

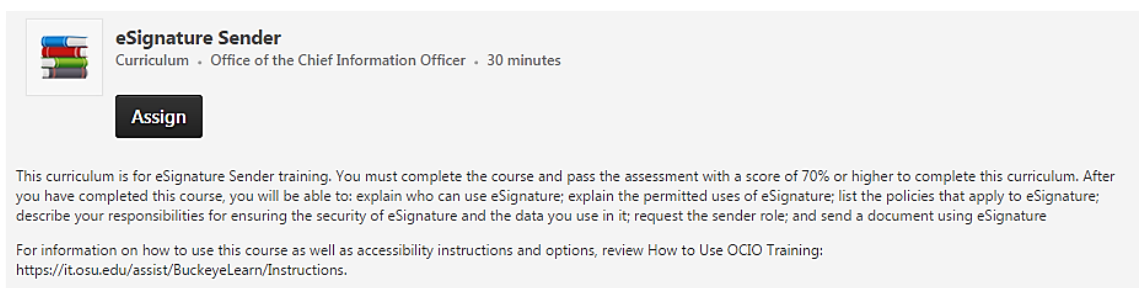
DocuSign Instructions for Asset Management Forms

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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](#).



eSignature Sender
Curriculum · Office of the Chief Information Officer · 30 minutes

Assign

This curriculum is for eSignature Sender training. You must complete the course and pass the assessment with a score of 70% or higher to complete this curriculum. After you have completed this course, you will be able to: explain who can use eSignature; explain the permitted uses of eSignature; list the policies that apply to eSignature; describe your responsibilities for ensuring the security of eSignature and the data you use in it; request the sender role; and send a document using eSignature

For information on how to use this course as well as accessibility instructions and options, review How to Use OCIO Training:
<https://it.osu.edu/assist/BuckeyeLearn/Instructions>.

- 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).

my.osu.edu Identity and Access Management

Jake, you are logged in as **weber.563** Password expires in 72 da
(on Sat Apr 23 08:36:29 EE

- ⇒ Home
- ⇒ Change My Password
- ⇒ Security Challenge Responses
- ⇒ My OSU Identity Information
- ⇒ Change email Delivery
- ⇒ BuckeyeBox
- ⇒ **eSignature**
- ⇒ eSignature Author

Manage eSignature Sender

eSignature Account is Enabled

eSignature provides an electronic signature service that enables you to upload a document, place it in an electronic envelope, specify who it goes to for signatures, tracking the envelope and its documents at every stage, and ending with an electronically signed PDF file that is a legal document with the same standing as a piece of paper with a physical signature.

[About the eSignature Service \(external link\)](#)

Electronic Signature Sender Terms and Conditions

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

- The university shall have no obligation to provide the Service and not be liable for any delay or failure to carry or make timely available the Service for any reason, including without limitation restrictions of law or regulations, labor disputes, acts of nature, acts of terrorism or war, telecommunications, network or power failures or interruptions, or mechanical or electronic breakdowns.
- These terms and conditions shall be governed by, construed, and enforced in accordance with, the laws of the State of Ohio.

Sanctions

Failure to comply with university policies may result in sanctions relating to the individual's use of IT resources (such as suspension or termination of access, or removal of online material); to the individual's employment (up to and including immediate termination of employment); to the individual's studies within the university (such as student discipline in accordance with applicable university policy); civil or criminal liability; or any combination of these. For eSignature policies see "[eSignature policy \(external link\)](#)"

Assent

Use of the Service indicates acceptance of these terms.

By choosing "Submit"

- I am verifying that I have read and agree to all Electronic Signature Sender Terms and Conditions, and understand they are subject to change without notice.
- I am verifying that I have completed all of the required training.

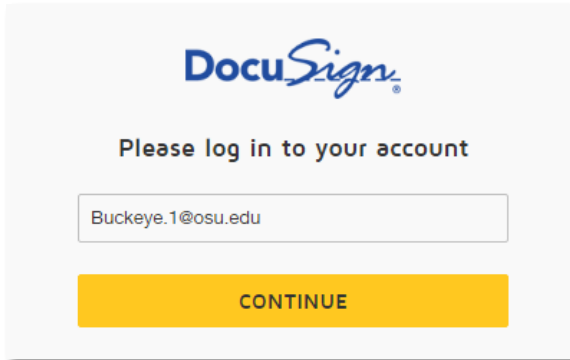
- After accepting the Terms and Conditions, you will receive an email from OCIO stating that they have received your request to become an **eSignature Sender**. You will receive a second email from OCIO when your request has been completed (typically within 24 hours). Once you have received the confirmation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

Selecting a Shared Template

[\[Help\]](#)

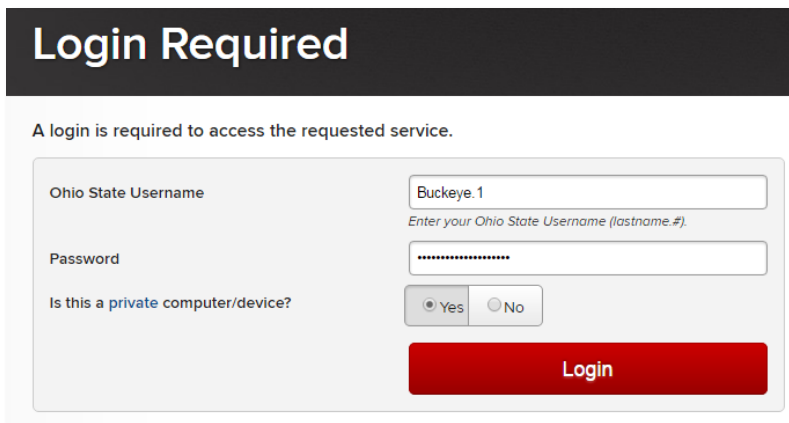
DO NOT create your own templates – only Asset Management shared templates will be accepted by the [Asset Management Office](#).

- 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**.



The image shows the DocuSign login page. At the top is the DocuSign logo. Below it, the text reads "Please log in to your account". There is a text input field containing the email address "Buckeye.1@osu.edu". Below the input field is a yellow button labeled "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**.



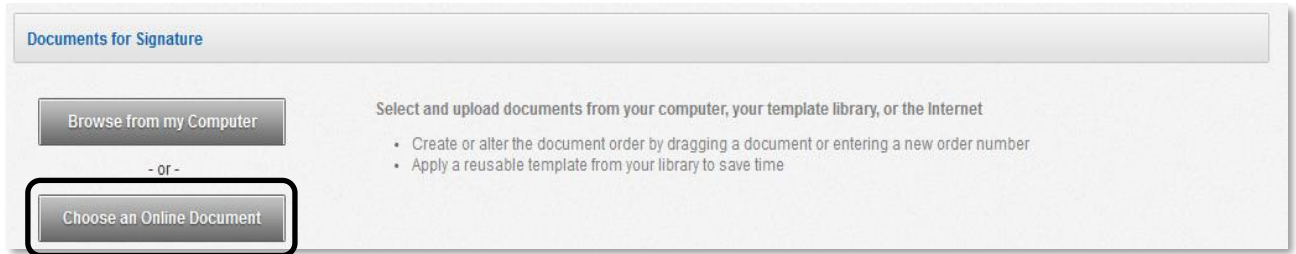
The image shows the OSU login page. At the top, a black banner reads "Login Required". Below this, a message states "A login is required to access the requested service." The login form includes fields for "Ohio State Username" (containing "Buckeye.1"), "Password" (masked with asterisks), and a radio button selection for "Is this a private computer/device?" with "Yes" selected. A red "Login" button is at the bottom.

- 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.

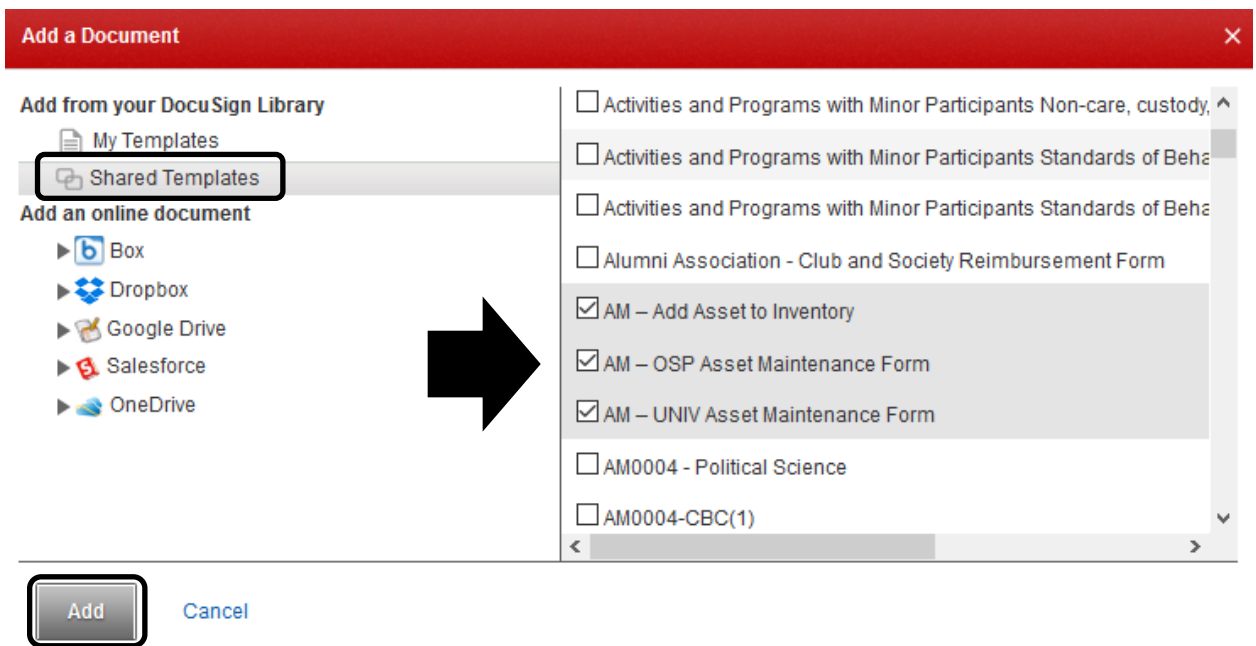


The image shows the OSU DocuSign Home page. The top navigation bar is red and contains the OSU logo, "THE OHIO STATE UNIVERSITY", and buttons for "Home", "Manage", "Send", "Dashboards", and "Reports". The "Send" button is highlighted with a black box. Below the navigation bar are buttons for "Start a New Envelope" and "Sign a Document Now", and a search bar labeled "Search Envelopes" with a magnifying glass icon.

- 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, or 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).

Order	Document	Document Actions
1	AM - UNIV Asset Maintenance Form 3 Pages	Actions ▾ ×
2	Multiple Assets to be Transferred betwet 1 Page	Actions ▾ ×

- **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

Order	Email	Name
1	Email (required)	Equipment Coordinator (
2	Email (required)	Dean, VP, Senior Fiscal C
3	assetmanagement@osu.edu	Asset Management Department

- 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

Order	Email	Name
1	Email (required)	Asset Custodian (option:
2	Email (required)	Equipment Coordinator (
3	Email (required)	Dean, VP, Senior Fiscal C
4	Email (required)	New Asset Custodian/Pr
5	Email (required)	New Dean, VP, Senior Fis
6	french.556@osu.edu	Adam Corey 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

Order	Email	Name
1	Email (required)	Asset Custodian (option:
2	Email (required)	Equipment Coordinator (
3	Email (required)	Dean, VP, Senior Fiscal C
4	Email (required)	New Asset Custodian (o)
5	Email (required)	New Dean, VP, Senior Fis
6	assetmanagement@osu.edu	Asset Management Department

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).

Recipients and Routing

Recipient Email [Add Me](#)

Order	Email	Name	Action	Identify
1	Email (required)	Asset Custodian (optio	Sign ▾	Email ▾
2	Email (required)	Equipment Coordinator	Sign ▾	Email ▾
3	Email (required)	Dean, VP, Senior Fisca	Sign ▾	Email ▾
4	Email (required)	New Asset Custodian (o	Sign ▾	Email ▾
5	Email (required)	New Dean, VP, Senior	Sign ▾	Email ▾
6	assetmanagement@osu.edu	Asset Management Department	Sign	Email ▾

Recipient Name

- or -

- 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.***