

Getting Started with DocuSign

Contact Keith Martin of OIT, keith.martin@princeton.edu, to have your Princeton NetID added to the University's DocuSign account

Once you are added to the account, you'll want to start with the online training courses in DocuSign University at <https://dsu.docebosaaS.com/learn>

When on the DocuSign University log in page, click on **"LOGIN WITH DOCUSIGN"** in the blue banner

Use your Princeton University email address and click on Continue

DO NOT TYPE IN A PASSWORD on the next page – CLICK ON **"USE COMPANY LOGIN"** (this is set up for Single Sign-On and uses DUO authentication)

Once logged in, you should take the following courses:

- DocuSign University Tour
- DocuSign Sender Fundamentals
- DocuSign Signer Fundamentals

After completing these courses, you should have enough information to get started. However, if interested, there are other courses in DocuSign University that are available to you.

At this time, there is no formal support at the University for using DocuSign. Each department using DocuSign has taken on responsibility for undergoing the basic training and then exploring/adopting any additional features that they need. DocuSign offers many advanced features, beyond the basic e-signature. If use of e-signature is your main goal, you can be up and running with DocuSign in a short time. If you intend to use DocuSign for more than just e-signature, you can contact our DocuSign representatives to get more information on additional training (which they offer for a fee).

There are a number of different roles within DocuSign. Here is a description of each role:

- University Administrator – All Administration Capabilities. Users with this permission have access to the Administration view for the University Account and can manage account settings, users and groups, signing and sending settings, and integrations. The current University Administrator is Keith Martin, OIT.
- Administrator – Users with this permission have access to the Administration view for the department account and can manage account settings, users and groups, signing and sending settings, and integrations. Each department using DocuSign should declare an Administrator to coordinate with the University Administrator.
- Sender Plus – Users with this permission have access to sending envelopes, adding fields, allowing sequential signing, signer attachments, signing on paper override, sending to bulk lists, language selection, disabling a document upload, and ability to set up templates.
- Sender – Users with this permission have the ability to send envelopes.

Princeton's Account Executive is Dawn Hamilton, Account Executive, Dawn.Hamilton@docusign.com