

## Overview

The DocuSign software allows Valley Water to develop, manage, and send electronic agreements securely with the capability of obtaining eSignatures, a way to electronically sign. This quick reference guide (QRG) provides DocuSign users specific trainings that correspond to specific DocuSign roles.

## DocuSign Roles

- **Signers:** Anyone who is asked to fill out information or attach their digital signature via DocuSign.
- **Senders:** Anyone who uses DocuSign to send an envelope (document you send for signature, along with recipient and other information that you associate with that document).
- **Advanced Senders:** Senders who use DocuSign to bulk send.
- **Template Creators:** Anyone who creates templates and PowerForms.
- **Admins:**
  - **Account Admins:** Restricted administrative accessed typically at least two (2) IT individuals at Valley Water.
  - **Delegated admins:** Restricted administrative access for IT users that assist the Account Admins.

## Training Resources by Role

- Signers:
  - [How to Sign a DocuSign Document](#)
  - [Signing Overview](#)
  - [Managing Email Notifications](#) (Note: Signers who do not have a DocuSign account will not be able to manage their individual notifications and will instead default to the notification settings for the account from which the envelope was sent)
- Senders:
  - [DocuSign Account Tour](#) (video, 1m 32s)
  - [Sending an Envelope](#) (video, 1m 58s)
  - [Sign and Send a Document](#) (video, 1m 39s)
  - [Sending Documents for Signature](#)
  - [Using Templates](#) (video, 3m 20s)
  - [Applying Templates to Files in Your Envelopes](#)
  - [Managing Envelopes](#)
  - [Correcting Envelopes](#)
- Advanced Senders:
  - [Using Bulk Send for Multiple Recipients](#)
  - [Distribute \(or Use\) a PowerForm](#)
- Template Creators:
  - [Working with Templates](#)
  - [Creating Templates](#)
  - [Editing a Template](#)
  - [Save an Envelope as a Template](#)
  - [PowerForms vs Templates](#)

# DocuSign Training Resources QRG

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- [Create, Test, and Edit a PowerForm](#)
- [Set Template Matching Behavior](#)
- [Limit Changes to Templates and Template Fields](#)
- [Add, Change, or Remove a Template Password](#)

## Comprehensive On Demand DocuSign University Training (Login Required):

- Signers:
  - [On Demand Training](#)
- Senders:
  - [On Demand Training](#)
- Template Creators:
  - [On Demand Training](#)