

Updated: 2023-11-29

DocuSign University

Course catalog



Download to get the latest version and enable course links:

[English](#) | [Deutsch](#) | [Español](#) | [Français](#) | [Italian](#) | [Português \(Brasil\)](#) | [Nederlands](#) | [日本語](#) | [한국어](#) | [繁體中文](#)

Contents

Get up and running quickly with training from DocuSign University. Want to expand your knowledge or become an expert? We can help with that too.

4 [Training Delivery Methods](#)

5 [Expertise Recognition Program](#)

6 [Accessing Training](#)

7 [DocuSign eSignature](#)

9 [DocuSign Organization Management](#)

10 [DocuSign CLM Essentials, CLM, CLM+](#)

Click a link below to find product training to meet your needs.

13 [DocuSign Insight](#)

14 [DocuSign Integrations](#)

15 [DocuSign APIs](#)

16 [Industry Best Practices](#)

The Way the World Agrees

Learn to organize, automate,
and customize agreements
with DocuSign University



Training Made for You

Learn anytime, anywhere, any way.

Instructor-Led Training

Live, instructor-led virtual training, taught by expert DocuSign University instructors, available in two forms:

Webinars: Short, one-hour complimentary webinars to help you get started or learn about a special topic.

Deep Dives: One-day or multi-day paid courses that provide more in-depth learning. Deep dives are available through a [Campus Pass](#) subscription.

Video Tutorials

How-to videos to get you up and running with your DocuSign account, covering new features, products, and best practices.

Self-Paced Courses

Complimentary self-paced training courses enable you to learn anytime, anywhere, and at your own pace. Topics range from product fundamentals to advanced features and cover all roles from end users to administrators to API developers.

Learn by Role

Curated learning paths designed to support your learning journey and build your expertise in specific roles, from senders to administrators to developers.



DocuSign Certifications

Showcase your expertise.



- Demonstrate your skills and experience with DocuSign.
- Highlight achievements on your resume and LinkedIn profiles.
- Be part of a community of recognized experts.
- Certifications are available for many DocuSign user roles, from administrators to workflow developers to technical consultants.

For more information, go to [DocuSign University](#).



Links

Access your DocuSign training portal for all courses and learning plans.

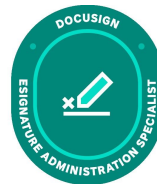
DocuSign Customers: <https://dsucustomers.docusign.com/>

DocuSign Developers: <https://dsudevelopers.docusign.com/>

DocuSign Partners: <https://partners.docusign.com>

DocuSign eSignature

Available
Specialist
Badges



Self-Paced Courses

Get Started Sending with eSignature

- Send Your First Envelope
- Configure Your eSignature Profile
- Configure Fields for Sending
- Manage Your Envelopes
- Send from a Mobile Device

Customize Your DocuSign eSignature Process

- Create and Manage eSignature Templates
- Send Using Standard Envelope Features
- Send Using Advanced Workflow Features
- Send Using Conditional Routing
- Create and Manage DocuSign PowerForms
- Send Using eSignature Bulk Send
- Send with eNotary
- Send Using Remote Online Notarization
- Create and Manage DocuSign Web Forms
- Configure Document Generation for eSignature

Get Started with eSignature Administration

- Configure your eSignature Account
- Manage eSignature Users
- Configure Basic eSignature Settings
- Explore eSignature Reporting and Auditing

Do More with eSignature Administration

- Customize Your eSignature Workflows
- Configure eSignature Identity Verification Preferences
- Trigger Actions with eSignature Data
- Explore eSignature Integrations and Add-Ons
- Implement Elastic Signing

DocuSign Click

- DocuSign Click for eSignature

Digital Signatures

- Support Compliance with Digital Signatures



English video playlists with subtitles in 10+ languages.

- [Sign with DocuSign eSignature](#)
- [Send with DocuSign eSignature](#)
- [DocuSign eSignature Templates](#)
- [DocuSign CFR Part 11](#)
- [DocuSign Notary](#)
- [DocuSign eSignature Administration](#)

Learn
Now



[| DocuSign Customers](#)
[| DocuSign Developers](#)
[| DocuSign Partners](#)

DocuSign eSignature

Available
Certifications



Complimentary Webinars

Get Started with DocuSign eSignature

Eliminate Manual Tasks with DocuSign eSignature

Customize Your Workflow with DocuSign eSignature

DocuSign eSignature: Template Creation Basics

Integrate Everywhere with DocuSign eSignature

Support Compliance Using DocuSign Advanced and Qualified eSignature (European Union)

Web Forms for DocuSign eSignature

Deep-Dive Courses

DocuSign eSignature: Sending Basics

2 hours instructor-led training

DocuSign eSignature: Working with Templates

2 hours instructor-led training

DocuSign eSignature: Advanced Sending

4 hours instructor-led training

DocuSign eSignature Administration I

8 hours instructor-led training

DocuSign eSignature Administration II

8 hours instructor-led training

Learn
Now



[| DocuSign Customers](#)

[| DocuSign Developers](#)

[| DocuSign Partners](#)

DocuSign Organization Management

Available
Specialist
Badge



Self-Paced Courses

DocuSign Organization Management

- Get Started with Organization Management
- Manage DocuSign Administrators
- Configure Organization Accounts
- Organization Bulk Actions
- Organization User Management
- Manage Organization Envelopes
- Get Started with Access Management
- Advanced Access Management
- Detect Potential Threats with DocuSign Monitor



English video playlist with subtitles in 10+ languages.

🔗 [DocuSign Access Management and Single Sign-On](#)

Learn
Now



[| DocuSign Customers](#)

[| DocuSign Developers](#)

[| DocuSign Partners](#)

DocuSign CLM Essentials

Available
Specialist
Badge



Self-Paced Courses

DocuSign CLM Essentials: End Users

- DocuSign CLM Essentials: Introduction
- DocuSign CLM Essentials: Generate, View, and Act on Agreements
- DocuSign CLM Essentials with Salesforce: Generate, View, and Act on Agreements
- DocuSign CLM Essentials: Complete the Agreement

DocuSign CLM Essentials: Administration

- DocuSign CLM Essentials: Introduction
- DocuSign CLM Essentials with Salesforce: Configure CLM Essentials with Salesforce
- DocuSign CLM Essentials: Manage the Process Builder and Admin Settings
- DocuSign CLM Essentials: Build a Workflow



*English video playlist with
subtitles in 10+ languages.*

🎥 [DocuSign CLM Essentials](#)

Learn
Now



[| DocuSign Customers](#)

[| DocuSign Developers](#)

[| DocuSign Partners](#)

DocuSign CLM

Available
Specialist
Badges



Self-Paced Courses

DocuSign CLM: End User Training

- DocuSign CLM: Introduction
- DocuSign CLM: Navigate the User Interface
- DocuSign CLM: Manage Folders and Documents
- DocuSign CLM: Apply Attributes and Use Search
- DocuSign CLM: Configure and Use Party Management
- DocuSign CLM: Create Reports
- DocuSign CLM: Collaborate on Agreements

DocuSign CLM: Administration

- DocuSign CLM: Introduction
- DocuSign CLM: Navigate the User Interface
- DocuSign CLM: Manage Folders and Documents
- DocuSign CLM: Apply Attributes and Use Search
- DocuSign CLM: Automate Manual Tasks
- DocuSign CLM: Create Reports
- DocuSign CLM: Customize, Integrate, and Deploy

DocuSign CLM: Advanced Administration

- DocuSign CLM: Configure and Use DocuSign Analyzer
- DocuSign CLM: Configure Salesforce Experience Cloud
- DocuSign CLM: Configure and Use Party Management

DocuSign CLM.CM: Administration

Alternative learning plan for version CLM.CM



*English video playlist with
subtitles in 10+ languages.*

- [DocuSign CLM Overview](#)
- [DocuSign CLM Workflows](#)

Complimentary Webinar

Get Started with DocuSign CLM

Learn
Now



[| DocuSign Customers](#)
[| DocuSign Developers](#)
[| DocuSign Partners](#)

DocuSign CLM

Available
Certifications



Coming Soon!

Partners Only

Self-Paced Courses

DocuSign CLM Technical Consultant

- Build Advanced DocuSign CLM Workflows
- Build Advanced DocuSign CLM eForms
- Make requests to the DocuSign CLM API
- Build Custom Integrations with DocuSign CLM

DocuSign CLM+: Administration

- DocuSign CLM+: Introduction
- DocuSign CLM: Navigate the User Interface
- DocuSign CLM: Manage Folders and Documents
- DocuSign CLM: Apply Attributes and Use Search
- DocuSign CLM: Configure and Use DocuSign Analyzer
- DocuSign CLM: Automate Manual Tasks
- DocuSign CLM: Create Reports
- DocuSign CLM: Customize, Integrate, and Deploy
- DocuSign Insight: Administration Fundamentals
- DocuSign Insight: Clause Library
- DocuSign Insight: Modeling Overview

Deep-Dive Courses

DocuSign CLM: Administration

16 hours Instructor-Led Training

DocuSign CLM: Build Workflows

24 hours Instructor-Led Training

DocuSign CLM: Advanced Document Generation

16 hours Instructor-Led Training

DocuSign CLM: Integrate Workflows with Salesforce

8 hours Instructor-Led Training

DocuSign CLM: Implement Advanced Workflows with Salesforce

32 hours Instructor-Led Training

Learn
Now



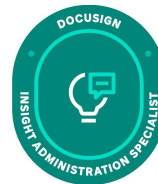
[| DocuSign Customers](#)

[| DocuSign Developers](#)

[| DocuSign Partners](#)

DocuSign Insight

Available
Specialist
Badges



Self-Paced Courses

Get Started with DocuSign Insight

- DocuSign Insight: Overview
- DocuSign Insight: Navigate and Search
- DocuSign Analyzer for End Users
- DocuSign Insight: Get Started with Document Review

DocuSign Insight: Administration

- DocuSign Insight: Administration Fundamentals
- DocuSign Insight: Custom Configuration
- DocuSign Insight: BI Dashboard for Viewers
- DocuSign Insight: BI Dashboard for Designers
- DocuSign Insight: Logic Apps
- DocuSign Insight: Clause Library

DocuSign Insight: Model Building

- DocuSign Insight: Modeling Overview
- DocuSign Insight: Create Models with DocuSign Insight Analytics
- DocuSign Insight: Create UDML Models

Deep Dive Courses

DocuSign Insight instructor-led training is available for private, custom engagements only. For more information, [contact DocuSign University](#).

DocuSign Insight for End Users

Private 4 hours Instructor-Led Training

DocuSign Insight: Introduction to Review

Private 4 hours Instructor-Led Training

DocuSign Insight: Application Administration

Private 6 hours Instructor-Led Training

DocuSign Insight: On-Premises Administration

Private 9 hours Instructor-Led Training

DocuSign Insight: Analyzer Administration

Private 3 hours Instructor-Led Training

DocuSign Insight: Model Building

Private 9 hours Instructor-Led Training



English video playlist with subtitles in 10+ languages.

🔗 [DocuSign Insight](#)

Learn
Now
➔ [| DocuSign Customers](#)
[| DocuSign Developers](#)
[| DocuSign Partners](#)

DocuSign Integrations

Self-Paced Courses

DocuSign + Salesforce: Gen and eSignature

- DocuSign for Salesforce: Administration
- DocuSign for Salesforce: Automate Workflows with Templates
- DocuSign Gen for Salesforce Revenue Cloud

DocuSign + Microsoft

- DocuSign eSignature for Microsoft Dynamics
- DocuSign eSignature for Microsoft SharePoint Online
- DocuSign eSignature for Microsoft Word
- DocuSign eSignature for Microsoft Outlook
- DocuSign eSignature for Microsoft Teams
- DocuSign eSignature for the Microsoft Power Platform

DocuSign + Oracle NetSuite

- DocuSign eSignature for NetSuite: Send, Sign, and Manage Documents

DocuSign + Google

- DocuSign eSignature for Google: Send, Sign, and Manage Documents

Available
Specialist
Badges



English video playlists with subtitles in 10+ languages.

- [DocuSign Integrations: Salesforce](#)
- [DocuSign Integrations: Google](#)
- [DocuSign Integrations: Microsoft](#)
- [Other Integrations](#)

Complimentary Webinar

Integrate Everywhere with DocuSign eSignature

Learn
Now



[| DocuSign Customers](#)

[| DocuSign Developers](#)

[| DocuSign Partners](#)

DocuSign APIs

Self-Paced Courses

Available
Specialist
Badge



Get Started with the DocuSign eSignature API

- eSignature API Overview
- Introduction to eSignature API Objects
- DocuSign API Authentication Overview

Create and Configure Envelopes with the eSignature API

- Set Up DocuSign Developer Tools
- Build Envelopes and Use Templates with the eSignature API
- Bulk Send with the eSignature API
- Implement Embedded Signing with the eSignature API
- Configure Responsive Signing with the eSignature API
- Implement Elastic Signing

Deploy and Manage eSignature API Integrations

- Go-live with API Integrations
- Build a Custom eSignature Integration with CORS
- Manage Envelopes with the eSignature API
- Trigger Actions with eSignature Data
- Configure DocuSign Connect Webhooks with the eSignature API
- Detect Potential Threats with DocuSign Monitor

Implement Authentication with DocuSign APIs

- DocuSign API Authentication Overview
- Set Up DocuSign Developer Tools
- Implement API Authentication with Authorization Code Grant
- Implement API Authentication with JSON Web Token Grant

Plan Custom Integrations with the DocuSign eSignature API

- Overview of Integration Types
- Integration Level Use Cases

Customize Workflows with the DocuSign CLM API

- Overview of the DocuSign CLM API
- Start Workflows with the DocuSign CLM API

Build Integrations with the DocuSign eSignature REST API

Build DocuSign eSignature Solutions with Apex Toolkit

Available in self-paced or deep dive format.

Learn
Now



[| DocuSign Customers](#)

[| DocuSign Developers](#)

[| DocuSign Partners](#)

Industry Best Practices

Available
Specialist
Badge



Transformation Strategies

Adoption
strategies



| [DocuSign Customers](#)

| [DocuSign Developers](#)

| [DocuSign Partners](#)

Template Library

Downloadable
sample
templates



| [DocuSign Customers](#)

| [DocuSign Developers](#)

| [DocuSign Partners](#)

Best-Practice Guides

Best
practices
and more



| [DocuSign Customers](#)

| [DocuSign Developers](#)

| [DocuSign Partners](#)

DocuSign by Industry

- DocuSign for Financial Services
- DocuSign for Health and Life Sciences
- DocuSign for Higher Education
- DocuSign for the Public Sector
- DocuSign for Real Estate

Industry



| [DocuSign Customers](#)

| [DocuSign Developers](#)

| [DocuSign Partners](#)



YouTube

English video playlists with subtitles in 10+ languages.

- [DocuSign Rooms for Real Estate](#)
- [DocuSign Rooms for Mortgage](#)
- [DocuSign CFR Part 11](#)
- [DocuSign for Real Estate](#)



DocuSign®

[DocuSign University](#) | [DocuSign Knowledge Market](#) | [How to log in to DocuSign University](#) | [Learning portal tour](#) | [Contact DocuSign University](#)