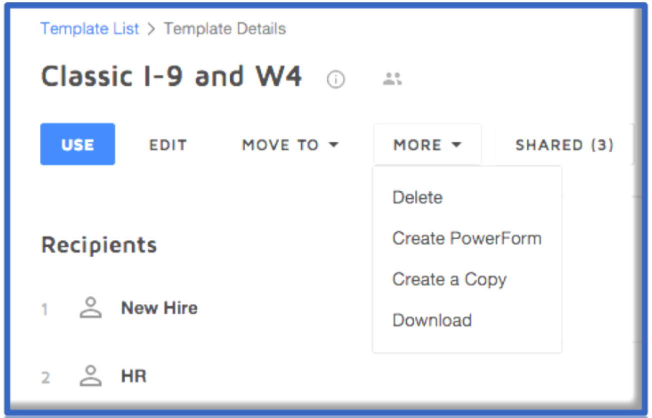
Powerforms

PowerForms

PowerForms deliver self service forms and signatures via a link.

Use Case: You own a gym and want potential new customers to sign up through your website and sign the health data sheet. You do not have the time to create and send each customer an envelope with the health data sheet and you do not have the budget to pay for a developer to build you an integration with DocuSign.

- PowerForms are envelopes initiated by a link
- Made from a template
- [Additional Info]



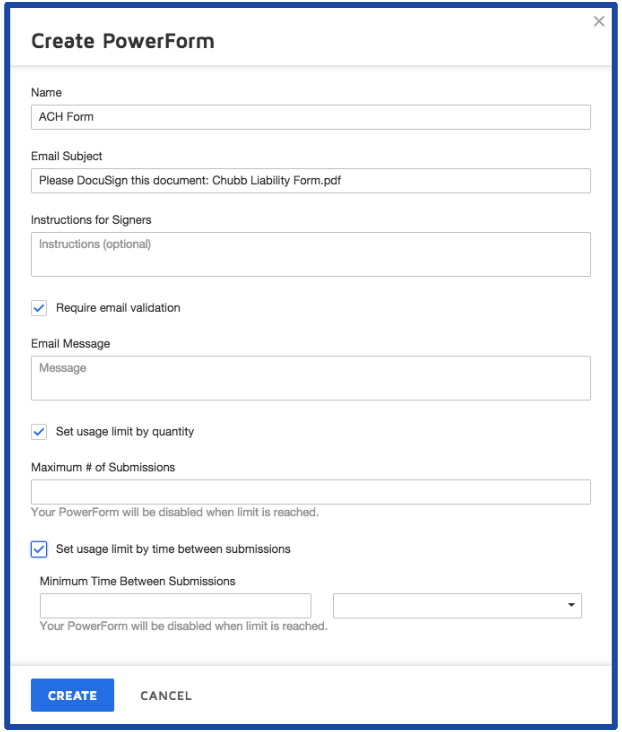
PowerForm Settings

Require Email Validation

- Checked - Email confirmation code gets sent to email
- Unchecked or Direct - No authentication required recipient starts the signing process immediately.
  - Invalidates: Collaboration, Branded Landing pages (defaults to in-session pages)

Times of Use

- How often the PowerForm can be used by the same recipient
- Maximum times a PowerForm can be used
- Helps avoid unexpected costs



PowerForm Activity

PowerForm Activity – Waiver Case Study

There are 2 Documents for this activity

- "XP Laser Sport Waiver Case"
- "Waiver"

Start by reading the story to get the context of the activity

Then create a template with the requirements on sign up sheet itself

30 minutes of partner work, then we'll go over it as a group

Waiver

Problems

- Collecting waivers in person is time consuming
- Storage of waivers is time consuming, wasteful and hard to access
- Holding up traffic
- Want it to be done before folks come in; but usually don't know who is coming in

Document

- Waiver

People involved/actions

- Participant
- Compliance (copy – always the same)

Focus On

- Workflow
- Fielding
- Creating PowerForm

Bulk Send

Bulk Send (aka Bulk Recipient)

This allows a sender to send the same document “en masse” to separate recipients.

Use Case: Your company has updated its time off policy and all 700 employees must review and sign the policy.

Benefits:

- Time savings
- Can import information from the bulk recipient file to Data Fields

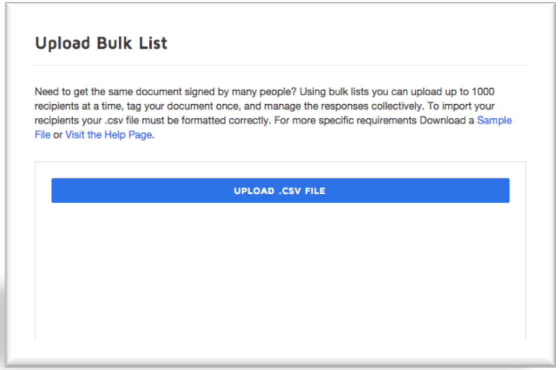
Bulk Recipient: Step 1 - Build your CSV

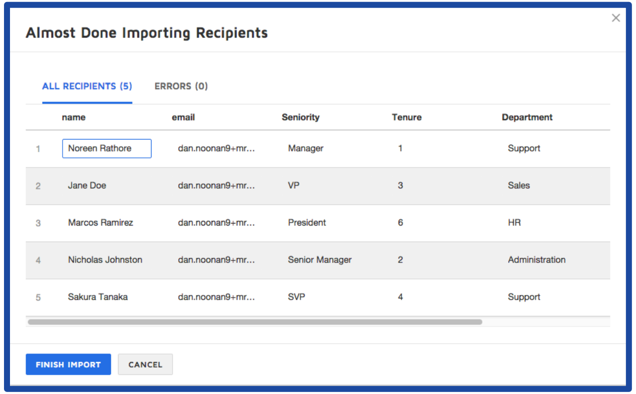
- **Bulk recipient file must be formatted as a comma-separated values (CSV) file.**
- **"Name" and "Email" are required columns**
  - Additional columns will be for optional information for Data fields

	A	B	C	D	E	F
1	Name	Email	Seniority	Tenure	Department	AccessCode
2	Noreen Rathore	noreen.rath@gmail.com	Manager	1	Support	1234
3	Jane Doe	doedoebird@gmail.com	VP	3	Sales	4321
4	Marcos Ramirez	markymarkram@gmail.com	President	6	HR	9999
5	Nicholas Johnston	little.nicky@gmail.com	Senior Manag	2	Administration	
6	Sakura Tanaka	hips.dont.lie@gmail.com	SVP	4	Support	

Bulk Recipient: Step 2 - Creating the Envelope

- Choose “Import Bulk List”
- Select the Bulk Recipient file (.csv)
  - Note: You can edit once .csv is uploaded
- Ensure your Data Field tags match exactly with the optional columns on bulk recipient file






Day 3

Agenda

TOPICS
Homework Review
Branding
User Management
Reporting
Connect/Retrieve
Features
Review Certification

Branding

Branding

Lets you set the look and feel of your organization's brand making it easier for users to identify documents coming from your organization. With branding you control the colors, logos and landing pages for the senders and signers.

Branding Profiles Can be Applied to:

- Sending
- Signing
- Email Templates
- Consumer Disclosure (Limited)

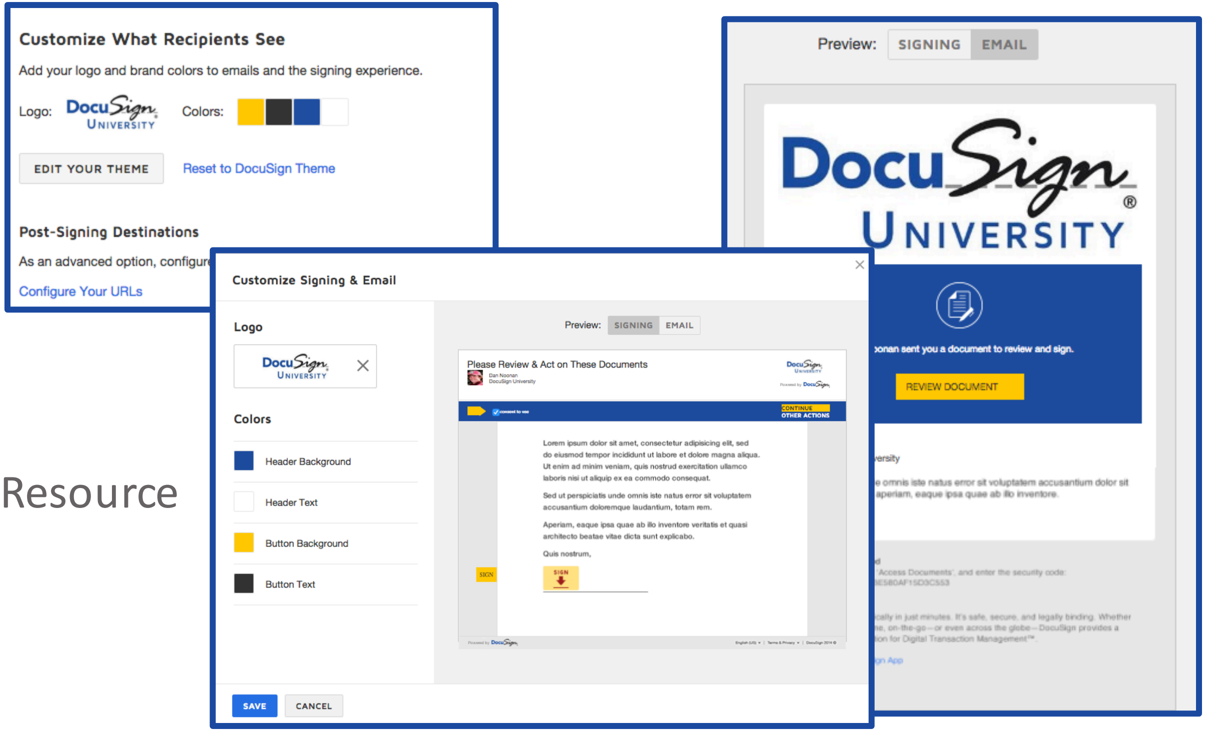
Branding Profiles Can be Applied at:

- Group Level
- Template Level
- Each Envelope
- * Landing page exception: Direct Users

****Resource Files***

Branding: Elements of Each Profile

- Logo
- Colors
  - Eye Dropper
- Links
- Landing Pages
- Info
- Advanced Branding
  - Sender, Signer & Email Resource Files



User Management

User Management

- Adding users
- Adding users in bulk
- Sharing
- Groups
- Permissions
  - Delegated Admin
- Envelope Custody Transfer

What is Delegated Administration?

Maximum levels of flexibility and control

Value for organizations

Decentralizes admin privileges to different individuals within a company to maximize organizational control of users, groups, and admins; enables compliance in heavily regulated industries

Value for admins

Admins' can access specified controls through an intuitive UI directly through https://admin.docusign.com, access audit logs and data for enhanced visibility

Delegated Administration: Key Features

- Customized permission sets
- User, group, and admin management
- Control over doc sharing and visibility
- Audit logging for tracking these changes

DocuSign®

Angela, IT Manager

Angela
IT Manager

User Management	✓
Group Management	✗
Admin Management	✗
Sharing Controls	✗
Templates Access	✗
Other DS Features	✗

- ✓ As an IT manager, Angela can add, remove, and update DocuSign users for her company, but does not have access to other features
- ✓ Angela's organization can delegate the IT Manager role to Angela without granting broader control

DocuSign®

Francisco, System Admin

Francisco
System Admin

User Management	✓
Group Management	✓
Admin Management	✓
Sharing Controls	✓
Templates Access	✗
Other DS Features	✗

- ✓ As a Systems Admin manager, Francisco has all the admin rights, such as management of users, groups, and other admins, but cannot use the DS product
- ✓ This ensures compliance for Francisco's org without giving him visibility into documents

Reporting

Reports Overview

Customizable reporting tools to track and improve your business processes

Key Features and Technology

- Run standard “out-of-the-box” reports
- Specify date range, filters, and columns shown
- Save views as custom reports to quickly access at a later date
- Schedule reports for email delivery at specified time intervals
- Export (as CSV) and print reports

DocuSign

Top Reports

DocuSign's most frequently run standard reports

DOCUMENT REPORT

- Shows status, sender, recipient(s) and activity for the document

DOCUMENT RECIPIENT REPORT

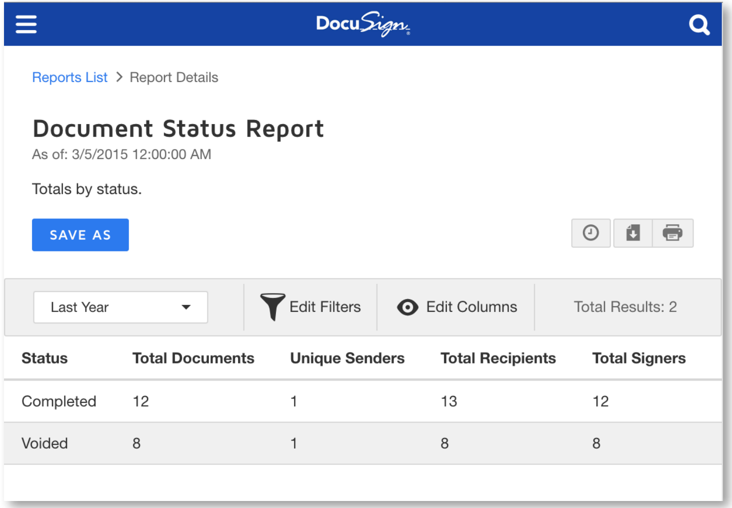
- Provides information about the document and recipient including routing order, authentication method, and their actions

RECIPIENT ACTIVITY REPORT

- Shows the number of documents received, signed, not signed, as well as that recipient's completion rate and average time to complete

DOCUMENT STATUS REPORT

- Gain insight into DocuSign usage in your business



User Examples

Customers use self-serve reports for a variety of use cases

“We generally use reports for **volume** and **work tracking** for performance.”

- Wellmark

“We use reporting to analyze **which users (and groups) are actually using the product.** We analyze this against the number of licenses purchased to make sure we’re spending our money appropriately.”

- Free The Children

“A majority of our report requests are related to a recent release of DocuSign to a new group, placing an outdated, manual process. So the question is **what is the average turnaround time** from when an envelope is sent out for signatures, to completion.”

- Irvine Company

DocuSign

User Examples

Customers use self-serve reports for a variety of use cases

“ m|ployee can pull up its dashboard within the DocuSign browser to check a document’s status, run reports, and see audit trails for full visibility. ”

- m|ployee

“ Now we simply look at the overview in DocuSign and can see where the process is hanging – where the problem is – and quickly make the contact needed in order to be able to move the process forward. ”

- EclectiC

Advanced Reporting
Connect & Retrieve

Advanced Reporting

CONNECT

Connect DocuSign via an API to a listener to transfer documents and triggers in real time

RETRIEVE

Pull and organize completed documents from DocuSign to a local storage location

Connect vs. Retrieve

	Benefits	Restrictions
Connect	• Custom triggers • Scheduling • Included in Enterprise accounts • Connects via API • Multiple customization options	• Requires a technical resource • Points to a specific program • Maintenance
Retrieve	• Easy to set up • Download completed files from the past • Scheduling available • Different environments • Multiple delivery file types	• Only PC • Only downloads to folders • No triggers

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Retrieve Examples

- Custom Retrieve for a bulk send. Set the search parameters to either hone in on the subject line or the envelope custom field specific to the bulk send. Then have it point to a shared folder on the network called "date, subject, bulk send."
- Custom Retrieve for a powerform. Same process as the bulk send, just setting it for the powerform information.
- Retrieve for all completed envelopes. Set no parameters and get ALL the envelopes.

Connect Examples

- **Box Connect sends all completed docs to their shared Box folder**. They can filter these by custom fields and then route to specific folders within Box
- **Connect can send notifications that an offer letter envelope has been completed**, then trigger a “welcome email” to be sent out to the same email detailing what next steps are going to be. At the same time, the new hire’s file is updated to “new hire” and new tasks are assigned for the appropriate HR rep

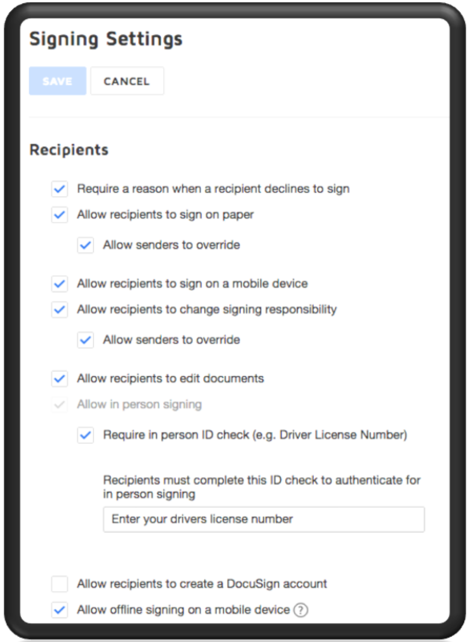
Takeaways

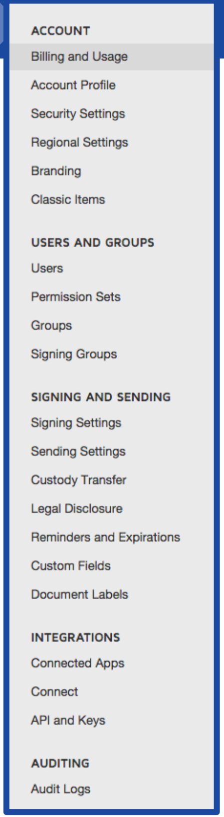
WEB APP REPORTING	Gain insights into DocuSign usage in your business	Measure time-to-close and process efficiency	Standardize your business views with saved reports
ADVANCED REPORTING	House your documents on your own servers	Kick off automated system processes	Organize your document in an easily accessible location

Account Settings

Account Settings

[Here is a link](#) to our Admin User Guide that describes everything in depth






Next Steps

Post Course Survey

You will now be given some time to complete our post course survey. Your feedback is invaluable to our team and allows us to constantly improve our trainings. You should have already received a link to the survey via email.

DocuSign Admin Certification

Written Exam

- Log into the same portal as your pre-work to complete the test

Practical Exam

- You should have received directions via email after the first day of class
- Attached to the email are directions and the form
- After you complete the practical please submit via the PowerForm link in that same email

When can I get started on my exams?

- As soon as you're ready – and as soon as you want to have your certification

When will I receive my certification?

- As soon as you complete both the written and practical exam with a passing score of 70% or better.

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