THE OHIO STATE UNIVERSITY

DocuSign Instructions for Asset Management Forms

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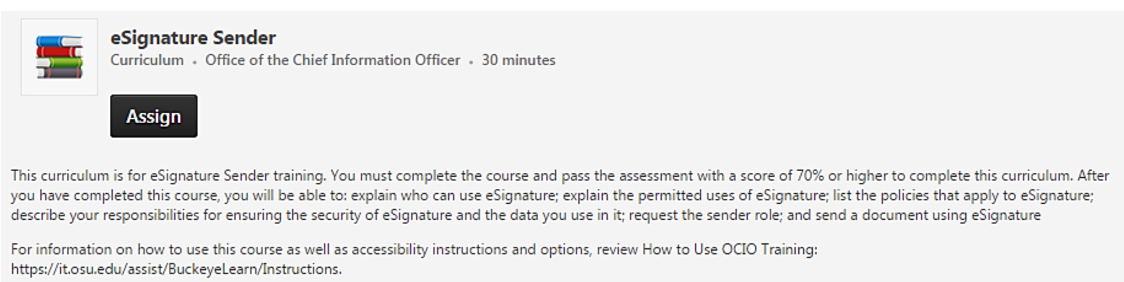
Role Responsibilities

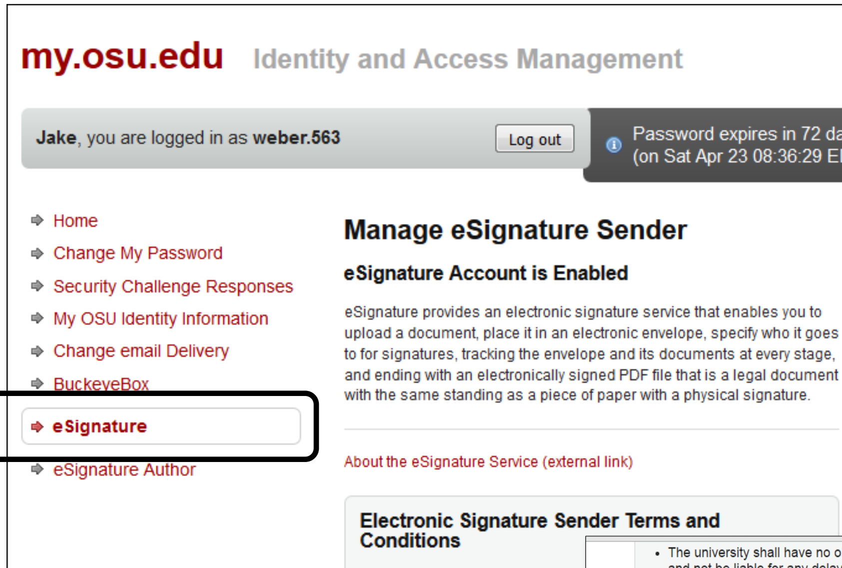
Signer	Ability to enter information into designated fields of Asset Management template forms and electronically sign (e.g. new asset). Available to all active OSU employees.
Sender	Ability to enter information into designated fields of Asset Management template forms, electronically sign, and designate to other signers (e.g. SFO). Available to all active OSU employees that have completed the ***eSignature Sender*** course in BuckeyeLearn.
Author	Ability to create and edit templates in DocuSign. Available to all active OSU employees that have completed the ***eSignature Author*** course in BuckeyeLearn. Note: DO NOT upload and/or create new templates for the Add Asset to Inventory & Asset Maintenance Form. You must use the Shared Templates that are authorized by the Asset Management Office.

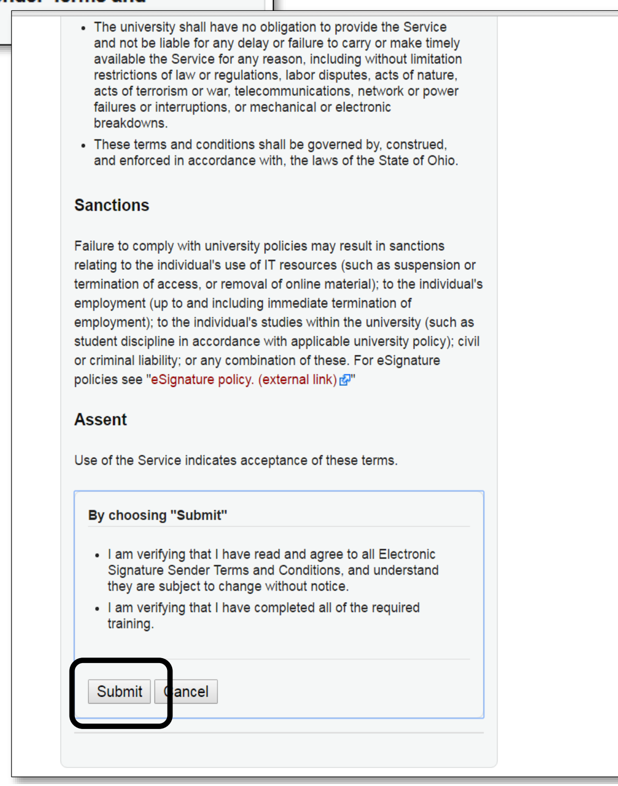
How to become a Sender [Help]

- Before you can send (submit) Add Asset to Inventory & Asset Maintenance Form through DocuSign, you must take the ***eSignature Sender*** course in BuckeyeLearn.



- After completing the course, you must log into ***my.osu.edu*** to accept the Electronic Signature Sender Terms and Conditions.
- Click the ***eSignature*** link from the menu on the left (see image below).





- Read the Terms and Conditions, then click **Submit** to accept the terms and conditions.

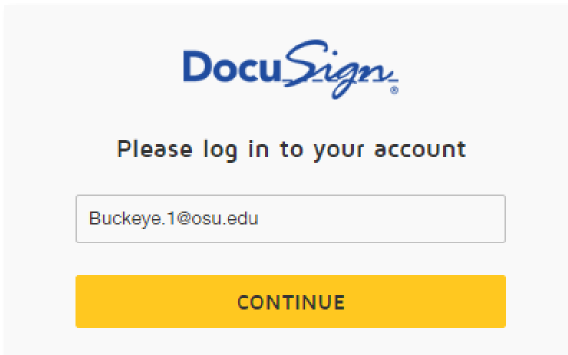
- After accepting the Terms and Conditions, you will receive an email from OCIO stating that they have received your request to become an **eSignature Sender**. You will receive a second email from OCIO when your request has been completed (typically within 24 hours). Once you have received the confirmation email, you will be able to send documents through DocuSign.

Selecting a Shared Template

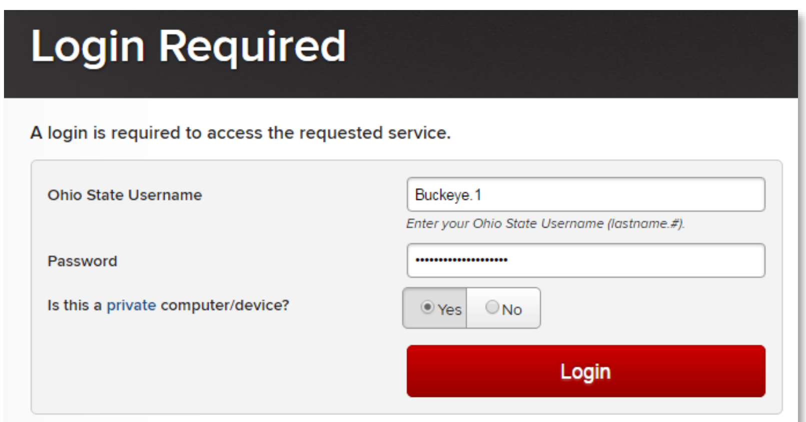
[Help]

DO NOT create your own templates – only Asset Management shared templates will be accepted by the Asset Management Office.

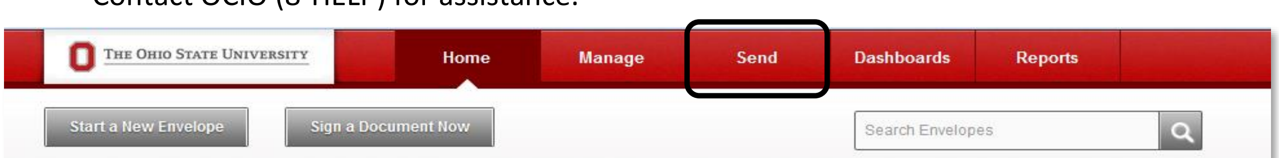
- Go to www.docusign.net or click the link to the appropriate form on the Asset Management Webpage. This will direct you to the DocuSign login page.
- Enter your full OSU email address (e.g. Buckeye.1@osu.edu), click **Continue**.



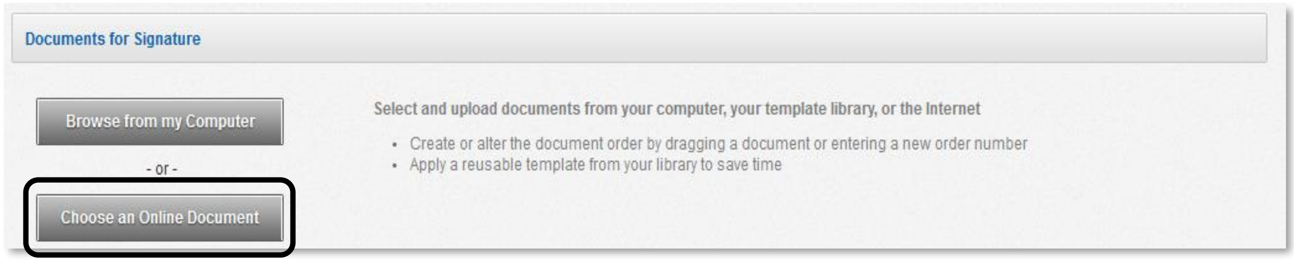
- You will be directed to the OSU login page, where you will be required to re-enter your OSU Username (name.#) and password.
- Click **Login**.



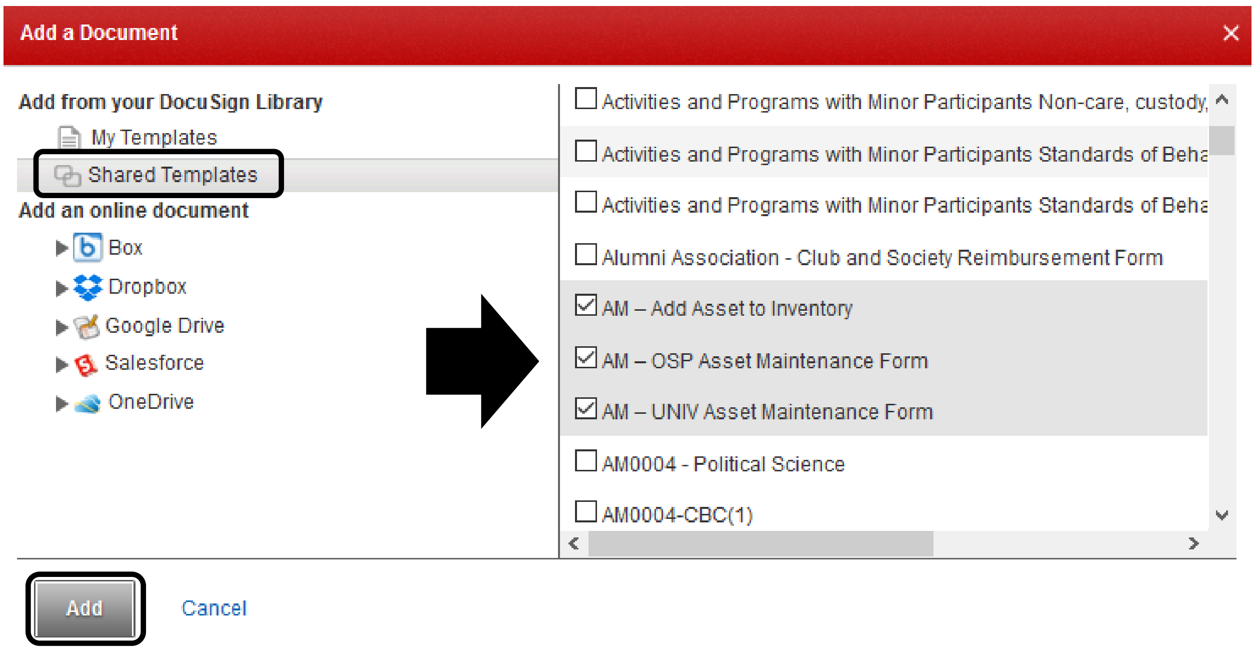
- On the OSU DocuSign Home page, click the **Send** button at the top of the page.
  - If the Send button is not visible, then your ***Sender*** access was not setup correctly. Contact OCIO (8-HELP) for assistance.



- Under Documents for Signature, click ***Choose an Online Document***.



- This will prompt a popup window to appear (be sure Pop-up Blockers are turned off). Click the ***Shared Templates*** link to bring up a list of forms that have been uploaded to DocuSign.
- From this list, select the Asset Management Template that you would like to submit **(*AM – Add Asset to Inventory***, ***AM – Asset Assignment Agreement Form***, ***AM – UNIV Asset Maintenance Form***, <u>or</u> ***AM – OSP Asset Maintenance Form*)** and then click the **Add** button in the lower left corner.

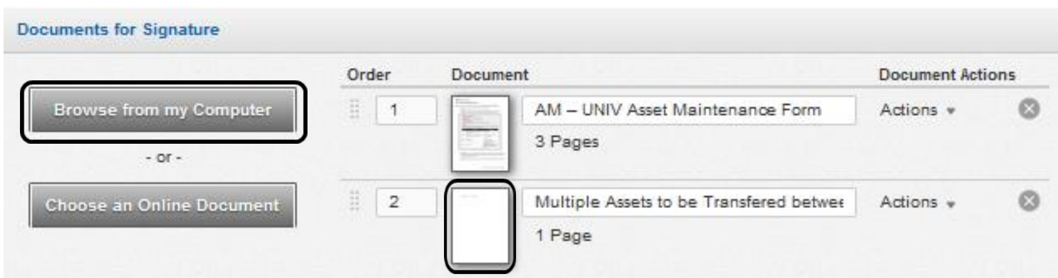


DO NOT create your own templates – only Asset Management shared templates will be accepted by the [Asset Management Office](#).

Completing Template [Help]

Before starting the template, consider the following important items:

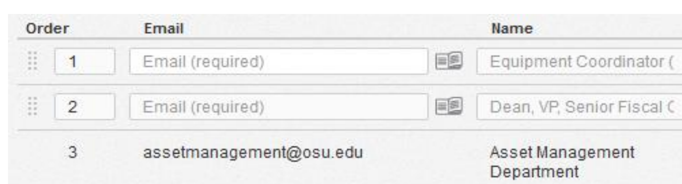
- ***Do I have all the critical information needed to complete and submit the form?***
  - Click the **Document** template in image format to review instructions and required information.
- **Will I need to attach any additional information?**
  - The Asset Maintenance Form template provides a limited number of fields for entry of assets. Additional assets must be added by attachment prior to hitting SEND.
  - Click the Browse from my Computer button to select the appropriate document(s) to attach (e.g. List of Assets).



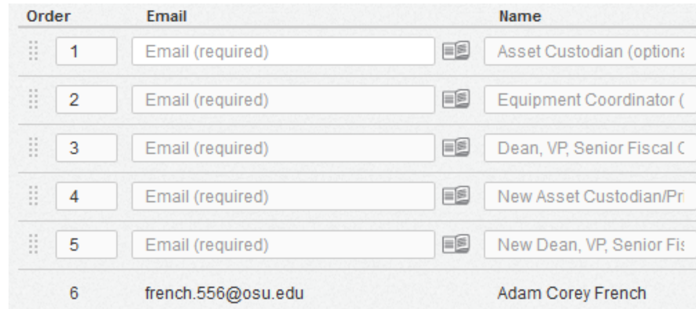
- **Do I know who the authorized recipients are for signature/approval for my area?**
  - Check with your applicable Service Center.

Starting the Template

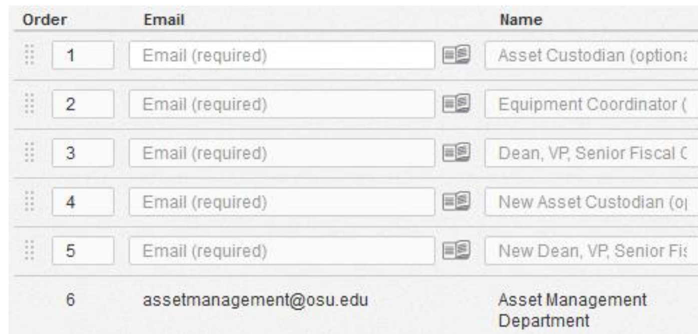
- Establish recipient and routing workflow for signature/approval by entering the email addresses of the appropriate recipient for each line:
  - AM – Add Asset to Inventory
    1. Equipment Coordinator
    2. Dean, VP, Senior Fiscal Officer, or Designee – required
    3. Asset Management Office



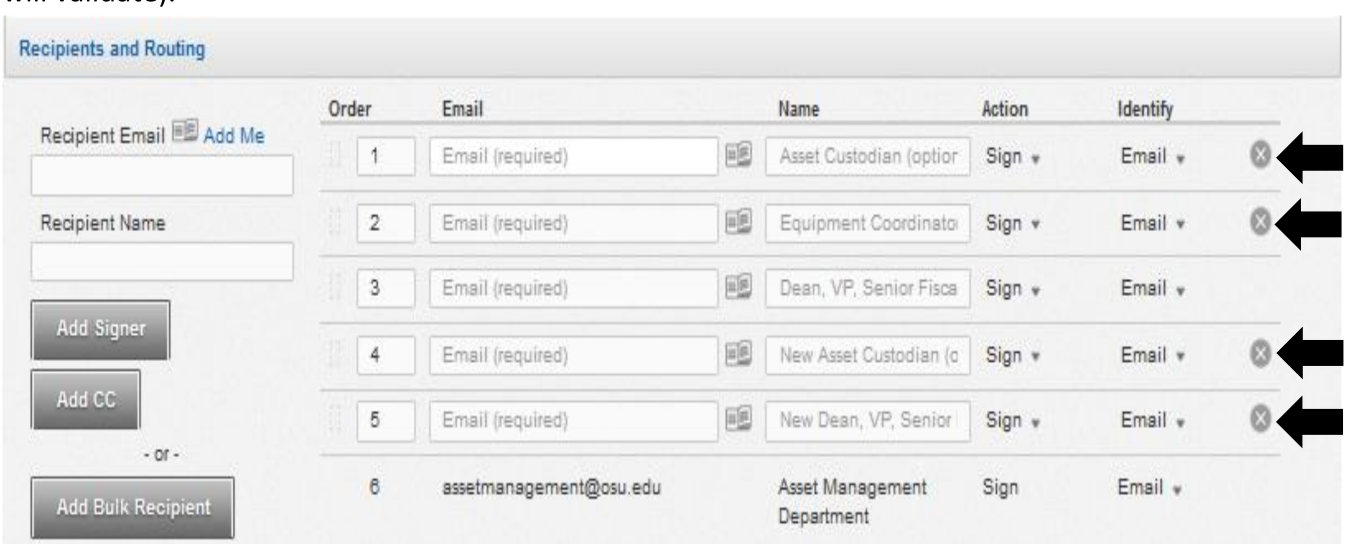
- AM – OSP Asset Maintenance Form
    1. Custodian/Principle Investigator
    2. Equipment Coordinator
    3. Dean, VP, SFO, or Designee – required
    4. New Dean, VP, SFO, or Designee – required for Internal Transfer
    5. New Custodian/Principle Investigator – optional for Internal Transfer
    6. Adam French



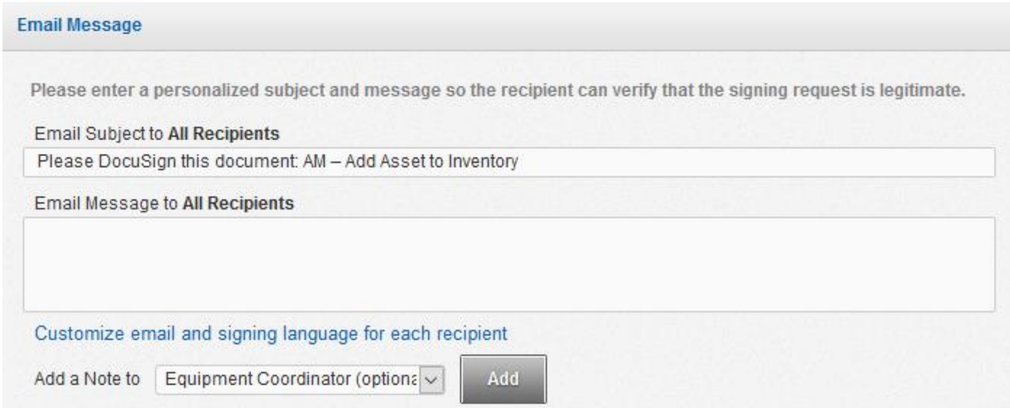
- AM – UNIV Asset Maintenance Form
    1. Custodian
    2. Equipment Coordinator
    3. Dean, VP, SFO, or Designee – required
    4. New Dean, VP, SFO, or Designee – required for Internal Transfer
    5. New Custodian – optional for Internal Transfer
    6. Asset Management Office



Note: If there is an X next to the recipient line, this signature is not required by the [Asset Management Office]. If you do not want the Custodian, Principle Investigator, or Equipment Coordinator signatures for your files, you can remove the signature fields from the routing workflow by clicking the X to the right of that line to delete the row (pop-up warning will validate). Likewise, if you are not internally transferring an asset, you can remove the signature fields for the New Dean, VP, SFO, or Designee and New Equipment Coordinator from the routing workflow by clicking the X to the right of that line to delete the row (pop-up warning will validate).



- If you want to add a message to the Recipients, you can do so in the ***Email Message*** section.



- Click the ***Next*** button at the bottom of the page to proceed to the Add Asset to Inventory or Asset Maintenance Form.

- Complete the Add Asset to Inventory or Asset Maintenance Form in full as prompted or allow the next recipient to add/edit information. Remember attachments can still be added and recipients can be changed by clicking the < Go Back button.

Submitting the Template

- When ready to route to next recipient, click **Send**.

Receipting the Template

- Once all of the required recipients have electronically signed the template form, you will receive an email notification stating that your document has been completed through the DocuSign process workflow.
    - ***This does not mean that the Asset Management Office has processed your request.***