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Welcome

DocuSign Admin provides DocuSign administrators with an easy and intuitive interface to manage their account settings and users.

What is an account?

An account is a container created for a DocuSign customer (either a company or an individual) that includes their envelopes, user memberships, templates and other customer data. An account provides access to DocuSign services based on a subscription plan and its associated features. Each account is uniquely identified by a GUID known as the accountID. A customer may have one or more accounts, based on their needs.

The customer designates individuals to act as administrators of their account. Administrators can change settings within an account, manage user memberships and access controls, and accomplish other administrative tasks.

For customers with multiple accounts, these can be collectively managed by DocuSign Organization Administration. For more information on this solution, see the DocuSign Organization Administration Guide.

Major sections

DocuSign Admin is divided into several major sections:
Note: Not all the sections described below are available to all account types. The sections shown in DocuSign Admin depend on the what type of DocuSign plan you have.

Accessing DocuSign Admin - Provides a short overview of the different ways to access DocuSign Admin

Account - Provides information on billing and usage, account profile, security settings, regional settings, and branding settings.

Users and Groups - Provides information on managing individual users, groups of users, and permission sets.

Signing and Sending - Provides information on managing the default behavior and various options for all envelopes sent from your account.

Integrations - Provides information on managing the Connect configurations and API integration keys for your account.

Auditing - Provides information on working with the audit log for the account.


Help us help you

DocuSign is committed to your success. Tell us how we can do a better job:
• **Product feedback:** send your product ideas or questions to new-docusignexperience@docusign.com

• **Online help:** for feedback about this help system, use the Send feedback... link available on any topic page

Here are some other resources to help you:

• **New DocuSign Experience forum:** visit the DocuSign Community forum and connect with other users and share best practices

• **New Experience website:** For more information about the new experience, including videos and FAQs, visit https://www.docusign.com/new-experience

**Accessing DocuSign Admin**

There are two ways to get to DocuSign Admin: from the DocuSign application and direct access.

In order to access DocuSign Admin, you must have either full admin or delegated admin permissions.

**Important:** For accounts with multiple users, it is recommended to have at least two users with full admin permissions to ensure continuity of coverage. You can review a list of users and update their assigned permission set from the **Users page**. For more information on updating user permissions, review **Manage Users** in the DocuSign eSignature Admin Guide.
From the DocuSign Application

If you are an administrator, you can go to DocuSign Admin from within the DocuSign application. Select the Go to Admin link in the account settings drop-down menu to access DocuSign Admin.

Direct Access

You can directly access DocuSign Admin by going to the administrator log on page and entering your credentials:

https://admin.docusign.com

**Note:** If you are trying to access the Demo version of DocuSign Admin, use this url instead: https://admindemo.docusign.com.

You can also directly access areas of DocuSign Admin by using these links:
**Note:** If you are not logged in, you will be prompted to enter your login info. Users with SSO will need to log in normally before accessing these links. All users should be able to access the links once logged in.

- Account Profile - https://admin.docusign.com/authenticate?goTo=accountProfile
- Security Settings - https://admin.docusign.com/authenticate?goTo=securityInfo
- Brands - https://admin.docusign.com/authenticate?goTo=branding
- Connect - https://admin.docusign.com/authenticate?goTo=connect
- Billing and Usage - https://admin.docusign.com/authenticate?goTo=billing
- Users - https://admin.docusign.com/authenticate?goTo=users
- Permission Sets - https://admin.docusign.com/authenticate?goTo=roles
- Groups - https://admin.docusign.com/authenticate?goTo=groups
- Sending Settings - https://admin.docusign.com/authenticate?goTo=sending
- Reminders and Expiration - https://admin.docusign.com/authenticate?goTo=reminders
- Regional Settings - https://admin.docusign.com/authenticate?goTo=regionalSettings
- API and Keys - https://admin.docusign.com/authenticate?goTo=apiIntegratorKey
• Audit Logs - https://admin.docusign.com/authenticate?goTo=auditLog
• Payments - https://admin.docusign.com/authenticate?goTo=payments

Admin Home

The Admin home page allows admins to quickly find what they need and stay up to date. You can search for users, account settings, and use quick links to easily find information.

**Note:** Delegated administrators will only see content available to them based on their permission set. For example, a user with the Account Settings delegated admin permission set will not be able to access content related to account settings. For more information, see [Delegated Administration](#).

Admin notifications

You also have access to admin notifications. These notifications provide just-in-time communications on important account health information, product release notifications, and DocuSign news and events.

Admin notifications will remain in the list for 90 days, after which they will be removed. You can click on individual notifications to view their full details.
Account Settings

In Account settings, you can manage account billing and usage, profile, security, regional, and branding settings.

The following topics are available in this section:

- Billing and Usage
- Account Profile
- Security Settings
- Regional Settings
- Branding

Billing and Usage Information

This topic covers the **Billing and Usage** view in the DocuSign Admin web application.

As the administrator on your DocuSign account, you have access to certain billing and usage details. For example, you can see exactly how many envelopes you have sent and how many you have remaining for the current billing period. You can also make changes to billing-related information, such as your payment information.

**Note:** Some billing information is only available for certain entry-level accounts (Free, Personal, and Individual accounts). If your account type does not include usage details, you can also find much of the information using reporting. For more information, see the [DocuSign User Guide - Using Reports](#).
To view billing and usage information

1. Log in to DocuSign Admin, either directly at https://admin.docusign.com or from within the New DocuSign Experience select the Go to Admin link in the account settings drop-down menu.

2. In DocuSign Admin, click Billing and Usage. Depending on your plan type, you may have access to the following information about your account:
   - **Usage data.** Provides details on usage data for services that can impact your billing, such as phone authentication, the number of seats in use, and the number of envelopes used and remaining. Usage data is only available on Free, Individual, and Personal accounts.
   - **Account plan type and ID.** Lists which plan type you subscribe to and your account ID.
• **Billing information.** Shows how much you are paying for your account, including your next payment due date and an invoice and payment history. Lists your current payment method and access to update your credit card information.

• **Billing history.** View and download invoices for your account. Learn more...

**View Usage Details**

Click **View Usage Details** to review usage on your account.

**Note:** This feature is only available on Free, Individual, and Personal accounts. If your account type does not include usage details, you can also find much of the information using reporting. For more information, see the [DocuSign User Guide - Using Reports](#).
Download an Invoice

From the Billing and Usage view, you can view and download your DocuSign invoices. Your transactions are listed in the Billing History section.

Simply navigate to **Billing and Usage**, and under the Billing History section, click the **Transaction #** to view, download, or print the invoice:
Note: Some advanced features and options are supported only in certain DocuSign plans. Your account plan might not support some options discussed in this help topic. For more information about which options are available for your account, check your account plan or contact your Account Manager.

Account Profile

The Account Profile allows you to update and maintain your account name and address of record. The account name is a global value for every user on your DocuSign account. The account name appears in notification emails to recipients and in the account dropdown menu. This value can only be changed by the account administrator.

In addition to the account name, your account users can set a unique company name. This is a unique value for their DocuSign user ID. The company name appears on the user's ID Card and is shown to other DocuSign users, depending on their Privacy Settings.

EXAMPLE — Company and Account Names

If you work in a small business, you'll likely use the same value for both names. So, for example, your company name and account name would both be "Express Tire & Automotive".

But what if you work for a large, global corporation. The account is owned by a corporate parent company, and there are some users who work for a subsidiary. So your account name might be "Hargrave International, Inc." and the company name is that of your subsidiary, "Western Supplies, Inc."
To update your account name or address

1. In DocuSign Admin, click **Account Profile**.

2. To edit your account name,
   a. Click **Edit** next to your current entry.
   b. In the Change Your Account Name dialog, enter the new value and click **Change Name**. You can see the change reflected in your account drop down:

   ![Account Profile Screen](image)

3. To edit your account address,
   a. Change the values as needed. All fields with a red asterisk (*) must be completed.
   b. Click **Save**.

**Security Settings**

Security Settings affect authentication options for:
• How your users access the account
• How recipients access all envelopes sent from the account

These settings apply to all users on the account and all of the envelopes sent from the account. For settings affecting access to envelopes, changes apply to any new envelopes created.

You must be an administrator with All Administration Capabilities in order to manage these settings. See Permission Sets for details. These settings are accessed through the DocuSign Admin view.

CONTENTS
How to define security settings
Account security settings - session timeouts
Authentication settings - authentication and login requirements
General authentication settings
Access codes
Password security
User Personal Information

To define security settings

1. In DocuSign Admin, click Security Settings.

2. Adjust your security settings as needed. The options are described following this procedure.

3. Click SAVE.
Account Security

These settings add increased security to this account and the signing transactions generated by all users.

- **Web App Session Timeout.** Specify a timeout duration in minutes to help ensure an account session does not remain open and active for an indeterminate period of time. This timeout setting includes web browser and mobile web browser sessions. **Limits:** 1 to 120 minutes

- **Recipient Session Timeout.** This session timeout is for signers. Specify a timeout value in minutes for increased security. **Limits:** 1 to 120 minutes.

- **Mobile App Session Timeout.** This session timeout is for account users who use a mobile device and a DocuSign mobile app to access the account. Specify a timeout value in minutes for increased security. **Limits:** 1 to 120 minutes

Authentication Settings

These options set recipient authentication behavior for the account. These settings can be very important, since your account might be charged for some authentication checks.

**Recipient Authentication Settings** This section determines if recipient authentication is required, can be configured by the sender, or is disabled for the account. This setting only applies to Phone Authentication, SMS Authentication, and Knowledge-Based ID checks. There are three possible selections:

- **Any recipient must authenticate on every envelope sent from this account** An authentication check is required and the sender must apply one of the three authentication methods to each new envelope they send.
• **The sender can require a recipient must authenticate on any envelope sent from this account** Authentication is configurable, allowing the sender to select one of the authentication methods as needed.

• **Disable recipient authentication for this account** The sender cannot apply Phone Authentication, SMS Authentication, and Knowledge-Based ID authentication checks to access documents.

**Recipient Authentication Triggers** This section controls how often recipient authentication is required for recipients. This setting only applies to Phone Authentication, SMS Authentication, and Knowledge-Based ID checks. The available settings are as follows:

• **The first time a recipient accesses an envelope per device** The recipient has to pass the authentication check the first time they access an envelope on a given device. With this setting, recipients are not asked to authenticate again when they access the envelope from the same browser, on the same device. If the recipient attempts to access the envelope from a different browser or a different device, the recipient must pass authentication again. Once authenticated, that recipient is not challenged again on the new device or browser.

  • **Completed envelopes are accessible without additional authentication** This setting offers the option to reduce the authentication burden for completed envelopes. When selected, it allows authentication from signing to persist. The recipient does not need to reauthenticate when accessing a completed envelope, regardless of the device or browser they use.

• **Every time a recipient accesses an envelope** The recipient must pass the authentication check each time they try to access the envelope. However, this option can be modified by setting a time for the Recipient Authentication Skip Option.

**Recipient Authentication Skip Option**. This option determines if recipients that have recently passed authentication can skip authentication. This setting only applies to
Phone Authentication, SMS Authentication, and Knowledge-Based ID checks. There are two possible settings:

- **Recipients cannot skip authentication when accessing subsequent envelopes from the same sender** When this option is selected, the recipient is always required to pass authentication to access envelopes.

- **Recipients can skip authentication when accessing subsequent envelopes from the same sender when using the same browser, on a device, for the following duration:** When this option is selected, administrators can set the length of time that recipients are allowed to skip authentication checks when the recipient recently passed authentication. The amount of time can be set in minutes, hours, or days.

**Login Requirements:** This option sets account and log in requirements for recipients.

There are four possible selections:

- **Not Required to Login:** The recipient is not required to log on to the system. If the recipient has a DocuSign account, they can sign their document from the email link without logging on.

- **Login Required if Signer Has an Account:** If the recipient has a DocuSign account, they must log on to their DocuSign account to open the document.

- **Account Required - Login Once Per Session:** The sender cannot send documents to anyone who does not have a DocuSign account and the recipient must log on to their DocuSign account to open the document.

- **Account Required - Login for Each New Document:** The sender cannot send documents to anyone who does not have a DocuSign account and the recipient must log on to their DocuSign account to open each document.
General Authentication Settings

- **Enforce authentication requirements on sender when signing:** If the sender is also a recipient on an envelope, then any authentication requirements set on the envelope must be completed in order for them to view and sign.

Access Codes

These options allow you to enable and set requirements for the format of access codes used for an additional measure of recipient security, and to enable the automatic Access Code Generator.

- **Enforce access code rules:** When selected, the access code rules can be entered and are enforced when a sender adds an access code requirement during sending. The access code rules are only enabled when this option is selected. The access code rules are:
  - **Minimum access code length:** This sets the minimum length for an access code. It can be 6 to 50 characters.
  - **Access codes must include at least:** This sets the characters required (letter, number, and special character) for an access code. One or more options can be selected. A special characters is any keyboard character that is not a letter, number, or space. The following characters are not allowed: <, >, &, or #.

- **Enable Access Code Generator:** When selected, senders can use the Access Code Generator to automatically generate and copy access codes.

Password Security

The DocuSign system allows users a set number of log in attempts with an incorrect password. For account security, if a user enters the wrong password too many times, the
system locks him out temporarily. Users can attempt to log in again after a brief waiting period.

- **Password Rules.** This option allows administrators to set the rules for passwords used by account users to access DocuSign.

**To set the password rules:**

1. Click **Password Rules.** The Password Rules page is shown.

2. Select the Password Strength for the account.
   - **Basic** - The minimum password length is 6 characters with no other password requirements. Password length is 6 characters with no other password requirements.
   - **Medium** - The minimum password length 7 characters and must have one uppercase letter, one lowercase letter, and one number or special character.
   - **Strong** - The minimum password length 9 characters and must have one uppercase letter, one lowercase letter, one number, and one special character.
   - **Custom** - This selection lets you customize password requirements.
     - Set the Minimum password length (6 to 15 characters) for user passwords.
     - Set the Minimum password age (0 or more days) for a password, this is the minimum number of days after a password is set before it can be changed.
     - Select if uppercase, lowercase, number and/or special characters must be included in the user password.

**Note:** Angle brackets ("<" ">") and spaces are never allowed in passwords.
- Select the number of Password questions required (0 to 4) to confirm a user’s identity when a user needs to reset their password.

3. To require that passwords expire, select **Enable password expiration** and enter the number of days until new passwords expire.

4. Click **SAVE** to save the password rules for your account.

User Personal Information

This option controls what changes account members can make to their personal account information, in their My Preferences view.

- **Allow users to edit their name**. When selected, account members can edit their name in their My Preferences, Personal Information section. If you need to control user names in your DocuSign account, clear this option to restrict users from making any changes, as described in the user guide **Change Your Name**.

![User Personal Information]

Document Retention

With a document retention policy, you can set the number of days that completed, declined, and voided documents are retained. By default, documents are kept in the
system. Setting a document retention period is optional.

If you choose to set a retention period, any affected envelopes are placed in a purge queue for 14 days, after which the documents in the envelopes are deleted from the DocuSign system. Along with deleting the documents, you can choose to also delete the fields and their data, as well as redact all personally identifiable information from the envelope.

The maximum retention period you can set is 9,999 days.

**Note:** Users can refer to *Purge Envelopes* for information on how purging works.

 CONTENTS

- Set a document retention period
- Purge queue and notifications

**Note:** For DocuSign customers interested in more detail and best practices for document retention and purging, visit the *DocuSign Knowledge Market* and read the *whitepaper*. (Account log in is required to view Knowledge Market content.)

To set a document retention period

1. In DocuSign Admin, click *Document Retention*.
2. Click to check *Enable document retention policy*. 
3. Enter the number of days to retain documents from completed envelopes. For all envelopes sent from your account, the documents from each completed, voided, or declined envelope will be moved at the end of the retention period to a 14-day purge queue, and then permanently removed from the system. The time is measured from the date the envelope is completed, voided, or declined and is completed during overnight processing.

Values: 1-9999

Note: When you activate or change a retention policy, affected envelopes are added to the purge queue within 24 hours. The policy is applied to all completed, voided, or declined envelopes in your account.
4. (Optional) If necessary, select **Remove fields and metadata** and **Redact personally identifiable information**.
   - When **Remove fields and metadata** is selected, DocuSign deletes the envelope documents as well as any fields that were added to the documents and any API attachments that were added to the envelope from the system.
   - When **Redact personally identifiable information** is selected, DocuSign redacts all personally identifiable information from the envelope, certificate of completion, and history. Fields that store personal data such as name, physical address, email, and IP address, are replaced with the text “Redacted”. Time stamps for when actions took place are left intact, but you won’t be able to identify the person who took that action.

   **Note:** The process of redacting personal data cannot be undone. Each individual’s personal information on an envelope will be redacted from the envelope, rendering the audit log and certificate of completion untraceable.
- If these options are not selected, when envelopes are purged, DocuSign deletes only the envelope documents from the system.

5. Click **SAVE**.

   Document retention is set to remove your completed, voided, or declined documents from the DocuSign system after the specified retention period and subsequent 14-day purge queue.

   **Note:** Disable the policy by unchecking **Enable document retention policy** and clicking **SAVE**. Disabling an existing policy will remove any envelopes currently in the purge queue.

Purge queue and notifications

If you have set a document retention period, when that number of retention days is reached, the envelopes are placed in a purge queue. The queue lasts 14 days, after which the documents within the envelopes are permanently deleted.

- If the remove metadata option is selected in your document retention settings, then all field data and any API attachments are also deleted.

- If the redact personally identifiable information option is selected, DocuSign redacts all personally identifiable information from the envelope, certificate of completion, and history.

Notifications
When an envelope enters the purge queue, email notifications are sent as follows to the sender and any recipients associated with the documents who have a DocuSign account:

1. A warning email notification is sent informing that the documents will be deleted in 14 days. The email provides a link to the documents, providing an opportunity to view, print, and download the documents before they are deleted.

2. A second email is sent 7 days later with the same message.

**Note:** If any party on a DocuSign transaction deletes an envelope before it is purged, they will still receive the purge warning notifications. The only way for a sender or recipient to not receive these notifications is to disable the notification option in their [My Preferences > Notifications](#).

**Changing retention period**

If your account is using document retention and you decide to change the retention period, all account envelopes, including those in the purge queue, are affected as follows:

- **Disable document retention.** Any envelopes in the purge queue, except those placed in the queue using Targeted Purge, are removed and the documents will be retained.

- **Increasing the retention period.** The increased retention period is applied to all envelopes, including those in the purge queue. Any envelopes in the purge queue remain in the queue, but the purge queue start date is delayed to reflect the new retention period.
• **Decreasing the retention period.** The reduced retention period is applied to all envelopes. Any envelopes that have met the new retention period are moved into the purge queue. Decreasing the retention period does not affect the purge queue start date of items already in the queue.

For more information, review these resources:

- Document Retention and Purging Whitepaper
- What you should know before using these features
- Envelope Purge - DocuSign Admin Guide
- Purge Envelopes - DocuSign User Guide

**Regional Settings**

The Regional Settings allows administrators to enforce a standard time zone and date and time format for all users, or allow users to choose their own settings. The time zone and date and time format settings are used to record the date and time of events listed in the envelope History and the Certificate of Completion.

If you change these settings, then the events listed in the History update to reflect the new values. However, for the Certificate of Completion, the audit events remain fixed with the time zone and date time settings that were in place when the event occurred.

If you allow users to set their own time zone and date time format, then they can adjust these settings in their My Preferences menu, under **Regional Settings.** In the DocuSign Admin Regional Settings, your personal time zone and date time format settings are shown, along with the account defaults.
You must be an administrator with All Administration Capabilities in order to manage these settings. See Permission Sets for details. These settings are accessed through the DocuSign Admin view.
To define regional settings for an account

1. In DocuSign Admin, click **Regional Settings**.

![DocuSign Admin screenshot showing Regional Settings](image)

2. Set the Default Time Zone for the account using the drop-down menu.

3. Set the Default Date/Time format for the account using the drop-down menu.
4. (Optional) To enforce the default account values for all users, clear the **Allow users to set their own Time Zone and Date Format** check box.

For all users (including administrators), these settings will update to the account defaults and be read-only in their My Preferences > Regional Settings.

5. (Optional) To enable users to define their own settings, select the **Allow users to set their own Time Zone and Date Format** check box.

6. Click **SAVE**.

Configure Brands

Branding offers a way to customize the DocuSign experience for both senders and recipients. With the branding controls in DocuSign, as an account administrator you can reinforce your brand presence and reassure signers that documents sent to them through your DocuSign account are coming from your organization. The branding configurations you specify are global and apply to all users on your account and every recipient experience for every envelope sent from your account.

You must be an administrator with All Administration Capabilities in order to manage these settings. See **Permission Sets** for details. These settings are accessed through the **DocuSign Admin view**.

All branding changes are captured in the account audit log.
Add a signing brand
Set a default signing brand
Delete a custom signing brand
Customize your sending brand theme
Add a custom logo to a sending brand
Customize sending brand header and footer links
Restore the default DocuSign sending brand
Related topics

**Note:** Some advanced features and options are supported only in certain DocuSign plans.
Your account plan might not support some options discussed in this help topic. For more information about which options are available for your account, check your account plan or contact your Account Manager.

What can you configure for signing and sending brands?

**Signing brands** offer control over the styling of the email notifications sent to recipients and the signing view. You can add a custom logo and specify a color theme to add your company branding to these interactions. You can set a default signing brand for all envelopes sent from your account. Senders can select a brand to apply to the envelopes they send. Signing brands are also applied and saved with templates. If your account includes PowerForms, the forms inherit the signing brand used on the associated template.

Advanced configuration options are available to customize destination URLs, links, and resource files. These options are covered in Advanced Configuration for Signing Brands.
The **sending brand** provides control over your DocuSign account styling. You can specify a single sending brand for all account members, and add a custom logo and specify a color theme to apply your company branding.

To add a signing brand for recipients

1. In DocuSign Admin, click **Brands**, and then select the **SIGNING** tab.

   ![Brands Section]

2. Click **ADD BRAND**, enter a unique brand name, and click **SAVE**.
   
   The Branding page for your new brand appears. At this point, the brand is the same as the default DocuSign sending brand.

3. For the **Info** section of your new brand, set the following options and values as needed:
• **Brand Name.** The brand name is how the brand is identified in Brands administration and to senders when they select a brand to use for the envelopes they send. Enter a distinctive name to help senders select a brand to use.

• **Company Name.** (Optional) Enter a company name to use in email communications and on the Electronic Record and Signature Disclosure. To employ the Company Name value entered on a brand, you must also enable the setting in your Legal Disclosure "Use brand company name". See Legal Disclosure for more information.

• **Use membership company name.** (Optional) Select this option to use the Company listed in the sender's Preferences > Personal Information. If this option is selected, any entry in the Company Name option for the brand is ignored.

  If neither the Company Name field is completed nor the Use membership company name option is selected, then the account name is used for email communications and the disclosure.
- **Set as Sign Default.** (Optional) Select this option to make the brand the default brand used for all documents sent from the account.

4. Under Customize What Recipients See, click **CREATE YOUR THEME**.

```
Customize What Recipients See
Add your logo and brand colors to emails and the signing experience.

CREATE YOUR THEME       View DocuSign Theme
```

5. To add a custom logo for signing or email notifications, click one of the following:

- **Upload Signing Logo.** Displays a custom logo in the signing view when recipients open your documents to view and sign.

- **Upload Email Logo.** Customize the logo used in email notifications sent to envelope recipients.

  Select a logo file that conforms to the image requirements guidelines.

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

6. To specify colors:
   a. Click the color box of the Header or Button background color you want to edit. The color controls appear:
b. Select a color using the color picker, use the eye dropper to match a color value in your custom logo or other image, or enter the hexadecimal value for the color.

c. For text, you can select either black or white only.

7. Use the **Preview** views to check what recipients will see for both the signing experience and email notifications:
8. To finish and save your changes, click **Save**. Your changes are summarized on the Branding page and can be applied to templates and envelopes generated by your account.

Customize What Recipients See

Add your logo and brand colors to emails and the signing experience.

**SIGNING**  **EMAIL**  **COLORS**
To set a default signing brand

1. In DocuSign Admin, click Brands, and then select the SIGNING tab.
2. Locate the brand you want to set as the default.
3. Click the menu icon and select Set as Default.
The selected brand becomes the default signing brand. All new envelopes and templates created in your account will use this brand to start. Depending on your configuration and user permissions, this selection can be changed by senders.
To delete a signing brand

1. In DocuSign Admin, click **Brands**, and then select the **SIGNING** tab.
2. Locate the brand you want to delete.
3. Click the menu icon and select **Delete**.
The selected brand is permanently removed from your account.

Back to Top
To customize your sending brand theme

1. In DocuSign Admin, click **Brands**, and then select the **SENDING** tab. Your current sending brand configuration is displayed.

   ![DocuSign Admin sending tab](image)

   **Customize What Your Users See**

   Add your logo and colors to your sending experience.

   **SENDING**

   ![DocuSign logo](image)

   **COLORS**

   ![Color options](image)

   **EDIT YOUR THEME**

   **Advanced Configuration**

   Modify advanced default settings to customize destination URLs, links, and resource files.

   **Header and Footer Links**

2. Click **EDIT YOUR THEME** to open the brand customization view.
3. Make your logo and color changes as desired and click **APPLY BRAND**.
Your new sending brand is saved and all account users will see the changes when they log in or refresh their active browser session.
Add a custom logo to a sending brand

When you create a custom sending brand, you can add a logo and specify colors. When you add a logo, if the image is transparent, DocuSign fills the background rectangle for the logo with a solid white color.

If you modify the header color for the brand, the color is applied as a background for the custom logo, as well as across the header area. A darker shade of the header color is applied to the Sign or Get Signatures banner area on the Home page.

To add a custom logo and specify brand colors

1. In DocuSign Admin, click Brands, and then select the SENDING tab, and click
EDIT YOUR THEME.

2. In the Logo section, click the "x" to remove the existing logo.

3. Click **UPLOAD LOGO** and select your logo file. The logo should meet the following requirements:
   
   - **Maximum file size:** 300KB
   - **Dimensions (recommended):** 296x76 pixels
   - **File formats:** JPG, GIF, PNG

4. To specify colors:
   
   a. Click the color box of the Header or Button background color you want to edit.
      
      The color controls appear:

   b. Select a color using the color picker, use the eye dropper to match a color value in your custom logo or other image, or enter the hexadecimal value for the color.

   c. For text, you can select either black or white only.
5. Use the **Preview** views to check what account members will see for the Home and Manage pages.

6. To finish and apply your brand, click **APPLY BRAND**.

   Your changes are summarized on the Branding page and all account members will see your custom sending brand when they log in to their account.

---

**Customize the sending brand header and footer links**

You can customize or hide various header and footer links in the DocuSign applications for your account members.

For the footer links, you can customize the text and destination of the "Contact Us" link, and you can add three additional footer links.
1. In DocuSign Admin, click **Brands**, and then select the **SENDING** tab. Your current sending brand configuration is displayed.

2. Click **Header and Footer Links**.
3. In the Customize Links page, you can configure the links as follows:

- **To hide a link.** Check the **Hide link** option next to the link

![Hide link option](image)

Note: if the footer link is blank, with no text or URL, it will not appear to your users. Using the Hide link option is useful if you have filled in the link information but you want to hide it without deleting the information.

- **To customize the help/support links.** For the Header Help and Footer Support links, you can enter custom link text and the full destination URL into the fields provided. Your entries replace the default DocuSign link values.
To add additional footer links. You can add up to three additional links to the footer by specifying text and URLs for Footer Link 1, 2, and 3.
4. Click **SAVE**.

Your header and footer link changes are saved and users will see the new links the next time they log in to DocuSign.

**To reset the default DocuSign sending brand**

You can revert your account's sending brand to the default DocuSign sending brand at any time. Any sending brand customizations will be permanently discarded when you reset the default brand.

1. In DocuSign Admin, click **Brands**, and then select the **SENDING** tab.

   Your current sending brand configuration is displayed.
2. Click **EDIT YOUR THEME** to open the brand customization view.
3. Click **RESET TO DEFAULT** at the bottom right, then click **RESET** to confirm.

   Your account’s sending brand is reset to the DocuSign default branding.
Related topics

- **Assign Signing Brands to Groups** - Use the groups functionality to manage which signing brands are available to your account members when they send envelopes and create templates.

- **Advanced Configuration for Branding** - Specify destination URLs, header and footer links, and customize resource files.

- **Create a PowerForm** - PowerForms inherit the signing branding specified on the associated template.

**Advanced Configuration for Signing Brands**

In addition to the logo and color customization you can apply to a signing brand, there are additional advanced configuration options you can use to modify the signing experience.

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**Destination URLs for post-signing navigation**

As an optional part of a signing brand, you can specify the web page displayed after certain recipient actions, such as when they complete signing or decline to sign. If your organization embeds the signing experience into another site, or uses PowerForms, this can be a useful feature to keep your signers on your site, rather than have them navigate
away to pages on the DocuSign domain. For a detailed explanation of how destination URLs are used with PowerForms, see Create a PowerForm.

In addition to controlling the navigation, you can opt to include contextually-relevant parameters to your landing page. You can pass the envelope ID, the recipient's name or email address, and any envelope custom fields defined for your account.

To specify post-signing destinations

1. In DocuSign Admin, click Brands.
2. Locate the signing brand you want to configure and click the action menu and select Edit.
3. In the Advanced Configuration section, click **Destination URLs**.

4. In the Configure Destinations dialog, for each action you want to configure:
a. Click in the value box.

b. Enter the complete URL of the web page you want to direct signers to for the specified action. Example:

   https://www.google.com

c. (Optional) To add merge fields to the URL string enter a question mark (?) at the
end of the web page URL, then add a query string with the name/value pairs of the contextual parameters you want to pass to the landing page. Click the **INSERT MERGE FIELD** drop down to select the field to insert.

Example: https://www.google.com?name=[[RecipientName]]&email=[[RecipientEmail]]

5. (Optional) To reset any destination to the DocuSign default, simply delete your custom entry in the field.

6. To finish and save your changes, click **SAVE**.

Header and footer links

You can customize the links that appear in the header and footer of the browser used when a recipient opens documents to view and sign. The links can point to web pages or mailto: email addresses. If you do not customize these links, or if you delete previously saved customizations, they will go to the default DocuSign links.
1. In DocuSign Admin, edit a signing brand.

2. In the Advanced Configuration section, click **Header and Footer Links**.

3. To customize your brand to hide the following signing elements, select the **Hide** check box:
- **About DocuSign** link in the OTHER ACTIONS menu
- **CLOSE** button shown on a completed document

Here are examples where the brand on the left hides both elements and the one on the right does not:

4. To customize the help links indicated in the following screenshot, enter your text and link into the **FOOTER SUPPORT/HELP & SUPPORT**.
5. To add additional footer links, specify text and URLs or mailto: email addresses for FOOTER LINK 1, 2, and 3.

6. To hide a link, check the Hide link option next to the link.
**Note:** if the footer link is blank, with no text or URL, it will not appear to signers. Using the Hide link option is useful if you have filled in the link information but you want to hide it without deleting the information.

7. To finish and save your changes, click **SAVE**.

**Resource files**

Resource files are an optional method to control the text elements in your account signing view and for emails sent by your account. If the resource file option is not enabled for an account; contact your Account Manager or DocuSign Support for more information and assistance.

**Important:** Customizing resource files is an advanced branding configuration option which can significantly impact your account, and should be done only by someone with expertise in XML and HTML. The master resource files are subject to change without notice. If you customize your resource files, after each release, DocuSign recommends you review any changes and update your custom files as needed.
DocuSign uses two master resource files; one for signing and one for email messages. In addition to setting text elements, the signing resource file also controls some of the dialog boxes displayed in the signing view.

To use resource files, you will download the appropriate master resource file for the information you want to change, modify the resource file and then upload your modified file to the DocuSign system. When you upload a modified resource file, only the differences between your modified file and the master file are saved by the system. An account can only upload one of each type of custom resource file for each signing brand, so all changes for all languages must be included in the uploaded files.

You can modify and upload one or both (signing and email) of the master resource files to customize them for your account. If you do not upload a modified resource file, the system will use default information in the master resource file.

For more information about specific resource files, please refer to the relevant information guide:

- Signing Resource File
- Email Resource File

Managed Stamps

DocuSign managed stamps allows the administrator to assign users or groups to a stamp as a way of giving signing authority on behalf of others. A stamp may represent an organization, a part of an organization, such as a department, or the identity of another user. In certain countries such as Japan, stamps are used in place of signatures, and
Managed Stamps helps to provide a higher level of control for sensitive stamps like company or departmental eHanko.

Historically, whoever has access to physical stamps can approve official documents. Managed Stamps gives the account administrator the ability to create a set of stamps for the organization and manage access to use those stamps.

**Note:** Managed stamps is only supported on Business Pro and Enterprise Pro plans. To enable, go to DocuSign Admin, click **Sending Settings** and then select the **Enable signature stamp field** check box. Contact your account admin if you need assistance.

**CONTENTS**
- Manage account stamps
- Upload a stamp
- Generate a stamp using Shachihata
- Assign users or groups
- Remove users or groups
- Edit a stamp
- Delete stamps
- What the signer sees when using stamps

**Manage account stamps**

The administrator can manage the creation of stamps and assign users and groups. A user who is assigned a stamp has the option to select that stamp when they open a document with a stamp field. When an account is enabled with Managed Stamps, all users have the ability to assign stamp fields to documents.
To manage account settings for Managed Stamps, click **Stamps** in DocuSign Admin.

If you have not assigned any new stamps yet then you have the option to either create a stamp or upload one.
Upload a stamp

1. In the DocuSign Admin, click **Stamps**.

2. Click **ADD STAMP**.

3. Click **browse** to open a file chooser or drag an image file to the dialog. The file should be a standard image file such as jpg, gif, png or IPX. IPX is a commonly used image type for stamps in Japan.
If you select an IPX image then you will be prompted with a confirmation message that stamps with the same serial number will not be added.
Use the available options to modify the image:

- Rotate the image
- Change the size of the image
- Make the image a square or circle

2. Click NEXT when you are ready to upload the image.

3. Enter a stamp name in **Stamp Name**.

4. Click **CREATE**.

5. Verify your stamp appears in the list of stamps.
Generate a stamp using Shachihata (Japanese version only)

DocuSign is integrated with Shachihata and allows you to generate stamps based on a Japanese last name.

1. Select 印鑑の追加 (ADD STAMP).

2. Select 選択 (Choose).
3. Enter a Japanese name in the field and click 印鑑の取得 (Get Stamps).

4. Three example stamps of the name entered will be generated by Shachihata. Select one of them.
5. Select 名前 (Name) or 名前と日付 (Name + Date).
- Selecting 名前 (Name) will generate stamps that only show the characters.

- Selecting 名前と日付 (Name + Date) will generate stamps that show the characters as well as the date. The date format here is fixed to match this type of physical stamp as it is commonly used in Japan.

6. Click 次へ (NEXT).
7. Click 作成 (CREATE).

8. Verify your stamp appears in the list of stamps.

Assign users or groups

Once you have one or more stamps, you can assign users or groups to them. When users in these groups receive a document with a stamp field, their assigned stamps are available for them to use.

To assign individual users
1. In the DocuSign Admin, Click **Stamps**

2. Click **ACTIONS**

3. Select **Users and Groups**

4. Click **ASSIGN USER**.
5. Select the checkboxes next to the users that you would like to assign access to this stamp.

6. Click **ASSIGN**.

To assign groups

1. In the DocuSign Admin, click **Stamps**.
2. Click **ACTIONS**.
3. Select **Users and Groups**.

4. Click **GROUPS**.
5. Click **ASSIGN GROUPS**.

6. Select the checkboxes next to the groups that you would like to assign access to this stamp.
7. Click **ASSIGN**.

Remove users or groups

This removes the stamp for future use. However documents that have been stamped with this value by users who stamped them remain unaffected.

1. In the DocuSign Admin, click **Stamps**
2. Click **ACTIONS**
3. Select **Users and Groups**

4. Select either the **USERS** or **GROUPS** tab depending on which type you are removing.

5. Click **REMOVE** to remove that user or group.

![User and Group Management](image)

---

**Edit a stamp**
1. In the DocuSign Admin, click **Stamps**.

2. Choose the stamp row then click **ACTIONS**

3. Select **Edit**.

4. Make the changes and click **SAVE**.
Delete a stamp

1. In the DocuSign Admin, click **Stamps**. Choose the stamp row then click **ACTIONS** and select **Delete**.

2. Ensure you want to delete the stamp and click **DELETE**.

   **Confirm Delete Stamp - 田中**

   Are you sure you want to delete this stamp? Any users with access to this stamp will immediately lose access and the stamp image will be permanently deleted. You will not be able to undo this action.

   **DELETE**  **CANCEL**
What the signer sees when using stamps

Opening the envelope

When a recipient opens an envelope that contains a stamp, they will see the stamp field in the location where it was placed.

Clicking on the stamp

Clicking on the stamp field displays a dialog box where the recipient can either choose an existing stamp or assign a new one.

Selecting a stamp

The recipient can select a stamp and click **DONE** to apply that stamp to the document.
The stamp will then be applied to the document.

**Stamp options**
The recipient has options to modify the stamp before completing the envelope.

- **Rotate** - Rotate the stamp.
- **Customer Date** - Change the date on the stamp (Only for Name + Date format stamps). New date needs to be in 'YY.MM.DD format.

![Change Date](image)

- **Create New** - Replace the stamp with a new one.
- **Choose From Existing** - Replace the stamp with another existing stamp.
- **Remove** - Remove the selected stamp.
If the recipient selects the option to Create New or selects Add New in the Existing Stamps dialog, a new dialog displays to generate a new stamp. Steps on how to create a new stamp or upload a stamp are described above.
Users and Groups

In the Users and Groups section of the DocuSign Admin web application, you can manage individual users, groups of users, and permission sets.

The following topics are available in this section:

- Users
- Permission Sets
- Delegated Administration Permission Sets (available with the Advanced Administration module)
- Groups
- Signing Groups

Users

As a DocuSign administrator, the Users view lets you manage the users on your account. If you are an administrator with delegated administration rights for Users and Groups only, then you can perform the actions described in this guide for non-administrative users only.

CONTENTS

Locate users
Add or edit users
Close or reactivate users
Initiate password resets

Related topics

Locate users

From the Users page, use the Search box to quickly locate users by name or email address. Use the Filter menu to find users by Permission Set, Group, or Status. You can combine the filters to narrow your results.
Add or edit users

You can add users on your account, in accordance with your plan details. You can see how many active users you have on the Billing and Usage view. Users must activate their account, at which point they become billable users on the account.

For users in the DocuSign system, an email address can belong to only one active or pending user. When you add users, the system checks to see if the address is already in use, before creating the new user. If there are one or more closed users only (no active or pending users), you have the option of reactivating one of the closed users or adding a new user to your account.

If your company recycles email addresses and reuses them for different employees, when you run into the reactivate or add new user option you should choose to add a new user. This ensures the new employee does not get access to any envelopes that belonged to the former account member.
**Note:** If you are an administrator with delegated administration rights for Users and Groups only, then you can perform the actions described in this guide for non-administrative users only. You cannot manage any user with a permission set that includes any level of administrative rights.

To add a user

1. In DocuSign Admin, click **Users**.
2. Click **ADD USER**.
3. Enter the email address for the new user and click **Next**.
4. If the email address is already part of your account:
   - **Active or Pending user**: If the email address belongs to a user whose status is either an active or pending, the Existing User dialog appears and you can select **View Profile** and review and edit the user.
• **Closed user**: If the email address belongs to one or more closed users only, then you have the option to reactivate a closed user or add a new user. If you reactivate a closed membership, the user gains access to all associated envelopes. If you are recycling an email address to add a new user to your account, click **ADD NEW USER**.
5. For the new user, in the Profile Information step, enter the user's full name and default language setting and complete any additional profile information as needed. After activation, the user can change these fields from their My Preferences.
Add User

Email: dricht@mailinator.com

Profile Information

Full Name *

Address 1

Job Title

Address 2

Company

City

Language *

Country

Region/Province

Postal Code

Phone

NEXT   BACK   CANCEL
6. Click **NEXT**.

7. (Optional) In the Security step, add an access code to the activation email. If you add a code, you must provide the code to the user in order for them to activate their account.

8. Click **NEXT**.

9. In the Permission Set and Groups step:
   a. Select a permission set to assign to the new user. See Permission Sets for more information.
   b. (Optional) Click **ASSIGN GROUPS** to select groups to assign to the new user.
10. Click **ADD USER**.

The user is added to the account with the status Pending.

The user receives an activation email and must complete the activation steps to activate their new account. Once they do so, their membership status changes to Active.

**To resend activation email to a pending new user**

1. In DocuSign Admin, click **Users**.
2. Use the Filter to locate users with a status of "Pending":
3. In the Actions drop down, select **Resend Invitation**.
4. (Optional) Enter an access code for additional security. You must communicate the code to the user in order for them to activate their account.

The user receives a new email with activation instructions for their account.

To edit a user

You can edit any users with the status "Active"; "Pending" and "Closed" users cannot be edited.

1. In DocuSign Admin, click **Users**.
2. Locate the active status user you want to edit.
3. In the Actions drop down for the selected user, select **Edit**.
4. In the Edit User view, update the entries as needed and click **SAVE**.
Close or reactivate users

Closing a user removes that user from your account. Closed users cannot send new envelopes or access their account. Envelopes sent before a user was closed can still be completed by the recipients. Closing a user removes them from any groups they were assigned to and also removes their permission set association. Optionally, you can also select to remove the user from any signing groups they belong to.

**TIP:** You can easily view closed users by using the Filter menu and selecting Closed.

In DocuSign, an email address can belong to only one active or pending user. When you reactivate a user, the system checks to see if the address is already in active use, before reactivating the user.

**Note:** If you are an administrator with delegated administration rights for Users and Groups only, then you can close or reactivate non-administrative users only. You cannot manage any user with a permission set that includes any level of administrative rights.

To close a user

**Note:** Closed users will lose access to any completed documents in their account. Before closing a user, it is recommended to set up envelope sharing or ask the user to download all of their completed documents.

1. In DocuSign Admin, click **Users**.
2. Locate the user whose account you want to close.
3. In the Actions drop down for the selected user, select **Close**.

4. (Optional) In the Close User dialog, if you want to also remove the user from any signing groups they belong to, select the **Remove user from all signing groups** check box. If you leave them in signing groups, you can always edit the groups later to remove them. However, until you remove them, they can continue to receive any notifications sent to the signing groups they belong to.

5. Click **CLOSE** to confirm that you want to remove the user from the account. The user's status changes to Closed and their record is grayed out. Depending on the filters currently applied to your view, you may not see the closed record.
To reactivate a user

1. In DocuSign Admin, click **Users**.

2. Locate the closed user whose account you want to reactivate. Your may need to adjust your filters to include Closed users.

3. In the Actions drop down for the selected user, select **Reactivate**.
The system checks to see if the email address is in active use for another user. If it is, you can view that user profile, but you cannot reactivate the user unless you first close the active user.

4. Review the user’s profile information and update as necessary, and click **NEXT**.

5. (Optional) Enter an access code for additional security. You must communicate the code to the user in order for them to reactivate their account.

6. Select a permission set for the user and, optionally, assign groups.

7. To finish and reactivate the user, click **REACTIVATE USER**.
   
   The user receives an email with activation instructions for their account.

**Reset user passwords**

You can initiate a password reset for users on your account. You can reset a user’s password if they forget their password, or if you want them to create a new password for security reasons.

1. In DocuSign Admin, click **Users**.

2. Locate the user who needs their password reset.

3. In the Actions drop down for the selected user, select **Reset Password**.
   
   The user receives a reset password email. The user clicks the reset password link and follows the instructions to change their password.
Related topics

- Modify user sharing settings
- Bulk user actions - add or update multiple users at a time
- Download users and permission sets
- Transfer envelopes and templates

User Bulk Actions

The Bulk Actions option allows administrators to add or update multiple users to an account at one time. The administrator adds user information to a comma-separated value (CSV) file, and then uploads the file through the Users page. Add and update actions must be done separately; you cannot combine adding and updating in the same CSV upload.
Adding multiple users

The Add Users bulk action allows an administrator to add multiple new users to an account. All administrators, including delegated administrators can use bulk actions to add users. The only limitation is if you are an administrator with delegated administration rights for Users and Groups only, then you can perform the actions described in this guide for non-administrative users only. So, for example, you could not add a new user with a permission set that includes any level of administrative rights.

Adding and updating users must be done in separate bulk actions. Your CSV can contain both new and existing users, but when you do a bulk add users, any existing users will be skipped and not updated. You must run a separate bulk update users action to update existing users.

To add multiple users using bulk actions

1. Create a comma-separated value (CSV) file with the user information as described in CSV file for Add Users below.
2. Go to DocuSign Admin and click BULK ACTIONS and select Add Users.
3. In the Bulk Add Users dialog, click **UPLOAD CSV FILE**.
Select the CSV file to upload. Note that you can change the CSV file before submitting the file for processing.

4. Click **SUBMIT**. The system asks you to confirm processing the file.
   - Click **CONFIRM** to continue
   - Click **BACK** to replace the file or cancel the upload process

5. After confirming the upload, the file is placed in a queue for processing and you are taken to the **Bulk Actions log** page, where your Add Users job appears in the log.
Note: An account can only have one in-process CSV file at a time.

6. Click the refresh icon in the Actions column to update the job status. The system processes the file and checks for errors in the formatting of the file and user information.

7. Once the file is processed, for users that were successfully added to the account, an activation email is sent to the user.

CSV upload file for Add Users

Tip: You can download a sample CSV file by going to DocuSign Admin, clicking Users, then on the Users page click BULK ACTIONS and select Add Users. In the Bulk Add Users dialog, click the sample file link and download a sample CSV file.

Your CSV upload file is made up of a header row with the column headers and a row of user data for each user you want to add to your account. Adding and updating users must be done in separate bulk actions. Your CSV can contain both new and existing users, but when you do a bulk add users, any existing users will be skipped and not updated. You must run a separate bulk update users action to update existing users.

The header row for add users

The first line of the file is the header row for the file and defines each of the columns. The header values are not required to be in the order listed and are not case-sensitive, but the text must match listed values.
*Required columns: Your Add Users CSV file must contain these columns: FirstName, LastName, UserEmail, and PermissionSet. The rest of the header values are optional.

The acceptable column header values for an Add Users CSV file are:

<table>
<thead>
<tr>
<th>Header Row Value*</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FirstName</td>
<td>The user's first name. Required column.</td>
</tr>
<tr>
<td>LastName</td>
<td>The user's last name. Required column.</td>
</tr>
<tr>
<td>UserEmail</td>
<td>The user's complete email address. Required column.</td>
</tr>
<tr>
<td>PermissionSet</td>
<td>The user's permission set. The PermissionSet value must match an existing permission set for the account. This value is not case-sensitive. For example, for the default permission set &quot;DS Sender&quot;, you could enter &quot;ds sender&quot;, &quot;DS SENDER&quot;, or &quot;DS Sender&quot;. Required column.</td>
</tr>
<tr>
<td>JobTitle</td>
<td>The user's job title.</td>
</tr>
<tr>
<td>CompanyName</td>
<td>The user's company name.</td>
</tr>
<tr>
<td>Group</td>
<td>The user's assigned groups. The Group values must match existing Group names for the account. Additional Group columns can be added to the file to add users to more than one group.</td>
</tr>
<tr>
<td>AddressLine1</td>
<td>The user's address - first line.</td>
</tr>
<tr>
<td>AddressLine2</td>
<td>The user's address - second line.</td>
</tr>
<tr>
<td>City</td>
<td>The user's city name.</td>
</tr>
</tbody>
</table>
StateRegionProvince | The user's regional location.
PostalCode | The user's postal code.
Phone | The user's phone number.
Language | The user's display language for their DocuSign account. See the list of language codes below.

The access code option (adding an access code for authentication during user activation) cannot be used with this bulk action.

The user data

In the lines of the file below the header row, add the user information with commas used as the delimiter (separator) between each value.

If you are using Microsoft® Excel® to create your file, you can enter the header values (UserName, UserEmail, etc.) in different columns on the first line, enter the user information on subsequent lines, and save the file as a CSV file. You do not need to add commas; Excel will automatically do this when you save the file.
Example Add Users - Excel:

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>UserEmail</td>
<td>FirstName</td>
<td>LastName</td>
<td>PermissionSet</td>
<td>Group</td>
</tr>
<tr>
<td>2</td>
<td><a href="mailto:van@mailinator.com">van@mailinator.com</a></td>
<td>Van</td>
<td>Adams</td>
<td>DS Sender - Use Template</td>
<td>Sales - West</td>
</tr>
<tr>
<td>3</td>
<td><a href="mailto:marcos@mailinator.com">marcos@mailinator.com</a></td>
<td>Marcos</td>
<td>Florencina</td>
<td>DS Sender - Use Template</td>
<td>Sales - West</td>
</tr>
<tr>
<td>4</td>
<td><a href="mailto:phillipe@mailinator.com">phillipe@mailinator.com</a></td>
<td>Phillipe</td>
<td>Marchand</td>
<td>DS Sender - Use Template</td>
<td>Sales - West</td>
</tr>
<tr>
<td>5</td>
<td><a href="mailto:gennifer@mailinator.com">gennifer@mailinator.com</a></td>
<td>Gennifer</td>
<td>Gengas</td>
<td>DS Sender - Use Template</td>
<td>Sales - West</td>
</tr>
<tr>
<td>6</td>
<td><a href="mailto:martina@mailinator.com">martina@mailinator.com</a></td>
<td>Martina</td>
<td>Novatora</td>
<td>DS Sender - Use Template</td>
<td>Sales - West</td>
</tr>
<tr>
<td>7</td>
<td><a href="mailto:bob@mailinator.com">bob@mailinator.com</a></td>
<td>Bob</td>
<td>Silver</td>
<td>DS Sender - Use Template</td>
<td>Sales - East</td>
</tr>
<tr>
<td>8</td>
<td><a href="mailto:brigitte@mailinator.com">brigitte@mailinator.com</a></td>
<td>Brigitte</td>
<td>Munn</td>
<td>DS Sender - Use Template</td>
<td>Sales - East</td>
</tr>
<tr>
<td>9</td>
<td><a href="mailto:minyee@mailinator.com">minyee@mailinator.com</a></td>
<td>Min</td>
<td>Yee</td>
<td>DS Sender - Use Template</td>
<td>Sales - East</td>
</tr>
<tr>
<td>10</td>
<td><a href="mailto:williamp@mailinator.com">williamp@mailinator.com</a></td>
<td>William</td>
<td>Portal</td>
<td>DS Admin</td>
<td>Division Mgmt</td>
</tr>
</tbody>
</table>

Display language values

The Language value is the default language for the user. The value can be any of the codes shown below:

**Language = Code**

- Chinese Simplified = zh_CN
- Chinese Traditional = zh_TW
- Dutch = nl
- English = en
- French = fr
- German = de
- Italian = it
- Japanese = ja
Updating multiple users

The Update Users bulk action allows an administrator to update multiple existing users in an account. You can update users whose account membership status is "Active". Pending users cannot be updated.

All administrators, including delegated administrators can use bulk actions to update users. The only limitation is if you are an administrator with delegated administration rights for Users and Groups only, then you can perform the actions described in this guide for non-administrative users only. So, for example, you could not update a user with a permission set that includes any level of administrative rights or assign administrative rights to a user.

Updating and adding users must be done in separate bulk actions. Your CSV can contain both new and existing users, but when you do a bulk update users, any users who do not exist in the account will be skipped and not added. You must run a separate bulk add users action to add new users.
**Note:** Administrators cannot change user email addresses for existing DocuSign memberships using Bulk Actions. To update a user’s email address, contact the user and request that they follow these steps: Change Your Email Address.

To update multiple users using bulk actions

1. Create a comma-separated value (CSV) file with the user information as described in CSV file for Update Users below.

2. Go to DocuSign Admin and click **BULK ACTIONS** and select **Update Users**.
3. In the Bulk Update Users dialog, click **UPLOAD CSV FILE**.

![Bulk Update Users dialog](image)

Select the CSV file to upload. Note that you can change the CSV file before submitting the file for processing.

4. Click **SUBMIT**. The system asks you to confirm processing the file.
   - Click **CONFIRM** to continue
   - Click **BACK** to replace the file or cancel the upload process

5. After confirming the upload, the file is placed in a queue for processing and you are taken to the **Bulk Actions log** page, where your Update Users job appears in the log.
6. Click the **refresh icon** in the Actions column to update the job status. The system processes the file and checks for errors in the formatting of the file and user information.

**CSV upload file for Update Users**

**Tip:** You can download a CSV file containing the existing users in your account and use that to prepare your CSV upload file for updating users. [More info...](#)

Your CSV upload file is made up of a header row with the column headers and a row of user data for each user you want to update on your account. Updating and adding users must be done in separate bulk actions. Your CSV can contain both new and existing users, but when you do a bulk update users, any new users will be skipped and not added. You must run a separate bulk add users action to add new users.

**The header row for update users**

The first line of the file is the header row for the file and defines each of the columns. The header values are not required to be in the order listed and are not case-sensitive, but
the text must match listed values.

*Required columns: Your Update Users CSV file must contain these columns: UserEmail and APIUserName. The rest of the header values are optional.

The acceptable column header values for an Update Users CSV file are:

<table>
<thead>
<tr>
<th>Header Row Value*</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UserEmail</td>
<td>The user's complete email address. Required column. This value must match the existing email address for the user and cannot be changed. To update a user's email address, contact the user and request that they follow these steps: <a href="#">Change Your Email Address</a>.</td>
</tr>
<tr>
<td>APIUserName</td>
<td>The unique user ID. Required column.</td>
</tr>
<tr>
<td>FirstName</td>
<td>The user's first name.</td>
</tr>
<tr>
<td>LastName</td>
<td>The user's last name.</td>
</tr>
<tr>
<td>PermissionSet</td>
<td>The user's permission set. The PermissionSet value must match an existing permission set for the account. This value is not case-sensitive. For example, for the default permission set &quot;DS Sender&quot;, you could enter &quot;ds sender&quot;, &quot;DS SENDER&quot;, or &quot;DS Sender&quot;.</td>
</tr>
<tr>
<td>JobTitle</td>
<td>The user's job title.</td>
</tr>
<tr>
<td>CompanyName</td>
<td>The user's company name.</td>
</tr>
<tr>
<td>Group</td>
<td>The user's assigned groups. The Group values must match existing Group names for the account. Additional Group columns can be added to the file to add users to more than one group.</td>
</tr>
</tbody>
</table>

You do not need to add users to the Everyone group, since all new users are automatically added to that group.
The user's data

In the lines of the file below the header row, add the user information with commas used as the delimiter (separator) between each value.

If you are using Microsoft® Excel® to create your file, you can enter the header values (UserName, UserEmail, etc.) in different columns on the first line, enter the user information on subsequent lines, and save the file as a CSV file. You do not need to add commas; Excel will automatically do this when you save the file.

Example Update Users - Excel:
The Bulk Actions log

This Bulk Actions log page shows a list of bulk actions, such as uploading multiple users and envelope transfers for your account, and the progress of the actions. You do not have to remain on this page while the processing is in progress. If you do choose to remain on the page, you must refresh the job display to see an updated status. Click the **refresh icon** in the Actions column to update the job status.

![Bulk Actions log page](image)

When processing is complete, the **Status** column shows the general results of the bulk action:

![Status column](image)
To review a summary of the bulk action results, click the menu in the Actions column and select **Details**.

The details dialog provides information on how many users were successfully added and a summary of any errors.

For users that were not successfully added or updated, the message provides a short description of the problem and allows you to download the CSV file to correct the issues. The downloaded file includes a "ProcessingResults" column that specifies the issue for
any row that failed to process correctly. After correcting the issues, the file can be uploaded and resubmitted for processing.

If there is a problem with the CSV file, processing might fail. If this occurs, download the file, then review and correct the contents. Alternately, you can create and upload a new CSV file.

Download Users and Permission Sets

As a DocuSign administrator with User delegated admin permissions or greater, you can download a list of the users on your account, along with their assigned permission sets. You can choose to include a full list of the permission settings, or just the permission set name.

To download users and permission sets

1. Log in to the DocuSign Admin app and select **Users**.
2. (Optional) Use the **Search** and **Filter** controls to select the set of users to download. The download will include only the set of users currently displayed.

CONTENTS

To download users and permissions
What is included in the download?
Examples of download files
3. On the Users page, click **Download Users**.

4. In the Download Users dialog, if you want to include the list of user permissions and
values, select the **Include user permissions** check box.

5. Click **Download**.
   
The selected data is download in a CSV file to your Downloads folder.

**What is included in the download?**

The following basic data is included in the downloaded CSV file:

- Email ("UserEmail")
- Status ("Status")
- User First Name ("FirstName")
- User Last Name ("LastName")
- Job Title ("UserTitle")
- Company Name ("CompanyName")
- Permission Set ("PermissionSet")
- Added Date ("AddedDate")
- API User Name ("APIUserName")
- Groups ("Group")

If you select the **Include user permissions** option, the file includes each permission setting and value.

Examples of download files

- **Download users - basic data only:**

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>UserEmail</strong></td>
<td><strong>Status</strong></td>
<td><strong>FirstName</strong></td>
<td><strong>LastName</strong></td>
<td><strong>UserName</strong></td>
<td><strong>Company/Name</strong></td>
<td><strong>PermissionSet</strong></td>
<td><strong>AddedDate</strong></td>
<td><strong>APIUserName</strong></td>
<td><strong>Group</strong></td>
<td><strong>Group</strong></td>
</tr>
<tr>
<td><a href="mailto:Amy.Adams@sunmiltailor.com">Amy.Adams@sunmiltailor.com</a></td>
<td>Active</td>
<td>Amy</td>
<td>Adams</td>
<td></td>
<td>Deschutes Properties, Inc.</td>
<td>DS Sender - Use Template</td>
<td>4/28/2017 23:55</td>
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<td>9/25/2017 12:17</td>
<td>868e8f8-898f-398f-805a-99e5-cd12e</td>
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</table>

- **Include user permissions:** This is a partial view of a sample download; not all download data is shown.

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<th>C</th>
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<td><strong>UserName</strong></td>
<td><strong>Company/Name</strong></td>
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<td>6/13/2017 0:26</td>
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<td>Everyone</td>
<td>Sales - East</td>
</tr>
<tr>
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<td>Deschutes Properties, Inc.</td>
<td>DS Sender - Use Template</td>
<td>8/27/2017 23:16</td>
<td>93490b0e-9349-398f-805a-99e5-cd12e</td>
<td>Everyone</td>
<td>Sales - East</td>
</tr>
<tr>
<td><a href="mailto:legro@msi.com">legro@msi.com</a></td>
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<td>DS Sender - Use Template</td>
<td>11/10/2017 3:20</td>
<td>868e8f8-898f-398f-805a-99e5-cd12e</td>
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<td>Everyone</td>
</tr>
<tr>
<td><a href="mailto:mvan@msi.com">mvan@msi.com</a></td>
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<td>Mike</td>
<td>Marsh</td>
<td></td>
<td>Deschutes Properties, Inc.</td>
<td>DS Sender - Use Template</td>
<td>2/18/2017 23:50</td>
<td>868e8f8-898f-398f-805a-99e5-cd12e</td>
<td>Everyone</td>
<td>Sales - West</td>
</tr>
<tr>
<td><a href="mailto:Melannie.deschutes@msi.com">Melannie.deschutes@msi.com</a></td>
<td>Active</td>
<td>Melannie</td>
<td>Deschutes</td>
<td></td>
<td>Deschutes Properties, Inc.</td>
<td>Account Administrator</td>
<td>9/25/2017 12:17</td>
<td>868e8f8-898f-398f-805a-99e5-cd12e</td>
<td>Everyone</td>
<td>Everyone</td>
</tr>
</tbody>
</table>
Envelope Sharing Between Account Users

Envelope sharing permits users on the same account to see and take action on shared envelopes.

The ability to share envelopes between your account users is helpful for scenarios such as coverage during a leave of absence, delegated management of DocuSign transactions, or other collaborative workflows. As a DocuSign Administrator, you can set up envelope sharing and allow users to see and act upon envelopes belonging to another DocuSign user.

Sharing is enabled on an individual user basis. When a user's envelopes are shared, the users who were granted access can see and act on all of that user's envelopes.

See the Shared Envelopes topic for more information about how users see and act on envelopes shared with them.

Note: All changes made to sharing settings are recorded in the audit log.

To manage sharing settings for a user

1. In DocuSign Admin, click Users.
2. Locate the user you want to manage sharing settings for.
3. In the Actions drop down for the user, select one of the following:
   - Share envelopes with user - to grant the selected user access to the envelopes of other users.
   - Share user's envelopes - to grant access to the selected user's envelopes to other users.
4. To share envelopes with the user:
   a. On the Envelopes shared with [user name] page, click **ADD USERS**.

   b. In the list of Users, check the users whose envelopes you want to share with the selected user. Use the Filters and Search to narrow the list of users to select from.
      - You can select up to 100 users at a time to add to the list.
      - You can use the select all check box to select all of the currently displayed
results (up to 100 users).

c. Click **ASSIGN**.

The list is updated to show all the users whose envelopes you have shared with the selected user.
5. To share a user's envelopes:
   a. On the Envelopes shared by [user name] page, click **ADD USERS**.

   ![Envelopes shared with Amy Adams]

   b. In the list of Users, check the users who can access the envelopes belonging to the selected user. Use the Filters and Search to narrow the list of users to select from.

   ![Envelopes shared by Amy Adams]
- You can select up to 100 users at a time to add to the list.
- You can use the select all check box to select all of the currently displayed results (up to 100 users).

c. Click **ASSIGN**.

**Permission Sets**

As a DocuSign administrator, the Permission Sets view lets you manage the user permission sets for your account.
Overview

A Permission Set is a group of options that determines the behavior and actions available for a user. A user is assigned a Permission Set when they are added to an account, but the assigned permission set can be changed later. Permission Sets make it easier to manage options for a large number of users, without having to change permission options on a user-by-user basis.

There are three default Permission Sets: DS Admin, DS Sender, and DS Viewer. These permission sets cannot be modified or deleted, but can be viewed and copied as the basis for other permission sets.

**Note:** If your account includes the Advanced Administration module, you can use the delegated administration options to create Permission Sets that have limited administrator capabilities. See [Delegated Administration Permission Sets](#) for more information.

See the [Permission Set Option Descriptions](#) below for information about all the available settings.
To view users assigned to a permission set

1. In DocuSign Admin, click Permission Sets
2. Find the permission set you want to view.
3. In the Actions drop down for the permission set, select View Users.
4. The list of users assigned to this permission set is shown, click Close to exit the list.

To view or edit permissions for a permission set

1. In DocuSign Admin, click Permission Sets
2. Find the permission set you want to edit or view.

   **Note:** You cannot edit the DS Admin, DS Sender, and DS Viewer permission sets.

3. In the Actions drop down for the group, select Edit or View.
4. In the Edit Permission Set dialog, change the permission set name and settings as needed and then click SAVE.
   
   See the Permission Set Descriptions below for information about the settings.

To add or copy a permission set

1. In DocuSign Admin, click Permission Sets
2. Click ADD PERMISSION SET.
Tip: You can use the Actions drop down Copy function to create a new permission set that is a copy of an existing set. The copied permission set will start with all the same settings as the original set. The name and settings can then be modified as needed using the following steps.

3. Type a Name for the permission set.

4. Adjust option settings as needed. See the Permission Set Descriptions below for information about each setting option.

5. To finish and add the permission set, click ADD. The permission set is added to the account.

To delete a permission set

1. In DocuSign Admin, click Permission Sets

2. Find the permission set you want to delete.

   Note: You cannot delete the DS Admin, DS Sender, and DS Viewer permission sets.

3. In the Actions drop down for the group, select Delete.

4. Confirm that you want to delete the permission set from the account.
   The permission set is removed from the list.
Download Permission Sets

You can download the full list of permission sets on your account to a CSV file. The download includes all permission sets, regardless of any filters or searches in effect, and contains the following details:

- Permission set name
- Permission set ID (useful for Account Server and integrations)
- Last modified date
- Number of users assigned to each permission set
- List of privileges and values

**Example:** This is a partial view of a sample download; not all privileges are shown.

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<thead>
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<th>Modified Date</th>
<th>Modified By</th>
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<th>All Administration</th>
<th>Allow Sending</th>
<th>Allow Edits</th>
<th>Allow Signatures</th>
<th>Address Book</th>
<th>Attachments</th>
<th>Allow Template</th>
<th>Other-Recipient-View-Notifications</th>
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</thead>
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<td>Use</td>
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</tr>
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<td>TRUE</td>
</tr>
<tr>
<td>4</td>
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<td>Personal/Shared</td>
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<td>FALSE</td>
<td>Create</td>
<td>Personal/Shared</td>
<td>False</td>
<td>True</td>
</tr>
</tbody>
</table>

To download permission sets

1. In DocuSign Admin, click **Permission Sets**.
2. Click **Download Permissions**.
The permission set data is exported to a CSV file and saved to your local Downloads folder.

Permission Set Option Descriptions

These options set the behavior and actions available for all account users assigned to the Permission Set.

**Note:** The information in this topic covers all the settings available in DocuSign. Some advanced features and options are supported only in certain DocuSign plans. Your account plan might not support some options discussed in this help topic. For more information about which options are available for your account, check your account plan or contact your Account Manager.

- **All Administration Capabilities.** When selected, users with this permission have access to the Administration view for the account and can manage account settings, users and groups, signing and sending settings, and integrations. This option is automatically selected for the DS Admin permission set.
- **Can send envelope.** When selected, the user can send envelopes.
• **Can add fields.** When selected, the user can use the fields palette to add fields when sending or correcting documents and creating templates.

• **Allow sequential signing.** When selected, the user can define the signing order of recipients while sending documents for signature.

• **Allow signer attachments.** When selected, the user can add signer attachment fields while sending documents. Note that the Sending Setting Enable signer attachment field option must be enabled to use this option.

• **Allow signing on paper override.** When selected, the user can override the default account sign on paper setting when sending envelopes. See the Set Advanced Document Options topic for more information about the sign on paper option.

• **Allow recipient viewed notifications.** When selected, an email is sent to a sender the first time a recipient opens an envelope.

• **Allow sending to bulk list.** When selected, the user can use the Bulk Send feature. Note that the Sending Setting Enable bulk recipients option must also be enabled to use the feature. See the Using Bulk Send topic for more information about using this feature.

• **Allow language selection.** When selected, the user can set the language used in the standard email format for a recipient when creating an envelope.

  **Note:** The account setting Enable custom email and language for each recipient must also be selected in order for this permission setting to be applied. See Sending Settings for more information.

• **Disable document upload.** When selected, the user cannot add files to the envelopes they send or correct. This restriction is applied to web app users only; it does not affect mobile app users.
• **Hide Other Actions menu.** When selected, the **Other Actions** menu is not included in the Add Fields view, where the sender tags documents with fields for recipients to complete. This option restricts senders from accessing and changing other aspects of the envelope, including uploaded documents, recipient messages, and advanced options.

• **PowerForm Role.** This option sets the PowerForms access for a user. The three options are:
  - **None:** The user cannot use PowerForms.
  - **Standard User:** The user can send PowerForms.
  - **Administrator:** The user can create, manage, and download PowerForms. With this option, there is a secondary permission **Allow access to envelopes and form data from other PowerForm senders.** If selected, the PowerForm administrator is granted access to form data and envelopes from other PowerForm senders.

  ![PowerForm Role](image)

• **Templates.** This option sets the user’s template usage and management rights. The four options are:
  - **None:** This user cannot use, create or share templates.
  - **Use:** This user can use templates created and shared by other users, but the user cannot create or share templates.
  - **Create:** This user can create and use templates, but the user cannot share templates.
  - **Share:** This user can use, create and share templates.
• **Address Book.** With this permission setting, you can control each users' access to personal and shared contacts, and to the ability to share contacts with other account users. Users access and manage contacts through their Contacts list, located in My Preferences. Of the four settings, only **Share** allows a user to share their personal contacts. If a contact is shared, it is shared with all account users who have access to shared contacts.
  
  † **Use Personal Only:** The user can create and use only personal contacts in their Contacts list. Signing groups are included in the personal contacts for users with this setting.

  † **Use Shared Only:** This user can use only the contacts shared by other account users. Signing groups are included in the shared contacts for users with this setting.

  † **Use Personal and Shared:** This user can create and use personal contacts, and can use any contacts shared by other account users and any signing groups.

  † **Share:** This user can create personal contacts, use any shared contacts, and share their contacts with other account users.

**Self-signed notifications delivered by.** This option selects the setting for how self-signed documents (documents sent using the Sign a Document option) are presented to the email recipients. This setting also affects self-signed documents sent from DocuSign mobile applications. There are two possible selections:

  † **Link:** A secure link to the self-signed documents is included in the email. Email recipients click the link to be taken to the completed documents, where they can view and download the documents.

  † **PDF:** A PDF of the completed documents is attached to the email. Email recipients can view and download the attached documents.

**Allow receipt of transferred envelopes.** When selected, administrators can transfer envelopes from other accounts to this user.
**Allow view and manage envelope rights through API.** When selected, the user can:

- View, manage, and request status of all envelopes for the account through the DocuSign API.
- Transfer envelope custody and set custody transfer rules if the user is also a DocuSign Administrator.
- Send on behalf of other users through API if **Allow send on behalf of other users through API** is also enabled.

**Allow send on behalf of other users through API.** When selected, the user can sends envelopes for (on behalf of) other users through the DocuSign API. The **Allow view and manage envelope rights through API** option must be enabled for the user to select this option.

- **Note:** In the Classic DocuSign Experience, this option was referred to as **Account-Wide Rights**.

**Allow supplemental documents.** When selected, senders can send documents as supplements. For the three possible recipient actions (must view, must accept, must read), the **signing settings** for supplemental documents determines whether they are required by default.

To allow senders to override the default behavior, select the appropriate **Allow sender to override** options. With an override option selected, senders can change the relevant recipient action setting for any supplements they send.
See Send Supplemental Documents for more information on using this feature.

Delegated Administration Permission Sets

As a DocuSign administrator, the Permission Sets view lets you manage the user permission sets for your account. The Delegated Administration functionality allows customers to create Permission Sets that have limited administrator capabilities in addition to the standard user permissions.

Note: For a more in-depth discussion of use cases, review the Best Practices for Delegated Admin white paper.
Note: If your account does not have Delegated Administration enabled, the Permission Sets dialog only shows User Permissions. Refer to Permission Sets for more information on User Permissions.

Delegated Administration is available only for certain plans. If you do not see the functionality described in this guide, check with your DocuSign Account Manager to determine if it can be enabled for your account.

About permission sets

A permission set is a group of options that determines the behavior and actions available for a user. A user is assigned a permission set when they are added to an account, but the assigned permission set can be changed later. Permission sets make it easier to manage options for a large number of users, without having to change permission options on a user-by-user basis.

There are three default Permission Sets: DS Admin, DS Sender, and DS Viewer. These permission sets cannot be modified or deleted, but can be viewed and copied as the basis for other permission sets.

If your account is enabled with Delegated Administration, when viewing, creating, or editing a permission set, the dialog is divided into two sections: Administrator Permissions and User Permissions. Administrator permissions and user permissions can be combined to create permission sets with limited, or full, administration capabilities in addition to sending and other non-administrative options.
Note: For information on User Permissions and tasks related to permission sets, such as creating, editing, deleting and downloading, see the Permission Sets guide.

Admin permissions options

These options determine the administrative actions available for all account users assigned to the permission set.
### Add Permission Set

**Name**

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<tr>
<th>ADMIN PERMISSIONS</th>
<th>USER PERMISSIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>✗ All Administration Capabilities [i]</td>
<td></td>
</tr>
</tbody>
</table>

**Delegated Administration:**

Grant limited administrative rights restricted to the categories selected. Learn more...

- Users and Groups
- Administrators
- Envelope Sharing
- Account Settings
- Reporting
- Security Settings
- Signing Groups

**ADD**  **CANCEL**

- **All Administration Capabilities:** When selected, users with this permission have access to the Administration view for the account and can manage account settings, users and groups, signing and sending settings, and integrations. (The default permission set DS Admin uses this option. Default permission sets cannot be modified.)
• **Delegated Administration:** These alternative admin options grant limited administrative rights. Delegated administrators are restricted to the categories selected and limit a user’s access to certain administrator functions. The options are as follows:
  
  ◦ **Users and Groups:** When selected, users with this permission can have fairly broad control over non-administrative users on the account. They can add, edit, and close non-admin users. They can perform bulk user actions to add or update non-admin users, and can download users. They can also add, edit, and delete groups for the account and add and edit the users assigned to a group.

  ◦ **Administrators:** When selected, users with this permission can add, edit, and close administrators (users with either All Administration Capabilities or one of the Delegated Admin permissions). Because users with this permission can change information for other users, selecting **Administrators** also automatically selects the **Users and Groups** setting.

  ◦ **Envelope Sharing:** When selected, users with this permission can set and modify user envelope sharing settings. Because users with this permission can change information for other users, selecting **Envelope Sharing** also automatically selects the **Users and Groups** and **Administrators** settings.

  ◦ **Account Settings:** When selected, users with this permission can manage account settings, signing and sending settings, and integrations (excluding Connect configuration). Users with this permission set cannot manage users, groups, or security settings.

  ◦ **Reporting:** When selected, users with this permission can access the reporting dashboard for account-wide data. From there, they can run, customize, schedule, and download and print reports for the account.

  ◦ **Security:** When selected, users with this permission can manage all items within the Security Settings and Document Retention areas. These areas include items such as the document retention policy, account login requirements, and password security settings.
- **Signing Groups**: When selected, users with this permission can create, edit, and delete signing groups.

**Admin permission matrix**

This table displays all administrative actions available for each of the delegated permission sets. It indicates whether users can view data or settings (read) or make changes to data or settings (write). If the cell is blank, users with that permission set can neither read nor write and will have no access to that data or setting.
<table>
<thead>
<tr>
<th>Area</th>
<th>Section</th>
<th>Functionality</th>
<th>DS Admin</th>
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<th>Administrators</th>
<th>Envelope Sharing</th>
<th>Account Settings</th>
<th>Reporting</th>
<th>Signing Groups</th>
<th>Security</th>
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<td>Read</td>
</tr>
<tr>
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</tr>
<tr>
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<tr>
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Groups

As a DocuSign administrator, the Groups view lets you manage the groups on your account.

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.

There are two default groups for every account: Everyone and Administrators. These groups cannot be edited or deleted from the account. The Everyone group contains all active account users. The Administrators group has all active users that have the All administration capabilities option enabled in their associated Permission Set. If your account includes the ability to define delegated administration permission sets, users who are assigned to these sets are not included in the Administrators group.

CONTENTS
Add or copy a group
View or edit group information, users, and settings
Delete a group
Assign brands to a group
To add or copy a group

1. In DocuSign Admin, click Groups.
2. Click ADD GROUP.

   **Tip:** You can use the Actions drop down Copy function to create a new group that is a copy of an existing group. The copied group will start with all the same users and settings as the original group. The users and setting can then be modified as needed using the following steps.

3. Type a Group Name for the group.
4. Find the users you want to add to the new group in the available list and click Add to move the user to the selected list.
5. To finish and add the group, click Create. The group is added to the account.

To view or edit group information

1. In DocuSign Admin, click Groups
2. Find the group you want to edit or view

   **Note:** You cannot edit the Everyone and Administrators groups.

3. In the Actions drop down for the group, select Edit or View.
4. In the Edit Group dialog, change the group name and users as needed and then click Save.
To delete a group

1. In DocuSign Admin, click Groups
2. Find the group you want to delete

**Note:** You cannot delete the Everyone and Administrators groups.

3. In the Actions drop down for the group, select Delete.
4. Confirm that you want to delete the group from the account.
   The group is removed from the group list.

Assign brands to a group

You can specify which brands group members can use by assigning brands to a group. For more details, see Assign Brands to Groups.

Assign Brands to Groups

If your account includes multiple signing brands, you can use the groups functionality to manage which brands are available to your account members. For the custom groups you define for your account, you can assign brands to specify the ones that group members can use. Group members can use the available brands when they send envelopes or create templates.
You cannot assign brands to the two default groups: Administrators and Everyone. Administrators have access to all brands configured for the account, regardless of the groups they are assigned to.

To assign a brand to a group

1. In DocuSign Admin, click Groups.
2. Locate the group you want to assign a brand to by searching or scanning the list, and click to open it.
3. Click the BRANDS tab.
4. Click **ASSIGN BRAND**.

The brands configured for your account are listed.
5. Mark the check box to select the brand or brands you want to assign to the group, and click **ASSIGN**.

All group members can now use the assigned brands on the envelopes they send and templates they create.

**To change the brands assigned to a group**

1. In DocuSign Admin, click **Groups**.
2. Locate the group you want to assign a brand to by searching or scanning the list, and click to open it.
3. Click the **BRANDS** tab to open the list of assigned brands.
4. To remove brands already assigned, click **REMOVE**.

5. To assign additional brands to the group, click **ASSIGN BRANDS**, select the brands to assign, and click **ASSIGN**.

**Why assign brands to a group?**

You can simplify and control brand usage in your account by limiting brand access by groups. In most cases, each user likely needs to use only a single brand for their DocuSign envelopes. But you may have defined multiple brands to support various divisions or teams within your company. By assigning brands to groups, and assigning users to those groups, you can control the brands used to send envelopes and create templates.
Here are the possible scenarios for users and groups, and how it affects the brands available:

- **User is not assigned to any groups.** The user uses the default signing brand for all envelopes he sends and any templates he creates.

- **User is assigned to a group that does not have any assigned brands.** The user uses the default signing brand for all envelopes he sends and any templates he creates.

- **User is assigned to multiple groups, which all have assigned brands.** The user has access to all of the brands assigned to all of the groups to which he belongs. He can select which brand to use for each envelope he sends or template he creates.

- **User is an administrator on the account.** Admins have access to all brands configured for the account, regardless of the groups they are assigned to.

Related topics

- **Groups.** How to add and manage groups for your account.

- **Manage users.** Assign groups to users.

- **Configure brands.** How to configure brands for your account.

**Signing Groups Administration**

The Signing Groups option allows administrators to create and edit signing groups. A signing group is used to send documents to a group of people, where any member of that group can open and act on the document fields addressed to the group, even though signature and other fields are not specifically assigned to a person.
Signing groups overview

When the signing group option is used, group members that open and sign the documents are tracked in the history and certificate of completion. The members of a signing group are not required to have a DocuSign account.

Once a signing group is set up, it is available for use by any account sender when adding recipients to an envelope. The group can be added in the same manner as any other recipient. See this Signing Groups topic for more information on sending envelopes with a Signing Group.

Adding an alternate email for notifications

You can choose to add an alternate email address for the signing group and have all email notifications sent to that email address, rather than directly to the group members. When you use an alternate group email, only the recipients who are also members of the signing group can view and act on envelopes sent to the group email. In addition, with an alternate email, members must have a DocuSign account to view and act on the envelope. If members access the documents from the group email notification, they must first sign in to their DocuSign account.
To add a signing group

1. In DocuSign Admin, click Signing Groups.
2. Click ADD SIGNING GROUP.

Tip: You can use the Copy option in the Actions drop down to create a copy of an
existing group and then modify the members as needed using the following steps.

3. Enter a name for the new signing group. The name must be unique for all signing groups in the account.

4. To add a signing group member who is a user in your account:
   - Locate the account user you want to add by searching or scanning the list of Available users.
   - Click **ADD** to move the user to the Selected list.

5. To add a signing group member who is not part of your account:
   - Click **Add User Manually**.
   - Complete the Name and Email fields.
   - Click **ADD** to add the member to the group's Selected list.

6. (Optional) To have all email notifications sent to a single email address, select the **Use an alternate email address**... option and enter the email address in the Email Address field. The signing group members will not receive notifications at their respective email addresses, but they can access the envelope from within their DocuSign account. Or, if they have access to the group email, they can use the link in the group email notification.

7. Click **ADD** to add the signing group to your account. The signing group is available to all members of the account.
To edit or view signing groups

Changes to a signing group affect envelopes that have already been sent and are still in progress, and any future envelopes sent using the group. You can edit a group to change the name or modify the list of group members.

- **If you remove a group member**, if there are any in progress envelopes for the group, the removed member can no longer access them.

- **If you add a group member**, the sender must resend any in progress envelopes for the group in order to grant access to the new member.

If group members have changed their email address, you'll need to edit the signing group to remove the old instance and then add in the new one. You can tell if a user's email address has changed since they were added to the group by checking to see if the user appears in both the Available and Selected columns. You can hover over each one to see the associated email address.
1. In DocuSign Admin, click **Signing Groups**.

2. Locate the signing group you want to edit or view by searching or scanning the list.

3. Click the **ACTIONS** drop down for the signing group and select **Edit**.

4. In the Edit Signing Group dialog, you can:
   - Change the signing group name.
   - Add or remove group members.
   - Get the signing group ID. The ID is a unique identifier for the group. This identifier
is useful for API developers using the DocuSign API.

5. Click **SAVE** to save your changes.

**To delete a signing group**

Deleting a signing group prevents it from being used in the future and affects all in progress envelopes sent to the group. Group members lose access to any in progress envelopes, so it's important to confirm there are no active envelopes before you delete a signing group.

If a signing group was used in a template, it is replaced with an empty recipient.
1. In DocuSign Admin, click **Signing Groups**.

2. Locate the signing group you want to delete by searching or scanning the list.

3. Click the **ACTIONS** drop down for the signing group and select **Delete**.

4. Confirm that you want to delete the group from the account.
   The group is removed from the Signing Groups list.

**Email Preferences**

These settings are the default email notification preferences for all new users added to your account. Users can modify these settings in their My Preferences, as described in the **Manage Notifications** guide. Changes to these defaults do not affect existing users.

The API User settings apply to envelopes sent using an API integration.
To set default email notification preferences for new users

1. In DocuSign Admin, click **Email Preferences**.

2. Select the **USER** tab.

3. Review the list of email preferences and make any changes as desired.
   a. **For Signers**. This list presents the notifications your account members will receive when they are the recipient of an envelope. This affects the **Recipient Notifications** list in the user’s My Preferences > Notifications settings.
b. **For Senders.** This list presents the notifications your account members will receive when they are the sender of an envelope. This affects the *Sending Notifications* list in the user’s My Preferences > Notifications settings.

4. Click **SAVE**.

Your defaults are saved. Any new users added to your account will inherit the default email notification preferences. Users can update these notification preferences at any time through their My Preferences.
Signing and Sending

In the Signing and Sending section of the DocuSign Admin web application, you can manage the default behavior and various options for all documents sent from your account.

The following topics are available in this section:

- Signing Settings
- Sending Settings
- Email Archive Configuration
- Custody Transfer
- Purging Envelopes
- Legal Disclosure
- Reminders and Expirations
- Custom Fields
- Document Labels

Signing Settings

These settings are the default signing behavior for envelopes sent from your account. In most cases you can choose to enforce these settings for all envelopes, or allow account senders to modify the values for each envelope they send.
You must be an administrator with All Administration Capabilities in order to manage these settings. See Permission Sets for details. These settings are accessed through the DocuSign Admin view.

Contents
How to define signing settings
Signing Experience settings
Recipients options
Document Formatting settings
Signature options
Supplemental Documents settings
Envelope Delivery settings

Note: The information in this topic covers the all signing settings available in DocuSign. Some advanced features and options are supported only in certain DocuSign plans. Your account plan might not support some options discussed in this help topic. For more information about which options are available for your account, check your account plan or contact your Account Manager.

To define signing settings

1. In DocuSign Admin, click Signing Settings.

2. Adjust your signing settings as needed. The settings and options are described below.

3. Click SAVE.
Signing Experience settings

These settings determine how the signing experience is shown to signers:

- **Watermark Configuration**: The Watermark feature is designed to ensure that in-process transactions cannot be printed and signed on paper and that any saved or printed in-process documents display a watermark.

  When the Watermark feature is enabled and document signing is not complete, a watermark is displayed on each page of the documents when a printable version of the document is downloaded.

  When all recipients have signed the document, the watermark is removed from the printable version of the document.

  **IMPORTANT**: If the Watermark feature is active and the Allow recipient to sign on paper option is enabled, the watermark does not appear when viewing or downloading documents to sign.

**To enable and set a watermark:**

1. Click **Watermark Configuration** to go to the Watermark page.

2. Select **Apply watermarks to documents that are still in progress**.

3. Select the appearance options for the watermark: font style, font color, font size, transparency percentage, and orientation.

4. Type the watermark message. The maximum length of the watermark message is 50 characters.

5. Click **PREVIEW** to see an example of how the watermark will appear if the document is printed before completely signed.

   Review the information and make any necessary changes.

6. Click **SAVE** to save the watermark settings.
• **Auto-Navigation**: This selects the document navigation option signing recipients see for their initial review of documents during a signing session. The selected option controls the navigation behavior as the recipient steps through the fields.

If you use Radio Buttons on your documents, the options to navigate blank required fields are recommended for a smoother signing experience.

The available auto-navigation options are as follows:

- **Page Only**: With this option there is no automatic navigation to the next field. The signer must manually navigate through the documents. The signer can scroll through pages, click Next, or use the document map on the right side of the browser to go to specific pages.

- **Navigate required fields**: The initial navigation moves to the next empty or filled-in required field. Optional fields are skipped.

- **Navigate blank required fields**: The initial navigation moves to the next empty required field.

- **Navigate all fields**: The initial and subsequent navigation moves to the next required or optional field.

- **Page then Navigate required fields**: The initial navigation goes to the top of the next page and then moves to the next empty or filled-in required field on the page. If there are no required fields on the page, the navigation stops at the top of the page and then goes to the next page when the signer clicks Next.

- **Page then Navigate blank required fields**: The initial navigation goes to the top of the next page and then moves to the next empty required field on the page. If there are no blank required fields on the page, the navigation stops at the top of the page and then goes to the next page when the signer clicks Next.

- **Page then Navigate all fields**: The initial navigation goes to the top of the next page and then moves to the next required or optional field on the page. If there are no required or optional fields on the page, the navigation stops at the top of the page and then goes to the next page when the signer clicks Next.
• **Allow senders to override**: When selected this option allows senders to disable the signing auto-navigation option for envelopes they send.

• **Allow recipients to view mobile-friendly documents with responsive signing**: This enables responsive signing for recipients. When selected, senders can choose to send mobile-friendly, responsive documents. Senders can also preview documents as a desktop, tablet, or mobile user prior to sending.

Recipients options

These settings provide options and actions related to envelope recipients.

• **Require a reason when a recipient declines to sign**: When selected this option requires signers to provide a reason why they are declining to sign a document.

• **Allow recipients to sign on paper**: When selected signers are allowed to choose to sign on paper instead of signing electronically.

  If this option is selected, the additional **Allow sender to override** option is available, which when selected allows senders to override the sign on paper setting when sending envelopes. See the [Set Advanced Document Options topic](#) for more information about the sign on paper option.

• **Allow recipients to sign on a mobile device**: When selected signers can use a mobile device to sign documents.

• **Allow recipients to sign documents offline on a mobile device**: When selected, documents that are signed with the DocuSign mobile app using offline signing are synchronized with this account.

**Note**: Offline signing is only currently available for DocuSign for iOS and DocuSign for Windows mobile apps.
• **Allow recipients to change signing responsibility.** When selected the signer can change the signing responsibility to another person.
If this option is selected, the additional **Allow sender to override** option is available, which when selected allows senders to override the change signing responsibility setting when sending envelopes. See the Set Advanced Options topic for more information about allowing recipients to change signing responsibility.

• **Allow recipients to edit documents.** When selected a user can choose to allow signers to edit document information using the Document Markup option. See the Document Markup topic for more information.

• **Allow recipients to create a DocuSign account.** When selected this option allows recipients to create their own DocuSign account after they have finished signing.

• **Allow offline signing on a mobile device.** When selected this option allows users to create, send, and sign documents using the DocuSign mobile applications while offline.

• **Select the signature pad type used by your organization.** This option is used to select the signature pad used with your account. See the Signature Pad Information guide for more information on using a signature pad with DocuSign.
There are four possible selections:

- **None**: This turns off the signature pad feature for your account.
- **Topaz**: Enables your account to work with Topaz Systems, Inc™ signature pad devices.
- **ePad with IntegriSign**: Enables your account to work with ePadLink ePad-ink with IntegriSign™ signature pad devices.
- **Topaz SigPlusExtLite**: Enables your account to work with a Topaz Systems signature pad device with Chrome, Firefox, Opera and Edge browsers. (Requires installation of the SigPlusExtLite extension.)

### Document Formatting

These settings establish the date, time, and signature formats when signing documents sent from the account.

- **Format of Date (date signed document fields)**. This selects the date format applied to all Date Signed fields on the documents. This setting also affects the Date data validation formatting. For details, see [Data Validation for Text Fields](#).

  **Note**: This effect on fields with Date data validation is new and applies only to fields added to envelopes and templates after this formatting change was implemented.

- **Format of Time (date signed document fields)**. This selects the time format applied to all Date Signed fields on the documents. The time is added to the field after the date. If **None** is selected, then the time is not added to the Date Signed field.
Signature options

- **Signature Adoption Configuration.** This option is used to set the signing options for the account. This includes the default signing modes, limiting signature styles for adopting a signature, locking a recipient’s name for signing and, for drawn signatures/initials, setting the minimum pixels required to adopt a signature. For a detailed description of the configuration options, see **Signature Adoption Configuration**.

- **The selected formats will be applied to all signatures.** This option controls the appearance of signatures for signers.
  - **Add DocuSign frame:** A frame with extra information is placed around the signer’s signatures and initials to make it easy to recognize the signature was created by DocuSign. This extra information appears on the documents, including the Certificate of Completion, sent from the account. **Note:** The frame is not applied if the signer is using the DocuSign mobile app to sign.
  
  - **Do not add frame:** Only the signer’s script name or initials are shown.

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**Why use the “DocuSign frame”??**

With the DocuSign frame selected, the signature is easily recognized as a DocuSign signature.
If you expect to be dealing with others who understand the DocuSign signature indicates a secure document handling process, and that they can rely on the document to be tamper proof, that there is an online backup, etc, then you should enable the DocuSign frame to make sure other can easily tell that the signature is from DocuSign.

If you expect to be sending documents to others who are not familiar with DocuSign, and do not expect extra layers of security, but perhaps just require faxed in documents, you can consider using the Do not add frame option so these recipients are not confused by the additional information.

**Supplemental Documents**

If supplemental documents are enabled for your account, you can specify the default recipient actions that signers must complete in order to finish signing. Selection here makes an action required for all supplemental documents sent from the account.

The settings you choose here are applied to all permission sets on your account. With the permission settings, you can control users' access to the supplemental documents feature and whether they can override the default actions when sending supplements. See the Send Supplemental Documents guide for more information.
The options are as follows:

- **Signers must view supplemental documents**: Recipients must click the **View** button on the supplement strip to open the supplement view, which lets them read through the document, and download or print it.

- **Signers must accept supplemental documents**: Recipients must click the **Accept** button on the supplement strip.

- **Signers must read supplemental documents**: Recipients must scroll to the bottom of the supplement. This option is only available if both must view and must accept options are selected.

Supplemental document interactions are logged in both the History and Certificate of Completion for an envelope.

**Envelope Delivery**

These settings are used to set the envelope delivery options for recipients.

- **Attach documents to completion email**: When selected all the completed documents are included in the completed email sent to senders and signers as PDF file attachments. To include the Certificate of Completion along with the documents, you must also select the setting **Attach certificate of completion to envelope**.

- **Attach certificate of completion to envelope**: When selected, when an envelope is downloaded as a Combined PDF, the Certificate of Completion is included at the end of the file. (The Certificate is always included with the Separate PDF download option.) If the setting **Attach documents to completion email** is also selected, the Certificate is included as a separate attachment to the completed email that is sent to senders and signers.

- **Suppress emails to embedded signers**: When selected, an email completion notice is not sent to embedded signers when envelope signing is completed. This option is
only used with the embedded signing function and cannot be selected if the Send completion emails to embedded signers option is selected.

- **Send completion emails to embedded signers.** When selected, an email completion notice is sent to embedded signers when envelope signing is completed. This option is only used with the embedded signing function.

- **Self-signed email notifications are delivered by.** This option selects the default account setting for how self-signed documents (documents sent using the Sign a Document option) are presented to the email recipients. This setting also affects self-signed documents sent from DocuSign mobile applications. There are two possible selections:
  - **PDF:** A PDF of the completed documents is attached to the email. Email recipients can view and download the attached documents.
  - **Link:** A secure link to the self-signed documents is included in the email. Email recipients click the link to be taken to the completed documents, where they can view and download the documents.

Additionally, you can select the **Allow account users to decide if they should send a link or attach a PDF** option. When this option is selected the Self-signed notifications delivered by option can be set in user Permissions Sets and will override the account setting. It also allows DocuSign mobile application users can set the email option used when sending from the application.

### Signature Adoption Configuration

The Signature Adoption Configuration view is used to set the signing options for the account. From this view, account administrators can specify which signing modes are available, limit signature styles for adopting a signature, lock recipient name for signing, and set the minimum pixels required to adopt a drawn signature.
Contents
How to configure the signature adoption
Limit recipients' signing options
Set the default mode for signature adoption
Define the minimum pixel size
Select signature styles

Note: Your account may be configured to provide only a subset of the three possible signing methods (select style, draw, or upload image). In that case, only the methods supported by your account can be configured in the signature adoption configuration view.

To set the signature adoption configuration options

1. In DocuSign Admin, select Signing Settings.

2. Scroll down the settings view, and under the Signature section, select the Signature Adoption Configuration link.
3. Set the signature adoptions options described in the following sections.

4. Click **Save** to save your changes.

Limit recipients' signing options

There are three possible methods that recipients can use to sign: select a pre-defined style, draw a signature, or upload an image file of their signature. To limit recipients' signing options, you can choose to disable all but one of the three options (draw, upload, or select a style).

The **Lock Recipient Name** option prevents recipients from changing their name when adopting a signature. However the sender spells the recipient's name, that is how they must sign the document.
Set the default mode for signature adoption

This option sets which of the available signing modes is shown first when a signer is adopting their signature or initials. If you prefer an option, but have not ruled out the others, you can set the preferred option to display when the Adopt Your Signature dialog appears. Recipients can still select any of the other signing modes configured for the account.

- **Start on adopt** shows the Select Style mode, with the different signature styles.
- **Start on draw** shows the Draw mode, where the signer draws their signature or initials.
- **Start on upload** shows the upload mode, where the signer can upload an existing file with their signature or initials.

Separate settings are available for DocuSign web app and mobile web signers.
Define the minimum pixel size

To ensure drawn signatures and initials are visible on completed documents, set a reasonable minimum pixel size. This minimum is applied to drawn signatures only, and does not apply to uploaded images.

<table>
<thead>
<tr>
<th>Minimum number of pixels required to adopt a signature</th>
<th>50</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum number of pixels required to adopt initials</td>
<td>50</td>
</tr>
</tbody>
</table>

Select signature styles

Select the signature styles available for signers to choose from in the Adopt Your Signature dialog. If no styles are selected, then Arial Unicode is used. The Arial Unicode signature style cannot be removed from the list. For language-specific styles, select the language tab and then select the signature styles. The language-specific styles are presented to a signer who is signing in that language.
Sending Settings

These settings set the default behavior for documents sent from your account. In most cases you can choose to enforce these settings for all documents, or allow account senders to modify the values for each document they send.

You must be an administrator with All Administration Capabilities in order to manage these settings. See Permission Sets for details. These settings are accessed through the DocuSign Admin view.
To Define Sending Settings

1. In DocuSign Admin, click **Sending Settings**.

2. Adjust your sending settings as needed. The different settings and options are described below.

3. Click **SAVE**.

Fields and Properties

These settings enable optional fields and field properties for the account.
Fields and Properties

- Enable formula field (calculated field)
- Enable conditional fields
- Allow admins to share custom fields
- When an envelope is sent, write the initial value of the field for all recipients
- Allow fax delivery to recipients
- Enable signer attachment field
  - Allow signers to add multiple attachments per field
  - Append attachments to the document with the attachment field

Document Visibility:

- Off
- Allow sender to specify document visibility

- Enable draw new signature for each signature or initial field
- Enable signature stamp field

- **Enable formula field (calculated field).** When selected account senders can add Formula fields to documents. Formula fields dynamically calculate a result based on recipient-entered values in other fields. See the Calculated Fields topic for more information.

- **Enable conditional fields.** When selected the conditional logic field property is enabled for the account. See the Conditional Fields topic for more information.

- **Allow admins to share custom fields.** This allows administrators to share custom fields they created with other users in the account.

- **When an envelope is sent, write the initial value of the fields for all recipients.** When selected the initial value in a field is written to the document for all recipients when the envelope is sent.
• **Allow fax delivery to recipients.** This allows senders to send documents through DocuSign and have recipients receive the documents by fax.

• **Enable signer attachment field.** If selected, account senders can add the Signer Attachment field to a document. You can further customize individual users' access to this feature using permission sets.

  ![Enable signer attachment field](image)

  If this field is enabled for the account, there are additional options as follows:

  ○ **Allow signers to add multiple attachments per field.** If selected, a signer can add multiple attachments to a Signer Attachment field.

  ○ **Append attachments to the document with the attachment field.** If selected, when a signer uploads an attachment, the document is inserted into the envelope directly after the document with the Signer Attachment field. (If this option is not selected, then any signer attachments are included at the end of all documents in the envelope.) Furthermore, with this option, the attachment becomes a permanent part of the envelope. The signer cannot remove the attachment after uploading it. Also, if the envelope is ever copied (as described in this help guide), any signer attachments are included in the new envelope.

• **Document Visibility.** This option enables and sets how the Document Visibility feature is configured for the account.

  If this option is selected, the additional **Allow sender to specify document visibility** option is available. When selected, the sender can adjust document visibility.

  The Document Visibility options are:
- **Off**: Document Visibility is not active for the account.

- **Must sign to view, unless a member of sender's account**: With this option Document Visibility is enabled for all envelopes sent from the account and any member of the sending account can view all the documents that are sent together.

- **Must sign to view, unless sender**: With this option Document Visibility is enabled for all envelopes sent from the account and only the sender can view all the documents that are sent together.

- **Sender can set "must sign to view, unless a member of sender's account"**: With this option the sender has the option of enabling Document Visibility for the documents that are sent together. When enabled, all the documents that are sent together are still visible to any member of the sending account.

- **Sender can set "must sign to view, unless sender"**: With this option the sender has the option of enabling Document Visibility for the documents that are sent together. When enabled for an envelope, all the documents that are sent together are only visible to the sender.

- **Enable draw new signature for each signature or initial field**: When selected this option allows a sender to require that signers draw their signature and initials in each signature and initial field in the sent documents. This option can be set separately for each signer. See Require Recipients to Draw Each Signature for information about using this option when sending.

- **Enable signature stamp field**: When selected, senders on the account can see the Stamp field and add it to documents and templates.

- **Enable including the Envelope ID on the document**: When selected, senders can stamp documents with the envelope ID, as described in Set Advanced Options. If the additional option to **Include Envelope ID by default** is also selected, then the advanced option to stamp documents is selected by default for all envelopes sent from the account. There are three possible states to configure for your account:
- **Default: ON Sender: Can Set**
  To include the envelope ID by default and allow senders to turn it off, leave both options selected.

  ![Enable including the Envelope ID on the document](check)
  ![Include Envelope ID by default](check)

- **Default: ON Sender: Cannot Set**
  To enforce the envelope ID stamp for all envelopes sent from the account, clear the **Enable including the Envelope ID on the document** setting, and leave the **Include Envelope ID by default** selected.

  ![Enable including the Envelope ID on the document](uncheck)
  ![Include Envelope ID by default](check)

- **Default: OFF Sender: Can Set**
  To allow senders to turn the envelope ID stamp on, select the **Enable including the Envelope ID on the document** setting, and clear the **Include Envelope ID by default** option.

  ![Enable including the Envelope ID on the document](check)
  ![Include Envelope ID by default](uncheck)

- **Automatically replicate information in fields with the same Data Label.** This option
sets how information is replicated for fields with the same Data Label. This applies to
Check box, Company, Text, Drop Down, Name, Note, and Title fields.

IMPORTANT: Changing this setting will affect envelopes that have been sent, but not yet completed.

There are two possible selections:

- **on an individual document**: The option only applies to fields with the same Data Label for a single file.

- **on all documents in an envelope**: The option applies to fields with the same Data Label for all files.

- **Allow sender to download form data**: This allows senders to download the data in a document to a CSV file.

- **Enable custom email and language for each recipient**: If selected, senders have the option to specify a custom email message and select the display language for each recipient on an envelope. See this help guide for senders for more information on using this option. You can further customize individual users’ access to this feature using permission sets.

- **Enable signing order by default**: If selected, all new envelopes have the Set signing order option selected by default. For any envelope, the sender can clear the option and turn off the signing order, to use parallel routing. See this help guide for senders for more information on how to set and use a signing order.

- **DocuSign Feedback**: If selected, senders on the account will receive occasional surveys within the DocuSign application to collect their feedback on the sending experience.
Recipient Roles

These settings enable additional recipient actions that senders can select when adding recipients.

- **Enable bulk recipients.** When selected the account is eligible to use the Bulk Send feature. Note that the Allow sending to bulk list option must also be enabled in a user’s Permission Set to allow them to use the feature.

  See the Using Bulk Send topic for more information about using this feature.

- **Enable in-person (hosted) signing role.** When selected, senders are able to use the In Person Signer recipient action when they prepare documents for signature. If this recipient role is enabled, the additional option Present this information request to in person signers is available. If selected, this option requires the in person signing host to collect the requested information from the signer before the signer can begin signing. A free text field is provided to enter the information request to be shown to in person signers.
All in person signers are shown the same request and must provide a response. The response is saved and included on the Certificate of Completion in the In Person Signer Events section.

See the In Person Signing topic for more information about using this feature.

- **Enable needs to view role.** When selected, senders are able to use the Needs to view recipient action. With this action the recipient must receive the completed documents for the envelope to be completed, but the recipient does not need to sign, initial, date or add information to any of the documents.

- **Enable Specify recipients** When selected, senders are able to use the Specify recipients recipient action. This specifies a recipient who can fill in the name and email address of the role recipients who are at their same position or later in the signing order.

- **Enable Allow to edit recipient** When selected, senders are able to use the Allow to edit recipient action. This specifies a recipient who can make recipient and document changes (correct) to an in process envelope. This recipient must have a valid DocuSign account.

- **Enable Update recipients** When selected, senders are able to use the Update recipients recipient action. This specifies a recipient who can edit recipient details for any remaining recipients in the signing order.

### Templates

This setting enables template folder sharing for the account.

- **Enable shared template folders.** When selected, this option allows account users with shared templates privileges to create shared template folders and assign access permissions for the folders.
Envelope Correct

This setting controls whether senders can add documents when correcting an in process envelope.

- **Allow adding documents after one or more recipients have completed their action.**
  When selected, this option allows senders to correct an in progress envelope and add documents at any time during the transaction. If this option is not selected, senders can only add documents to an envelope when no recipients have completed their action.

Document Sources

Select the list of cloud storage providers that can be used when account members add documents to an envelope or template.

```
Document Sources
Allow senders to access documents from these sources

- [x] Box
- [x] Dropbox
- [x] Google Drive
- [x] OneDrive
```

Account members will see only the selected options in the **GET FROM CLOUD** menu when preparing their envelopes and templates:
Email Archive Configuration

This feature allows an account to set up email addresses that automatically receive copies of DocuSign email notifications for archiving purposes. When the option is enabled and at least one email address is active, a copy of each DocuSign system generated email sent to a sender or recipient for the account is also sent to the active email archive addresses.
Overview

The Email Archive Configuration view shows a list of active, pending, and closed email archive addresses associated with the account. This view allows you to add, close and view the history of the email archive addresses. An account can have up to five active or pending email archive addresses.

When an email address is added to the list, DocuSign sends a validation email to that email address. The validation email contains a link that, when clicked, activates the email address. If the link is not clicked, the email address remains in a pending status and email copies are not sent to the email address.

To ensure that DocuSign emails are not going to junk or spam folders for the active email addresses you can allow email from dse@docusign.net and the domains @docusign.net and @docusign.com. Optionally, you can allow emails for specific IP addresses. The IP addresses for the DocuSign Service can be found in the DocuSign Trust Center on the IP Ranges page.
To Add an Email Archive Addresses

**Reminder:** An account can only have a maximum of five active or pending email archive addresses at one time.

1. In DocuSign Admin, click **Email Archive Configuration**.
2. Click **ADD EMAIL**.
3. In the Email field, type the email address and click **ADD**.
   
   DocuSign sends a validation email to the email address with a link to activate the email address. If the link is not clicked, the email address remains in a pending status and email copies are not sent to the email address.

**Tip:** If the validation email is deleted or lost, you can close the pending email address and then reactivate it to send a new validation email.

The following events will trigger a DocuSign email notification which will also be sent to the archive address:

- In Session Recipient Envelope Signed
- Failed Envelope Vaulting
- Recipient Envelope Complete
- Recipient Envelope Complete In Person
- Envelope Activation Failed
- Envelope Activation (this includes reminder and expiration emails)
- Certified Delivery Notification
- Reassign Signer
- In Session Recipient Envelope Viewed
- Envelope Corrected
- Fax Received
- Envelope Voided
- Change Signer
- Voided Fax Received
- Recipient Add Access Code
- Fax Received Wet Sign
- Carbon Copy Notification
- Envelope Declined
- Purge Envelopes
- Document Markup Activation
- Agent Notification

To View History for an Email Archive Address

The history view shows information about the actions and status changes associated with the email address, such as when it was created, became active, and was closed. It does not show information about emails that were sent to the email address.
1. In DocuSign Admin, click **Email Archive Configuration**.

2. In the Email Archive Configuration list, find the email address you want to view.

3. In the Actions drop down for the email address, select **View History**.
   
The View History dialog box for the email address is shown. Click **OK** to exit the dialog box.

**To Close an Email Archive Address**

When an email archive address is closed, DocuSign stops sending copies of the DocuSign system generated emails to the email address.

1. In DocuSign Admin, click **Email Archive Configuration**.

2. In the Email Archive Configuration list, find the email address you want to close.

3. In the Actions drop down for the email address, select **Close**.
   
The email address is closed and the status and history for that address are updated. Closed email addresses can be reactivated.

**To Reactivate an Email Archive Address**

Closed email archive addresses can be reactivated.

**Reminder:** An account can only have a maximum of five active or pending email archive addresses at one time.

1. In DocuSign Admin, click **Email Archive Configuration**.

2. In the Email Archive Configuration list, find the email address you want to reactivate.
3. In the Actions drop down for the email address, select **Reactivate**.

   DocuSign sends a validation email to the email address and the status and history for that address are updated. The link in the validation email must be clicked to complete the reactivation. If the link is not clicked, the email address remains in a pending status and email copies are not sent to the email address.

**Custody Transfer Rules**

Administrators can add and manage rules to automatically transfer ownership of envelopes between users in the same DocuSign account from the Custody Transfer page.

**Note:** The Transfer Custody feature must be enabled for your account to be able to transfer ownership.

To transfer envelopes or templates manually, see: [Transfer Envelopes and Templates](#).

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- About Envelope Custody Transfer Rules
- How to Add Envelope Custody Transfer Rules
- How to Disable or Enable Custody Transfer Rules
- How to Delete Custody Transfer Rules
Envelope Custody Transfer Rules

Custody transfer rules are set up to transfer envelope ownership from an individual user, or a group of users, to another user automatically when envelopes are sent or completed. When ownership is transferred, the envelopes are removed from the original owner’s account and added to the new owner's Manage page. The original owner will only retain access to the envelopes if the transfer rule adds them as a carbon copy recipient.

The Custody Transfer page provides a summary view of all envelope custody transfer rules for your account. The summary view shows who, a user or group, envelopes are transferred from, who they are transferred to, the destination folder for the transfer, when the transfer happens, and if the transfer rule is enabled.

Custody transfer rules cannot be modified. After rules are added they can only be disabled, enabled, or removed.

Note: To learn more about DocuSign's envelope custody transfer best practices, see "Best Practices for Custody Transfer" in the DocuSign Knowledge Market. You will be prompted to log in using your DocuSign email and password to access this content.
Add Envelope Custody Transfer Rules

Custody transfer rules can be set up to transfer envelopes from an individual user or group of users when the envelope status changes to Sent or Completed. Envelopes can only be transferred to users in the same account.

**Note:** You must be a DocuSign administrator with Account Wide Rights to add custody transfer rules.

**To add a custody transfer rule**

1. In DocuSign Admin, click **Custody Transfer**.
2. Click **Add Rule**. The Add Custody Transfer Rule page is shown.
3. In the From section:
   a. Select if the transfer is from a single user (**From User**) or from all the users in a group (**From Group**).
   b. Select the user or group that documents are transferred from. Multiple users or groups can be selected, but users and groups cannot be selected in the same
rule.

4. In the To section:
   a. Select the user the envelopes will be transferred to.
   b. Select the destination folder for the envelopes in the Folders list.
5. In the Transfer Time section:
   a. (Optional) You can clear the **Add Original Owner as Carbon Copy** setting to remove the original sender entirely from the envelope transaction. This option is selected by default and adds the original sender as a “Receives a copy” recipient for the envelopes they send. If you clear the setting, the original sender cannot access the envelopes or view the documents and will not receive notifications.

   b. Specify when the envelopes will be transferred: **On Send** or **On Complete**.

   c. (Optional) For On Send transfer rules, you can select the **Transfer prior to first send** option. When selected, ownership is transferred before the envelopes are sent and the new owner becomes the sender in all emails to recipients. The original creator will be added as a “Receives a copy” recipient only, provided the **Add Original Owner as Carbon Copy** option is selected.
**Transfer Time:**

- [ ] On Send
- [ ] On Complete
- [x] Add Original Owner as Carbon Copy
- [ ] Transfer prior to first send

**Important:** For On Send transfer rules if the **Transfer prior to first send** option is not selected and all recipients are in the same routing order, the recipients receive the email invitation from the original sender. Subsequent email messages are from the user to which the envelope is transferred.

If the **Transfer prior to first send** option is not selected and there are recipients in multiple routing orders, the recipients in the first routing order receive the email invitation from the original sender, while subsequent recipients in the routing order receive the email invitation from the user to which the documents are transferred.

6. Click **SAVE**. The rule is saved, enabled, and added to the Custody Transfer rule list on the Custody transfer page.

**Note:** If the transfer From or To user is closed or the destination Folder is deleted, the transfer rule is automatically disabled and cannot be enabled until the error condition is corrected.
Disable or Enable Custody Transfer Rules

Custody transfer rules can be disabled or enabled from the Custody Transfer rule list. To disable or enable a custody transfer rule:

1. In DocuSign Admin click **Custody Transfer**.
2. Locate the rule you want to disable or enable.
3. Click the **ACTIONS** menu and select **Disable** to disable the rule. If a rule is disabled, select **Enable** to enable the rule.
   
   The check mark in the **Enabled** column changes to show if the rule is disabled (no check mark) or enabled (check mark).

Delete Custody Transfer Rules

1. In DocuSign Admin click **Custody Transfer**.
2. Locate the rule you want to delete.
3. Click the **ACTIONS** menu and select **Delete**.
4. Click **Delete** to confirm the change.

Purging Envelopes

Administrators can search for and purge all completed, declined, or voided envelopes on the account that have been sent from or signed by a specific email address. Envelopes purged in this way are immediately moved into the purge queue. For more information on the purge queue, see **Document Retention**.
Note: To be purged, envelopes must have a status of Completed, Declined, or Voided. In-process and Draft envelopes cannot be purged.

Along with deleting the documents, you can also choose to delete the envelope's metadata and redact all personally identifiable information from the envelope, certificate of completion, and history. The metadata includes any fields that were added to the documents and any API attachments that were added to the envelope from the system.

**Locate and purge envelopes for a signer or sender**

1. In DocuSign Admin, click **Document Retention**.
2. Click the **TARGETED PURGE** tab.
3. Click **FILTERS** to search for the sender or signer.
4. Select the appropriate filters, then click APPLY.

![Filters](image)

**Name / Email**: Filter to view envelopes belonging to a specific sender on the account. Accounts with fewer than 10 users will see a sender list instead of a search box.

**Recipient or Envelope Subject**: Filter based on a recipient's name, email address, or the subject of an envelope.

**Envelope Status**: Filter based on the status of the envelope. Only completed, declined, or voided envelopes are available to purge.

**Date Range**: The default date range is one day. Expand the date range to view more envelopes.
5. Select the envelopes to be purged, then click PURGE.

6. (Optional) If necessary, select **Remove fields and metadata** and **Redact personally identifiable information**.
When **Remove fields and metadata** is selected, DocuSign deletes the envelope documents as well as any fields that were added to the documents and any API attachments that were added to the envelope from the system.

When **Redact personally identifiable information** is selected, DocuSign redacts all personally identifiable information from the envelope, certificate of completion, and history. Fields that store personal data such as name, physical address, email, and IP address, are replaced with the text “Redacted”. Time stamps for when actions took place are left intact, but you won’t be able to identify the person who took that action.

**Note:** The process of redacting personal data cannot be undone. Each individual’s personal information on an envelope will be redacted from the envelope, rendering the audit log and certificate of completion untraceable.

If these options are not selected, DocuSign deletes only the envelope documents from the system.
7. Click **PURGE** to move the selected envelopes into the purge queue. The Purge Status of the envelopes changes to Purge Soon. Users can refer to **Purge Envelopes** for information on how purging works.

For more information, review these resources:

- [Document Retention and Purging Whitepaper](#)
- [What you should know before using these features](#)
- [Document Retention - DocuSign Admin Guide](#)
- [Purge Envelopes - DocuSign User Guide](#)
Transfer Envelopes and Templates

As an administrator, you can manually transfer envelopes or templates between users. When you transfer ownership of envelopes or templates, the transferred items are removed from the original owner’s account and moved to the new owner’s account.

**Note:** The Transfer Custody feature must be enabled for your account to be able to transfer ownership of envelopes and templates.

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- How to transfer envelopes or templates between users (DocuSign Admin)
- How to transfer envelopes in bulk using a CSV file (DocuSign Admin)
- Custody transfer rules for automatic transfer
- How to transfer envelopes from your account
- How to transfer templates from your account

Overview

Transferring envelopes and templates is useful when you close a user, or a user's role in your company changes and you want to assign responsibility for their DocuSign items to another account member.

You may have someone who creates all of your account templates. Once a template has been created, you may want to transfer ownership to someone else on your account for ongoing maintenance. Anyone with whom a template is shared can edit or delete it. Administrators can edit or delete all account templates, regardless of ownership.
Administrators can transfer envelopes and templates between users from either the Users page or the Custody Transfer page. They can also transfer items directly from within their DocuSign account, using the Shared Envelopes interface to transfer envelopes, and the Templates page to transfer or delete templates.

**Note:** For more information on deleting templates from within your DocuSign account, see DocuSign User Guide - Delete Templates.

Using DocuSign Admin to transfer envelopes or templates between users

You can manually transfer envelope or templates from one user to another from either the DocuSign Admin Users page or the Custody Transfer page.

1. In DocuSign Admin, click **Users**.
2. Locate the user whose items you want to transfer.
3. Click **Actions** and select either **Transfer Envelopes** or **Transfer Templates**.
4. Select the items you want to transfer by selecting the check box on the corresponding rows. Use the FILTERS settings to change the list of items shown.

5. Click TRANSFER NOW.

6. Select the user to transfer the items to and click TRANSFER.
   (Optional) Check Add Original Owner as Carbon Copy to add the original sender as a “Receives a copy” recipient for the envelopes. If you do not select this option, the original sender loses all access to the transferred items.

7. Click CONFIRM to confirm the transfer.
   The job is placed in a queue for processing and listed in the Bulk Actions log. This log shows a list of bulk actions for your account and the progress of the actions.
8. When the transfer is complete, the transferred items are available in the new owner's account. You can click **Details** to review the transfer information and download a copy of the CSV file with the transfer information.

To transfer envelopes or templates from the Custody Transfer page

1. In DocuSign Admin, click **Custody Transfer**.
2. Click **TRANSFER** and select either **Envelopes** or **Templates**.
All corresponding items in your account for the last three months are listed. Use the **FILTERS** settings to change the list of items shown by specifying a different date range or other criteria, such as the template owner or envelope sender.

3. Select the items you want to transfer by selecting the check box on the envelope row.

4. Click **TRANSFER NOW**.

5. Select the user the items are being transferred to and click **TRANSFER**.

6. Click **CONFIRM** to confirm the transfer.

   The job is placed in a queue for processing and listed in the Bulk Actions log. This log shows a list of bulk actions for your account and the progress of the actions. Once the job is completed, the transferred items are moved to the new owner's account.
Transfer envelopes or templates in bulk using a CSV file

You can transfer envelopes or templates in bulk by using a comma-separated value (CSV) file containing the IDs to be transferred. The CSV file must contain only one column with each ID (envelope or template, depending on which you are transferring) entered on a different row, and no other data.

A common workflow for bulk transfer is:

- Use the Custody Transfer page to filter for the envelopes you want to transfer.
- Download the list of envelopes using the download CSV option.
- Review the download file and remove any unwanted data and remove all columns except for Envelope ID.
- Use the transfer using CSV option to transfer the envelopes in bulk to the new owner.

To download a CSV file of envelope or template information

1. In DocuSign Admin, click Custody Transfer.

2. Click TRANSFER and select either Envelopes or Templates.

   All corresponding items in your account from the last three months are listed. Use the FILTERS settings to change the list of items shown by specifying a different date range or other criteria, such as the envelope sender or template name.

3. Click DOWNLOAD CSV.
For envelopes, in the Download CSV dialog, select if the recipient information and envelope custom fields information should be included in the CSV file. These details are not used in the transfer process, but you may find them helpful for other purposes. For instance, you can use the envelope custom fields to help sort envelopes and identify the ones you want to transfer.

4. Click **DOWNLOAD** to download the CSV file. Example:
To transfer envelopes or templates in bulk using a CSV file

1. Open the **downloaded CSV file** and remove all data except the EnvelopeID or Template ID column with each ID for the items you want to transfer.

<table>
<thead>
<tr>
<th>Event Date (UTC)</th>
<th>Sender</th>
<th>EnvelopeId</th>
<th>Envelope Status</th>
<th>Subject</th>
<th>Void/Decline Reason</th>
</tr>
</thead>
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<td>Melanie E. Deschutes</td>
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<td>Sent</td>
<td>Please DocuSign: download users pdf</td>
<td></td>
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<td>Clone of Stevenson's document</td>
<td></td>
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<td>Sent</td>
<td>Please DocuSign: Residential Seller’s Property</td>
<td></td>
</tr>
<tr>
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<td>Sent</td>
<td>Please DocuSign: cleaning review agreement doc</td>
<td></td>
</tr>
<tr>
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<td>Please DocuSign: docu-sign-envelope-florida.pdf</td>
<td></td>
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<td>Sent</td>
<td>Please DocuSign: docu-sign-envelope-florida.pdf</td>
<td></td>
</tr>
<tr>
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<td>Sent</td>
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<td>Sent</td>
<td>Please DocuSign: docu-sign-envelope-florida.pdf</td>
<td></td>
</tr>
</tbody>
</table>

2. In DocuSign Admin click, **Custody Transfer**.
3. Click **TRANSFER** and select either **Envelopes** or **Templates**.

4. Click **TRANSFER USING CSV**.

5. In the Transfer Using CSV dialog:
   a. Click **UPLOAD .CSV FILE** and select the prepared CSV file.
   b. Select the user the items are being transferred to and click **TRANSFER**.
   c. (Optional - envelopes only) Check **Add Original Owner as Carbon Copy** to add the original sender as a “Receives a copy” recipient for the envelopes. If you do not select this option, the original sender loses all access to the transferred items.
6. Click **CONFIRM** to confirm the transfer.

The transfer job is placed in a queue for processing and listed in the Bulk Actions log. This log shows a list of bulk actions for your account and the progress of the actions.
When the transfer is complete, you can click **Details** to review the transfer information and download a copy of the CSV file with the transfer information. Once the job is completed, the transferred items are moved to the new owner’s account.

**Custody Transfer Rules for Envelopes**

In addition to manual transfer of envelopes, you can establish custody transfer rules to automatically transfer envelope ownership from an individual user, or a group of users, to another user when envelopes are sent or completed. When ownership is transferred, the envelopes are removed from the original owner’s My Documents list and added to the list for the new owner. The original owner will only have access to the documents if the transfer rule adds them as a carbon copy recipient.

For more information, see **Custody Transfer Rules**.
Transfer envelopes from your account

As an administrator, you can transfer your own sent envelopes from within your DocuSign account view, and you can transfer envelopes belonging to other account members using the shared envelopes option. To transfer another user’s envelopes, their envelopes must first be shared with you. See the Envelope Sharing Between Account Users guide for details on how to share envelopes.

To transfer your envelopes

You can transfer your own sent envelopes from within your DocuSign account view.

1. Log in to your account and select the Manage page.
2. Locate any of your draft or sent envelopes you want to transfer to another account member.
3. To transfer a single envelope,
   a. Click the action menu for the envelope and select Transfer Ownership.
b. Select the new owner for the envelope.

![Transfer Ownership](image)

- (Optional). To add yourself (as the current owner of the envelope) as a Receives a Copy recipient, mark the option "Add Original Owner as Carbon Copy". The envelope will appear in your Inbox after the transfer is complete, and you are added to the envelope routing order as a completed copy received recipient.

- Click **TRANSFER**.
  
  The transfer is initiated. The envelope may remain in your account for a brief time until the transfer is complete. Refresh your browser for an updated view of the transferred item.

4. To transfer multiple envelopes,
   a. Mark the check box for each envelope you want to transfer.
   
   b. Click **MORE** and select **Transfer Ownership**.
c. Select the new owner for the envelopes and click TRANSFER.

The transfer is initiated. The envelopes may remain in your account for a brief time until the transfer is complete. Refresh your browser for an updated view of the transferred items.

To transfer a shared envelope

You can transfer envelopes belonging to other account members if their envelopes are shared with you.

1. From your DocuSign account view, select the Manage page.

2. Click Shared Envelopes and select the user whose envelopes you want to transfer.
3. Locate the envelopes you want to transfer by filtering, searching, or scanning the list.

4. To transfer a single envelope,
   a. Click the action menu for the envelope and select **Transfer Ownership**.
b. Select the new owner for the envelope.

c. (Optional). To add the current owner of the envelope as a Receives a Copy recipient, mark the option "Add Original Owner as Carbon Copy". The envelope will appear in their Inbox after the transfer is complete, and they are added to the envelope routing order as a completed copy received recipient.

d. Click **TRANSFER**.

The transfer is initiated. The envelope may remain in the original owner's account for a brief time until the transfer is complete. Refresh your browser for an updated view of the transferred item.

5. To transfer multiple envelopes,
   a. Mark the check box for each envelope you want to transfer.

   b. Click **MORE** and select **Transfer Ownership**.
c. Select the new owner for the envelopes and click **TRANSFER**.

The transfer is initiated. The envelopes may remain in the original owner's account for a brief time until the transfer is complete. Refresh your browser for an updated view of the transferred items.

**How to transfer templates from your account view**

As an administrator, you have access to all templates created by the users on your account. You can transfer ownership of templates from the Templates page of your DocuSign account. Only the template owner can delete a template, so transferring a template to your own ownership is useful if you need to delete it. You can also transfer a template ownership to any other account member.
To transfer a template

1. From your DocuSign account view, select the Templates page.

2. Click All Templates and locate the templates you want to transfer by filtering, searching, or scanning the list.

3. To transfer a single template,
   a. Click the action menu for the template and select Transfer Ownership.
   b. Select the new owner for the template and click TRANSFER.

   The transfer is initiated. The template may remain in the original owner’s account for a brief time until the transfer is complete. Refresh your browser for an updated view of the transferred item.
4. To transfer multiple templates,
   a. Mark the check box for each template you want to transfer.
   b. Click MORE and select Transfer Ownership.

   ![Screenshot of DocuSign interface]

   c. Select the new owner for the templates and click TRANSFER.

   The transfer is initiated. The templates may remain in the original owner's account for a brief time until the transfer is complete. Refresh your browser for an updated view of the transferred items.
Legal Disclosure

As a DocuSign administrator, the Legal Disclosure view lets you enable and manage the Electronic Record and Signature Consent Disclosure (ERSD) options for your account.

CONTENTS

Overview
Enable the ERSD for your account
Use the Signing Brand Company Name
Configure and Edit the Default ERSD
Create and Edit a Custom ERSD

Overview

If enabled for your account, the ERSD disclosure is shown to each new recipient who is going to sign or add other information, or is required to view the documents you send to them. The recipient must read and agree to the terms of the disclosure before they can access and take action on the documents you send. The ERSD does not apply to copy-only recipients but does apply to recipients who must sign or view your documents.

View a sample Legal Disclosure.

All changes to the legal disclosure are captured in the account audit log.
DocuSign provides a default ERSD disclosure for the convenience of U.S.-based customers only. This default disclosure is only valid for transactions between U.S.-based parties. You can customize values in the default disclosure or create your own free-form disclosure using your own text and HTML formatting.

If you have questions about using a disclosure, please contact your legal counsel.
To enable the Electronic Record and Signature Disclosure for your account

1. In DocuSign Admin, click **Legal Disclosure**.

2. Select **Yes, I elect to use an Electronic Record and Signature Consent Disclosure with my new recipients**.

3. Specify how often recipients who must sign or view your documents must accept the ERSD. Note: this setting applies only to those recipients who hold DocuSign accounts. Any recipients who are not account holders must accept the ERSD for every envelope they receive from your account, regardless of this frequency setting. Setting options:

   - **Once for this account.** A recipient has to accept the disclosure only for the first envelope they sign from your account. Future envelopes sent by anyone on the account will not offer the disclosure.
• **First time viewing each envelope sent from this account.** A recipient has to accept the disclosure only the first time they open a specific envelope. They must accept the ERSD once for each envelope they receive from any sender on your account.

• **First time viewing each time the recipient appears in the signing order.** A recipient must accept the ERSD the first time viewing each envelope they receive from any sender on your account. If the recipient is listed multiple times in the routing order for an envelope, they must accept the ERSD again for each subsequent time they are required to act on the envelope.

4. Optionally, select if you want to **Allow recipients to withdraw their consent**.

   If this option is selected, your recipients have the option to withdraw their consent when they decline to sign documents. These recipients will be required to agree to the terms in the disclosure if they sign documents sent to them from your account in the future.

5. Click **SAVE**.

   The ERSD is enabled for your account and recipients will need to agree to it for all envelopes sent from the account, as you have specified in the setting details.

**Use the Signing Brand Company Name**

If your account uses multiple signing brands (see Configure Brands), you can specify a company name in the brand that can be used in the ERSD, as in the following example.
If you set the controlling option on the Legal Disclosure settings, any time the field for CompanyName is used in the ERSD, it will be replaced by the company name specified in the brand. This substitution only works if you use the default legal disclosure or if you apply the CompanyName the merge fields in a custom ERSD.

To use the signing brand company name

1. In DocuSign Admin, click Legal Disclosure.
2. With your ERSD enabled, select the option Use brand company name.
3. Click **SAVE**.

Your settings are saved. Whenever an envelope is sent from the account that uses a signing brand with a specified Company Name, the value is used in email notifications and in the Signing experience. If the signing brand does not specify a Company Name, the Account Name is used instead.

Configure and Edit the Default Electronic Record and Signature Disclosure

**IMPORTANT**: If you choose to create a custom disclosure, you will not be able to change back to the default disclosure once you save the custom disclosure. Additionally,
DocuSign will not automatically translate your custom disclosure and you must create a disclosure for each language used by your signers.

**Note:** If you have elected to use a disclosure, each time you change the disclosure content all unsigned recipients of outstanding documents will be required to accept a new version. You can edit the information in the disclosure even if acceptance of the disclosure is not required.

**To configure or edit the default disclosure**

1. In DocuSign Admin, click **Legal Disclosure**.
2. Edit your Account Name as needed. This is the company information shown to recipients in the disclosure.
   
   Optionally, you can select to have your account name, as shown in the **Account Profile**, automatically updated to be the same as the Account Name you just entered.

3. Update the text fields (input boxes) in the disclosure as needed. Review the question above each field and enter or select the appropriate information for the field.

The maximum number of characters for the fields are:

- Email address your customer should use if they want to request paper copies of their documents? = 100 characters.
- If your customer requires paper copies how will you collect those fees? = 255 characters.
- Customer consent withdrawal Email contact = 100 characters.
- Customer consent withdrawal Phone contact = 20 characters.
- Customer consent withdrawal Mail contact Address line 1 = 100 characters.
- Customer consent withdrawal Mail contact Address line 2 = 100 characters.
- Customer consent withdrawal Mail contact City = 50 characters.

- Customer consent withdrawal Mail contact Postal Code = 20 characters.

- If your customer decides to withdraw their consent, what other information will you need? = 255 characters.

- Are there any special consequences of your customer withdrawing their consent to receive electronic records from you? = 255 characters.

- If your customer needs to change their email address, where should they send the change request? = 100 characters.

- Enter any other information you require from your customer if they change their email address. = 255 characters.

4. Click SAVE.

Create and Edit a Custom Electronic Record and Signature Disclosure

The Custom Electronic Record and Signature Disclosure allows you to create a free-form disclosure using your own text and HTML formatting.

1. To create a custom disclosure in DocuSign Admin, click Legal Disclosure and then click Create Custom in the upper right corner. You are asked to confirm that you want to create a custom disclosure. Click OK to continue.

If you have already selected to use a custom disclosure, you are taken to the Configure a Disclosure page when you click Legal Disclosure.

2. Select the Signer Language for the disclosure.
**Note:** When you save the changes, only the disclosure for currently selected Signer Language is saved. DocuSign will not automatically translate your custom disclosure and you must create a disclosure for each language used by your signers.

3. Edit your custom disclosure text and HTML formatting in the **Enter HTML** field as needed. HTML is required to maintain the display formatting.

**IMPORTANT:** Javascript, XML, and CSS style tags cannot be used to edit this field.

If this is the first time you are editing the disclosure, the Enter HTML field shows the default English (US) DocuSign disclosure. You can use this as a guideline for your custom disclosure or click **CLEAR** to remove the disclosure text.

4. To review the changes you have made, click **PREVIEW**. Your current disclosure for the selected language is shown for review. This is the same view your recipients see.
   
   Click **DONE** to close the preview.

5. Click **SAVE** to save the disclosure changes.

**Reminders and Expirations - Account Defaults**

These settings are the default behavior for all envelopes sent from your account. As an administrator, you can choose to enforce these settings for all envelopes, or allow users to modify the values for each envelope they send.
**Note:** Users can always use the **resend envelope** feature to send a manual reminder to recipients whose turn it is to sign.

You must be an administrator with All Administration Capabilities in order to manage these settings. See [Permission Sets](#) for details. These settings are accessed through the [DocuSign Admin view](#).

**CONTENTS**

- How to set account defaults
- Reminders
- Expiration
- Related topics
To set account reminders and expiration defaults

1. In DocuSign Admin, click **Reminders and Expirations**.

2. To allow users to change the account defaults on the envelopes they send, select
Allow senders to override account defaults.

3. To enable and set automatic reminders:
   a. Select the **Send automatic reminders** option.
   b. Enter values for how many days to wait until sending the first reminder and how many days to wait between subsequent reminders. (1-999, integers only)

4. For envelope expiration, enter how many days after sending an envelope expires and how many days before expiration to warn signers. (1-999, integers only)

Reminders

(Default: Off; Values: 1-999 days)

You can turn on reminders to send follow up emails to signers automatically. When you enable reminders, you specify when and how often to send notifications. The number of days before sending the first reminder should be less than the number of days before the request expires.

Expiration

(Default: 120 days; Values: 1-999 days; no warning)

By default, requests to sign or view expire 120 days after sending the envelope. You can modify this value as desired. You can also add the option to send signers an expiration warning.

**Best practice:** Enter a low value for the option **Days to warn signers before expiration**, such as 3 days. Warning signers of a expiring envelope improves the likelihood of getting envelopes to complete, rather than expiring.
When an envelope expires, the status changes to Voided and it can no longer be viewed or signed by recipients.

When an in process envelope reaches six days to expiration, a warning icon appears and the status shows "Expiring". Hover over the status to show the expiration date.

Related topics

- **Resend envelopes**. Users can use the resend envelope feature to send a manual reminder to recipients whose turn it is to sign.

- **Set Advanced Options**. Information on how senders can modify reminder and expiration settings on each envelope they send.
Document Custom Fields

Users and administrators can create custom versions of standard fields and save them for reuse on future documents. Define any combination of field properties, such as font type or size, or a validation setting. Document custom fields help speed up document preparation by allowing you to save fields customized for repeated use.

The custom fields created by users, appear in the Fields palette for adding recipient fields to documents. Custom fields are also listed in their user Preferences.

In the Administration view, administrators can view and manage the custom fields saved by all account users, as well as add new custom fields for themselves or to share with all users.

**Note:** Changes to Document Custom Fields are captured in your account audit log.

**CONTENTS**
- Create a document custom field
- Edit a custom field
- Delete a custom field

**Note:** Some advanced features and options are supported only in certain DocuSign plans. Your account plan might not support some options discussed in this help topic. For more information about which options are available for your account, check your account plan or contact your Account Manager.
To create a document custom field

1. In DocuSign Admin, click **Document Custom Fields**.

![Image of DocuSign Admin with Document Custom Fields section highlighted]

2. Click **ADD FIELD**.

3. Enter the Name for the custom field.

   **TIP:** Use a descriptive name to help users identify it in the Fields palette.

If your account is integrated with Salesforce and you have a Salesforce Connect configuration set up, you can select to relate this custom field to a Salesforce field. See the DocuSign for Salesforce Administrator Guide for more information about relating a custom field to a Salesforce object.

4. Select the custom field **Type**.
Set the properties that you wish to use as a custom field. The properties available depend on the field Type selected. Custom field properties are generally the same field properties for the field type selected; information about additional custom field properties is provided below:

- If the field Type selected is Drop Down, add the **Options** for the list. These are the options shown to a recipient in the list. The options must be separated by semicolons (;) and you are limited to 2000 characters in the list, including the semicolon separators.

- Most fields allow you to set an **Initial Value** for the field. The sender and recipient can change this information unless the **Read Only** option is selected.

- To share the field with all account users, select **Shared**.

- If the field Type is Text, you can select a Validation setting to constrain user input to an assigned format.

- If the field Type is Note, the **Include in email** option is available. Select this option to have the note appear in the email sent to the recipient.

- The AutoPlace Text field allows you to add the custom field to all instances of a word or characters in a document. Type the string of characters in the AutoPlace field. When the custom field is added to a document the custom field will be attached to all occurrences of the characters in the document.

  See [Add Fields Automatically with AutoPlace](#) for more information on using AutoPlace.

5. Click **SAVE** to save your custom field.

Your new custom field appears in the list. If you shared the field, all account users also see it in the Fields palette when they prepare a document and add recipient fields.
To edit a custom field

1. In DocuSign Admin, click **Document Custom Fields**.

2. The page has a list of document custom fields for the account. Find the custom field you want to edit.
   
   Click on the custom field name or click **ACTIONS** and select **Edit**.

3. Edit the custom field as needed.

4. Click **SAVE** to save the changes.

To delete a custom field

1. In DocuSign Admin, click **Document Custom Fields**.

2. The page has a list of document custom fields for the account. Find the custom field you want to delete.
   
   Click **ACTIONS** and select **Delete** to delete the custom field.

Envelope Custom Fields

Envelope custom fields are used to classify, record, and track information about envelopes sent for signature. The sender enters field values when preparing an envelope. Envelope custom fields and their values are not shown to recipients.

The values for an envelope custom field can be free-text entries, or selected from a list of possible values. Envelope custom fields can be required or optional. Values are entered or selected when envelopes are created. See the Add Envelope Custom Fields topic for more information about how to add envelope custom fields to an envelope.
Note: Envelope custom fields apply only to envelopes sent for signature. They are not applicable for documents signed using the Sign a Document feature.

As a DocuSign administrator, the Envelope Custom Fields view lets you manage the envelope custom fields for your account.

Note: Changes to Envelope Custom Fields are captured in your account audit log.

CONTENTS
Add a new envelope custom field
Edit an envelope custom field
Delete an envelope custom field
Reports and envelope custom fields

To add an envelope custom field

1. In DocuSign Admin, click Envelope Custom Fields.
2. Click ADD FIELD.
3. Type a Name for the field.

4. Select if the field is shown and required:
   - **Show field to envelope creators.** When selected, the field is shown in the Envelope Custom Fields section when an envelope is created.
   - **Make field required for envelopes.** When selected, senders are required to enter or select information into the field before the envelope can be sent.

5. Select the Field Type:
   - **Text:** Provides a text fields where senders can enter information. The text can be a maximum of 100 characters.
   - **List:** Provides a drop down where the senders can select a value. When this is
selected the List of Values field is active. Type the list values separated by a semi-colon (Example: for the list options North, South, East, and West, enter "North;South;East;West").

The List of Values field can be a maximum of 2048 characters, but each value can only be a maximum of 100 characters.

6. Click **Save** to save the document label.

To edit an envelope custom field

1. In DocuSign Admin, click **Envelope Custom Fields**.

2. Find the field you want to edit and click the **ACTIONS** drop down menu and select **Edit**.

3. In the Edit dialog, change the field information as needed and then click **Save**.

4. In the Apply changes to template dialog, select whether or not you want the change to be applied to any templates that use the field.
To delete an envelope custom field

1. In DocuSign Admin, click **Envelope Custom Fields**.
2. Find the field you want to delete and click the **ACTIONS** drop down menu and select **Delete**.
3. The field is removed from the account.

Reports and envelope custom fields

As an administrator, you can use Reports to create a custom envelope report that includes envelope custom field information. When you add the envelope custom field column to a report, all fields defined on your account will be listed in the envelope report, including those that are not shown to envelope creators.

For information on how to create a custom report, see **View and Modify Reports**.
Comments Settings

Comments can help transactions to complete by enabling recipients to ask and answer questions about specific sections of documents in envelopes.

CONTENTS

About comments
Enabling comments
Disabling comments
Allowing users to disable comments on an envelope
Including comment text in email notifications

About comments

You must be an administrator with All Administration Capabilities in order to manage Comments settings. If you are the administrator for an account you can control the following concerning comments:

- whether senders and recipients can comment and reply to comments on documents in envelopes sent from the account

- whether senders can disable comments on an envelope through the envelope's Advanced Options

- whether comment text is included in notifications sent to recipients when a comment or reply is posted to an envelope

Comments settings apply to all users of an account. You cannot change comments settings for some users on an account and not for others.
By default comments are disabled for an account. To use the comments feature, you must enable comments on the account.

### Enabling comments

If you are one of the admins for a DocuSign account, you can enable comments and replies on documents in envelopes sent from the account. When you enable comments, senders and recipients can comment and reply to comments on envelopes sent from the account.

### To enable comments

1. Go to [www.docusign.com](http://www.docusign.com) and log in to your DocuSign account.
2. In your DocuSign account, click the account menu drop down in the upper right corner and select **Go to Admin**, which opens DocuSign Admin.
3. In DocuSign Admin, on the left under Signing and Sending, click **Comments**.

4. On the right, under Comments Settings, check the check box **Enable comments in envelopes sent from this account**, and then click **SAVE**.
Disabling comments

If you are an administrator for a DocuSign account, you can disable all comments and replies for envelopes sent from the account. When you disable comments, senders and recipients cannot comment nor reply to comments on any envelopes sent from the account—even those that were sent before you disabled comments. For those envelopes that were sent before you disabled comments, senders and recipient will still be able to view comments and replies they are authorized to see.

To disable comments

1. Go to www.docusign.com and log in to your DocuSign account.
2. After logging into your DocuSign account, click your avatar in the upper right corner
and from the menu choose **Go to Admin**, which opens DocuSign Admin.
3. In DocuSign Admin, on the left under Signing and Sending, choose **Comments**.

4. On the right, under Comments Settings, uncheck the checkbox **Enable comments in envelopes sent from this account**, and then click **SAVE**.
Allowing users to disable comments on an envelope

If you have comments enabled for an account, and you have admin privileges, you can allow individual users of the account to enable and disable comments on envelopes they send. The senders enable and disable comments for an envelope through Advanced Options of the envelope.

To allow users to disable and enable comments on envelopes

1. Go to www.docusign.com and log in to your DocuSign account.

2. In your DocuSign account, click the account menu drop down in the upper right corner and select Go to Admin, which opens DocuSign Admin.
3. In DocuSign Admin, on the left under Signing and Sending, click **Comments**.

![DocuSign Admin screenshot with Comments highlighted]

On the right under Comments Settings:

- To allow users to enable and disable comments on envelopes check **Allow senders to override**, then click **SAVE**.

- To disallow users to enable and disable comments on envelopes uncheck **Allow senders to override**, then click **SAVE**.
Including comment text in email notifications

If you are the admin for an account, you can control whether comment and reply text is included in email notifications. Individual users control whether or not they receive notifications when a comment or reply is posted, but as an account admin, you control whether or not the comment or reply text will be included in those notifications. Some organizations may not want any comments or reply text to exist outside of an envelope, in which case you would want to disable the inclusion of comment and reply text.

Inclusion of comment and reply text in notifications is enable by default when you enable comments for an account.

To control whether comment and reply text is included in notifications:

1. Go to www.docusign.com and log in to your DocuSign account.
2. In your DocuSign account, click the account menu drop down in the upper right
corner and select **Go to Admin**, which opens DocuSign Admin.
3. In DocuSign Admin, on the left under Signing and Sending, click **Comments**.

On the right under Comments Settings:

- To enable the inclusion of comment and reply text in email notifications, check **Include comment text in email notifications when a comment is posted**, then click **SAVE**.

- To disable the inclusion of comment and reply text in email notifications, uncheck
Include comment text in email notifications when a comment is posted, then click SAVE.

Related Topics

User preferences: See Changing the Frequency of Comment Notifications.

Envelope settings: See Disabling Comments on an Envelope.
Integrations

In Integrations section of the DocuSign Admin web application, you can manage the Connect configurations and API integration keys for your account.

The following topics are available in this section:

- Connect
- API and Keys

Connect

DocuSign Connect is a push service that sends real-time data updates to external applications.

An account can have a maximum of 300 Connect configurations. DocuSign Connect currently supports the following configurations:

- Custom Connect - DocuSign Connect pushes data updates to a custom listener application.
- **Connect for Box** - DocuSign Connect pushes completed documents to a Box folder.

- **Connect for OneDrive** - DocuSign Connect pushes completed documents to a OneDrive folder.

- **Connect for Salesforce** - DocuSign Connect pushes data updates to the DocuSign for Salesforce application. See the DocuSign for Salesforce Administration Guide for more information on setting up Connect for Salesforce.

- **Connect for eOriginal** - DocuSign Connect pushes an event to eOriginal informing the eOriginal system that a transaction that needs to be vaulted is complete.

An account can have multiple active Custom, Connect for Box, Connect for OneDrive configurations. An account can only have one active Connect for Salesforce and Connect for eOriginal configuration.

### Enable Connect Configurations

In order to use DocuSign Connect, Connect must be enabled in your DocuSign account. It is not enabled by default.

1. In DocuSign Admin, click **Connect**.

2. On the Connect Configurations page, click **ENABLE CONNECT**.
   
   Connect configurations can now be set up for the account.

### Disable All Connect Configurations

In order to use DocuSign Connect, Connect must be enabled in your DocuSign account. It is not enabled by default.

1. In DocuSign Admin, click **Connect**.

2. On the Connect Configurations page, click **DISABLE CONNECT**.
All Connect configurations for the account are now inactive.

Checking Connect Logs

When the **Enable Log** option is selected for any Connect configuration logging for this connection. This option is typically used to facilitate troubleshooting any problems. DocuSign maintains the 100 most recent active log entries for your account in the logs page. The active log entries can be viewed by clicking **LOGS** on the Connect configuration page.

Checking Connect Failures

If the **Require Acknowledgment** option is selected for a Connect Configuration and a publication message fails to be acknowledged within 100 seconds, the message goes back into the queue and the system will retry delivery after a successful acknowledgment is received. If the delivery fails a second time, the message is not returned to the queue for sending until Connect receives a successful acknowledgment and it has been at least 24 hours since the previous retry. There is a maximum of ten retries.

You can always view the list of Connect publish failures by clicking **FAILURES** on the Connect configuration page. You can manually republish these items from the Failures page by clicking **REPUBLISH** on the same line as the failure.

If **Require Acknowledgment** is not selected, the delivery of the status is not guaranteed and the DocuSign System normally does not retry delivery in cases where the web server is unavailable.
Publish Options

The Publish Envelopes view provides a way to publish envelope information from your account to Custom Connect and Connect for Salesforce configurations, upload envelope information as a comma-separated value (CSV) file to publish to Custom Connect and Connect for Salesforce configurations, and download envelope information from your account to a CSV file.

Publishing envelope information to Custom Connect and Connect for Salesforce configurations causes the envelope information to be sent to your Connect listener or DocuSign for Salesforce configuration. This is typically done if there was an issue where a listener did not receive Connect messages.

The download option is used to download a CSV file with information for the selected envelopes.

To Publish Envelope Information from a List

1. In DocuSign Admin, click **Connect**.
2. Click **PUBLISH** to go to the Envelope Publish view.
3. Select the envelopes you want to publish to Connect by selecting the check box on the envelope row.
   
   You can use the **FILTERS** settings to change the list of envelopes shown by changing the date range, senders, recipients, and envelope status.
4. Click **PUBLISH**.
5. Select if the DocuSign Connect Settings should be applied to the CSV file. Selecting this option applies the settings from the Connect configurations to the envelopes being published.
6. Click **PUBLISH**.
The publish job is placed in a queue for processing and you are taken to the Bulk Actions log page. This page shows a list of bulk actions for your account and the progress of the actions. You do not have to remain on this page while the publish action is in progress.

When the action is complete, you can click Details to review the transfer information and download a copy of the CSV file with the information.

To Publish Envelope Information from a CSV File

1. Create a comma-separated value (CSV) file with the envelope IDs for the envelopes you want to publish to Connect. The CSV file should only have one column with each envelope ID entered on a different row.

   You can use the Download CSV option to get a CSV file with envelope IDs.

2. In DocuSign Admin, click Connect.

3. Click PUBLISH to go to the Envelope Publish view.

4. Click PUBLISH USING CSV and select the previously created CSV file.

5. Select if the DocuSign Connect Settings should be applied to the CSV file. Selecting this option applies the settings from the Connect configurations to the envelopes being published.

6. Click UPLOAD .CSV FILE and select the previously created CSV file.

7. Click PUBLISH.

   The publish job is placed in a queue for processing and you are taken to the Bulk Actions log page. This page shows a list of bulk actions for your account and the progress of the actions. You do not have to remain on this page while the publish action is in progress.

   When the action is complete, you can click Details to review the transfer information and download a copy of the CSV file with the information.
To Download a CSV File

1. In DocuSign Admin, click **Connect**.
2. Click **PUBLISH** to go to the Envelope Publish view.
3. Select the envelopes you want to include in the CSV file by selecting the check box on the envelope row.
   
   You can use the **FILTERS** settings to change the list of envelopes shown by changing the date range, senders, recipients, and envelope status.

4. Click **DOWNLOAD CSV**.
5. Select if the recipient information and custom fields information should be included in the CSV file.
6. Click **DOWNLOAD** to download the CSV file.

Custom Connect Configuration

This topic provides information on custom Connect configurations.

**CONTENTS**

- Overview of DocuSign Connect
- General Connect set-up information and prerequisites
- Creating a Custom Connect Configuration
- Basic Authentication for a Custom Connect configuration
- Editing a Custom Connect Configuration
- Changing a Custom Connect Configuration Status
- Deleting a Custom Connect Configurations
Overview

DocuSign Connect is a push service that sends real-time envelope and recipient data updates to customer listener applications. These updates are generated by changes to the envelope as it progresses from sending to completion. Connect provides updated information about the status of these transactions, including the actual content of document fields. Connect is useful to organizations that want a real-time view into the transactions across their user base in a centralized location. This information can be customized to drive reporting or workflow specific to that organization’s needs.

Customers can create multiple custom Connect configurations, each with different events or users, and set up different listeners to monitor those configurations.

A DocuSign Connect configuration watches envelopes, noting when transactions reach the subscribed event triggers. At that point Connect sends an XML status change to the customer’s listener. The general flow of events is outlined below.

An organization’s external application can use a secure (HTTPS) listener or an API interface to accept information from Connect.
The listener is an application that accepts XML transactions sent from DocuSign Connect as events happen. This interface is not a SOAP API, such as the other interfaces in the DocuSign System, instead the messages are sent through an HTTP POST.

The API interface uses DocuSign’s SOAP or REST API, like the other interfaces in the DocuSign System, to receive XML information posts.

**Note:** For cases where envelopes are sent through the DocuSign API with event notification enabled and Connect is also used, when the events for both the API and Connect are set to be the same, then two separate notifications are sent for the envelope. One from the API and another from Connect.

See the [custom Connect technical information](#) for additional information and best practices.

**General Setup Information**

In order to use DocuSign Connect, Connect must be enabled in your DocuSign account. It is not enabled by default. Once enabled, the Connect Settings page can be accessed from the DocuSign Admin web application. You can create multiple Connect configurations with different event triggers and users. An account can have a maximum of 300 Custom Connect configurations.

At a high level, the following steps must be taken to use a custom Connect configuration:

1. Select the events you will use as triggers for updating the information. Events can include several items such as document sent, viewed, signed, completed, etc.

2. Develop an understanding of the XML data sent from Connect to your application.
3. Determine how your application will accept information from Connect; by secure listener or by an API interface.
   - If using a secure listener: Create an application at your HTTPS location that can accept data, parse the inbound XML data and utilize it. This is a web application written specifically for your business.
   - If using an API interface: Create a Retrieving Service endpoint (URL), method name, method’s argument name, and Namespace. Refer to the Connect SOAP Publishing section for more information about using the SOAP interface. Inclusion of the DocuSign X.509 certificate in the SOAP header is optional.

Creating a Custom Connect Configuration

1. In DocuSign Admin, click Connect.

2. On the Connect Configurations page, click ADD CONFIGURATION and select Custom.
An account can have a maximum of 300 Custom Connect configurations.

3. On the configuration page you set the events that generate information and select the users integrated with the information.

Set the DocuSign Connect configuration settings as follows:

- **Name:** This is name of the Connect configuration. The name helps identify the configuration in the list.

- **URL to Publish:** This is the web address of your Connect listener. The URL must use the HTTPS: protocol (SSL/TLS connections). The URL can include query parameters.

  The standard port for HTTPS, port 443, will be used. An alternative port can be specified in the URL, for example "https://listener.example.com:1443/listener.aspx", but only for the following ports: 1443, 2443, 3443, 4443, 5443, 6443, 7443, 8443, or 9443.

  Your web server’s SSL/TLS certificate must chain to a CA in Microsoft’s list of trusted CAs. Self-signed certificates will not work. Free certificates from the Let’s Encrypt organization can be used. See https://letsencrypt.org/

- **Include Basic Authentication Header:** Select this option to enable Basic Authentication and include a username and password with Connect requests to your web server. See Basic Authentication below for more information.

- **Enable Log:** Select this option to enable logging for this configuration. It is recommended that you enable this option to facilitate troubleshooting any problems. If you do not want to enable logging for this configuration, clear this box. DocuSign will keep the last 100 log entries for all Connect configurations for the account. The log entries can be viewed by clicking **LOGS** on the Connect page.

- **Require Acknowledgment:** Select this option to log posting failures. DocuSign waits 100 seconds for an acknowledgment before recording a failure. DocuSign logs a failure if the attempt to reach the external endpoint returns anything other than an HTTP 200. The acknowledgment failure messages are logged on the
Failures page, which is accessed by clicking **FAILURES** on the Connect page. When this option is selected, DocuSign will automatically attempt to repost any failures. You can also manually repost from the Failures page.

- **Include options:**
  - **Document PDFs:** Select this option to have Connect send the PDF documents along with the XML update. If you do not want to receive the PDF documents with the updates, clear this box.
  - **Certificate of Completion:** Select this option to have Connect include the Certificate of Completion with completed documents. If you do not want to receive the Certificate of Completion with the updates, clear this box.
  - **Time Zone Information:** Select this option to include the envelope time zone information.
  - **Envelope Voided Reason:** Select this option to include the reason an envelope was voided (as entered by the person that voided the envelope) in the message.
  - **Sender Account as Custom Field:** Select this option to include the sender account information as a custom field on the Connect message.
  - **Document Fields:** Select this option to include the envelope custom fields associated with envelopes. Envelope custom fields are optional custom name-value pairs added to envelopes using the API. Custom field information is returned with status, but otherwise is not used by DocuSign.

- **Associated Users:** Select the users associated with the trigger events. These are the users whose trigger events are sent to the listener or Retrieving Service endpoint. If a user is not selected, no information is sent about the user’s envelopes. Selection options:
  - **All users (includes new users)** - to send envelope information for all the current users and new users when they are added to the account.
- **Select users to include** - to view a list of all users associated with the account. Move users between the Available and Selected boxes using the Add and Remove buttons.

- **Trigger Events**: Select the trigger events for updating your system. There are two categories of trigger events - Envelope Events and Recipient Events. The difference between envelope events and recipient events is that envelope events are only triggered when the envelope status changes, while recipient events are triggered each time information for a recipient changes.

  Note: In cases where multiple events for a single envelope or recipient are queued, only one set of XML data with the most recent change is published to a customer’s listener.

The following lists provide information about when particular envelope and recipient events are sent by Connect.

**Envelope Event Trigger Descriptions**

- **Envelope Sent** - This event is sent when the email notification, with a link to the envelope, is sent to at least one recipient. The envelope remains in this state until all recipients have viewed the envelope.

- **Envelope Delivered** - This event is sent when all recipients have opened the envelope through the DocuSign signing website. This does not signify an email delivery of an envelope. This event requires that the last recipient in an envelope’s routing order is a signer, rather than a copy-only recipient, so it is usually better to use theRecipient Delivered event.

- **Envelope Signed/Completed** - The envelope has been completed by all the recipients.

- **Envelope Declined** - The envelope has been declined by one of the recipients.
Envelope Voided - The envelope has been voided by the sender.

Recipient Event Descriptions

- **Recipient Sent** - This event is sent when an email notification is sent to the recipient signifying that it is their turn to sign.

- **Recipient Delivery Failed** - This event is sent when DocuSign gets notification that an email delivery has failed. The delivery failure could be for a number of reasons, such as a bad email address or that the recipient’s email system auto-responds to the email from DocuSign.

- **Recipient Delivered** - This event is sent when the recipient has viewed the document(s) through the DocuSign signing web site. This does not signify an email delivery of an envelope.

- **Recipient Signed/Completed** - This event is sent when the recipient has signed (completed) the document. If the recipient is not a signer, this is sent when the recipient completes their actions for an envelope.

- **Recipient Declined** - This event is sent when the recipient declines to sign.

- **Recipient Authentication Failed** - This event is sent when the recipient fails an authentication check. In cases where a recipient has multiple attempts to pass a check, it means that the recipient failed all the attempts.

- **Use Soap Interface (SOAP method: DocuSignConnectUpdate)**: Select this option to use the SOAP interface Retrieving Service. If this option is selected, there are two additional options presented.
Integration and Security Settings

- **Namespace**: Sets the SOAP namespace that will be used in the notification requests to your server. (Required)

- **Include XML Digital Signature in SOAP Header**: If checked, the SOAP XML message will be digitally signed.

- **Enable Mutual TLS**: This option enables Mutual TLS to be supported. Note that Mutual TLS is only initiated when your listener server sends a valid Certificate Request message during the TLS handshake protocol. DocuSign cannot initiate Mutual TLS since it is the client. This option is only available if Use SOAP Interface is not checked.

- **Require Mutual TLS**: This option is not yet implemented.

4. Click **ADD** to save your configuration. You can modify this information or add another custom configuration by repeating the previous steps.
Basic Authentication for a Custom Connect configuration

If your integration requires authentication, Custom Connect configurations support Basic Authentication for username and password. This is an optional feature to include the Authorization header in Connect requests to your web server.

To enable Basic Authentication

1. Create a new custom connect configuration or edit an existing one.
2. In the System Settings, select the option Include Basic Authentication Header.
3. Enter the user name and password credentials in the fields provided.
Custom Configuration Settings

System Settings

Name
Example with Basic Authentication

URL to Publish (HTTPS recommended. See System Updates.)
https://

Include Basic Authentication Header

User Name

Password

Enable Log (maximum 100)

Require Acknowledgement

Note: There is no validation on your entries in the configuration settings. You must test the connection in order to confirm the credentials are valid for authentication.
4. Complete your configuration setup and click ADD (or SAVE if you are editing a configuration).

**Troubleshooting Basic Authentication**

1. Test your configuration by executing one of the trigger events for the custom connect service.

2. Check for failures by clicking the FAILURES button on the Connect Configurations page. If there are problems with the Basic Authentication credentials, you will see a "401- unauthorized" error.

3. Edit your configuration to correct the credential information.

4. From the Connect Configurations page, click FAILURES, locate the authorization error, and select Actions > Republish.

**Editing a Custom Connect Configuration**

1. In DocuSign Admin, click Connect.

2. The page has a list of existing Connect configurations for the account. Find the configuration you want to edit
   
   Click on the configuration name or click ACTIONS and select Edit.

3. Edit the configuration as needed. Refer to the Creating a Custom Connect Configuration procedure for explanations of the custom configurations settings.

4. Click Save to save the changes.
Changing a Custom Connect Configuration Status

Normally when a custom configuration is created it is set to active status, which means DocuSign Connect is sending data to the entered web address. There might be times when, due to maintenance or other issues, you need to stop DocuSign Connect from sending data without deleting the configuration. In this case you can change the custom configuration status to inactive and then change it back to active when your listener is ready to receive data.

1. In DocuSign Admin, click Connect.

2. The page has a list of existing Connect configurations for the account. Find the configuration you want to edit.
   
   Click ACTIONS and select Deactivate to change the status to Inactive or Activate to change the status to active.

Deleting a Custom Connect Configuration

In cases where a custom Connect configuration should no longer be used, you can delete it from the system. If a configuration will not be used temporarily, DocuSign recommends changing the configuration status to Inactive and then activate it again when it is needed.

1. In DocuSign Admin, click Connect.

2. The page has a list of existing Connect configurations for the account. Find the configuration you want to delete.
   
   Click ACTIONS and select Delete to delete the configuration.
Custom Connect Technical Information

This topic provides additional information about DocuSign custom Connect configurations.

CONTENTS
Custom Connect Best Practices
Recommendations for receiving documents
Custom Connect and SOAP API publishing
XML message structure

Once you activate a custom Connect configuration, DocuSign sends an XML object to the secure URL entered on the configuration page for every event selected and from every user selected. If your application is not configured to accept these post messages, the DocuSign system will not return an error.

It is important that you do not turn on DocuSign Connect if you have not configured a listener or Retrieving Service endpoint at the URL entered in the configuration page. Once you have the listener set up, you may test the publisher by sending transactions and observing the behavior of your application.

Note: You must include the protocol (HTTP: or HTTPS:) in the web address for Demo account. You must include HTTPS:// in the web address for Production accounts because SSL is required in Production. Connect sends to the default ports of 443 for HTTPS: and 80 for HTTP. If you cannot use port 443 for Production contact DocuSign to review possible options.
Best Practices

In order to take advantage of DocuSign Connect, a clear understanding of the use of the information needs to be understood. Be sure to ask questions such as:

1. What data do you want to capture?
2. Who will be accessing this information?
3. What decisions or reporting will be generated?
4. Should the document be pushed?

These questions must be thought out and agreed in order to deploy a solution that will meet your business needs. Additionally, developing the secure listener application to have some flexibility can enable modifications to the data that is collected without requiring coding for minor adjustments. This field mapping approach enables future modifications and changes that can be made by analysts.

Recommendations for Receiving Documents

There are several factors to consider when determining how to receive envelope PDF documents from DocuSign in your document management system. While it is perfectly acceptable to just select the Include Document PDFs option in your Connect configuration to have Connect include the PDF documents when an event is triggered; you might consider using the DocuSign API to retrieve the documents when a triggering event (such as envelope status Complete) is received if the following are considerations for your architecture:

- Throttling of document retrieval: If for some reason your service is not available to Connect or you are expecting a very high volume, your processing routines might be overwhelmed by the Connect messages. If you are not appropriately scaled to handle the volume or catch-up spikes from connection outages, you might be at risk of an out of
memory error.

- File size and storage: Connect sends PDF documents in base 64 encoding format, which is on average 1/3 larger than a binary file format. This might or might not be a storage consideration for you.

In these cases, DocuSign often recommends that corporate and enterprise customers get the completed envelope message through Connect without including the PDF documents, then makes an API call to get those PDF documents at a time that make sense to your workflow and allow you to throttle the processing of those files.

Connect SOAP Publishing

The following configurations are available in Connect:

- Retrieving Service endpoint (URL).
- Retrieving Service method name. DocuSignConnectUpdate.
- Retrieving Service method’s argument name. DocuSignEnvelopeInformation.
- Retrieving Service Namespace. The default is DocuSignConnectListener.
- X.509 security in the SOAP Header. DocuSign uses the standard WSE3 BinarySecurityToken in the Soap Header to pass the certificate.

When planning the SOAP Publishing Retrieval Service, you need to do the following:

1. Create a web service that has the DocuSign API as a web reference.
2. Create a method in your web service that matches the Retrieving Service method name.
3. Have a single argument on the method that matches
The argument must be of the type DocuSignAPI.DocuSignEnvelopeInformation, where DocuSignAPI is configurable based on the namespace used when importing the DocuSign API web service.

4. Return the EnvelopeID passed to it, if received. Otherwise, it should return a SOAP Fault.

XML Message Structure

The DocuSign Connect publisher sends the status update in the body of an HTTP or SOAP XML post. The receiving web server needs to take the entire structure and parse the XML in order to make use of the various elements available in the XML.

Key Transaction Elements

The key transaction elements available are listed below. The full XML structure contains more, but these are the most commonly used data elements:

Status Information

- Sent Date/Time
- Envelope Status (in process, completed)
- Envelope ID

Envelope Information

- Document(s)
- Recipients
- Tabs
- Subject
- Email
- Custom Fields

**Recipient activity and information**

- Recipient ID(s)
- Recipient Email(s)
- Recipient Username(s)
- Recipient Note(s)
- Recipient Type (Signer, CC, CD)
- Recipient Sent Date/time
- Recipient Delivered Date/time
- Recipient Signed Date/time
- Recipient Routing Order
- Recipient Status Code (created, sent, delivered, signed, declined)
- Recipient Event (viewed, declined, signed)

**Document Information**

- Document Name(s)
- Document ID(s)

**Document Content**

- Custom Tab Name
- Custom Tab Value
- Custom Tab Label
- Custom Tab Required/Not Required
- Custom Tab Type (text, checkbox, radio, list)
- TabTypeCode (signature, initial, name, company, title, date)
- Document PDF Bytes (base 64)

To make use of this information your application must parse the inbound XML looking for the data associated with each node you are evaluating. Then the application must extract the data and place it into the external application.

**Form Field Data**

DocuSign Connect is able to publish not only the status of the transaction, but also the values contained in any form fields or envelope fields in the transaction. This is useful to help interpret what transaction data can be updated into the external system. DocuSign supports many different field types including checkbox, radio button, form field, and drop down list. These all have a common name structure and the value from the signer can be extracted from the XML structure.

**Sample Connect Message**

The information below is a sample DocuSign Connect message in XML format. Note that the personal information (names and email addresses), document names, and PDFBytes information has been removed from this sample.

```xml
<?xml version="1.0" encoding="utf-8"?>

xmlns="http://www.docusign.net/API/3.0">
  <EnvelopeStatus>

  </EnvelopeStatus>
</DocuSignEnvelopeInformation>
```
<RecipientStatuses>

<RecipientStatus>

<Type>Signer</Type>

<Email>user.email@address.com</Email>

<UserName>User Name</UserName>

<RoutingOrder>1</RoutingOrder>

<Sent>2010-06-26T09:19:18.883</Sent>

<Delivered>2010-06-26T09:19:40.723</Delivered>

<DeclineReason xsi:nil="true" />

<Status>Delivered</Status>

<RecipientIPAddress>::1</RecipientIPAddress>

<CustomFields />

<Tab_statuses>

<TabStatus>

<TabType>Custom</TabType>

>Status>Active</Status>

<XPosition>364</XPosition>

</TabStatus>

</Tab_statuses>

</RecipientStatus>

</RecipientStatuses>
<YPosition>52</YPosition>

<TabLabel>Radio</TabLabel>

<TabName>Two</TabName>

<TabValue />

<DocumentID>1</DocumentID>

<PageNumber>2</PageNumber>

<OriginalValue />

<ValidationPattern />

<RoleName>TestRole</RoleName>

</TabStatus>

</TabStatuses>

<AccountStatus>Active</AccountStatus>

<RecipientId>fb89d2ee-2876-4290-b530-ff1833d5d0d2</RecipientId>

</RecipientStatus>

</RecipientStatuses>

<TimeGenerated>2010-06-26T09:45:771206-07:00</TimeGenerated>

<EnvelopeID>0aa561b8-b4d9-47e0-a615-2367971f876b</EnvelopeID>
<Subject>CreateEnvelopeFromTemplates Test</Subject>

<UserName>User Name</UserName>

<Email>user.email@address.com</Email>

<Status>Delivered</Status>

<Created>2010-06-26T09:16:21.27</Created>

<Sent>2010-06-26T09:19:19.01</Sent>

<Delivered>2010-06-26T09:19:40.747</Delivered>

<ACStatus>Original</ACStatus>

<ACStatusDate>2010-06-26T09:16:21.27</ACStatusDate>

<ACHolder>ACHolder Name</ACHolder>

<ACHolderEmail>ACHolder.email@address.com</ACHolderEmail>

<ACHolderLocation>ACHolder Location</ACHolderLocation>

<SigningLocation>Online</SigningLocation>

<SenderIPAddress>::1</SenderIPAddress>

<EnvelopePDFHash/>

<CustomFields>

<CustomField>
<CustomFields>
  <CustomField>
    <Name>Envelope Field 1</Name>
    <Show>False</Show>
    <Required>False</Required>
    <Value />
  </CustomField>
  <CustomField>
    <Name>Envelope Field 2</Name>
    <Show>False</Show>
    <Required>False</Required>
    <Value />
  </CustomField>
</CustomFields>

<AutoNavigation>true</AutoNavigation>
<EnvelopIdStamping>true</EnvelopIdStamping>
<AuthoritativeCopy>false</AuthoritativeCopy>
<DocumentStatuses>
  <DocumentStatus>
    221 Main Street, Suite 1000, San Francisco, CA 94105 Ι www.docusign.com Ι © DocuSign, Inc.
  </DocumentStatus>
</DocumentStatuses>
Connect for Box Configuration

DocuSign Connect for Box is a two-way integration with Box that allows documents and information to be exchanged between DocuSign and Box. It lets users to view the Box
documents directly through the DocuSign web application, send documents from the
Box folders, and view completed documents. Connect for Box also ties together
completed documents and the Box account by automatically placing copies of
completed documents in your Box account.

CONTENTS
Overview of Connect for Box
Creating a Connect for Box Configuration
Editing a Connect for Box Configuration
Changing a Connect for Box Configuration Status
Deleting a Connect for Box Configurations

**Important:** This topic only provides information about setting up Connect for Box. It does
not cover setting up an account with DocuSign or Box. You must have a Box account in
place before setting up Connect for Box. Refer to the Box website for more information
about setting up an account and adding folders and documents.

Overview

In order to use the DocuSign Connect for Box you must have:

- a Box account and the folders or documents must be shared with your users,
- DocuSign Connect must be enabled in your DocuSign account
- Box must be enabled as one of your external document sources
DocuSign Connect is not enabled by default and you might need to contact your DocuSign Account Manager to ensure that it is enabled.

Once enabled, the Connect configurations page can be accessed from the DocuSign Admin web application. Account administrators can then set up the DocuSign Connect for Box configuration and select the destination Box folder for completed documents. An account can have multiple configurations of DocuSign Connect for Box, with different settings and destination folders for each configuration.

After DocuSign Connect for Box is enabled and set up, users can access and preview documents in the Box folders directly from the DocuSign web application.

When a document in a Box folder is selected, the user can view summary information about the document, view the document and initiate sending an envelope with the document. When a Box document is completed, the completed documents are placed in the destination Box folder set in the Connect for Box configuration. Additionally, if the option for including the Certificate of Completion is selected, DocuSign places the Certificate of Completion for the associated document in the Box folder.

Creating a Connect for Box Configuration

1. In DocuSign Admin, click Sending Settings and verify that Box is selected as a document source. If Box is not a document source, select Box and click Save.

2. In DocuSign Admin, click Connect.

3. On the Connect Configurations page, click ADD CONFIGURATION and select Box.

   Note: You might be asked to enter your Box credentials.
4. On the configuration page you set the destination Box folder and select the users integrated with the configuration.

Set the DocuSign Connect configuration settings as follows:

- **Name:** This is name of the Connect configuration. The name helps identify the configuration in the list.

- **Enable Log:** Select this option to enable logging for this configuration. It is recommended that you enable this option to facilitate troubleshooting any problems. If you do not want to enable logging for this configuration, clear this box. DocuSign will keep the last 100 log entries for all Connect configurations for the account. The log entries can be viewed by clicking **LOGS** on the Connect page.

- **Require Acknowledgment:** Select this option to log posting failures. Because DocuSign Connect is the client in this case, you must also add the DocuSign public ‘signed by’ certificate to your server’s certificate store. DocuSign waits 100 seconds for an acknowledgment before recording a failure. The acknowledgment failure messages are logged on the Failures page, which is accessed by clicking **FAILURES** on the Connect page. When this option is selected, DocuSign will automatically attempt to repost any failures. You can also manually repost from the Failures page.

- **Include Certificate of Completion:** Select this option to have Connect include the Certificate of Completion with completed documents. If you do not want to receive the Certificate of Completion with the updates, clear this box.

- **Include Envelope Voided Reason:** Select this option to include the reason an envelope was voided (as entered by the person that voided the envelope) in the message.

- **Folder to Publish to:** Click **BROWSE** to select the destination Box folder for this configuration. This is the folder where completed documents are saved. Additionally, if the Include Certificate of Completion option is selected, the Certificate of Completion is saved to this folder.

- **Associated Users:** Select the users associated with this configuration. These are
the users that can interact with Box through the DocuSign web application. If a user is not selected, no information is exchanged with Box for the user's documents.

Select **All users (includes new users)** to send envelope information for all the current users and new users when they are added to the account.

Select **Select users to include** to view a list of all users associated with the account. Move users between the Available and Selected boxes using the **Add** and **Remove** buttons.

5. Click **ADD** to save your configuration. You can modify this information by repeating the previous steps.

**Editing a Connect for Box Configuration**

1. In DocuSign Admin, click **Connect**.

2. The page has a list of existing Connect configurations for the account. Find the configuration you want to edit
   
   Click on the configuration name or click **ACTIONS** and select **Edit**.

3. Edit the configuration as needed. Refer to the [Creating a Connect for Box Configuration procedure](#) for explanations of the configurations settings.

4. Click **Save** to save the changes.

**Changing a Connect for Box Configuration Status**

Normally when a Connect for Box configuration is created it is set to active status, which means DocuSign Connect will send completed documents to the destination Box folder. There might be times when you need to stop DocuSign Connect from sending
documents without deleting the configuration. In this case you can change the Connect for Box configuration status to inactive and then change it back to active later.

1. In DocuSign Admin, click **Connect**.

2. The page has a list of existing Connect configurations for the account. Find the configuration you want to edit.
   
   Click **ACTIONS** and select **Deactivate** to change the status to Inactive or **Activate** to change the status to active.

Deleting a Connect for Box Configuration

In cases where a Connect for Box configuration should no longer be used, you can delete it from the system. If a configuration will not be used temporarily, DocuSign recommends changing the configuration status to Inactive and then activate it again when it is needed.

1. In DocuSign Admin, click **Connect**.

2. The page has a list of existing Connect configurations for the account. Find the configuration you want to delete.
   
   Click **ACTIONS** and select **Delete** to delete the configuration

Connect for OneDrive Configuration

This topic provides information about the DocuSign Connect for OneDrive configuration.
DocuSign Connect for OneDrive is a two-way integration with OneDrive that allows documents and information to be exchanged between DocuSign and OneDrive. It lets users to view the OneDrive documents directly through the DocuSign web application, send documents from the OneDrive folders, and view completed documents. Connect for OneDrive also ties together completed documents and the OneDrive account by automatically placing copies of completed documents in your OneDrive account.

**Important:** This topic only provides information about setting up Connect for OneDrive. It does not cover setting up an account with DocuSign or OneDrive. You must have a OneDrive account in place before setting up Connect for OneDrive. Refer to the OneDrive website for more information about setting up an account and adding folders and documents.

**Overview**

In order to use the DocuSign Connect for OneDrive you must have:

- a OneDrive account and the folders or documents must be shared with your users
- DocuSign Connect must be enabled in your DocuSign account
- OneDrive must be enabled as one of your external document sources
DocuSign Connect is not enabled by default and you might need to contact your DocuSign Account Manager to ensure that it is enabled.

Once enabled, the Connect Configurations page can be accessed from the DocuSign Admin web application. Account administrators can then set up the DocuSign Connect for OneDrive configuration and select the destination OneDrive folder for completed documents. An account can have multiple configurations of DocuSign Connect for OneDrive, with different settings and destination folders for each configuration.

After DocuSign Connect for OneDrive is enabled and set up, users can access and preview documents in the OneDrive folders directly from the DocuSign web application.

When a document in a OneDrive folder is selected, the user can view summary information about the document, view the document, and initiate sending an envelope with the document. When a OneDrive document is completed, the completed documents are placed in the destination OneDrive folder set in the Connect for OneDrive configuration. Additionally, if the option for including the Certificate of Completion is selected, DocuSign places the Certificate of Completion for the associated document in the OneDrive folder.

Creating a Connect for OneDrive Configuration

1. In DocuSign Admin, click Sending Settings and verify that OneDrive is selected as a document source. If OneDrive is not a document source, select OneDrive and click SAVE.
2. In DocuSign Admin, click Connect.
3. On the Connect Configurations page, click ADD CONFIGURATION and select OneDrive.
Note: You might be asked to enter your OneDrive credentials.

An account can have a maximum of 300 Connect configurations.

4. On the configuration page you set the destination OneDrive folder and select the users integrated with the configuration.

Set the DocuSign Connect configuration settings as follows:

- **Name**: This is name of the Connect configuration. The name helps identify the configuration in the list.

- **Enable Log**: Select this option to enable logging for this configuration. It is recommended that you enable this option to facilitate troubleshooting any problems. If you do not want to enable logging for this configuration, clear this box. DocuSign will keep the last 100 log entries for all Connect configurations for the account. The log entries can be viewed by clicking **LOGS** on the Connect page.

- **Require Acknowledgment**: Select this option to log posting failures. Because DocuSign Connect is the client in this case, you must also add the DocuSign public ‘signed by’ certificate to your server’s certificate store. DocuSign waits 100 seconds for an acknowledgment before recording a failure. The acknowledgment failure messages are logged on the Failures page, which is accessed by clicking **FAILURES** on the Connect page. When this option is selected, DocuSign will automatically attempt to repost any failures. You can also manually repost from the Failures page.

- **Include Certificate of Completion**: Select this option to have Connect include the Certificate of Completion with completed documents. If you do not want to receive the Certificate of Completion with the updates, clear this OneDrive.

- **Include Envelope Voided Reason**: Select this option to include the reason an envelope was voided (as entered by the person that voided the envelope) in the message.
Folder to Publish to: Click BROWSE to select the destination OneDrive folder for this configuration. This is the folder where completed documents are saved. Additionally, if the Include Certificate of Completion option is selected, the Certificate of Completion is saved to this folder.

Associated Users: Select the users associated with this configuration. These are the users that can interact with OneDrive through the DocuSign web application. If a user is not selected, no information is exchanged with OneDrive for the user’s documents.

Select All users (includes new users) to send document information for all the current users and new users when they are added to the account.

Select Select users to include to view a list of all users associated with the account. Move users between the Available and Selected boxes using the Add and Remove buttons.

5. Click ADD to save your configuration. You can modify this information by repeating the previous steps.

Editing a Connect for OneDrive Configuration

1. In DocuSign Admin, click Connect.

2. The page has a list of existing Connect configurations for the account. Find the configuration you want to edit

   Click on the configuration name or click ACTIONS and select Edit.

3. Edit the configuration as needed. Refer to the Creating a Connect for OneDrive Configuration procedure for explanations of the configurations settings.

4. Click SAVE to save the changes.
Changing a Connect for OneDrive Configuration Status

Normally when a Connect for OneDrive configuration is created it is set to active status, which means DocuSign Connect will send completed documents to the destination OneDrive folder. There might be times when you need to stop DocuSign Connect from sending documents without deleting the configuration. In this case you can change the Connect for OneDrive configuration status to inactive and then change it back to active later.

1. In DocuSign Admin, click **Connect**.

2. The page has a list of existing Connect configurations for the account. Find the configuration you want to edit.
   
   Click **ACTIONS** and select **Deactivate** to change the status to Inactive or **Activate** to change the status to active.

Deleting a Connect for OneDrive Configuration

In cases where a Connect for OneDrive configuration should no longer be used, you can delete it from the system. If a configuration will not be used temporarily, DocuSign recommends changing the configuration status to Inactive and then activate it again when it is needed.

1. In DocuSign Admin, click **Connect**.

2. The page has a list of existing Connect configurations for the account. Find the configuration you want to delete.
   
   Click **ACTIONS** and select **Delete** to delete the configuration.
Connect for eOriginal Configuration

DocuSign Connect enables the sending of real-time data updates to external applications.

When coupled with the eOriginal service, DocuSign Connect publishes an event to eOriginal, informing the eOriginal system that a transaction that needs to be vaulted is complete. Then eOriginal initiates an operation to move the authoritative copy of the transaction from DocuSign to eOriginal and to have DocuSign remove the original transaction from the DocuSign system.

This solution requires no additional IT infrastructure to deploy and works seamlessly with existing business process systems, allowing institutions to easily implement a compliant vaulting solution.

**Important:** This guide only provides information about setting up DocuSign Connect. It does not cover setting up an account with DocuSign or eOriginal. You must have an eOriginal vault in place before setting up DocuSign Connect. Also, the eOriginal vault must not be set to flatten the files coming from DocuSign. Refer to the eOriginal documentation for setting up vaulting with eOriginal.
Overview

In order to use DocuSign Connect with eOriginal, several features must be enabled in your DocuSign account. You must have vaulting and Connect enabled for your DocuSign account. Vaulting and Connect are not enabled by default, they must be enabled by your DocuSign Account Manager. Once enabled, the vaulting settings and Connect configuration page can be accessed and you can set up your Connect configuration with eOriginal.

After DocuSign Connect for eOriginal is set up, when documents are completed a Connect message is sent to eOriginal. However, only authoritative copy envelopes are automatically vaulted with eOriginal and envelopes that are not marked for authoritative copy will result in an error.

Note: At this time, if you need to set authoritative copy on an envelope by envelope basis you should not use DocuSign Connect for eOriginal for vaulting. You should set up separate account for vaulting purposes or use a legacy process.

When the Auto Authoritative Copy option is enabled for your account, all envelopes sent through the account are designated as authoritative copy envelopes and are vaulted in the eOriginal system.

At a high level, the following steps must be taken to use the Connect Service with eOriginal:

1. Request that vaulting, DocuSign Connect, API access with Account-Wide Rights and, optionally, Auto Authoritative Copy be enabled for your account. Your DocuSign Account Manager can help you with this step.

2. Set up the DocuSign Connect for eOriginal configuration.
3. Test your settings by sending and completing DocuSign envelopes to ensure proper vaulting of your authoritative copy envelopes in the eOriginal system and that the envelopes are marked in the DocuSign system to reflect the authoritative copy has been exported.

When the setup is done, Connect notifies eOriginal when documents that need to be vaulted are complete. When eOriginal receives the notification, it initiates an API transaction with DocuSign to move an authoritative copy of the documents to the eOriginal vault and remove it from the DocuSign system.

**Note:** The eOriginal account being used to initiate the API transaction must have the Can Export Authoritative Copy option enabled.

Creating a Connect for eOriginal Configuration

1. In DocuSign Admin, click **Connect**.

2. On the Connect Configurations page, click **ADD CONFIGURATION** and select eOriginal.

3. On the configuration page you set the destination eOriginal information and select the users integrated with the configuration.

Set the DocuSign Connect configuration settings as follows:

- **Publish to:** This is where the completed document information is sent. Select the location from the list. There are options for production, preview, and testing sites included in the list.

- **Enable Log:** Select this option to enable logging for this configuration. It is recommended that you enable this option to facilitate troubleshooting any problems. If you do not want to enable logging for this configuration, clear this box. DocuSign
will keep the last 100 log entries for all Connect configurations for the account. The log entries can be viewed by clicking **LOGS** on the Connect page.

- **Include Sender Account as Custom Field:** Select this option to include the sender account information as a custom field on the Connect message.

- **Include Document Fields:** Select this option to include the Document Fields associated with documents. Document Fields are optional custom name-value pairs added to documents using the API. Custom Document Field information is returned with status, but otherwise is not used by DocuSign.

- **Associated Users:** Select the users associated with this configuration. If a user is not selected, no information is exchanged with eOriginal for the user’s documents.

  Select **All users (includes new users)** to send document information for all the current users and new users when they are added to the account.

  Select **Select users to include** to view a list of all users associated with the account. Move users between the Available and Selected boxes using the **Add** and **Remove** buttons.

- **Require Mutual TLS:** Select this option to enable mutual authentication at Transport Layer Security (TLS) with DocuSign. DocuSign accepts TLS v1.2 for inbound traffic, but our outbound is TLS v1.0.

  **Note:** At this time, self-signed certificates are not supported in Connect and the Certificate Authority associated with your certificate must be in DocuSign’s CA store.

4. Click **ADD** to save your configuration. You can modify this information or add another custom configuration by repeating the previous steps.

This completes the Connect for eOriginal setup. DocuSign recommends that you test your settings by sending and completing envelopes to ensure proper vaulting of your envelopes and documents.
Editing a Connect for eOriginal Configuration

1. In DocuSign Admin, click Connect.

2. The page has a list of existing Connect configurations for the account. Find the configuration you want to edit
   Click on the configuration name or click ACTIONS and select Edit.

3. Edit the configuration as needed. Refer to the Creating a Connect for eOriginal Configuration procedure for explanations of the configurations settings.

4. Click Save to save the changes.

Changing a Connect for eOriginal Configuration Status

Normally when a custom configuration is created it is set to active status, which means DocuSign Connect is sending data to eOriginal. There might be times when you need to stop DocuSign Connect from sending data without deleting the configuration. In this case you can change the configuration status to inactive and then change it back to active when your listener is ready to receive data.

1. In DocuSign Admin, click Connect.

2. The page has a list of existing Connect configurations for the account. Find the configuration you want to edit.
   Click ACTIONS and select Deactivate to change the status to Inactive or Activate to change the status to active.
Deleting a Connect for eOriginal Configuration

In cases where a custom Connect configuration should no longer be used, you can delete it from the system. If a configuration will not be used temporarily, DocuSign recommends changing the configuration status to Inactive and then activate it again when it is needed.

1. In DocuSign Admin, click Connect.
2. The page has a list of existing Connect configurations for the account. Find the configuration you want to delete.
   Click ACTIONS and select Delete to delete the configuration

API and Keys

The API and integration Key Information page provides API information for your account, the integration keys associated with your account, and a way to add integration keys.

An integration key (also known as an API key) is a unique GUID used to identify your API integration. An integration key is required to authenticate your API calls with DocuSign. Your account can have as many test integration keys as you’d like, but they cannot be deleted once created. You can also have multiple keys in production.

Note: The full functionality of this view is only available in the DEMO environment. Once a key has been moved in to the Production environment, the account it is linked to is used to manage secret keys, RSA keypairs and redirect URIs.

For more information about using your integration key with the DocuSign API, visit the DocuSign Developer Center.
To add an integration key

1. In DocuSign Admin, click API and Keys.
2. Click ADD APP / INTEGRATION KEY.
3. Add a name for your app, then click ADD.
4. Select an authentication type:
   - **Authorization Code Grant** - This is most common for web apps and requires a secret key.
   - **Implicit Grant** - This is most common for mobile apps.
   - **JSON Web Token Grant (Service Integration)** - This is used for a service integration which integrates directly with a DocuSign account. It requires an RSA keypair.

   **Note:** For more information on selecting an authentication type, see our developer center.

5. If your application uses the Authorization Code Grant, you must create a secret key. To generate a new secret key, click ADD SECRET KEY.
6. If your application uses a Service Integration, you must create an RSA Keypair. To generate a new keypair, click ADD RSA KEYPAIR.
Important: Copy the secret key or RSA keys to a secure location immediately after you create them. Secret keys and RSA keys are displayed in plain text only once: when they are first created. After that, for security purposes, DocuSign only shows the last 4 digits of any secret keys or the RSA Keypair ID of any keypairs generated. Secrets should be stored securely within your application. They should never be shared or disclosed publicly.

7. Click **ADD URI** and enter a redirect URI for your application.

When your application sends an authorization request to DocuSign, it includes the redirect URI in the request. The Account Server verifies that the URI in the request and the URI in the application registration match and sends a request to this URI to continue the process.

Your application can have more than one redirect URI.

8. Add the links to the privacy policy and terms of use for your app.

9. Click **SAVE**. Your integration key is generated and added to the list of keys.

Your integration key is a 32-digit GUID that appears in the **My Apps / Integration Keys** section of DocuSign Admin. Example: 230546a7-9c55-40ad-8fbf-af205d5494ad.

To edit an existing integration key

1. In DocuSign Admin, click **API and Keys**

2. Find the integration key you want to edit and click on the integration key or in the **Actions** drop-down select **Edit**.

3. Edit the App Name, Redirect URI, or links to the Privacy Policy and Terms of Use.
Optionally, you can click **ADD URI** to add a new redirect URI for the integration key.

4. Click **SAVE**. The updated information is saved.

To enable an existing integration key in a live production account

Before you go live with your API integration, you need to promote one of your developer demo account integration keys in a live production account. To enable your key, you need to pass an automated review process, which is accessible from your developer demo account.

1. In DocuSign Admin, click **API and Keys**.

2. Next to the key you would like to enable in production, click **ACTIONS** and select Review Transactions.

3. In the Review API Transactions dialog, enter the date your 20+ API transactions were run in the Demo environment:
4. Click **REVIEW** to start the automated review process. The status changes to "Under Review".

Reviews may take up to 20 minutes to complete. If your review fails, ensure you have run 20+ consecutive, error-free API transactions under the selected integration key that comply with API rules and limits.

5. Upon successful review, the integration key's status changes to "Review Passed" and you can request promotion of the key to a live production account.

6. To promote the key to production, click **ACTIONS** and select **Go Live**.

7. Log in to your production DocuSign account using your production DocuSign username and password (that is, not your developer demo account credentials).

8. Accept the Developer Terms and Conditions.

9. Grant DocuSign access to your app by clicking **Accept** in the following window.

10. Select the production account you want to promote the integration key to. Note that
you need administrator access to the account in order to push the integration key. After selecting a live DocuSign account, the key’s status changes to "Pending Approval". You do not need to take any action at this point and your key should be promoted within one business day after reaching this status.

If you are integrating on behalf of a client and do not have administrator access to their production DocuSign account, you will need to provide the client admin access to your developer demo account. Alternatively you can have them log in in real-time to the live account through an online meeting while promoting the key, this way they can provide you access to the account without revealing the password or creating a new user.

eNote Credentials

To configure your account for creating and sending eNotes, you must add your eOriginal credentials. With these credentials in place, eNotes sent through your account are tamper sealed and vaulted in your eOriginal vault. In addition, before you can send eNotes, you must also configure Connect for eOriginal.

eNotes are sent for electronic signature using the DocuSign REST API. For details on sending eNotes and eMortgage integration, see the eMortgage Implementation guide.

eNote credentials are managed in DocuSign Admin through the eNote Credentials view. You can add, edit, and delete eNote credentials.

To add a eNote credentials

1. In DocuSign Admin, under Integrations, click eNote Credentials.
2. In the eNote Credentials view, select Add eNote Configuration.
3. In the Add eNote Configuration dialog, enter your organization's eOriginal credentials.

   **Tip:** DocuSign recommends you create an eOriginal Admin user specifically for DocuSign API calls, and use those credentials here.

4. Click **Verify and Save** to check and store your eOriginal credentials.

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### To edit or delete eNote credentials

If your eOriginal credentials change, you can edit the eNote credentials.

1. In DocuSign Admin, under Integrations, click **eNote Credentials**.

2. Click the Actions menu for the eNote credentials.

3. To make update your eOriginal credentials, select **Edit** and make the necessary changes, and then click **Verify and Save**.

4. To remove the eOriginal credentials, select **Delete**, and then select **Confirm**.
Auditing

In the Auditing section of DocuSign Admin, you can request, review, and download reports for your account.

The following topics are available in this section:

- **Audit Logs**
- **Bulk Actions Logs**

**Account Audit Logs**

The account audit log provides an easy way for administrators to see changes to their account settings, billing information, plan type, and users. Administrators can export this information as a comma separated value (CSV) file.

**Note:** The audit log contains data for account changes starting from June 1, 2015. Earlier data is not available in the audit log.

What events are included in the audit log

The audit log provides a record of the changes made to the following categories:

- Account settings
- User settings
- Billing credit card and billing address information
- Account plan changes
- Permission sets (does not include creation or deletion of permission sets)
- Envelope sharing settings
- Branding changes
- Electronic Record and Signature Disclosure changes
- Document Custom Fields
- Envelope Custom Fields

A maximum of 100 events are shown on the audit log page. To view any additional events, export the CSV file.

View, modify, and export the audit log

To view the Audit Log, in DocuSign Admin, click **Audit Logs**.

By default, the Audit Log page shows the account changes from the last 7 days.

**From here you can:**

- **Change the Date Range:** Use the drop-down to select a date range for audit log events. You can select one of the predefined ranges or select **Custom** and enter your own range.

- **Change the Log Sort Order:** You can change how the audit log is sorted by clicking a column heading.

- **Export to CSV:** Click **Export to CSV** to export the audit log information to a comma separated value (CSV) file. If the date range is changed, the number of rows exported
to the CSV is the same as the events shown at the top of the page.

Audit log information

The information displayed in the audit log is described below:

- **Event Date**: The date and time the account change was made. The date and time shown uses the time zone setting for your browser and will vary depending on your browser settings.

- **User**: The name and email address of the user who changed the setting. Usually, this is an administrator on your account, but in some cases, this column may display one of the following system user roles:
  - "System User" - This role indicates a change made to your account by a DocuSign technical process. Typically, this occurs when a new user activates their account, or if there is a change in your account plan where features are added or changed.
- "DocuSign System User" - This role indicates a change made to your account by an internal DocuSign employee. Typically this would occur if you request that DocuSign make a change to your account.

Contact your account manager or DocuSign Support if you have any questions about a change completed by either a System User or a DocuSign System User.

- **Description:** The category for the changed setting. For categories that have multiple entries, such as Users, the name of the entry is also included in the description.
  
  *Example:* If you change something for user John Jones, the description will show "User Setting Change - John Jones."

- **Field:** The name of the field that was changed.

- **Old Value** and **New Value:** The old and new values for the field.
  
  In some cases the Old Value might be blank. This is expected and only means that there was no old value for the field.

  For fields that use a check box, a value of True means the check box is selected and False means the check box is not selected.

### Exported CSV file columns

The exported CSV file has the same information as the displayed audit log, with some minor differences. The CSV file has two additional columns and one column headers with a different name. The differences are described below:

- **Audit ID:** Multiple events can be changed in one save action. This new column shows an ID number for each save action, so that it is easier to sort and group changes that were made with the same save action.

- **Field Name:** This has the same information as the **Field** column in the displayed audit log.

- **Change Type:** This new column describes the type of setting change.
Bulk Actions Log

The bulk actions log provides an easy way for administrators to track different bulk actions, such as uploading multiple users, envelope transfers, and publish envelope actions, for their account along with the progress and details of the actions.

To view the Bulk Actions Log

- In DocuSign Admin, under Auditing, click **Bulk Actions**.
  
  The view shows a list of bulk actions for your account.

The log summarizes each bulk action job, and includes the type of action, status, name of the administrator who initiated the action, and the date of the action.

When an action is complete, you can click the Actions menu and select **Details** to review the information associated with the action and download a copy of the comma separated value (CSV) file with the information for the action. The Details information includes any error messages associated with the action.
You can also download the CSV file by clicking the Actions menu and selecting **Download CSV**.
DocuSign Part 11 Module Overview

DocuSign has partnered with industry experts to deliver transactions which meet the United States Federal Food and Drug Administration (FDA) regulations. DocuSign's Part 11 module contains industry-designed capabilities that include:

- Pre-packaged account configuration
- Signature-level credentialing
- Signature-level Signing Reason
- Signature manifestation (Printed Name, Time Stamp, and Signature Reason)
- Detailed audit trail
- Tamper-evident digital seal using open PKI standards

DocuSign's Part 11 module enables customers to maintain compliance with national and international standards. DocuSign provides a high availability, high-security, and highly customizable solution which provides both electronic and digital signature (PKI) capabilities. The module is configured in a standards compliant manner, allowing customers to benefit from efficiencies and cost-savings afforded by maintaining a digital process provides while ensuring compliance with standards in a systematic and controlled manner.

This section provides information about the account settings used by the DocuSign Part 11 module, which is designed to assist in compliance with FDA Title 21 of the Code of Federal Regulations (CFR), Part 11. This guide also provides information about customer responsibilities for compliance; however these are only suggestions for the DocuSign portion of the 21 CFR Part 11 technology solution. Full compliance with 21 CFR Part 11 cannot be achieved with technology alone; it can be achieved through
technology coupled with policies and procedures to ensure compliance. THIS INFORMATION IS NOT OFFERED AS LEGAL ADVICE.

How DocuSign's Part 11 Module fits with 21 CFR Part 11

FDA 21 CFR Part 11 regulation (Part 11) covers document signing and records retention for processes and documents specified by the FDA. DocuSign’s Part 11 module has been designed to be incorporated as part of an “open system” system solution, as defined in Section 11.3(b)(9), in which there is electronic communication among multiple persons and where system access extends to people who are not part of the organization that operates the system. As part of the controls for an open system, as discussed in Section 11.30, the system shall employ procedures and controls designed to ensure the authenticity, integrity and, as appropriate, the confidentiality of electronic records from the point of their creation to the point of their receipt to ensure record authenticity, integrity and confidentiality.

The DocuSign compliance information and the responsibilities for your account are discussed in the following sections.

DocuSign Compliance Information

To help meet the control requirements, DocuSign’s Part 11 module has pre-set account options to add, authenticate and limit envelope access to authorized signers. These are outlined below and include the section requirement.
Note: The account settings for DocuSign’s Part 11 module apply to all envelopes sent from the account to ensure all transactions are conducted in a compliant manner.

- Section 11.50(a) requires that signature manifestations have the printed name of the signer, the date and time the signature was executed and the reason for signing. DocuSign provides this information at each signature location below the signer’s signature image, as shown below.

![](signature_image.png)

Note that because signature and initials tags have the date/time, printed name, and signing reason information added below the signer’s signature/initials, you must ensure that you leave space below signature and initial tags for that information.

- Section 11.50(b) requires that signature manifestations are readily viewable and cannot be disabled. DocuSign provides access to signature manifestations to any authorized party when viewing documents through DocuSign’s web application and in the downloadable PDF.

- Section 11.70 requires that signatures linked to electronic records. DocuSign maintains links between the signatures and documents within an envelope and to the particular location of a signature on a document. Once an envelope is completed, these signatures are unalterable.

- Section 11.100(a) and (b) requires that signers are identified and that their signatures are unique and not used by other signers. DocuSign requires signers to authenticate using DocuSign account credential to access the system and each time they access
their unique adopted signature. The adopted signature also has a globally unique identifier (GUID) within the DocuSign system.

If you are using the New DocuSign Experience for sending, your account can be enabled to automatically create DocuSign accounts for signers that do not already have an account. When this option is enabled and you send to a signer that does not have a DocuSign account, DocuSign creates an account for the signer and sends an account activation email in addition to the request to sign email. DocuSign recommends that you contact your signers to let them know that they will be receiving an account activation email from DocuSign. You can see if automatic account creation is enabled for your account by looking at the Login Requirements setting. This option is enabled by DocuSign and you can contact your DocuSign Account Manager to request to enable the option.

If the Manage Signers feature is enabled for your account, it provides the ability to create DocuSign accounts for signers that are not part of your organization and that must sign documents sent to meet the 21 CFR Part 11 requirements.

- Section 11.200(a) covers requirements for electronic signatures that are not based on biometrics. At a minimum, DocuSign requires that the signer enter a username and password to access the system. Additionally, DocuSign offers a number of extra authentication options. Signatures are protected by login and password. Sharing these credentials requires collaboration between the owner and one other person. It is the responsibility of the customer to establish a process whereby a signer’s credentials are confidential and secure.

Areas of Customer Responsibility

In addition to the Part 11 module pre-set account options, there are several other processes and procedures that customers must set up to meet the 21 CFR Part 11 requirements. These are outlined below and include the section requirement.
Section 11.10(i) requires records to verify persons that maintain or use electronic signature systems have education, training and experience to perform their assigned tasks. Customers are responsible for ensuring this is followed, but training is available from DocuSign to assist in this process.

Section 11.10(j) requires the establishment of, and adherence to, written policies that hold individuals accountable and responsible for actions initiated under their electronic signatures, in order to deter record and signature falsification. Customers are required to write and enforce their own procedures. DocuSign has established systems and maintenance documentation specific to the DocuSign platform, including: Validation policy and procedures (11.10(a)), Disaster recovery, Revision and change control procedures (11.10(k)(2)), System access and security procedures (11.10(c), (d),(g)) and Document control procedures (11.10(k)(1),(2)).

Section 11.100(c) requires that signers agree that the electronic signatures are intended to be the legally binding equivalent of traditional handwritten signatures. The DocuSign Part 11 module settings ensure the Electronic Record and Signature Disclosure feature is active, but customers must verify or provide specific language for the consumer consent to meet the requirements of the section. Refer to the Legal Disclosure section for more information about the disclosure.

Section 11.300(b) requires that passwords be periodically revised. Customers must set their passwords to expire in the Password Strength settings. Additionally, DocuSign recommends that customers use the Strong or Custom Password Strength setting for their account. Customers are responsible to setup and maintain password settings in alignment with compliance needs. Refer to the Password Security section in this guide for more information about password settings.

Section 11.300(c) requires that there are loss management procedures to de-authorize lost, stolen, missing or compromised identification codes or passwords. Customers are responsible for ensuring this information is documented.

Section 11.300(e) requires procedures for initial and periodic testing of devices that are used to generate identification code or password information. Customers are responsible for documenting any internal controls for this.
uses the SMS Authentication feature, DocuSign can provide information about periodic testing for this feature.

Part 11 Information in Completed Documents

Senders can open and view the information in completed envelopes. There are several places where the Part 11 information can be viewed:

- When viewing the completed document in the web application or PDF, the signature manifestation is shown.

- In the envelope History, an entry is made each time the signer is authenticated to add a signature. The reason for adding the signature is also included in the entry.

- In the Certificate of Completion, there are entries in the Signer Events section showing that the signer was authenticated and the signing reasons.

DocuSign recommends keeping a copy of the Certificate of Completion if documents
are downloaded.

<table>
<thead>
<tr>
<th>Signer Events</th>
<th>Signature</th>
<th>Timestamp</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Smith</td>
<td>John Smith</td>
<td>Sent: 12/16/2015 4:45:15 PM</td>
</tr>
<tr>
<td><a href="mailto:11-ind@mailinator.com">11-ind@mailinator.com</a></td>
<td></td>
<td>Viewed: 12/16/2015 4:52:14 PM</td>
</tr>
<tr>
<td>Test Account</td>
<td></td>
<td>Signed: 12/16/2015 4:53:53 PM</td>
</tr>
<tr>
<td>Security Level: Email, Account Authentication (Required)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Signature ID: 8B6538B1-830E-4CD6-8606-0D74EB771E80</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Using IP Address: 10.10.65.37</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Electronic Record and Signature Disclosure: Not Offered</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ID:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

DocuSign Part 11 Module Administration

This section provides additional information about administration settings, features, and actions that are affected by the DocuSign Part 11 module.

In general, administration settings and features for Part 11 module accounts are managed in the same manner as non-Part 11 module accounts. However, in some cases settings cannot be changed or have limited selections. These are explained in the Settings and Features that Affect Part 11 Module Configuration section below.

Additionally some functions are not available for Part 11 module accounts. These are described in the Features and Functions Not Available in the DocuSign Part 11 Module section below.

You can determine if the DocuSign Part 11 module is enabled for your account by going to the Account Profile page and looking under the account name.
Note that the New DocuSign Experience Home page also shows if the DocuSign Part 11 module is enabled for the account.

Settings and Features that Affect Part 11 Module Configuration

Some account settings and features affect the Part 11 module configuration and are noted with a shield icon adjacent to the setting or feature name. Settings that cannot be changed due to Part 11 requirements are not editable and are grayed out.
The following settings in each section affect the Part 11 module configuration. The information about each settings notes if it has limited functionality or are not editable.

Security Settings

The following settings affect the Part 11 module:

- **Mobile App Session Timeout.** This setting is marked as a reminder that signing Part 11 documents is not allowed on DocuSign's mobile applications. Mobile web signing is allowed.

- **When recipients return to documents, authenticate on** This setting is marked as a reminder to set how often signers authentication is required when accessing documents.

- **Login Requirements:** This setting is marked as a reminder to set signer Login requirements. Only the Account Required - Login Once Per Session and Account Required - Login for Each New Document settings are available for selection.

  **Note:** If your account is enabled to automatically create a DocuSign account for signers that do not already have DocuSign accounts, then the **Automatically create an account for the recipient** setting is shown below your Login Requirements setting. This option is enabled by DocuSign and you can contact your DocuSign Account Manager to request to enable the option.

Signing Settings

- **Require a reason when a recipient declines to sign.** This setting is marked as a reminder to set if signers should be required to provide a reason why they are declining to sign a document.
- **Allow recipients to sign documents offline on a mobile device.** This setting is marked and not editable because signing on a mobile device is currently not allowed.

- **Allow recipients to change signing responsibility.** This setting is marked and not editable because signers are not allowed to change signing responsibility for accounts with the Part 11 module.

- **Allow in person signing.** This setting is marked and not editable because in person signing is not allowed for accounts with the Part 11 module. Signers must be authenticated with a user name and password, which cannot be done with in person signing.

- **Allow recipients to create a DocuSign account.** This setting is marked and not editable because signers are always required to have a DocuSign account.

- **Attach documents to completion email.** This setting is marked and not editable because completed documents are never included as attachment to the completed email sent to senders and signers.

### Sending Settings

- **Allow signers to add multiple attachments per field** This setting is marked and not editable because signers are not allowed to add multiple attachments to a Signer Attachment field.

### Legal Disclosure

Because signers are required to agree that the electronic signatures are intended to be the legally binding equivalent of traditional handwritten signatures, the Electronic Record and Signature Consent Disclosure option is automatically enabled and not editable for the account. However, the information in the disclosure can still be edited by administrators.
Some features and functions that customers might be familiar with from other DocuSign packages might not be available with the Part 11 module. These include:

- PowerForms
- Free-Form sending and signing
- In-Person sending and signing
- Fax recipients
- Document Markup and Field Collaboration
- Allow sign on paper
- Mobile application signing (Mobile web signing is available)
- Embedded Sending and Signing through the DocuSign API.
Content Coming Soon

This content will be published soon.
Validator for Life Sciences

The DocuSign Validator for Life Sciences supports careful testing of electronic signature system processes. It provides corresponding documentation to demonstrate the solution performs tasks necessary to adhere to Part 11 regulations.

Reports include screenshots of each test, details of the specific provisions tested, and the final test results. You can determine report recipients and enable or disable monthly reports.

The report will be sent via a DocuSign envelope which will be retained by DocuSign for 365 days and then automatically purged and redacted of personal data such as name and email address.

For more information on Part 11, see the DocuSign Part 11 Module Overview.

Sample test from a report:
Require sender to log in to create and send envelopes

Senders are required to log in to their 21 CFR Part 11 account in order to create and send envelopes to recipients for signing.

21 CFR Part 11 Subpart B 11.10.d  21 CFR Part 11 Subpart B 11.10.g

Users
1. cfr_sender@domain.com
2. cfr_recipient1@domain.com

Set up a 21 CFR Part 11 sender account and a recipient account.

Validate that the sender account is 21 CFR Part 11 enabled.

Log in as the sender.

Note: Report files are high-resolution; you can zoom in to view the full details of each test.
To manage recipients and enable the report

1. In DocuSign Admin, click **Validations**.
2. Click **MANAGE RECEPIENTS**.
3. Search for the user to add or remove, then click **ADD** or **REMOVE**.

   ![Validations Recipients](image)

   **Note:** You can add any user on the account as a recipient. A report can have up to 50 recipients.

4. When finished, click **SAVE**.
5. Click to toggle **Enable report**.

![Enable Reports]

The report is typically delivered to the selected recipients between the first and fifteenth of each month.