

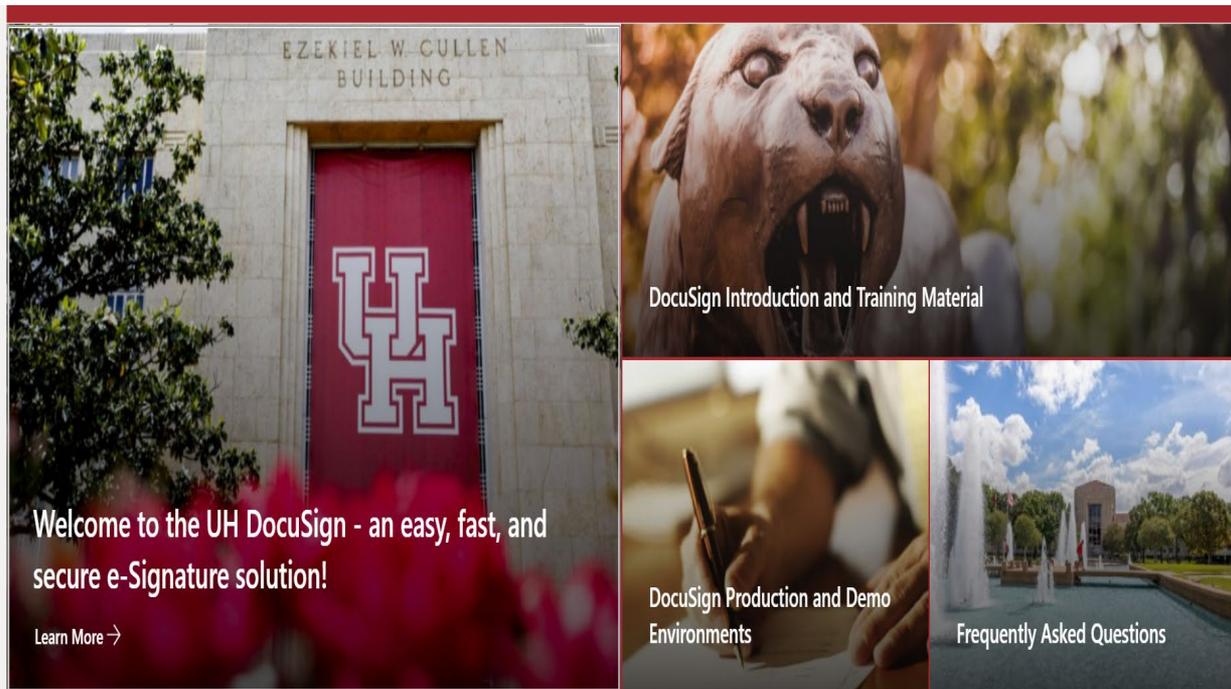


# **eSignature Powered by DocuSign**

## Topics

- SharePoint for UH DocuSign
- DocuSign Demo vs. DocuSign Production
- A&F Templates & PowerForm
- Best Practices DocuSign
- DocuSign Team/Contacts
- Next Steps

## SharePoint for UH DocuSign



<https://uofh.sharepoint.com/sites/UniversityofHouston-DocuSign>

- Introduction
- Training Materials
- DocuSign Environments
- FAQ'

# DocuSign Demo vs. DocuSign Production

DocuSign Demo



DocuSign Demo

<https://appdemo.docusign.com/home>

DocuSign Production



DocuSign Production

<https://app.docusign.com/home>

# A&F Templates & PowerForms

## Listing of DocuSign Templates

1	Addendum A - House-Hunting/Moving Relocation Expense Form	13	Hyperion Budget-Planning (CoogPlan) Access Form
2	Asset/Property Update Form	14	Off Campus Property- Return Form
3	Authorization for Off-Campus Property Form	15	Official Approval Functions Form
4	Cell Phone Allowance Form	16	P-Card Application
5	Certification of Annual Physical Inventory	17	SAM and MAPP Policy Approval Form (Office of Compliance & Ethics)
6	Certifying Signature Form	18	SAM/MAPP Policy Exception Form-A&F
7	Designation of Property Custodian Form	19	SAM/MAPP Policy Exception Form-Academic Affairs
8	Encumbrance Adjustment Form	20	SAM/MAPP Policy Exception Form-Chancellor/President
9	Exhibit B - Taxable Payment or Reimbursement to Employees	21	SAM/MAPP Policy Exception Form-All Other Divisions
10	Finance Access Form	22	Summary of Purchases >100K
11	Gift Card Request Form	23	Revenue Contracts Over \$50,000 Form
12	HRIS PeopleSoft Access Form	24	Request for Additional Compensation

## Best Practices

- Only for Official University Business
- Each unit have a Point of Contact (CDAs)
- Complete trainings available
- Use DocuSign Demo to self-train, test, initiate envelop, create template, PowerForm
- Recipient's must have a valid email address
- Do not use DocuSign to sign contracts with outside parties, unless OCA has approved the contract and the usage of DocuSign for signature
- Use A&F templates and PowerForm (HRIS) (fast, efficient, green, sustainable)
- Manage/update your DocuSign Profile and Preferences
- Manage 'My Preferences' - Signing and Sending, Sending Notifications, Recipient Notifications
- Set up Outlook email notifications from DocuSign

# DocuSign My Preferences (Notifications)

## Sending Notifications

Notify me when I am the sender and:

Select All

An envelope is complete

A signer assigns or delegates an envelope to someone else

A signer declines to sign

A signer withdraws consent to do business online

The first time each recipient views an envelope

Envelope delivery to a recipient fails

A signer's offline signature fails to synchronize

Documents will be purged from the system

When a response-limited Powerform hits either 70% or 100% of the responses limit

A comment is posted in an envelope I've sent

All comments

Only comments that mention me or are private to me

## Recipient Notifications

Notify me when I am a recipient and:

Select All

I have an envelope to sign

An envelope is completed

I am a copy-only recipient

I am an acknowledge recipient

Another signer declines to sign

The sender voids an envelope

The sender corrects an envelope

A signer assigns an envelope to me

Documents will be purged from the system

My fax is received

Another signer made changes that require my approval

I can edit an envelope, or specify or update recipient information

An envelope I signed offline fails to synchronize

An envelope is sent to a signing group to which I belong

A comment is posted in an envelope that's been sent to me

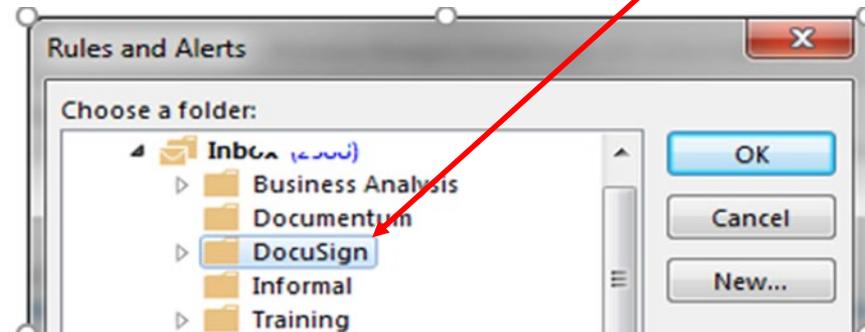
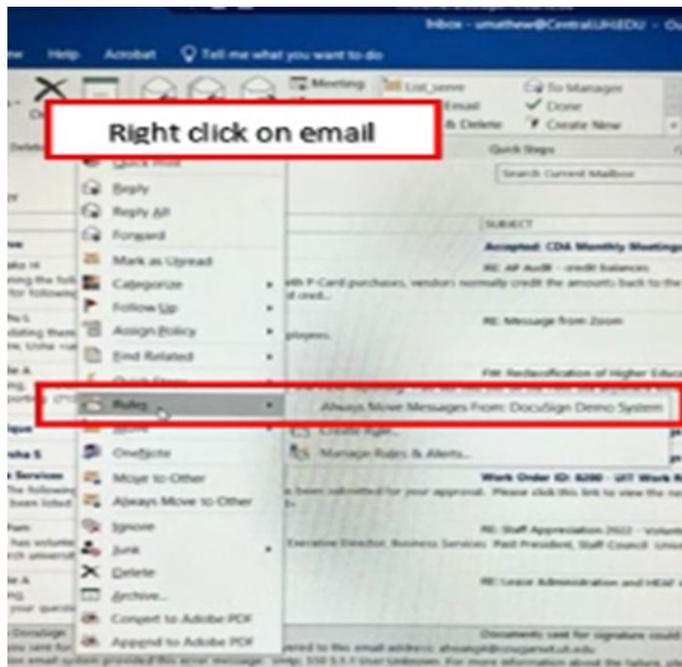
All comments

Only comments that mention me or are private to me

# Quick Rule Setting in Outlook about DocuSign emails

Select a DocuSign email in your inbox, then right-click on that email, scroll down to select **Rules**, and then choose **Always Move Messages from DocuSign System**

Next, click **New** to create a new folder or select the folder you wish to move DocuSign alerts to and click **OK**.



# DocuSign Contacts & What Next?

- **Contacts:**
  - Email [DocuSign@central.uh.edu](mailto:DocuSign@central.uh.edu)
  - Andrew Hoang, Financial Computing Systems
  - Sunin Cho, Manager, Computing Systems
  - Usha Mathew and/or Samantha (we can assist with templates/PowerForms)
  
- **What Next?**
  - Provide on-going additional trainings
  - Continue to add more templates/PowerForms
  - Update FAQ's
  - Open to suggestions

**eSignature Powered by DocuSign.**