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OTS
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SERVICES

Basic eSignature Admin Training

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Logging into DocuSign

1. Visit app.docusign.com to access your DocuSign account
2. Enter your @la.gov email address to login
3. Select Use company login



Use company login

4. You will be prompted to login through SSO

If you have any questions or issues with logging in, please contact David.Dousay@la.gov or Brad.Smith@la.gov

How to Navigate Settings

DocuSign eSignature Administrators have an easy and intuitive interface to manage their account settings and users.

[Learn More](#)

View our full eSignature Administration YouTube playlist for additional videos on all settings



<https://www.youtube.com/watch?v=Wa0BeG4RBPk&list=PLIIMTiU7qZekZR7JEQhlwZRZUKPqYZf>

How to Manage Users

As an administrator, you can manage individual users, groups of users, and permission profiles in the Users and Groups section of eSignature Settings.

[Learn More](#)

[Step-by-Step Video Tutorial](#)



https://www.youtube.com/watch?v=pv3mNKWL_VA&list=PLIIMTiuDU7qZekZR7JEQhlwZRZUKPqYZf&index=2

How to Manage Permission Profiles

Permission profiles make it easier to manage permission settings for a large number of users. Administrators can modify the profile settings, which are applied to all users with that profile, instead of changing permission settings for each user individually.

[Learn More](#)



<https://www.youtube.com/watch?v=mOgHiFD2umQ&list=PLIIMTiuDU7qZekZR7JEQhlwZRZUKPaYZf&index=3>

How to Manage Groups

Groups are used to organize users into functional units for template sharing to limit user access to templates.

Additionally, if multiple account brands are enabled, groups are used to set which brands can be used by group members.

[Learn More](#)



<https://www.youtube.com/watch?v=L0kFOxkqXYc&list=PLlIMTiuDU7qZekZR7JEQhlwZRZUKPqYZf&index=4>

How to Create a Template

Creating a template is a lot like starting an envelope. You add files, recipients, messages, and signing fields, and you can add any of the standard supported file types to your template.

[Learn More](#)

[How to Send Using a Template](#)



<https://www.youtube.com/watch?v=othyAQxhNvo>

Reporting

The Reports feature allows users and administrators to get insights into their DocuSign account. Report data is generated continuously, and reports contain near real-time data from document activity.

[Learn More](#)

[Step-by-Step Video Tutorial](#)



<https://www.youtube.com/watch?v=9PzoNLTP0w&list=PLlIMTiuDU7qZekZR7JEQhlwZRZUKPqYZf&index=14>

Additional Resources

[DocuSign eSignature Journey Guide](#)

Learn foundational skill development, customize the signer experience, and optimize eSignature functionality with these 5 steps.

[DocuSign YouTube](#)

Curated video playlist that covers the basics for admins in 2 minutes or less.

[DocuSign eSignature Admin Central](#)

Resources to help Admins maximize DocuSign eSignature account capabilities across their business unit.

[DocuSign University](#)

Self-paced courses and live training to build expertise.

Support Services

DocuSign Premier Support Plan

The Premier Support Plan which provides the following services:

- 24x7 System Availability Monitoring
- Online Case Submission and Management
- Case Submission Response Time Target: < 4 Hours
- 24x7 Global Emergency Support
- Emergency response time target (Severity 1) < 1hour
- 24x7 Sender and Signer Live Chat Support
- Escalated Support - Tier 2
- DocuSign Integration Support (Connectors)
- Self Service Resources, including DocuSign Community Support Portal, Knowledge Base

Full details can be found here: [Premier Support Data Sheet](#)

Support Resources

DocuSign Support Center

Support Center: support.docusign.com

One-stop shop for all support and adoption resources.

- [DocuSign Support Center](#) – Open & manage support cases or view product help
- [DocuSign Community](#) - Questions & answers from Customers
- [Knowledge Market](#) - Use cases & best practices
- [DocuSign University](#) - Training & certification

Trust / Security

Trust Center: trust.docusign.com

- Monitored System Status on any performance issues
- DocuSign Public Certificates & Security information

Developer Support

Developer Center: developers.docusign.com

- [Stackoverflow.com](#) using #DocuSignAPI
- Email: devsupport@docusign.com

Logging a Support Case Steps

- For after-hours support DocuSign's Support Center using the instructions below:
 - Sign into the DocuSign Support Center and access this link: <https://support.docusign.com/en/caseOverview>
 - Select **Add New Case** to open a new online support case
 - Use the Request a Call Back capability to get immediate help from the next available Support expert via phone.
 - More information on how to log and track your open support tickets can be found [HERE](#).

Logging a Support Case Best Practices

- Always have your **account number** ready for appropriate routing. If you do not have your account number available, inform the support representative of your level of Support for re-routing.
 - To retrieve your account number, select your profile icon in the upper right-hand corner and the account number will be listed.
- To ensure that the DocuSign Support team handles your request in the most efficient manner, please **include all relevant information** when contacting Support
 - Description of the issue with repro steps.
 - Issue start date/time
 - Affected users email address(s)
 - Envelope ID(s)
 - A screenshot or a screen-recording that displays the issue

For additional best practices when contacting support [click here](#)
- **Single Sign On Issues** - Engage your DocuSign Organization Administrator/IT department for initial troubleshooting.
 - Review [DocuSign Organization Administration Guide](#)

Information needed:

 - [SAML Trace](#) of the user experiencing the issue