DocuSign: Getting Started

What is eSignature?

The eSignature project uses DocuSign, a digital signature application that allows users to securely sign, initial, and enter other information on an electronic document rather than a physical copy. High use forms have already begun to be incorporated into eSignature, with more forms being added weekly.

For some helpful introductory videos on using DocuSign, visit https://support.docusign.com/ or visit our Trainings tab.

Benefits of using eSignature

Faster Signatures: Routine approval processes can take weeks because physical documents must be walked or mailed for physical signatures. With eSignature, documents are automatically routed through the approval process as they are signed, eliminating timely travel.

More Visibility In The Approval Process: eSignature tracks each document’s location within approval processes in real time and who still needs to sign, with updates sent periodically to remind signers they have a document waiting for their approval. No more physical forms getting lost amid the clutter.

Easier Storage: eSignature utilizes electronic documents, eliminating the need to scan and store physical documents.

How to Get Started - Lehigh Users Who Are Just Signing Documents

Note: Most electronics documents internal to Lehigh will not require you to log on and sign. However should you need to, simply:

1. If the document you received did not already take you there, go to https://account.docusign.com/#/username.
2. To start the login process, enter your username@lehigh.edu. This will redirect you to the standard Lehigh University Single-Sign-On page, if not already signed in.
   - On the SSO page, enter your Lehigh credentials (username and password) and click Login. Duo 2-factor authentication will be required.
   - You will then be brought to the DocuSign homepage.
3. You are good to go!

How to Get Started - Lehigh Users Who Will Need to Send Documents

1. First you need to create your account. Go to https://account.docusign.com/#/username.
2. Enter your username@lehigh.edu. This will redirect you to the standard Lehigh University Single-Sign-On page, if not already signed in.
   - On the SSO page, enter your Lehigh credentials (username and password) and click Login. Duo 2-factor authentication will be required.
   - You will then be brought to the DocuSign homepage.
3. Your account has now been created, but only with signing permissions.
4. Please go to the DocuSign: Permissions and Groups and check out the available permission sets to determine which level of access you need.
5. Once you decided on the access you need in #4, go to the Trainings tab and follow the links for obtaining your desired role.
6. Once you have completed the training, submit a Jira Ticket at https://jira.cc.lehigh.edu/servicedesk/customer/portal/1/create/118 (choose the DocuSign radio button).
7. If you have any questions, please email helpdesk@lehigh.edu