

Preparing for Signature

When the Department Approver(s) and any Ad Hoc approvals you may have created are all Approved, you will receive an email notification and the Contract Status will be Approved:

Contracts: My Assigned Contracts

Status: 1 record(s) found, 1 page(s) [Click for details...](#)

New Actions

Views Search

Edit	ID ↓	Division	Department	Company Name	Contract Title	Contract Type	Status	Contract End Date
	663	E60 VP Student Development	D062 Career Services	zGoogle	Sample Sponsorship Agreement	Sponsorship Agreement	Approved	

Subject	Content	Attachments	Created On
Contract for zGoogle has been approved	<p>The Contract for Sponsorship Agreement described in more detail below has just been approved.</p> <p>Click here to view the record directly.</p> <p>ID: 663 Status: Approved Contract Title: Sample Sponsorship Agreement Description: Sample Sponsorship Agreement Renewal Type: One time contract ...</p>		Sep 22 2018 13:04

At this point, you're ready to route the contract for signature.

The document must be signed by any users listed in the Internal Signers and Counterparty Signers sections of the Details tab. The internal list will eventually be automatically populated based on a number of factors, including the Business Unit, Division/School and Department selected, as well as potentially the dollar amount of the contract.

For this first phase, you must specify all signers.

1. Click the Signature tab. Add as many signers as you need using the Add Signer form. You may use the magnifying glass lookup to find users already stored in the People table, or you can manually type in their Name, Title, and email address. Send Order controls the order in which DocuSign routes the envelope for signature. Each signer must have a different role name. The "add contract details" button should be used to send an approval summary to the INTERNAL signer. Ensure SLU signers are noted with an InternalSigner role name, and 3rd party signers

▼ Add Signer

Click the magnifying glass to search for an existing internal or external contact. You may also directly type in the recipient's information.

New Signer Full Name

New Signer Email

New Signer Title

Role Name

Send Order

Signer Message

2. Signers you add will appear in related tables of Internal Signers and Counterparty Signers:

▼ Internal Signers

Status: 1 record(s) found, 1 page(s). [Click here to recount records.](#)

<input type="checkbox"/>	Send Order ↑	Role Name	Full Name	Title	Email
<input type="checkbox"/>	1	InternalSigner1	Agiloft Implementer	Implementer	careytestagiloft+sluadmin@gmail.com

▼ Counterparty Signers

Status: 1 record(s) found, 1 page(s). [Click here to recount records.](#)

<input type="checkbox"/>	Send Order ↑	Role Name	Full Name	Title	Email
<input type="checkbox"/>	2	Customer1	External Reviewer	The Reviewer	careytestagiloft+sluexternalreviewer@gmail.com

3. Now it's time to prepare the Contract document itself. Click the blue hyperlinked Attached File and choose Edit and Checkout. This will save your changes directly to the Word file on the server:

Prepare ESignature Files

INSTRUCTIONS

All active attachments are shown below. Remember:

1. Work through any **tracked changes** that might exist for the document, accepting or rejecting them, and then turn off track cha
2. If you need to **merge a signature block** for SLU templates, select the checkbox next to the contract, and choose "Merge Signat
3. Ensure that any files that you need to be included in the DS Envelope are marked "Include in DS Envelope."

Status: 1 record(s) found, 1 page(s). [Click here](#) to recount records.

New Select Files Mass Edit Save Changes Cancel Changes Views Search

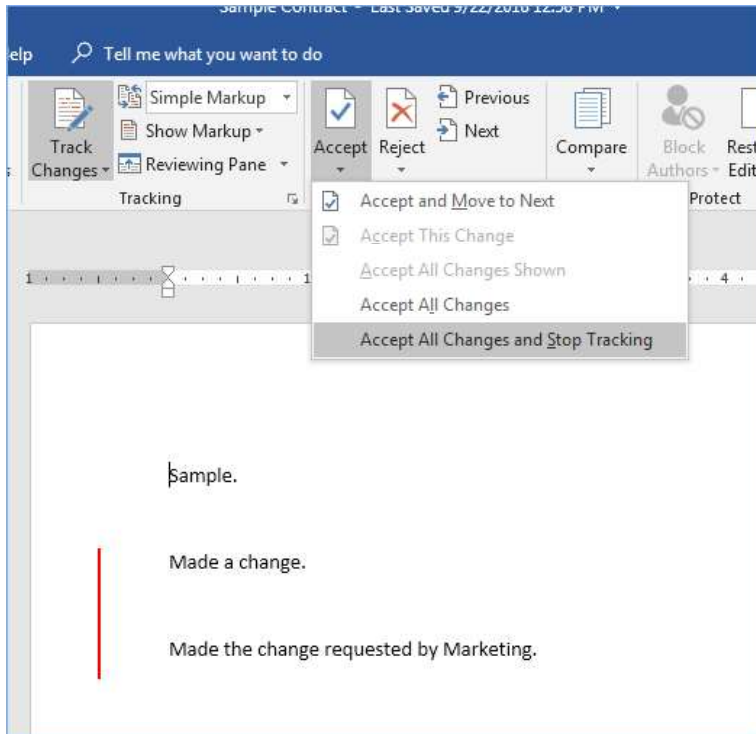
<input type="checkbox"/>	Edit	ID	Attachment Type	Attached File	Include in Approval Packet	Include in DocuSign Envelope	Status
<input type="checkbox"/>		429	Document Provided by Outside Party	Sample Contract.docx	Yes	No	Active

Sample Contract.docx

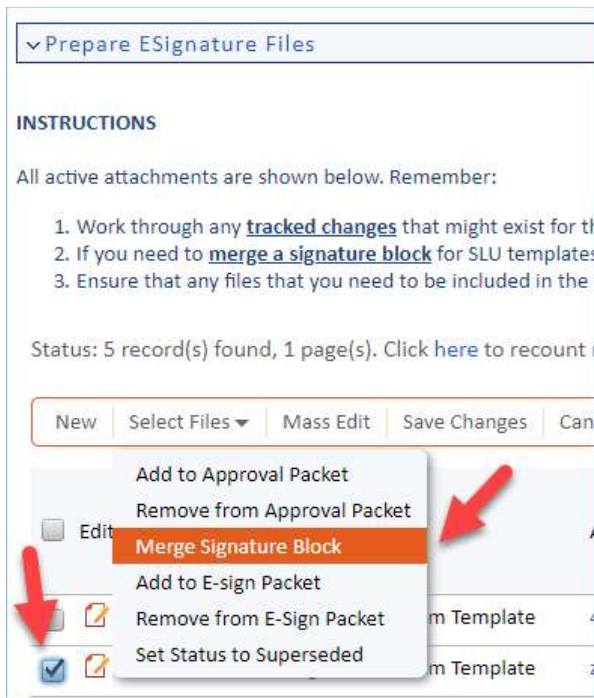
[Download/Save](#) [View File](#) [Edit and Checkout](#)

4. Work through any tracked changes in the document and turn off tracked changes. If it's a SLU template, you will need to Unlock Track Changes by going to Review > Track Changes > Lock Tracking, and enter the password "slu" (all lowercase). Accept or reject changes; accept them all and stop tracking by choosing Accept > Accept all changes and stop tracking. Save the Word file and

close.



5. If you're using a SLU template for the SSA or the Affiliation Agreements, you will need to merge the signature block. Click the box to the left of the contract document to be signed, hover over Select Files, and choose Merge Signature Block:



6. This will create a new attachment record of the contract, now with a signature block included. It will automatically be marked to be included in the DocuSign Envelope:

<input type="checkbox"/> Edit	ID	Attachment Type	Attached File	Include in Approval Packet	Include in DocuSign Envelope	Status
<input type="checkbox"/>	423	Generated Agreement from Template	422-zGoogle-SSA-Sep 18 2018-with_signature_block.docx	Yes	Yes	Active

7. Adjust any other attachment records as necessary using the Quick Edit field "Include in DocuSign Envelope." Any files that you want to be included in the envelope must be set to Yes. Once you've done that and saved each entry, click Refresh Files to show the Files that will be included in the envelope:

Files to Sign 422-zGoogle-SSA-Sep 18 2018-with_signature_block.docx

[Refresh Files](#)

8. Click Create DocuSign Envelope:

▼ DocuSign Envelopes

[Create DocuSign Envelope](#)

DocuSign Envelopes

NOTE: If "Responsible Party Affirmation Received" is No, you will get an error message trying to create the envelope, and will not be able to proceed:



9. The DocuSign Envelope form will display, showing the Internal and External Signers you entered as DocuSign Recipients, along with the file(s) that will be included in the envelope. Click Create and

Preview:

DocuSign Envelope

Save Cancel Envelope Status <> 📄 📧

Create & Preview Send Discard

Envelope Status Draft

Linked Record contract/621 Sender Agiloft Implementer

*Subject Test - SSA for D004

Attached Documents Attach/Manage

1. 409-zGoogle-SSA-Sep 17 2018-with_signature_block.docx

Recipients Status: 3 record(s) found, 1 page(s). Click here to recount records.

New Mass Edit Delete Views Search

Edit	ID	Send Order	Status	Full Name	Email	Title	Role Name	Message	Envelope
	326	3	Draft	External Reviewer	careytestagiloft+sluexternalreviewer@gmail.com	The Reviewer	Customer1		
	325	2	Draft	Cari Wickliffe	careytestagiloft+wicklics@gmail.com		InternalSigner2		
	324	1	Draft	Agiloft Implementer	careytestagiloft+docusigndev@gmail.com	Implementer	InternalSigner1	Please sign this document.	

Signed Documents

Save Cancel <>

10. You will be taken to the DocuSign Interface, where you can see the contract document and drag in tags as necessary. Use the controls on the left to drag in additional tags; if you're using SLU templates, most tags will be in place already for you.

Test - SSA for D004

Agiloft Implementer

Standard Fields

- Signature
- Initial
- Stamp
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Checkbox
- Dropdown
- Radio
- Payment Item
- Formula
- Attachment
- Note
- Approve

Signature: Sign

Name: Agiloft Implementer

Title: Implementer

Date: Date Signed

Signature: Sign

Name: External Reviewer

Title: The Reviewer

Date: Date Signed

Signature: Sign

Name: Cari Wickliffe

Title:

Date: Date Signed

Documents

409-zGoogle-SSA-...
Pages: 6

1

2

3

ACTIONS SEND

11. When you're ready, click Send.

Status Changes

DocuSign will handle emailing all of the recipients, and will notify you as well when they're sent and signed. DocuSign will also send status updates to Agiloft so that from within the CMS you can see where the envelope is in the process.

When an envelope is sent the contract status will change to Pending Signature.

The recipients will get an email notification from DocuSign that the documents need to be signed off by them, and they can click the link in their email to access and sign the document.

When the document is fully signed it will be added to the Attachments tab, the status will change to Signed, and an email will be sent to the Contract Manager and Responsible Party. If the contract is set to become active on date of last signature, the contract start date will be set automatically when the signed document comes back from DocuSign and become Active. Otherwise, once the contract reaches its start date the status will change to Active.