

Wisconsin eSignature: DocuSign Quick Guide for Admins

Updated 12/19/2019



Contents

- Overview & Resources 3**
 - State of Wisconsin 3
 - DocuSign 3
- Common Admin Tasks..... 3**
 - Access the Admin Page 3
 - Add a New User 4
 - Deactivate (“Close”) a User..... 4
 - Reactivate Users 4
 - Reset a User’s Password 4
 - Create Permission Sets 4
 - Edit Permission Sets 5
 - Create a New Group 5
 - Add User to an Existing Group 5
 - Share Envelopes Between Users..... 5
 - Perform a Custody Transfer 5
 - Create Signing Groups..... 6
 - Edit Signing Group..... 6
- Branding..... 6**
 - Add or Edit a Signing Brand for Recipients 6
 - Add or Edit a Sending Brand for Users..... 7
- Account-Wide Reporting 7**
- Security Settings 8**
 - Account > Security Settings 8
 - Account > Regional Settings..... 10
 - Signing and Sending > Signing Settings..... 10
 - Signing and Sending > Sending Settings..... 11
 - Signing and Sending > Document Retention 13
 - Signing and Sending > Legal Disclosure 13
 - Signing and Sending > Reminders and Expiration..... 13

Overview & Resources

This guide provides a quick overview for DocuSign Admins at Wisconsin State agencies and University of Wisconsin System campuses. For additional resources, visit the following links:

State of Wisconsin

Wisconsin eSignature: DocuSign User Guide:

<https://doa.wi.gov/Documents/DEO/WisconsinSignatureUserGuide.pdf>

Provides a practical overview of using DocuSign for an average State user.

Wisconsin eSignature: DocuSign Quick Guide for Template Builders:

<https://doa.wi.gov/Documents/DEO/WisconsinSignatureTemplateBuilderGuide.pdf>

Provides basic instruction on creating and sharing templates, including recommended best practices.

WisPro Help Desk:

doawispro@wisconsin.gov or (608) 264-7897

Hosted by the State Bureau of Procurement; members of the WisPro Help Desk are Organizational Admins for DocuSign.

DocuSign

DocuSign's Admin User Guide:

<https://support.docusign.com/guides/ndse-admin-guide>

The official DocuSign guide for Admins. Provides detailed walkthrough for all Admin tasks, with pictures.

DocuSign's User Guide:

<https://support.docusign.com/guides/ndse-user-guide>

The official DocuSign guide for general users. Provides detailed walkthrough of all user tasks, with pictures.

DocuSign University:

<https://dsu.docebosaas.com/learn>

DocuSign's video tutorial library. This resource is available to all users with a DocuSign account.

DocuSign's Support Page:

<https://support.docusign.com>

Allows users to access DocuSign's help topics and resources.

Common Admin Tasks

Access the Admin Page

You can get to the Admin Page by clicking the profile picture and selecting **Go to Admin**. You will see a number of tabs on the left that will allow you to perform various administrative tasks. Organizational

Admins will need to click **Accounts**, then select a subaccount from the list available before landing on the Admin Page.

Add a New User

Click the **Users** tab on the Admin Page, then click the **Add User** button at the top. Follow the on-screen prompts and click **Next** as needed. At a minimum, you will be asked to provide the new user's email address, full name, and will need to assign them to a permission set. You may also add an Access Code for additional security, though it's not required. If you enter an email address that is already associated with an account, the system will notify you and provide you with additional options.

If you need to add multiple users at once, you can upload a CSV file by clicking the **Bulk Actions** button and selecting **Add Users**. For detailed instructions for completing this action, refer to [DocuSign's Admin User Guide](#).

Deactivate ("Close") a User

To deactivate a user, click the **Users** tab on the Admin Page and locate the user's name. If needed, you can filter the list by clicking **Filters** at the top of the page. Click the **Actions** button in the corresponding row and select **Close** from the dropdown menu. Confirm you want to close the user and indicate whether you'd like to remove them from any Signing Groups (if applicable), then click **Close**. A closed user's information will appear greyed out.

Reactivate Users

Click the **Users** tab on the Admin Page. By default, deactivated (closed) users do not appear in the user list. To show all users, click **Filters** at the top of the page and check the **Closed** checkbox, then click **Apply**. Locate the user and click the **Actions** button in the corresponding row, then select **Reactivate**. Confirm their information (similar to adding a new user), assign a Permission Set, and assign to any Groups necessary, then click **Reactivate User**. The reactivated user will receive a new invitation to join DocuSign and will be asked to set up a new password and security question.

Reset a User's Password

From the Admin Page, click the **Users** tab, then find the user in the list. Click the **Actions** dropdown menu and select **Reset Password**. The user will receive an email allowing them to set up a new password and security question.

Create Permission Sets

Permission Sets are the roles we assign to users that grant or limit their abilities within DocuSign. All Wisconsin State accounts start with five Permission Sets: DS Admin, DS Sender, DS Viewer, Template Builder, and Admin Lite. For full descriptions of the abilities each of these Permission Sets grant, please refer to the [Wisconsin eSignature: DocuSign User Guide](#).

To create a new Permission Set, click the **Permission Sets** tab on the Admin Page. You can either click the **Add Permission Set** to build one from scratch, or click the **Actions** button for an existing Permission Set and select **Copy**. This allows you to start off with a known Permission Set (like DS Sender) and add or remove permissions as needed. Note that you have two tabs of options available: Admin Permissions and User Permissions.

Edit Permission Sets

To edit a Permission Set, click the **Permission Sets** tab on the Admin Page and click the name of the Permission Set you'd like to edit. This will open a popup window where you can change the name and add or remove permissions. Remember to click **Save** before closing. Note that you can't edit any of the default Permission Sets: DS Admin, DS Sender, or DS Viewer.

Create a New Group

By assigning users to Groups, you can simplify the process of sharing templates. This can be especially helpful in ensuring a new user has access the templates they need. Users can belong to multiple Groups and all accounts begin with two Groups that cannot be edited or deleted: Everyone and Administrators. In addition, each Group may be assigned a unique Brand (see *Branding* section below for additional instructions).

To create a new group, click the **Groups** tab on the Admin Page. Click **Add Group** and enter a name for the new Group and click **Add**. This will take you to the new Group's page. Click **Assign User** and click the checkbox on the corresponding row for any user who should be added to the Group.

Add User to an Existing Group

You can add users to existing Groups by going to the **Groups** tab on the Admin Page, then clicking the name of the desired Group and clicking **Assign Users**. You can also go to the **Users** tab on the Admin Page and click the user you'd like to add to view their profile information. At the bottom of their profile, you can click **Add Group** (there must be an existing Group that the user is already a member of for this option to work).

Share Envelopes Between Users

When users Share Envelopes, users on the same account can view and take action on the same envelopes. For example, a user may ask to Share Envelopes with their supervisor when they go on vacation.

To Share Envelopes, click on the **Users** tab on the Admin Page. Locate the user you would like to either share envelopes with, or the user whose envelopes you'd like to share, and click the corresponding **Actions** button, then select either **Share Envelopes with User** or **Share User's Envelopes**. Next, click **Add Users** and select the users you would like to share the envelopes with, and click the **Assign** button once you're done. For more information on Sharing Envelopes, refer to [DocuSign's Admin User Guide](#).

Perform a Custody Transfer

At times it may be necessary to transfer the ownership of a user's envelopes or templates to another user. In DocuSign, this is referred to as a Custody Transfer. When you do this, the envelopes will no longer appear in the original user's account.

Before you will be able to perform a Custody Transfer, you will first need to share the envelopes that will be transferred with yourself (you can un-share them immediately afterwards). Follow the instructions in the Share Envelopes Between Users section above before proceeding with the next steps.

From the **Users** tab, locate the user who currently owns the items you want to transfer. Click **Actions** and select either **Transfer Envelopes** or **Transfer Templates**, depending on what you'd like to transfer.

Select the appropriate items in the list by clicking the checkbox on the corresponding row(s). You can filter the results by clicking **Filters**. Once all items have been selected, click the **Transfer Now** button. Select the user the items will be transferred to and click **Transfer**, then click **Confirm**. The transfer will be placed in the queue for processing and will be listed in **Bulk Actions**.

You can also set up Custody Transfer Rules that will automatically transfer ownership of an envelope as soon as envelopes are sent or completed. For complete instructions, refer to [DocuSign's Admin User Guide](#).

Create Signing Groups

Signing Groups are used when you want to send an envelope to a group, and any member of that group may open and sign the document(s). After it has been created, Senders can add the Signing Group as the recipient of an envelope and the first member of the Signing Group to open and sign the document will complete that step of the envelope. If a Signing Group member opens the envelope but doesn't complete the signing, another member can still open and complete it.

To create a Signing Group, click the **Signing Groups** tab on the Admin Page and click **Add Signing Group**. Enter a unique name for the Signing Group. Locate the signers you would like in the Signing Group and click **Add** next to each person's name. If you like, you can have email notifications be sent to an alternative email (like a group email account) instead of having them sent to each Signing Group member by clicking the corresponding checkbox at the bottom of the page. When all desired users have been added, click **Add** at the bottom of the page.

Edit Signing Group

To edit a Signing Group, click the **Signing Groups** tab on the Admin Page. Locate the Signing Group you'd like to edit and click the corresponding **Actions** button and select **Edit** from the dropdown menu. From this window, you can edit the group's name and add or remove users.

Branding

Branding allows you to customize the look of DocuSign for users (Sending Brand) and recipients/signers (Signing Brand). You can add your agency or campus logo, tailor the colors, and specify what website recipients/signers will see when they are done signing a document. You can set up a single Signing Brand for your entire agency or campus, or you can have multiple Signing Brands for specific Groups (see the sections related to *Groups* above for additional instructions on creating Groups).

Add or Edit a Signing Brand for Recipients

From the Admin Page, click the **Brands** tab. By default, the page will display the Signing Brand tab. Click **Add Brand** and enter a name for it, then click **Save**. If you want this Signing Brand to be the default Signing Brand all users will use, click the **Set as Sign Default** checkbox.

Click the **Create Your Theme** button. You can add a logo by clicking **Upload a Custom Logo** and selecting a logo file that matches the site's requirements. You can also set background and text colors for the header and buttons by using the color selector or eyedropper (color picker). The **Preview** will show you what the email and signing experience will look like to recipients. When you're finished, click **Save**.

If you want to add additional Signing Brands, repeat these steps as needed.

You can also set up the website signers are taken to once they have completed signing a document by clicking the **Destination URLs** link below Advanced Configuration.

To Edit the Signing Brand, click the **Brands** tab from the Admin Page and click **Edit** on the Signing Brand you'd like to change.

Add or Edit a Sending Brand for Users

From the Admin Page, click the **Brands** tab. By default, the page will display the Signing Brand tab, so you will need to click the **Sending** tab at the top. Note that unlike Signing Brands, you can only create a single Sending Brand for your account at a time.

Click **Upload Your Custom Logo** and select your logo file. For the Sending Brand, the following specifications are enforced:

- Maximum file size: 300KB
- Dimensions (recommended): 296x76 pixels
- File formats: JPG, GIF, PNG

Select the background and text colors for the header, action buttons, and primary buttons. The preview window will allow you to see what the Home and Manage tabs will look like with this Sending Brand. When you're finished, click **Apply Brand**.

To Edit the Sending Brand, click the **Brands** tab from the Admin Page, then click the **Sending** tab and click **Edit Your Theme**.

Account-Wide Reporting

Unlike standard users, Admins have the ability to run account-wide reports. To do this, click the **Reports** tab on the DocuSign Homepage (if you are on the Admin Page, you will first need to click **Go to DocuSign** at the top of the page). Once on the Reports tab, use the tabs on the left side to access a variety of reports and click **View** to see the details for a report.

Helpful Note:

The logo used in the Signing Brand will appear at the top of the emails sent to recipients. Depending on the size of the logo you upload, it may appear *very large* in the email. We recommend sending a test envelope to yourself to double check that the logo looks the way you intended. If it appears too large, delete the logo and upload a smaller version.

Each time a report is run, the date range will default to Month to Date. To change it, click the **Month to Date** dropdown menu and select a different option. You can also edit the data shown in the report by clicking **Edit Columns** and limit or expand the data by clicking **Edit Filters**. You can also save a customized report by clicking the **Save As** button. In addition, you can schedule a report to run automatically by clicking the **Clock Icon**, download a CSV file of the data by clicking the **Download Icon**, or print the report by clicking the **Printer Icon**.



Security Settings

As an Admin, you have the ability to edit the security settings for your agency or campus, as needed. The default settings established by the Organizational Admins for all Wisconsin State accounts are listed in the relevant sections below. Note that some account settings only become visible after enabling other settings.

Helpful Note:

Any changes made to the settings from the Admin Page will be applied to all users in the subaccount (e.g., your entire agency or campus). For example, if you turn on the watermark setting, every document in every in-progress envelope sent by your agency or campus will print with the same watermark.

Account > Security Settings	
Account Security	
Web App Session Timeout (minutes)	30
Recipient Authentication Settings	
<input type="radio"/>	Any recipient must authenticate on every envelope sent from this account
<input checked="" type="radio"/>	The sender can require that a recipient must authenticate on any envelope sent from this account
<input type="radio"/>	Disable recipient authentication for this account
Recipient Authentication Triggers	
<input checked="" type="radio"/>	The first time a recipient accesses an envelope per device
<input type="radio"/>	Every time a recipient accesses an envelope
Recipient Authentication Skip Option	
<input checked="" type="radio"/>	Recipients cannot skip authentication when accessing subsequent envelopes from the same sender
<input type="radio"/>	Recipients can skip authentication when accessing subsequent envelopes from the same sender when using the same browser, on a device, for the following duration: [#] [Minutes]

Login Requirements		
<input checked="" type="radio"/>	Not Required to Login	
<input type="radio"/>	Login Required if Signer Has an Account	
<input type="radio"/>	Account Required – Login Once Per Session	
<input type="radio"/>	Account Required – Login for Each New Envelope	
General Authentication Settings		
Access Codes		
<input type="checkbox"/>	Enforce access code rules	
	Minimum access code length (6-50)	#
<input type="checkbox"/>	Access code must include at least:	
<input type="checkbox"/>	One letter	
<input type="checkbox"/>	One number	
<input type="checkbox"/>	One special character (except "<", ">", "&#")	
Password Security		
Password Strength (dropdown menu)		
<input type="radio"/>	Basic (Must be at least 6 characters long)	
<input checked="" type="radio"/>	Medium (Must be at least 7 characters long; must contain at least one uppercase letter; must contain at least one lowercase letter; must contain at least one number OR one special character)	
<input type="radio"/>	Strong (Must be at least 9 characters long; must contain at least one uppercase letter; must contain at least one lowercase letter; must contain at least one number; must contain at least one special character)	
<input type="radio"/>	Custom	
	Minimum password length (6-15 characters)	#
	Minimum password age (0 or more days)	#
	Password must include:	
<input type="checkbox"/>	At least one uppercase letter	
<input type="checkbox"/>	At least one lowercase letter	
<input type="checkbox"/>	At least one digit	
<input type="checkbox"/>	At least one special character	
	Password questions required (0-4)	#
<input type="checkbox"/>	Enable password expiration	
	Days until expiration	#

Account > Regional Settings	
Time Zone	
<input type="checkbox"/>	Allow users to set their own Time Zone and Date Format
Default Time Zone for the account	<i>(UTC-06:00) Central Time (US & Canada)</i>
Default Date/Time format for the account	<i>4/27/2018 04:00:00 pm</i>

Signing and Sending > Signing Settings	
Signing Experience	
In-session Landing Pages	
Signing Completed	<i>[DocuSign Default]</i>
Viewed completed, voided, or declined envelope	<i>[DocuSign Default]</i>
Finish Later	<i>[DocuSign Default]</i>
Declined	<i>[DocuSign Default]</i>
Session Timeout	<i>[DocuSign Default]</i>
Time to Live token expired	<i>[DocuSign Default]</i>
Failed knowledge-based authentication check	<i>[DocuSign Default]</i>
Failed access code authentication check	<i>[DocuSign Default]</i>
System Error	<i>[DocuSign Default]</i>
Watermark Configuration	
<input type="checkbox"/>	Apply watermarks to documents that are still in progress
Auto-Navigation (dropdown menu)	
<input type="radio"/>	Page only
<input checked="" type="radio"/>	Navigate required fields
<input type="radio"/>	Navigate blank required fields
<input type="radio"/>	Navigate all fields
<input type="radio"/>	Page then navigate required fields
<input type="radio"/>	Page then navigate blank required fields
<input type="radio"/>	Page then navigate all fields
<input checked="" type="checkbox"/>	Allow recipients to view mobile-friendly documents with responsive signing
Recipients	
<input checked="" type="checkbox"/>	Require a reason when a recipient declines to sign
<input type="checkbox"/>	Allow recipients to sign on paper
<input type="checkbox"/>	Allow senders to override sign on paper
<input checked="" type="checkbox"/>	Allow recipients to sign on a mobile device
<input checked="" type="checkbox"/>	Allow recipients to change signing responsibility

<input checked="" type="checkbox"/>	Allow senders to override change signing responsibility
<input type="checkbox"/>	Allow recipients to edit documents
<input type="checkbox"/>	Allow recipients to create a DocuSign account
<input checked="" type="checkbox"/>	Allow offline signing on a mobile device
<input checked="" type="checkbox"/>	Allow recipients to sign documents offline on a mobile device
Document Formatting	
Current Date Format (dropdown menu)	1/18/2019
Current Time Format (dropdown menu)	2:59 pm
Signature	
<input checked="" type="radio"/>	Add DocuSign frame
<input type="radio"/>	Do not add frame
Supplemental Documents	
<input type="checkbox"/>	Signers must view supplemental documents
<input type="checkbox"/>	Signers must accept supplemental documents
<input type="checkbox"/>	Signers must read supplemental documents (requires that signer view and accept)
Envelope Delivery	
<input type="checkbox"/>	Attach documents to completion email
<input type="checkbox"/>	Attach certificate of completion to envelope
<input checked="" type="checkbox"/>	Suppress emails to embedded signers
<input type="checkbox"/>	Send completion emails to embedded signers
<input checked="" type="checkbox"/>	Allow account users to decide if they should send a link or attach a PDF
Self-Signed email notifications are delivered by...	
<input type="radio"/>	PDF
<input checked="" type="radio"/>	Link

Signing and Sending > Sending Settings	
Fields and Properties	
Default font for fields:	Calibri, Size 11, Black
<input checked="" type="checkbox"/>	Enable formula field (calculated field)
<input checked="" type="checkbox"/>	Enable conditional fields
<input checked="" type="checkbox"/>	Enable conditional routing
<input checked="" type="checkbox"/>	Allow admins to share custom fields
<input type="checkbox"/>	When an envelope is sent, write the initial value of the field for all recipients
<input type="checkbox"/>	Allow fax delivery to recipients
<input checked="" type="checkbox"/>	Enable signer attachment field

<input checked="" type="checkbox"/>	Allow signers to add multiple attachments per field
<input type="checkbox"/>	Append attachments to the document with the attachment field
Document Visibility: (dropdown menu)	
<input type="radio"/>	Off
<input type="radio"/>	Must sign to view, unless member of sender's account
<input type="radio"/>	Must sign to view, unless sender
<input checked="" type="radio"/>	Sender can set "must sign to view, unless member of sending account"
<input type="radio"/>	Sender can set "must sign to view unless sender"
<input checked="" type="checkbox"/>	Allow sender to specify document visibility
<input type="checkbox"/>	Enable draw new signature for each signature or initial field <i>(Note: You will need to save other settings first, then return to this page before this setting will become available. Setting is unchecked by default.)</i>
<input type="checkbox"/>	Enable signature stamp field
<input checked="" type="checkbox"/>	Allow sender to download form data
<input type="checkbox"/>	Enable custom email and language for each recipient
<input checked="" type="checkbox"/>	Enable signing order by default <i>(Note: You will need to save other settings first, then return to this page before this setting will become available. Setting is unchecked by default.)</i>
Recipient Roles	
<input checked="" type="checkbox"/>	Enable bulk recipients
<input type="checkbox"/>	Enable needs to view role
<input checked="" type="checkbox"/>	Enable specify recipients
<input type="checkbox"/>	Enable allow to edit recipient
<input type="checkbox"/>	Enable update recipients
<input type="checkbox"/>	Enable in person (hosted) signing role
<input type="checkbox"/>	Present this information request to in person signers [text]
Templates	
<input checked="" type="checkbox"/>	Enable shared template folders
Envelope Correct	
<input checked="" type="checkbox"/>	Allow adding documents after one or more recipients have completed their action <i>(Note: You will need to save other settings first, then return to this page before this setting will become available. Setting is checked by default.)</i>
Document Sources	
<input type="checkbox"/>	Box
<input type="checkbox"/>	Dropbox
<input checked="" type="checkbox"/>	Google Drive
<input checked="" type="checkbox"/>	OneDrive

Signing and Sending > Document Retention

DOCUMENT RETENTION POLICY

<input type="checkbox"/>	Enable document retention policy
After an envelope is completed, voided, or declined, how many days should DocuSign keep documents before sending them to the purge queue? [#]	
<input type="checkbox"/>	Remove fields and metadata
<input type="checkbox"/>	Redact personally identifiable information

Signing and Sending > Legal Disclosure

<input type="radio"/>	No, I choose not to use an Electronic Record and Signature Disclosure at this time.
<input checked="" type="radio"/>	Yes, I elect to use an Electronic Record and Signature Disclosure with my new recipients.
Recipients must accept the Electronic Record and Signature Disclosure when signing documents:	
<input checked="" type="radio"/>	Once for this account
<input type="radio"/>	First time viewing each envelope sent from this account
<input type="radio"/>	First time viewing each time the recipient appears in the signing order
<input type="checkbox"/>	Enforce frequency setting for members of this account.
<input type="checkbox"/>	Allow recipients to withdraw their consent.
<input type="checkbox"/>	Use brand company name.
Note: Each time you change the content below, all envelope recipients with unsigned documents will be required to adopt a new version	

Signing and Sending > Reminders and Expiration

<input checked="" type="checkbox"/>	Allow senders to override account defaults
Reminders	
<input type="checkbox"/>	Send automatic reminders
Days before sending first reminder: [#]	
Days between reminders: [#]	
Expiration	
Days before request expires: 120	
Days to warn signers before expiration: 0	