ESM DOCUSIGN INSTRUCTIONS

FOR SIGNERS

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 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 contract will automatically be uploaded to ESM, and both signers will receive a copy via DocuSign.