DocuSign FAQ

1. **Required - How to secure PII or other sensitive data (i.e. Class 1)?**
   a. If your document contains PII or sensitive data, it must contain the following custom field - **Class 1 Data Indicator** - it is a white text, thus invisible field - that indicates your document contains this data and is used for reporting purposes. You can add it anywhere in your document. (See image below.) **Shared Templates being moved to production will not be approved without this field.**

   ![Class 1 Data Indicator Image]

   b. **SSN -** There is a saved field that hides the SSN in an envelop or template called **SSN Hidden.** To access it when creating an envelop or template, click the Custom Field Section and find the field named SSN Hidden. (See image below.) **Only the sender of the initial document will be able to retrieve the actual SSN by viewing the document from within DocuSign.**

   ![SSN Hidden Image]
c. You can cover any sensitive data field with asterisks (*** by clicking the Formatting field on the right menu. (See image below.) Only the sender of the initial document will be able to retrieve the actual data field by viewing the document from within DocuSign.

2. How do I get access to DocuSign?
   Visit the Getting Started Page

3. What do I enter into the Jira ticket when requesting access to DocuSign?
   You should enter the Permission set and any groups that you are requesting access to. If you are requested the Technical Designer access, you should explain the reasons behind needing this level of access.
   Please visit the DocuSign: Permissions and Groups to see what types of DocuSign access exists and be sure to watch the training videos that correspond to those permission before requesting access.

4. I keep getting a permissions error when clicking on a DocuSign email in my inbox to sign a Document.
   Someone sent a document for your signature to your email alias. DocuSign cannot handle alias email addresses, as it cannot verify that the alias and the user logging in are the same person that the sender intended to sign the document. The envelop must be corrected and resent. If this was a University form (i.e. from RAS or Purchasing, etc.), you can contact their department and they can fix it and resend. If you know the individual sender (non-student) of the envelop, you can contact them and ask them to correct it. If someone is unsure of who/how to fix, please enter a Jira ticket.

5. I want to add field validation for a field in my envelop/template. It says I need to use regex expressions, how do I write those?
   Regex is an entire mini-language of it's own that uses symbols to define patterns. Here are some helpful sites with examples that you can use and where you can test your expressions.
   - https://alvinalexander.com/blog/post/perl/common-regular-expressions-that-developers-need/ These are common expressions.
   - https://www.keycdn.com/support/regex-cheatsheet Here are more examples and info.
   - https://regex101.com/ This is a tester that you can use to test your expressions.
   - http://regexlib.com This is a library you can search.

6. How do I get help re-engineering a business process in our department to utilize the automation ability that DocuSign provides?
   Please complete the Use Case form and attach it to a Jira ticket for DocuSign. The more information you can provide in this form the better we can assist you.

7. Where can I find additional DocuSign technical help that is not on this site?
   In addition to the videos found on the Training page there is an abundance of support on DocuSign's support site at http://support.docusign.com. If you cannot find what you are looking for, or need additional guidance, please contact LTS - Enterprise Systems at es-docusign-suppl-list@lehigh.edu.