



ESM DOCUSIGN INSTRUCTIONS

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Overview

The implementation of DocuSign streamlines the University's contract signature process and ensures that all contract records are automatically finalized and activated within ESM.

Under the updated process, approvals are now separate from the signature process. Contracts will first be submitted for approval. Once approved and ready for signature, the Contract Manager will initiate the signature process directly in ESM, which integrates seamlessly with DocuSign.

This guide provides step-by-step instructions for creating, routing, and completing contract documents through ESM and DocuSign.

Support

For additional support, please contact one of us in the procurement office at procurement@richmond.edu. We are glad to assist!

INSTRUCTIONS FOR UNIVERSITY-TEMPLATED CONTRACT

1. Create the Contract Record

1.1 Start by entering the required contract details:

1.1.1. Contract Details

1.1.2. Basic Contract Information

1.1.3. Contract Party Information

1.2 IS Survey

1.3 Save the contract record by clicking Save.

Note: For completed ESM Contract Management Instructions, see the ESM Training guide [here](#).

2. Prepare the Contract Document

2.1 Return to your saved contract record.

2.2 Navigate to the **Documents** tab

2.3 Select the appropriate Contract Template from the **All Available Contract Templates Section** (at the bottom of the Documents screen).

2.4 **Download** the agreement template to your hard drive and **edit** the template with contract-specific details as you normally would.

Everyday edits may include:

2.4.1. Collaborate with the vendor or others within your department

2.4.2. Updating scope of work

2.4.3. Confirming dates and dollar amounts

2.4.4. Including all required attachments or exhibits

2.5 Add the Vendor's legal company name to the signature block

Note: DO NOT change or delete any of the DocuSign formulas that are in the signature and date fields. Also, the signature block must be on its own page, as it is in the template.

2.6 Save the edited draft contract to your hard drive.

2.7 In your saved contract record, go to the Documents tab, click New to add the contract document you just saved.

2.8 Fill in the Title, Document Type (draft), and then add your document to the record. Select Yes to include the contract in the Approval Packet. Click Save.

Note: Your Document must be a Word Document with the .docx file type. Do not save it as a PDF.

Note: Due to a known issue, any standard dollar amount needs to be pre-pended with a “\” (for example, \\$100,000). This avoids a formatting error that drops the first number.

2.9 Click Save again to save the contract record.

3. Add Signers

Pre-requisite:

- *You must have an estimated amount of the total contract cost to identify who the signer will be for your contract.*
- *Have your vendor representative provide you with their signer's legal name, title, and email address.*

3.1 Within the contract record, select the **DocuSign Envelopes** tab.

3.1.1. Internal Signer

Select Signer Name from the drop-down. Be sure to adhere to the Delegation of Contract Approval and Signature Authority Policy. This policy can be found in the university policy library at: <https://policy.richmond.edu/library/index.html>.

Note: If you have a second Internal Signer, add their information into the Internal Signer 2 fields following the same instructions above.

3.1.2. 1st Party Signer (Vendor Signer)

Type the Signer's Full Legal Name, Title, and Email address in the fields provided. This is the name and title that will be used for the DocuSign signature. *Note: if there are two vendors, you would enter the second vendor as the 2nd Party Signer.*

3.2 Click Save to save the contract record.

4. ESM Approvals (Before Sending for Signature)

Before initiating DocuSign, you need to submit your contract reviews/approvals within ESM.

- 4.1 Enter the Contract Record
- 4.2 From the Approval Tab, to submit your Draft or possibly Final contract for Review and Other Approvals, click “Submit for Approval”
- 4.3 Approvers will review and approve the loaded contract in the Documents tab
- 4.4 Once the contract has been reviewed and approved by all applicable parties, the contract manager will receive an email notification stating the contract has been approved and the contract record status will change to **Approved**.

Once you have received notification that your contract is approved, the contract manager can proceed with finalizing the contract document and submitting it for signature.

5. Finalizing the Contract Document - Generate DocuSign Document

- 5.1 Enter the Contract Record, Select Edit Record.
- 5.2 Verify all approvals have been completed on the Approval Tab. If so, proceed to the Documents Tab.
- 5.3 In the **Generate Document Template Section**, upload the final contract by selecting Attach/Manage or by dragging your final edited contract into the drop box.

Note: Your Document must be a Word Document with the .docx file type. Do not save it as a PDF.

- 5.4 Once the document is uploaded, click the green “Generate DocuSign Document.”

Generate DocuSign Document

The updated document will now show up in the document listing with the “Contract Final” document type designation. Note, only Documents of type “Contract – Final” are currently available to send for signature.

Note: The Generate DocuSign Documents icon will not show unless you have completed Step 3.

- 5.5 Save the Contract Record.

6. Initiate DocuSign Signature Process

- 6.1 Proceed to the **DocuSign Envelopes** tab.
- 6.2 Verify the Document to be signed is selected in the File to Sign Section
- 6.3 Click on “**Create DocuSign Envelope**”
- 6.4 Review the Envelope and make sure the signing order and signers are correct.

To make updates, select the field and click the edit icon.

Note: If you make edits, you will need to re-finalize the contract document and repeat Instructions #5.

- 6.5 In the Top Left-hand corner, click the  icon. This will open the contract in DocuSign.
- 6.6 Hover over the contract document and select the “View” button to review the document.
- 6.7 Scroll through the document to review the layout and signing fields. If all is correct, you can click the X in the upper-right corner.
- 6.8 Optional: If you’d like to add a message to the signers, including a **summary of the contract’s purpose**, you can do so by clicking **Next**. Otherwise, click **Send Now**.

Once sent, your contract status will change to Pending Signature.

7. Completion

- 7.1 The document will be automatically emailed to the signers in the appropriate order of signature.
- 7.2 Once all signatures are obtained:
- 7.3 The **executed document** will automatically be uploaded to the ESM record, and the contract record status will update to Signed (if the start date of the contract is in the future) or to Active on the start date.
- 7.4 Both the Vendor and UR Signer will also receive a copy of the fully executed contract

As a best practice, please follow up with your vendor contact to ensure they have received a fully executed copy of the contract.

INSTRUCTIONS FOR VENDOR TEMPLATED CONTRACT:

1. Create the Contract Record

1.1. Start by entering the required contract details:

1.1.1. Contract Details

1.1.2. Basic Contract Information

1.1.3. Contract Party Information

1.2. IS Survey

1.3. Save the contract record by clicking Save.

Note: For completed ESM Contract Management Instructions, see the ESM Training guide [here](#).

2. Prepare the Contract Document

2.1. Return to your saved contract record.

2.2. Navigate to the **Documents** tab

2.3. Add the Vendor contract draft document as you usually would, by clicking the “New” button in the Documents Tab of the Contract record.

Note, only Documents of type “Contract – Final” are currently available to send for signature.

2.4. **Edit** the Vendor Template with contract-specific details as needed.

Everyday edits may include:

2.4.1. Collaborate with the vendor or others within your department

2.4.2. Updating scope of work

2.4.3. Confirming dates and dollar amounts

2.4.4. Including all required attachments or exhibits

2.5. Add the University’s Name to the signature block

Note: The signature block does not need to be on its own page.

2.6. Save the edited contract to your hard drive.

2.7. Upload contract draft revisions to the contract record by going to the Documents Tab and select

the Edit icon  on the Contract Draft Record.

2.7.1. Select Attach/Manage

2.7.2. Select the Update Icon  and attach the updated, revised contract to the record

2.7.3. Select Finish

2.7.4. Select Save

2.7.5. Save Contract Record

3. Add Signers

Pre-requisite:

- *You must have an estimated amount of the total contract cost to identify who the signer will be for your contract.*
- *Have your vendor representative provide you with their signer's legal name, title, and email address.*

3.1. Within the contract record, select the **DocuSign Envelopes** tab.

3.1.1. Internal Signer (University Signer)

Select Signer Name from the drop-down. Be sure to adhere to the Delegation of Contract Approval and Signature Authority Policy. This policy can be found in the university policy library at: <https://policy.richmond.edu/library/index.html>.

Note: If you have a second Internal Signer, add their information into the Internal Signer 2 fields following the same instructions above.

3.1.2. 1st Party Signer (Vendor Signer)

Type the Signer's Full Legal Name, Title, and Email address in the fields provided. This is the name and title that will be used for the DocuSign signature. *Note: if there are two vendors, you would enter the second vendor as the 2nd Party Signer.*

3.2. Click Save to save the contract record.

4. ESM Approvals (Before Sending for Signature)

Before initiating DocuSign, you need to submit your contract reviews/approvals within ESM.

4.1. Enter the Contract Record

4.2. From the Approval Tab, to submit your Draft or Final contract for Review and Other Approvals, click "Submit for Approval"

4.3. Approvers will review and approve the loaded contract in the Documents tab

4.4. Once the contract has been reviewed and approved by all applicable parties, the contract manager will receive an email notification stating the contract has been approved and The contract status will change to **Approved**.

Once you have received notification that your contract is approved, the contract manager can proceed with finalizing the contract document and submitting it for signature.

5. Finalizing Contract Document

- 5.1 Enter the Contract Record, Select Edit Record.
- 5.2 Verify all approvals have been completed on the Approval Tab. If so, proceed to the Documents Tab.
- 5.3 Upload the Final Contract (Can be in PDF format or Word with file type .docx) to the Documents Section using the Document Type of either Contract – Final, Amendment – Final, or Addendum – Final.
- 5.5 Save the Contract Record.

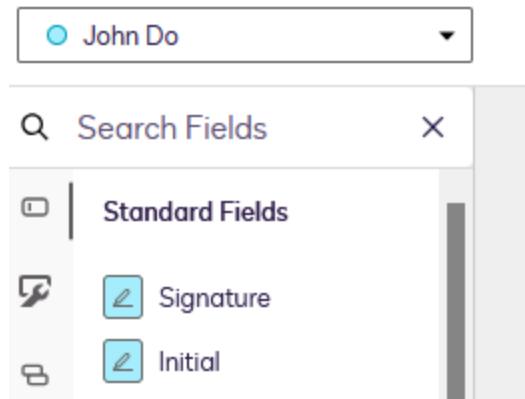
6. Initiate DocuSign Signature Process

- 6.1. When the Contract is ready for signature, proceed to the **DocuSign Envelopes** tab of the Contract record:
- 6.2. Ensure that your Contract document is selected in the “Files to Sign” Field.
- 6.3. Click “Create DocuSign Envelope” icon  .
- 6.4. In the DocuSign Envelope window that is displayed, ensure the Recipients are set appropriately with the correct Email addresses. If they need to be updated, you must repeat Instruction #5.
- 6.5. Click the “Create & Preview” button. This will open a DocuSign page for further review of the documents.
- 6.6. Hover over the contract document and select the “View” button to review the document.
- 6.7. Scroll through the document to review the layout and signing fields. If all is correct, you can click the X in the upper-right corner.
- 6.8. Optional: If you’d like to add a message to the signers, including a **summary of the contract’s purpose**, you can do so by scrolling down and entering the message.
- 6.9. Select **Next**

6.10. Scroll to the **Signature Block on the Contract**

6.11. From the **top-left of this preview page**, you can select a Recipient and drag-and-

drop   Signature a Signing tag into the signature location/field on the document.



Note: Some of these tags may be auto-filled with the recipient's details (Full Name, Email, etc.). You can also select existing tags and, from the top-right, change which recipient the tag is assigned to:



7. Repeat Step #6 for all signer recipients.

8. Once this is complete, click the “Send” button.

Once sent, your contract status will change to Pending Signature.

7. Completion

7.1 The document will be automatically emailed to the signers in the appropriate order of signature.

7.2 Once all signatures are obtained:

7.3 The **executed document** will automatically be uploaded to the ESM record, and the contract record status will update to Signed (if the start date of the contract is in the future) or to Active on the start date.

7.4 Both the Vendor and UR Signer will also receive a copy of the fully executed contract

7.5 As a best practice, please follow up with your vendor contact to ensure they have received a fully executed copy of the contract.

As a best practice, please follow up with your vendor contact to ensure they have received a fully executed copy of the contract.

DIRECTIONS FOR SIGNERS

Once a contract is submitted for Signature, the signer will receive an email from DocuSign stating that the contract is ready for their signature.

1. Within the Email received from DocuSign, select Review Document.
2. In DocuSign, review the Contract.
3. To Sign, Select Start.
4. Select Sign.
5. Select Finish.

The signed contract will be forwarded to the next recipient for finalization.

Once fully executed, the fully executed contract will automatically be uploaded to ESM, and both signers will get a copy of the fully executed copy via DocuSign.