DocuSign Training

Since DocuSign offers a wide range of functionality from simple signing and sending to complex automation integrated with other applications like Banner, Workflow, and Form Fusion, there are a variety permissions that users can request. DocuSign provides an abundance of training and support, which can be found at DocuSign Support. However, we have consolidated the necessities for general Lehigh users here. There are also videos of the initial Lehigh University training provided by DocuSign for users who want to gain more in depth knowledge of DocuSign and its features.

Before beginning any training below, please visit the DocuSign: Permissions and Groups page to determine the appropriate training to view. If you have any questions, please email es-docusign-support-list@lehigh.edu.

For any of the links below, Control + Click to open link in a new tab.

All users that want to send documents through DocuSign must read the Sensitive Data Rules and watch the following training videos then submit a Jira request for the Sender role:

- Sensitive Data Rules - FAQ #1
- Sending a Document
- Correcting a Document
- Supplemental Documents
- Recipient Roles/Actions
- Using Templates
- OR - If you want to learn more, watch Lehigh's training provided by DocuSign - LU 101 Training Provided by DocuSign aka LU Powerform Training provided by Docusign

To add the ability to design/create templates for personal (not departmental or University level) use, users must watch the additional training videos then submit a Jira request for the Individual Designer role:**

- Create Simple Template
- LU Template Training Provided By DocuSign (Advanced and Optional, same as bulleted links below)

To add the ability to bulk send envelopes for signature, users must watch the additional training videos then submit a Jira request for the Bulk Sender role:**

- https://support.docusign.com/en/guides/ndse-user-guide-multiple-recipient-bulk-send (Read only, no video)

To add the ability to design/create templates and Power Forms, as well as signing groups, users must watch the additional training videos then submit a Jira request for the Technical Designer role (note: this is for technical employees and your Jira request should provide a reason for requesting this):

- LU Powerform Training Provided by DocuSign
- LU Template Training Provided by Docusign

** For both of these, watch the respective training videos and request the Bulk Sender & Individual Designer Role.