



Employee Admin Certification

docusignuniversity@docsing.com

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

The background of the image shows a long bridge at night with streetlights. A group of four people are running across the bridge. On the far left, a man in a dark hoodie and shorts is in mid-stride. In the center, two women are running; the woman on the left wears a pink sequined top and purple pants, while the woman on the right wears a yellow jacket and black pants. On the far right, a man in a black long-sleeved shirt and black pants is running. To the left of the image, there is a large yellow arrow pointing right, and several smaller white arrows pointing right are scattered across the top and bottom edges.

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

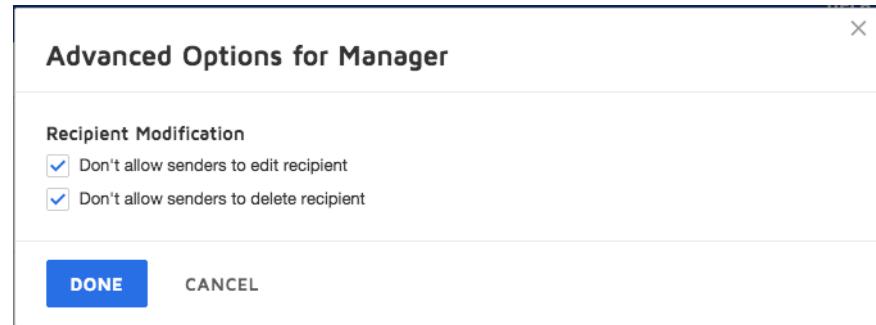


Can prevent senders of templates from Editing and/or Deleting Recipients.

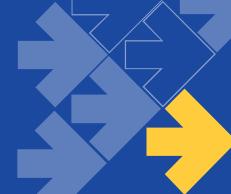
- Eliminates human error
- Ensures greater compliance
- Hides “locked” roles in PowerForms

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.



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

Authentication for Manager

NONE **ACCESS CODE** PHONE\$ SMS\$ KNOWLEDGE BASED\$?

You must provide this code to your recipient.

Access Code:

Access codes are not case sensitive.

DONE CANCEL

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.

#	Role	Name	Email	Action	More
1	Renter			<input type="checkbox"/> Needs to Sign	
2	Liaison	Liaison	dan.noonan9+1@gmail.com	<input type="checkbox"/> Specify Recipients	
3	Manager	Manager	BranchManager	<input checked="" type="checkbox"/> Needs to Sign In Person Signer Receives a Copy <input checked="" type="checkbox"/> Needs to View Specify Recipients Allow to Edit Update Recipients	
4	Accounting	Accounting Dept.	accounting@fakecompany.com	<input type="checkbox"/> Needs to Sign In Person Signer Receives a Copy <input type="checkbox"/> Needs to View Specify Recipients Allow to Edit Update Recipients	

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

#	Role	Name	Email	Action
1	Renter			Needs to Sign
2	Liaison	Liaison	dan.noonan9+1@gmail.com	Specify Recipients
3	Manager	Manager	BranchManager	<input checked="" type="checkbox"/> Needs to Sign <input checked="" type="checkbox"/> In Person Signer <input checked="" type="checkbox"/> Receives a Copy <input checked="" type="checkbox"/> Needs to View <input checked="" type="checkbox"/> Specify Recipients <input checked="" type="checkbox"/> Allow to Edit <input checked="" type="checkbox"/> Update Recipients
4	Accounting	Accounting Dept.	accounting@fakecompany.com	

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 document and want to allow a signer to make additions or changes during the signing process.
- Any change requires approval from and must be initiated by all signers. This maintains a secure audit trail of all of the changes

Recipient Privileges

Allow recipients to sign on paper

Allow recipients to change signing responsibility

Allow recipients to edit the document



CONTINUE OTHER ACTIONS

FINISH LATER
Save the document in its current state and finish the signing process at a later time.

PRINT & SIGN
Print the document and sign in ink. Then either scan and upload or fax back the document.

ASSIGN TO SOMEONE ELSE
Should someone else be signing? Provide the new signer's email address and send the document to them for signature.

DECLINE TO SIGN
Notify the sender that you refuse to sign the document.

MARK UP
Make changes and collaborate on the document's content.



A photograph of four people in mid-air, performing a synchronized dance move on a bridge at night. They are holding hands and have their legs kicked up. The background is a dark, illuminated bridge under a blue sky.

Workflow Setup Activity

Workflow Set-up Activity – Momentum Insurance



There are 2 Documents for this activity

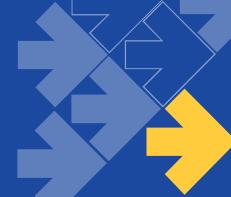
- “Insurance Story”
- “MomentumPolicyApplication”

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

A wide-angle photograph of a bridge at night. Four people are captured in mid-stride, running towards the right. A large, solid yellow arrow points from the left towards the right, aligning with the direction of the runners. The scene is lit by streetlights, creating a dynamic and energetic atmosphere.

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

Sending Settings

Fields and Properties

Enable formula field (calculated field)
 Enable conditional fields
 When a document is sent, write the initial value of the field for all recipients
 Enable signer attachment field
 Allow signers to add multiple attachments per field

Document Visibility:

Must sign to view, unless sender

Enable draw new signature for each signature or initial field



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

Add Signing Group

Signing Group Name *

ADD USER MANUALLY

AVAILABLE (5)	
Name	Search by name
Showing 3 Users	
Carl Spackler	ADD
Ty Webb	ADD
William Coblenz	ADD

SELECTED (0)	
Name	Search by name
Showing 2 Users	
Dan Noonan	REMOVE
Judge Smalls	REMOVE

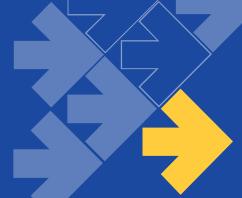
A signing group can have up to 50 users.

ADD **CANCEL**



Day 2

Agenda



TOPICS

Tagging/Fielding

Advanced Tagging/Fielding

PowerForms

Bulk Send

A blue-toned photograph of a long bridge at dusk or night. In the foreground, a man in a dark hoodie and shorts is captured mid-air in a crouched position. In the center, two women are jumping; one wears a pink sequined top and purple pants, while the other wears a light-colored blazer and dark pants. They are holding hands. The background shows the bridge stretching into the distance under a dark sky.

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

Create Radio Buttons

Radio buttons require the signer to make a single selection amongst a group of buttons.

Buttons Group Name:

Number of Buttons:

Don't show this dialog any more

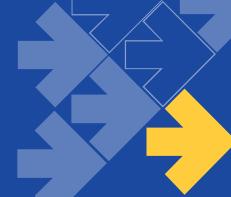
ADD **CANCEL**

Group Label
Sex

Radio Button Values

<input type="checkbox"/>	Male
<input type="checkbox"/>	Female

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.

Options ^

Type or paste a semicolon separated list of values below

WA; OR; CA; AZ; TX; NV

Default Selection

-- Select -- ▾

Office Location:

Select

WA
OR
CA
AZ
TX
NV

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

The screenshot shows a 'Conditional Logic' panel with a 'Create Rule' button. The panel has a light gray background with dark gray text and a small upward arrow icon in the top right corner.

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



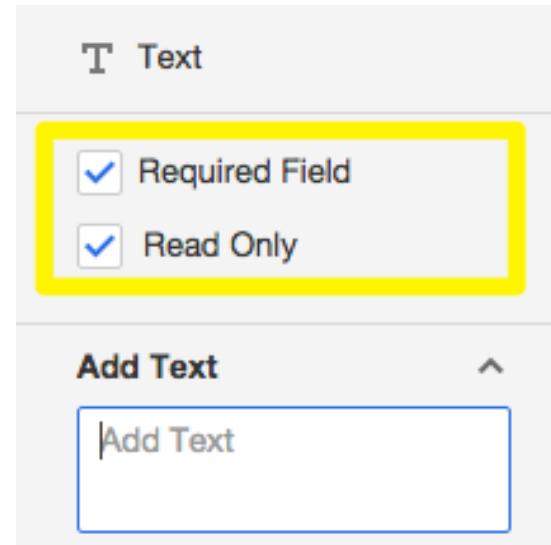
The Text field is an adaptable field that allows the recipient to enter different information.

- **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.

The screenshot illustrates the collaboration features in the DocuSign interface. On the left, a sidebar shows two checked options under 'Collaboration': 'Recipients Can Collaborate' and 'Changes Require Initials'. The main area displays a large exclamation mark icon with the text 'Please review suggested changes' and a 'REVIEW DOCUMENT' button. To the right, a data field shows the text 'Amount: \$400,000.00' in red, indicating a change. A red box highlights the text 'Your Initial Tab' next to a small yellow square containing an 'Initial' tag. Another red box highlights the text 'Initials of the person that made the change' next to the 'Initial' tag. Red arrows point from the labels 'Your Initial Tab' and 'Initials of the person that made the change' to the respective parts of the 'Initial' tag.

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.

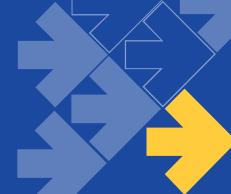
- **Use Case:** You send out purchase orders that require payment information to be input at the time of signing, for processing later and you want a way to make sure what the recipients are a valid credit card pattern.

- **Regex resource:** <http://regexlib.com/>

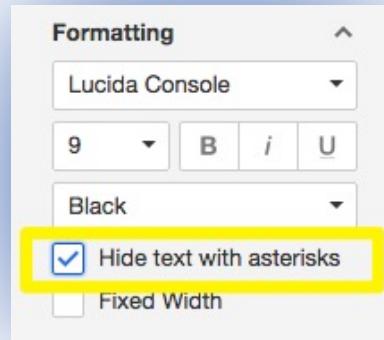
- *Note this is not a DocuSign owned website



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

The background image shows a long bridge stretching into the distance under a darkening sky. A large yellow arrow points from the left towards the center of the frame. In the upper right, four people are captured in mid-air, performing a dynamic dance or exercise routine.

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

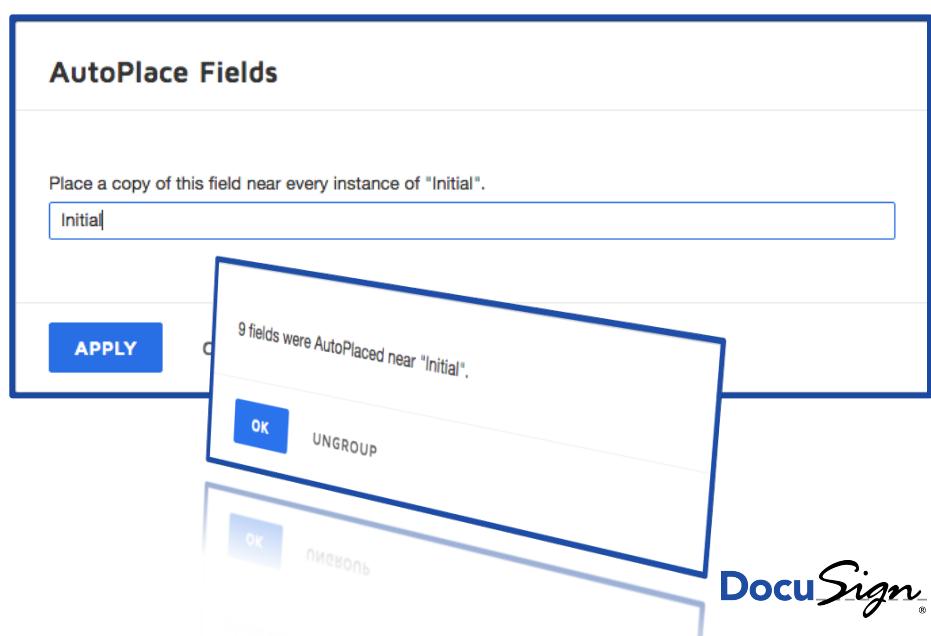


Ties and auto places/anchors a tag to a certain string of text.

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



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.



Custom Fields List > Custom Field Details

Custom Field Details

SAVE CANCEL

Name

Relate to Salesforce

First, create a [Salesforce connect configuration](#) then return here.

Type

Initial Value

Required field
 Read only
 Shared

Formatting

Default Default

Hide text with asterisks
 Fixed size

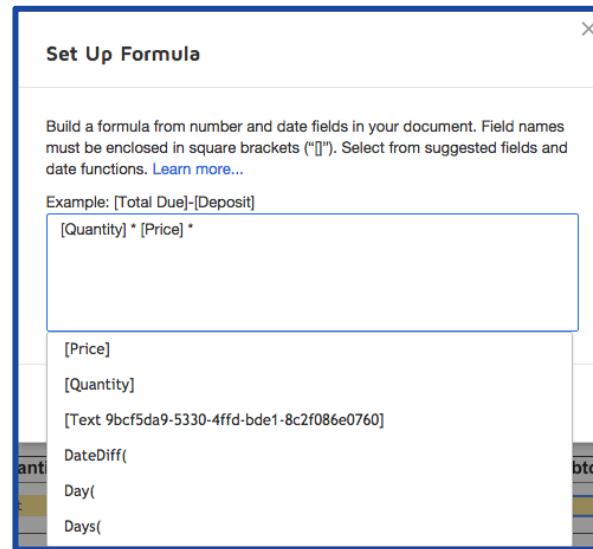
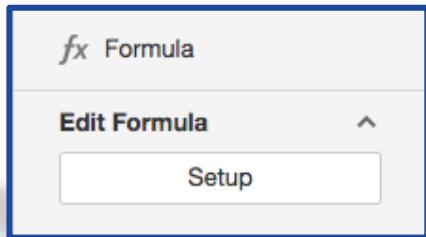
Custom Fields	
<input type="button" value="Search"/>	X
T	#HREF Cats
👤	/name1/ Anchor
👤	/name2/ Anchor
✍	/sig1/ Anchor
✍	/sig2/ Anchor
T	7 Digit Phone Number
DS	All
✍	Anchor 14-03
✍	Anchor Above
👍	Approve Anchor
T	Area Code
✍	AutoPlace /sig1/
T	Birth Month
T	Canadian Postal Co...
T	Codename
T	Credit Card
T	Data Field 13
T	Date of Birth
+	New Field

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.

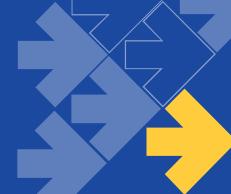
- If the Approve option is selected the envelopes moves forward in the routing order or completes
- If the Decline option is selected the recipient must give a reason & the envelope is cancelled
- Approver role = Needs to Sign

The screenshot shows a DocuSign Order Form envelope titled "Please DocuSign: Order Form[1] Dfs.doc". The envelope includes fields for "Address", "Quantity", "Item/Description", "Price/Item", and "Subtotal". At the bottom, there are "Shipping Method:" buttons for "Approve" (green checkmark) and "Decline" (red X). To the right, there is a "Documents" panel showing the envelope's structure and a preview of the form.

A blue-toned photograph of a bridge at dusk. In the foreground, a paved surface leads towards a bridge. Three people are captured in mid-air, performing a synchronized jump. The person on the left wears a dark hoodie and shorts. The two individuals on the right are wearing athletic gear; one is in a red top and purple pants, and the other is in a yellow top and black pants. The background shows streetlights and the bridge stretching into the distance.

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



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 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](#)

The screenshot shows the 'Template List > Template Details' page for a template named 'Classic I-9 and W4'. The page includes a 'USE' button, an 'EDIT' button, a 'MOVE TO' dropdown, and a 'MORE' dropdown menu. The 'MORE' menu is open, showing options: 'Delete', 'Create PowerForm', 'Create a Copy', and 'Download'. Below the menu, there's a section titled 'Recipients' with two entries: '1 New Hire' and '2 HR'. At the bottom of the page, there's a partial view of another template section with '3 HR'.

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

Create PowerForm

Name
ACH Form

Email Subject
Please DocuSign this document: Chubb Liability Form.pdf

Instructions for Signers
Instructions (optional)

Require email validation

Email Message
Message

Set usage limit by quantity

Maximum # of Submissions
Your PowerForm will be disabled when limit is reached.

Set usage limit by time between submissions

Minimum Time Between Submissions
Your PowerForm will be disabled when limit is reached.

CREATE **CANCEL**



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

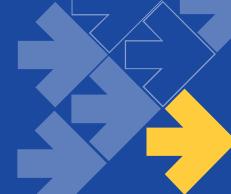
Bulk Recipient: Step 1 - Build your CSV



- 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 Manager	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

Upload Bulk List

Need to get the same document signed by many people? Using bulk lists you can upload up to 1000 recipients at a time, tag your document once, and manage the responses collectively. To import your recipients your .csv file must be formatted correctly. For more specific requirements Download a Sample File or Visit the Help Page.

UPLOAD .CSV FILE

Almost Done Importing Recipients

ALL RECIPIENTS (5) ERRORS (0)

	name	email	Seniority	Tenure	Department
1	Noreen Rathore	dan.noonan9+mr...	Manager	1	Support
2	Jane Doe	dan.noonan9+mr...	VP	3	Sales
3	Marcos Ramirez	dan.noonan9+mr...	President	6	HR
4	Nicholas Johnston	dan.noonan9+mr...	Senior Manager	2	Administration
5	Sakura Tanaka	dan.noonan9+mr...	SVP	4	Support

FINISH IMPORT **CANCEL**



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

The image displays three components related to DocuSign branding:

- Customize What Recipients See:** A screenshot of a web interface where users can upload their logo and select colors for emails and signing experiences. It shows a preview of the "SIGNING" and "EMAIL" interfaces with the "DocuSign UNIVERSITY" branding.
- Customize Signing & Email:** A modal dialog box showing color customization options. It includes a preview window showing a sample email or signing interface with the "DocuSign UNIVERSITY" logo and branding.
- Recipient View:** A screenshot of an email inbox showing a received document from "DocuSign UNIVERSITY". The subject line is "John sent you a document to review and sign." The email body contains placeholder text and a prominent "REVIEW DOCUMENT" button.

A wide-angle photograph of a bridge at night. Four people are captured in mid-stride, running towards the right. A large, solid yellow arrow points from the left towards the right, aligning with the direction of the runners. The scene is lit by streetlights, creating a dynamic and energetic atmosphere.

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



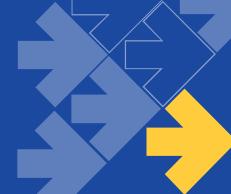
Value for organizations

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

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

Francisco, System Admin



Francisco
System Admin

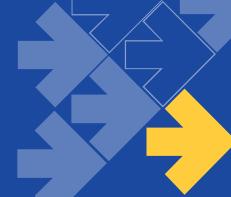
User Management	✓
Group Management	✓
Admin Management	✓
Sharing Controls	✓
Templates Access	✗
Other DS Features	✗

- ✓ 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

A wide-angle photograph of a bridge at night. In the center, four people are captured in mid-air, performing a synchronized jump. They are holding hands in a circle. The background shows the long bridge stretching into the distance under a dark sky.

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



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

The screenshot shows the DocuSign Reports List interface. At the top, there are navigation icons (three horizontal lines, DocuSign logo, magnifying glass) and a search bar. Below the header, the path 'Reports List > Report Details' is shown. The main title is 'Document Status Report' with the note 'As of: 3/5/2015 12:00:00 AM'. A sub-section titled 'Totals by status.' is displayed. A 'SAVE AS' button is located on the left. On the right, there are three small icons: a clock, a download arrow, and a printer. Below this, there is a table with the following data:

Status	Total Documents	Unique Senders	Total Recipients	Total Signers
Completed	12	1	13	12
Voided	8	1	8	8

Total Results: 2

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

User Examples



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

“ Employee 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

A blue-toned photograph of a long bridge at dusk or night. In the foreground, a man in a dark hoodie and shorts is captured mid-air in a crouched position. In the middle ground, two women are jumping; one wears a red sequined top and purple pants, the other wears a yellow jacket and black pants. They appear to be holding hands. The background shows the bridge stretching into the distance under a dark sky.

Advanced Reporting
Connect & Retrieve

Advanced Reporting



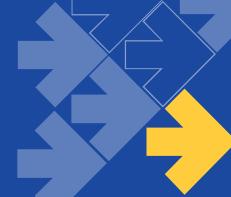
CONNECT

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



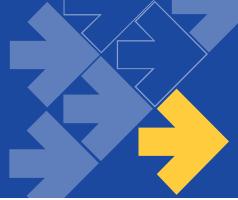
	Benefits	Restrictions
Connect	<ul style="list-style-type: none">Custom triggersSchedulingIncluded in Enterprise accountsConnects via APIMultiple customization options	<ul style="list-style-type: none">Requires a technical resourcePoints to a specific programMaintenance
Retrieve	<ul style="list-style-type: none">Easy to set upDownload completed files from the pastScheduling availableDifferent environmentsMultiple delivery file types	<ul style="list-style-type: none">Only PCOnly downloads to foldersNo triggers

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

A wide-angle photograph of a bridge at night. In the center, four people are captured in mid-stride while running. A large, solid yellow arrow points from the left towards the right, positioned above the bridge's railing. The background is a dark blue night sky.

Account Settings

Account Settings

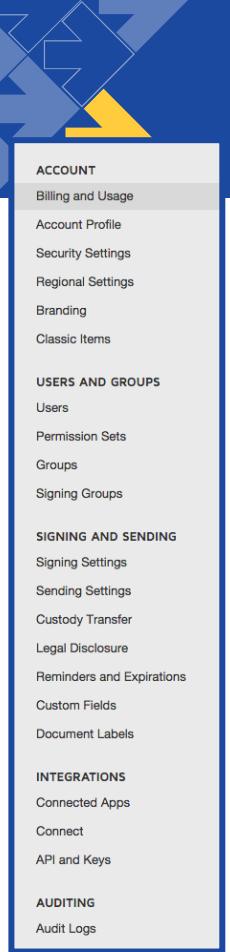
[Here is a link](#) to our Admin User Guide that describes everything in depth

A screenshot of the DocuSign Signing Settings interface. The title bar says "Signing Settings" with "SAVE" and "CANCEL" buttons. The main section is titled "Recipients" and contains several checkboxes:

- Require a reason when a recipient declines to sign
- Allow recipients to sign on paper
- Allow senders to override
- Allow recipients to sign on a mobile device
- Allow recipients to change signing responsibility
- Allow senders to override
- Allow recipients to edit documents
- Allow in person signing
- Require in person ID check (e.g. Driver License Number)

A note below states: "Recipients must complete this ID check to authenticate for in person signing". A text input field says "Enter your drivers license number". At the bottom are two more checkboxes:

- Allow recipients to create a DocuSign account
- Allow offline signing on a mobile device (with a help icon)





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.





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.

Docu*Sign*[®]