

USING DOCUSIGN WITH SCM

Simplifying the SCM contract document electronic signature process requirements for internal and external contract document signatories with the DocuSign solution.

Setup external/internal signers
and route your contract for
signature

Signer Setup and Route for Signature

Before we get started

THINGS YOU SHOULD KNOW

- **Only the procedures for setting up signers, routing documents for signature, and electronically signing contract has changed with the implementation of DocuSign; everything else stays the same.**
- **Signers no longer need to be registered as bidders or designated as a contact under a registered bidder.** “Yah-hoo.”
- **You need a valid email address to setup a signatory.** (That goes for external AND internal.)

There’s an alternate procedure that allows you to setup signers the old way using the bidder contact (external) and the PS user ID (internal), but it’s more complicated and requires more steps. It’s your option, but we’re going to focus on teaching you the new way because it’s SO much easier!

- **You need a valid phone number (no extensions) for the EXTERNAL signer.**

The State has opted to use DocuSign functionality requiring authentication of the *external* signer by text. It’s simple and verifies the signatory’s identity. In case you’re wondering, we don’t need to authenticate State (internal) signers.

- **As the document author/administrator, you designate the signing order; it should still ALWAYS BE external (supplier) first, then internal (the State).**

All SCM templates have been updated to provide yellow “sign here” tags (invisible from within SCM) in the signature blocks. They’ll require signers to provide a signature, a title, and the date.

External signers will be the first tags visible to a signer, so you’ve got to get the signing order right! Again, supplier first, then the State.

Signer Setup and Route for Signature

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Signer Setup and Route for Signature

Okay, here we go!

FIRST THINGS FIRST

Employee Self Service Find an Existing Document [New Window](#)

Find an Existing Document

*Source Transaction

Contract Style

Document Type

*SetID Contract ID

Supplier SetID Supplier ID

Supplier Name Short Supplier Name

Description

Administrator

Sponsor

Department

All Statuses Draft/Collaborated Pending Approval Pending Internal Signature

Pending Internal Collaboration/Review Approved Pending External Signature

Pending External Collaboration/Review Dispatched Executed/Complete

Additional Search Criteria

[Keyword Search](#) [Add a Document](#)

FIND YOUR CONTRACT

Log into PeopleSoft and navigate to Supplier Contract Management (SCM).

Use the search options to locate your contract and pull up the Document Management page.

So far, nothing's different!

Signer Setup and Route for Signature

On your mark. Get set.

GOT YOUR DOC?

Document Management

Document Management

SetID STIND Contract ID 000000000000000000041434 [Return to Document Search](#)

Supplier ATWOOD LAKE COMMUNITY ASSOC INC

Contract Style General Contract

Document Type 00705 FA APHS & IAP Grants [Is This Contract Co](#)

Description art grant

Administrator Werner,Jeania-061

Sponsor Department 039095 DOA - Procurement - Admin Svcs

Version 0.00 Created On 04/17/20 9:48AM [Document Details](#)

Status Draft Last Modified On 04/21/20 10:15AM

View and Edit Options:

[View Document](#)

[Edit Document](#)

[Add Supplemental Documents](#)
[Document Modification Summary](#)
[Document Version History](#)

Review and Approval:

[Route Internally](#)

[Preview Approval](#)

[Submit for Approval](#)

[Bypass Approvals](#)

[Internal Contacts/Signers](#)

[External Contacts/Signers](#)

Other Document Actions:

[Recreate Document](#)

[Prepare and Route for e-Signature](#)

[Deactivate Document](#)

[Generation Log](#)

OKAY, LET'S ROLL!

From the Document Management page, click the **Prepare and Route for e-Signature** .

This'll take you to the **Send Document for Signing** page where we set up the document for signing with the new DocuSign process.

We can get this done in just FOUR steps!

Signer Setup and Route for Signature

Send Document for Signing

SetID STIND Contract ID 000000000000000000041456

Supplier ATWOOD LAKE COMMUNITY ASSOC INC

Signing Order Sign based on Sign Order

Send To Recipients

Identity Authentication

*Email	User	Recipient Name	Carbon Copy	Sign Order	External Signer
XXronmike@outlook.com		Rhonda Fink	<input type="checkbox"/>	1	<input checked="" type="checkbox"/>

Subject art grant

Message

Attachments

Send Cancel

STEP 1

Setup signers and the signing order on the **Email Address** tab.

- **Email**
Enter the signer's valid email address.
- **Recipient Name**
Enter the signer's name as it must appear on the contract.
- **Sign Order**
Enter a number to define the order in which the document should be signed.
- **External Signer**
Use the plus and minus buttons if you need to add or remove rows.

Select the **Identity Authentication** tab to move on to the next step!

Other Details

Before you setup signatures, ALWAYS verify that the contract is the correct document and version.

The name entered as the Recipient Name will default as the signature for the signer, so the spelling must be correct. The signer could decline to sign if something isn't right.

Keep these things in mind.

- External signers should always be first; that's the State's requirement.
- DocuSign will send email notifications to signers in the order you specify
- Don't forget and leave the Sign Order blank; because of the embedded Sign Here tags signatures might end up in the wrong places.

Signer Setup and Route for Signature

Send Document for Signing

SetID STIND Contract ID 000000000000000000041528

Supplier KELTNER AND ASSOCIATES INC

Signing Order Sign based on Sign Order

Send To Recipients

*Email	User Authentication	Country Code	Phone Number	Access Code		
idojeanlawerner@idoa.in.gov	Text Message	1	3175655555		+	-
JWerner@idoa.IN.gov		1			+	-

Subject consulting services

Message

Attachments

Send Cancel

STEP 2

Set up the External Signer authentication.

- **User Authentication**

From the User Authentication field drop down list, select text message as the authentication method *for the external signer*.

The signer must have a mobile device that can accept text or SMS messages.

Other Details

Signer authentication is not system-enforced.

The State's definition of electronic signature requires authentication for *external signers* but not for internal signers.

Oversight agency approvers may deny your contract if External Signers have not been authenticated.

Signer Setup and Route for Signature

Send Document for Signing

SetID STIND Contract ID 000000000000000000041528
Supplier KELTNER AND ASSOCIATES INC

Signing Order Sign based on Sign Order

Send To **Recipients**

*Email	User Authentication	Country Code	Phone Number	Access Code
idoajeaniawerner@idoa.in.gov	Text Message	1	3175555555	
JWerner@idoa.IN.gov		1		

Subject CONSULTING SERVICES

Message
A contract for consulting services with the State of Indiana has been prepared and is ready for your review and electronic signature.
Before you click Review Document, visit the eSigning Electronic Contracts webpage at <https://www.in.gov/idoa/2977.htm> to find instructions for signing with DocuSign.

Attachments

Send Cancel

STEP 3

Prepare the email notification.

The DocuSign email notification that is sent to signers will include what's written in the Subject and Message fields at the bottom of the Send Document for Signing page.

1. The Subject Line

Adjust the wording in the Subject field as you prefer to identify the document to be signed.

2. Enter a Message for Signers

There will not be system-generated text (as was included before DocuSign) in the notification to signers; it's up to you to provide anything necessary in the message.

Do not use quotation marks inside the message field!

Other Details

We recommend something like this to include in the email notification message.

A contract for **FILL IN THE BLANK** services with the State of Indiana has been prepared and is ready for your review and electronic signature.

Before you click Review Document, visit the eSigning Electronic Contracts webpage at <https://www.in.gov/idoa/2977.htm> to find instructions for signing with DocuSign.

Thank you.

FILL IN YOUR NAME

FILL IN YOUR CONTACT INFO

Signer Setup and Route for Signature

Send Document for Signing

SetID STIND Contract ID 000000000000000000041528
Supplier KELTNER AND ASSOCIATES INC

Signing Order

Send To **Recipients**

*Email	User Authentication	Country Code	Phone Number	Access Code
<input type="text" value="idoajeaniawerner@idoa.in.gov"/>	<input type="text" value="Text Message"/>	<input type="text" value="1"/>	<input type="text" value="3175555555"/>	<input type="text"/>
<input type="text" value="JWerner@idoa.IN.gov"/>	<input type="text"/>	<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>

Subject

Message

Attachments

STEP 4

Send for Signature.

Last chance! Before you send it out, check one last time to make sure you've got the bases covered.

- ✓ email address is good
- ✓ Recipient's name spelled correctly
- ✓ Sign Order designated
- ✓ Checkbox selected for External Signer
- ✓ Identity Authentication set up for External Signer(s)

All set? Okay, let's do this!

Click the **Send** button.

Other Details

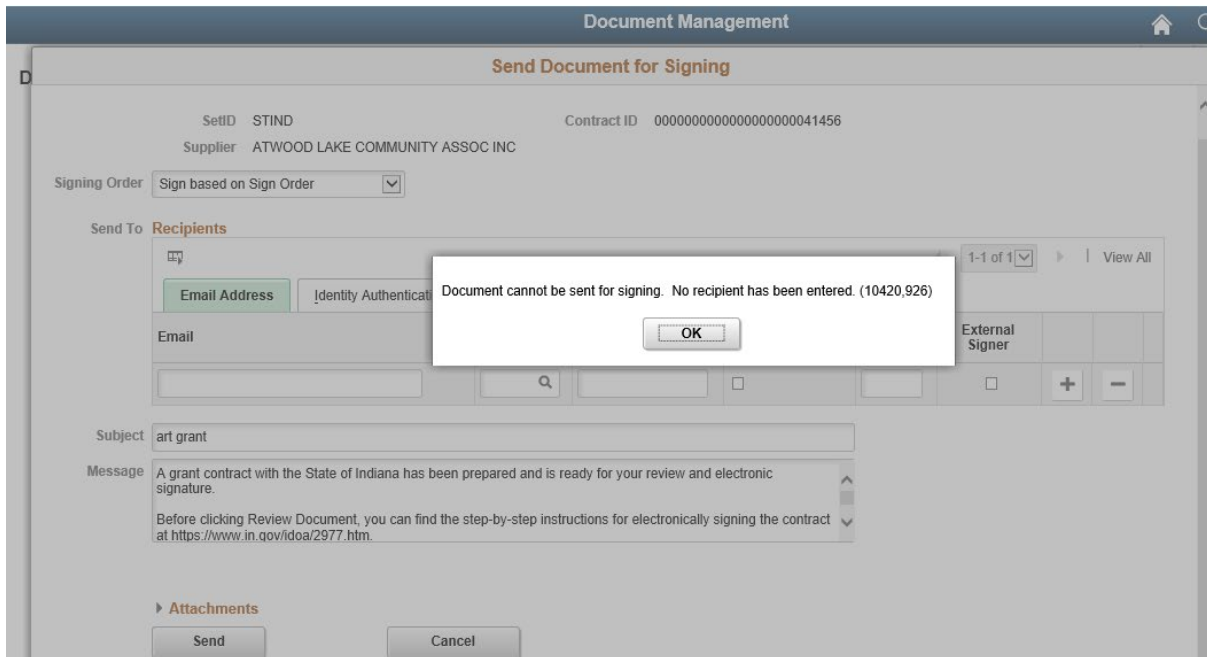
The Review Document email notification will be sent to the first signer.
After the first signer has finished, an email notification will be sent to the next signer in line, and so on.

AWESOME JOB!

Signer Setup and Route for Signature

Uh-Oh! There's a Problem.

DOC CAN'T BE SENT



GOT AN ERROR?

If you click Send without setting up signers, you'll get this error message that says, "Document cannot be sent for signing. No recipient has been entered."

Just click the OK button and complete the required steps to set up the signers.

Signer Setup and Route for Signature

Let the signing begin.

TRACK THE STATUS

The screenshot shows the DocuSign Document Management interface. At the top, there's a navigation bar with a back arrow and the text "Document Management". Below this, the "Document Management" section displays various document details:

- SetID: STIND
- Supplier: ATWOOD LAKE COMMUNITY ASSOC INC
- Contract Style: General Contract
- Document Type: SOI Grant Template
- Description: art grant
- Administrator: Werner, Jeania-061
- Contract ID: 000000000000000000041456
- Department: 039095
- Version: 0.01
- Status: Draft
- Created On: 04/21/20 10:49AM
- Last Modified On: 04/21/20 3:45PM

A red arrow points to the "Get e-Signature Status" button. Below the button, the "Signing Details" section shows the signature status as "Pending Signatures" and provides a log of actions:

- 04/21/2020 07:45 PM The envelope was created by Jeania Werner
- 04/21/2020 07:45 PM Jeania Werner sent an invitation to Rhonda Fink [idoajeaniawerner@gmail.com]

The "Signers" section contains a table with the following data:

	Email	User Name	Sign Status	Signed DTTM
1	idoajeaniawerner@gmail.com	Rhonda Fink	Pending Signature	
2	jwerner@idoa.in.gov	L Erin Kellam	Pending Signature	

At the bottom, there are three sections of actions:

- View and Edit Options:** View Document, Add Supplemental Documents, Document Modification Summary, Document Version History
- Review and Approval:** Internal Contacts/Signers, External Contacts/Signers
- Other Document Actions:** Cancel Signature Process, Deactivate Document, Generation Log

SIGNING DETAILS

After you click Send, the Document Management page will update and display info about your actions.

Under **Signing Details** it'll show the date/time you created the DocuSign envelope and sent the invitation (to sign) to the first signer.

Under **Signers** it'll show the Sign Order, email address, User Name and Sign Status for all signers entered.

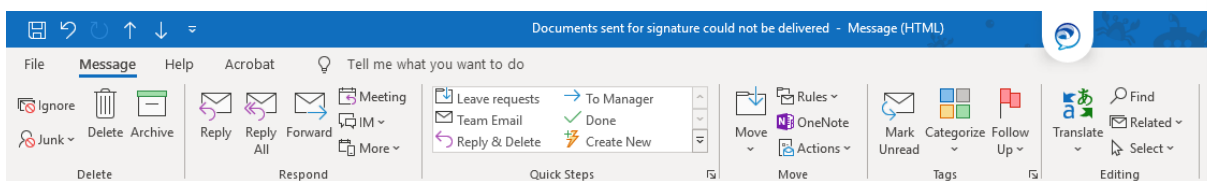
This is the only place you can verify the signer information after clicking Send.

The info on this page won't update until *you* click the **Get e-Signature Status** button *after* the signers have signed.

Signer Setup and Route for Signature

Return to sender.

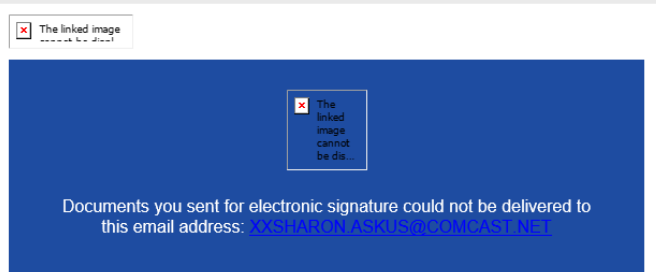
DOCS NOT DELIVERED



Documents sent for signature could not be delivered

DocuSign Demo System <dse_demo@docusign.net>
To Werner, Jeania

**** This is an EXTERNAL email. Exercise caution. DO NOT open attachments or click links from unknown senders or unexpected email. ****



The destination email system provided this error message:

For more information about the failure, please see the attached email message or reference DocuSign's knowledge base to interpret this error code.

If the email address is incorrect, follow these steps to correct it and resend the

YOU'LL GET A MESSAGE

If the signer email address is invalid, you'll receive a message like this one to let you know the documents couldn't be delivered.

No problem.

Make sure you have the correct email address, then just follow the steps to cancel the e-Signature process and you can update the info.

Signer Setup and Route for Signature

Signing declined.

SIGN PROCESS VOIDED

Voided: consulting contract Trash X



Jeania Werner via DocuSign <dse_demo@docusign.net>
to me ▾

Tue, Apr 21

DocuSign



Jeania Werner voided consulting contract.

Jeania Werner
JWerner@idoa.IN.gov

consulting contract has been voided for the following reason:
Cancel All Signatures:

YOU'LL GET A MESSAGE

If the signer declines the invitation to sign (in the case of an External Signer) or “voids” the contract (when an Internal Signer says no), you’ll get a notification like this one. The signers will get it, too.

Maybe the signer’s name was wrong, or maybe there’s a problem with something in the contract document. You’ll have to figure that out, but we can fix this so it can be sent again.

Follow the procedures to cancel signatures, and you’re all set.

Signer Setup and Route for Signature

Need to stop the signing?

CANCEL SIGNATURES

The screenshot shows the DocuSign Document Management interface. At the top, there is a navigation bar with a back arrow and the text 'Document Management'. Below this, the document details are displayed in a grid format. The details include: SetID (STIND), Contract ID (000000000000000000041456), Supplier (ATWOOD LAKE COMMUNITY ASSOC INC), Contract Style (General Contract), Document Type (SOI Grant Template), Description (art grant), Administrator (Werner.Jeania-061), Sponsor, Department (038085), Version (0.01), Status (Draft), Created On (04/21/20 10:49AM), and Last Modified On (04/21/20 3:45PM). There is also a checkbox for 'Is This Contract Confidential?' set to 'No'. Below the details, there is a 'Signing Details' section with a 'Get e-Signature Status' button. The 'Signers' section contains a table with the following data:

	Email	User Name	Sign Status	Signed DTTM
1	idoajeaniawerner@gmail.com	Rhonda Fink	Pending Signature	
2	jwerner@idoa.in.gov	L Erin Kellam	Pending Signature	

At the bottom of the interface, there are three main sections: 'View and Edit Options' with a 'View Document' button; 'Review and Approval' with links for 'Internal Contacts/Signers' and 'External Contacts/Signers'; and 'Other Document Actions' with a 'Cancel Signature Process' button (highlighted with an orange box) and a 'Deactivate Document' button. A 'Generation Log' link is also present.

STOP THE PROCESS

If at any time for any reason you need to stop the e-Signature process, just follow these steps.

1. Click the **Cancel the Signature Process** button.

Email notifications will be sent to all parties.

2. Clear the info (**literally delete the information from the page**) on the Internal Contacts/Signers and External Contacts/Signers pages.

3. When you're ready to try again, repeat the steps to setup the signers and send for signature.

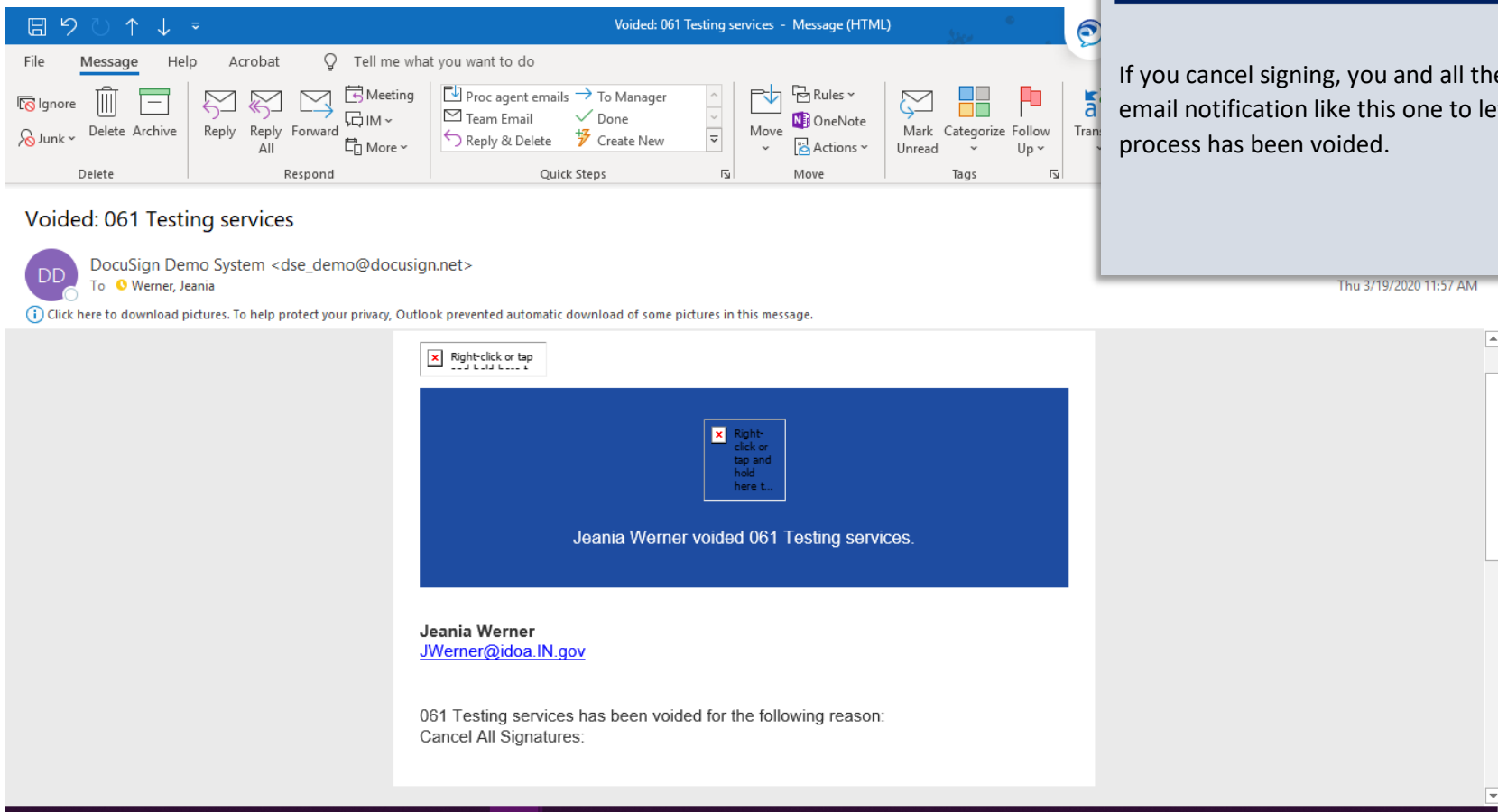
Signer Setup and Route for Signature

It's a done deal.

SIGNING CANCELLED

YOU'LL GET A MESSAGE

If you cancel signing, you and all the signers will get an email notification like this one to let you know the process has been voided.



Signer Setup and Route for Signature

Signers need some help?

SIGNING INSTRUCTION



VISIT THE WEBPAGE

The procedures for signing an SCM document electronically with DocuSign are pretty simple; many signers will likely make their way through the procedure without additional instruction.

For those who might not be as confident or would just like to make certain they've got it covered, detailed step-by-step instruction is available on IDOA's website at:

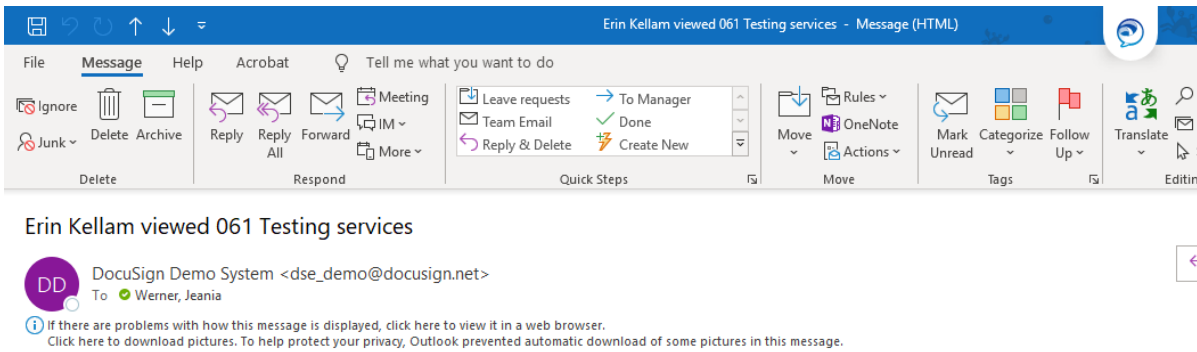
<https://www.in.gov/idoa/2977.htm>.

The State of Indiana is using the Supplier Contract Management module (SCM)

Signer Setup and Route for Signature

Inquiring minds want to know.

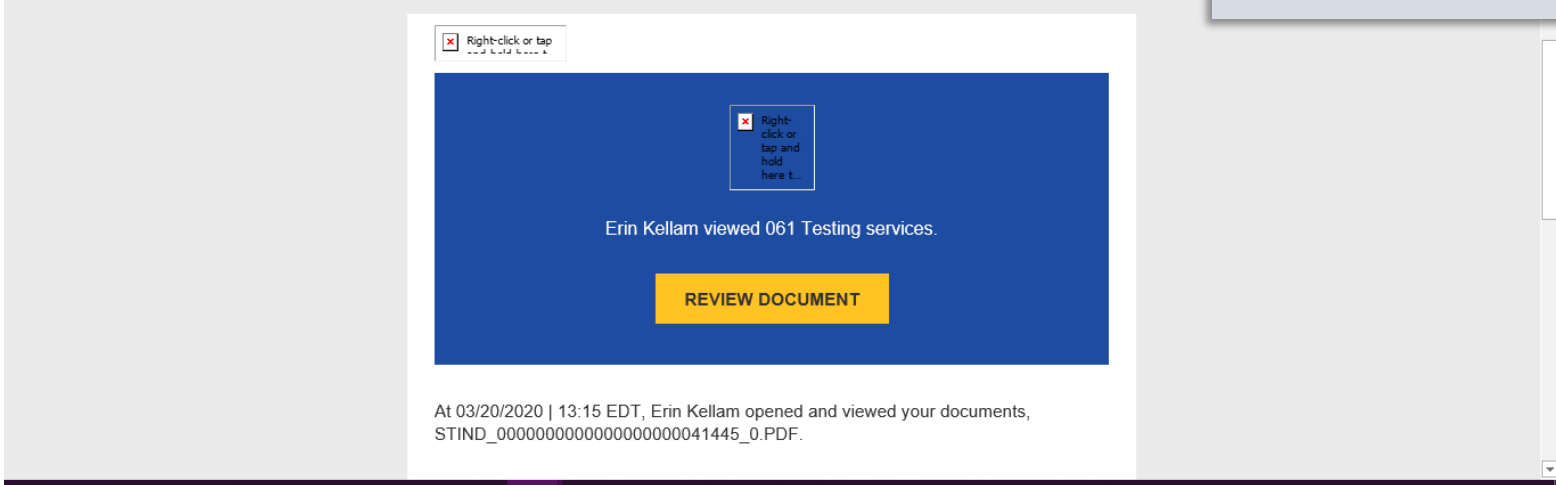
DOCUMENT VIEWED



YOU'LL GET A MESSAGE

After a signer clicks **Review Document** in the DocuSign email they receive, you'll get a message to let you know the person opened and viewed the documents you sent.

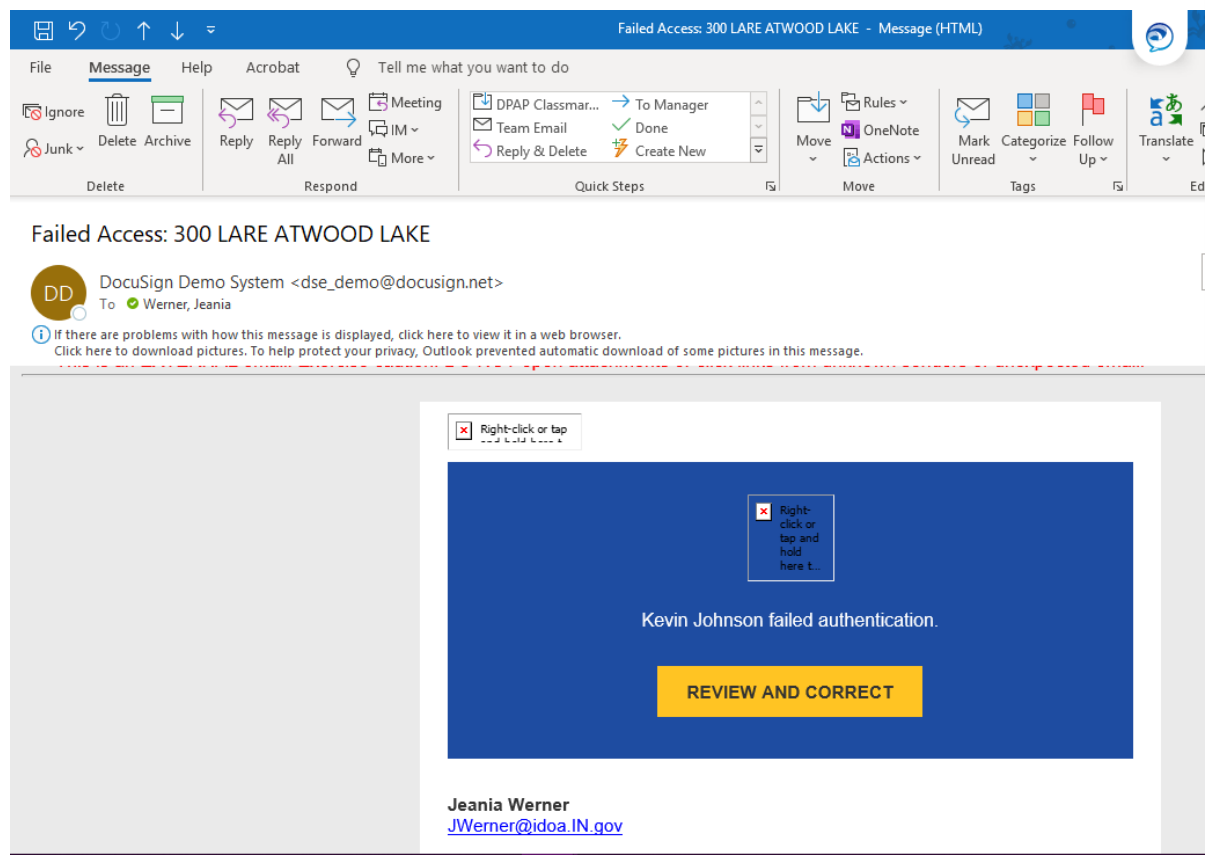
Pretty cool!



Signer Setup and Route for Signature

Inquiring minds want to know MORE.

AUTHENTICATION FAILED



YOU'LL GET A MESSAGE

If a signer isn't able to authenticate his or her identity for whatever reason, you'll get notification like this one to let you know.

You'll need to figure out why it failed; maybe it was the wrong phone number, or maybe it was entered incorrectly by mistake.

It's okay. We can fix it!

Signer Setup and Route for Signature

Let's try again.

AUTHENTICATE REPAIR

Document Management

Document Management

SetID STIND Contract ID 000000000000000000041456 [Return to Document Search](#)

Supplier ATWOOD LAKE COMMUNITY ASSOC INC

Contract Style General Contract

Document Type SOI Grant Template Is This Contract Confidential? No

Description art grant

Administrator Werner,Jeania-061

Sponsor Department 039095 DOA - Procurement - Admin Svcs

Version 0.01 Created On 04/21/20 10:49AM [Document Details](#)

Status Draft Last Modified On 04/21/20 3:45PM

Signing Details

Signature Status Pending Signatures

04/21/2020 07:45 PM The envelope was created by Jeania Werner
04/21/2020 07:45 PM Jeania Werner sent an invitation to Rhonda Fink [idoajeaniawerner@gmail.com]
04/21/2020 07:51 PM Phone Authentication Failed for Rhonda Fink

[Get e-Signature Status](#)

	Email	User Name	Sign Status	Signed DTTM
1	idoajeaniawerner@gmail.com	Rhonda Fink	Pending Signature	
2	jwerner@idoa.in.gov	L Erin Kellam	Initial	

View and Edit Options:

[View Document](#)

[Add Supplemental Documents](#)
[Document Modification Summary](#)
[Document Version History](#)

Review and Approval:

[Internal Contacts/Signers](#)
[External Contacts/Signers](#)

Other Document Actions:

[Cancel Signature Process](#)

[Deactivate Document](#)

[Generation Log](#)

HERE'S THE DRILL

- Make your way back to the Document Management page.
- Click the **Get e-Signature Status** button.

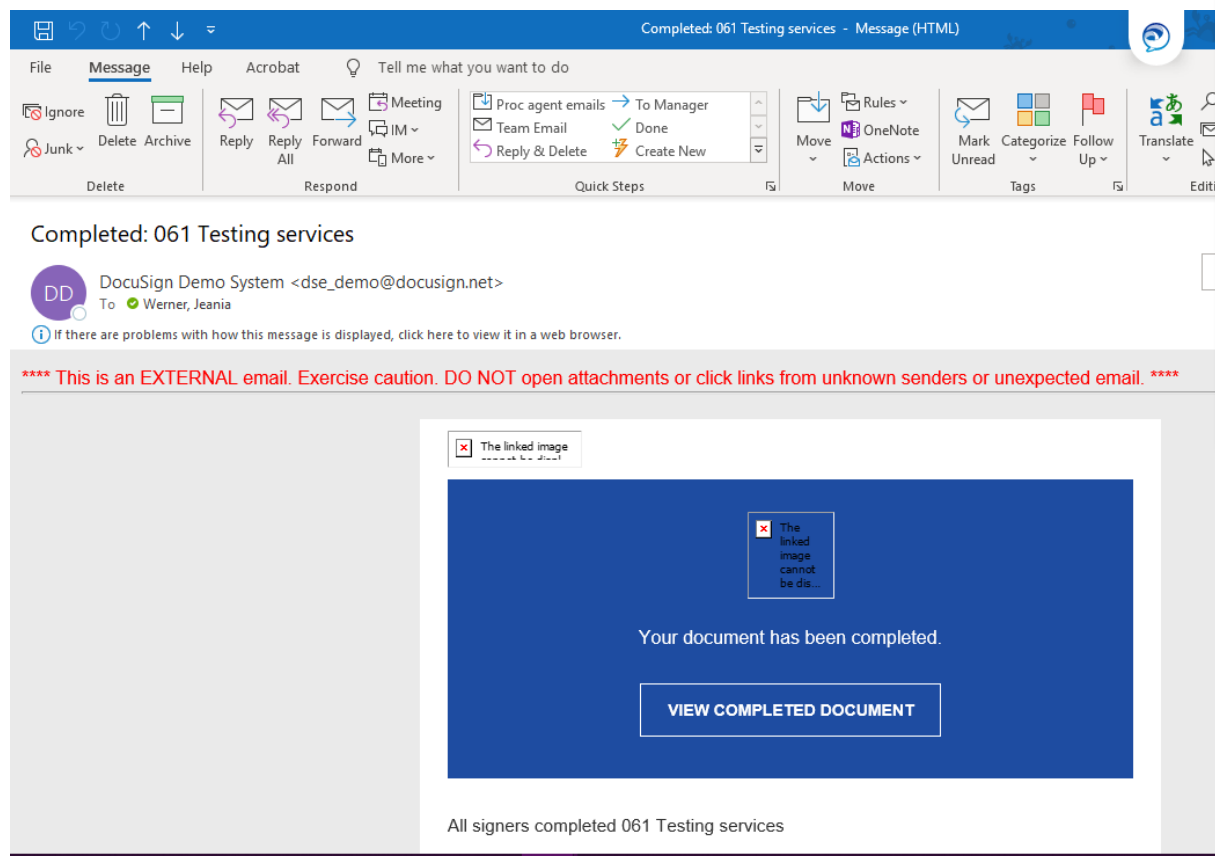
The Signing Details section will update to show **Authentication Failed** for the signer.

From here, follow the steps to cancel the e-Signature process and you can start again.

Signer Setup and Route for Signature

The signers are finished.

SIGNING COMPLETE



YOU'LL GET A MESSAGE

When the last signer has finished signing the document, you'll get a notification to let you know the signature process has been completed.

Time for a High-Five!

Signer Setup and Route for Signature

Let's wrap it up.

DETAILS IN SCM

The screenshot shows the 'Document Management' page in the SCM system. The document details include:

- SetID: STIND
- Supplier: THE UNIFORM HOUSE
- Contract Style: General Contract
- Document Type: SOI Professional Services
- Description: non skid shoes
- Administrator: Wemer, Jeania-061
- Sponsor: [Redacted]
- Department: 039095
- Amendment: 2
- Version: 0.03
- Status: Draft

The 'Signing Details' section is highlighted with an orange box and contains the following log:

- 04/17/2020 12:25 PM The envelope was created by Jeania Wemer
- 04/17/2020 12:25 PM Jeania Wemer sent an invitation to Jeania Wemer
- 04/17/2020 12:26 PM SMS Authentication Passed for Jeania Wemer
- 04/17/2020 12:26 PM Jeania Wemer opened the envelope [documents:(STIND_000000000000000000041425_0.PDF)]
- 04/17/2020 12:26 PM Jeania Wemer viewed the envelope [documents:(STIND_000000000000000000041425_0.PDF)]
- 04/17/2020 12:27 PM Jeania Wemer signed the envelope
- 04/17/2020 12:27 PM Jeania Wemer sent an invitation to Wemer, Jeania [wemer@idoa.in.gov]
- 04/17/2020 12:27 PM Wemer, Jeania viewed the envelope [documents:(STIND_000000000000000000041425_0.PDF)]
- 04/17/2020 12:27 PM Wemer, Jeania opened the envelope [documents:(STIND_000000000000000000041425_0.PDF)]
- 04/17/2020 12:28 PM Wemer, Jeania signed the envelope

The 'Signers' table below shows the following data:

	Email	User Name	Sign Status	Signed DTTM
1	TheBigCheese@Yahoo.com	Colby Jack	Signed	04/17/2020 12:27PM
2	werja@idoa.in.gov	Werner, J E	Signed	04/17/2020 12:28PM

At the bottom of the page, there are three sections of buttons:

- View and Edit Options:** View Original Document, View Amendment File
- Review and Approval:** Preview Approval, Submit for Approval, Bypass Approvals
- Other Document Actions:** Cancel Signature Process, Deactivate Document

Additional links include: Add Supplemental Documents, Document Modification Summary, Document Version History, Internal Contacts/Signers, External Contacts/Signers, and Generation Log.

UPDATE THE INFO

- Make your way back to the Document Management page.
- Click the **Get e-Signature Status** button to refresh the page and update the Signing Details section.

If everything went according to plan, you'll see all the steps completed.

- Each external signer's identity authenticated
- Envelope opened by each signer
- Envelope viewed by each signer
- Envelope signed by each signer

This information will remain on the page until an Amendment is created.

Signer Setup and Route for Signature

Verify the signing.

CHECK THE SCM DOC

Agreement to Use Electronic Signatures

I agree, and it is my intent, to sign this Contract by accessing State of Indiana Supplier Portal using the secure password assigned to me and by electronically submitting this Contract to the State of Indiana. I understand that my signing and submitting this Contract in this fashion is the legal equivalent of having placed my handwritten signature on the submitted Contract and this affirmation. I understand and agree that by electronically signing and submitting this Contract in this fashion I am affirming to the truth of the information contained therein. I understand that this Contract will not become binding on the State until it has been approved by the Department of Administration, the State Budget Agency, and the Office of the Attorney General, which approvals will be posted on the Active Contracts Database:

https://fs.gmis.in.gov/psp/guest/SUPPLIER/ERP/c/SOI_CUSTOM_APPS.SOI_PUBLIC_CNTRCT S.GBL

In Witness Whereof, Contractor and the State have, through their duly authorized representatives, entered into this Renewal. The parties, having read and understood the foregoing terms of this Renewal, do by their respective signatures dated below agree to the terms thereof.

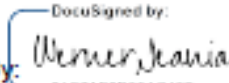
THE UNIFORM HOUSE

DocuSigned by:
By: 
368BBD568AF1437...

Title: Project Coordinator

Date: 4/17/2020 | 08:27 EDT

Indiana Department of Administration

DocuSigned by:
By: 
31C7AF0D95AC42B...

Title: The Big Cheese

Date: 4/17/2020 | 08:28 EDT

SIGNATURES ALL SET?

Always check your contract's signature page to make sure that the signatures are complete and correct.

If everything looks good, you're ready to Submit for Approval (back to the existing SCM procedures).

If there's a problem, you'll need to follow the steps to cancel the e-Signature process; then you can start again.

The Big Cheese?

Signer Setup and Route for Signature

Tracking the details.

DOCUMENT HISTORY

Employee Self Service Purchase

Document History

SetID: STIND Contract ID: 000000000000000000041425
Supplier: THE UNIFORM HOUSE

Amendment Option: Amendment Files Only
Document Action:

[View Source Version History](#) [Return to Document](#)

Document History

1-15 of 27

Select	DateTime	Document Action	Last User to Take Action	Version	Amendment	Details
<input type="checkbox"/>	04/22/20 2:38PM	Document Viewed	Werner, Jeania-061	0.03	2	
<input type="checkbox"/>	04/20/20 12:01PM	Document Viewed	Werner, Jeania-061	0.03	2	
<input type="checkbox"/>	04/20/20 11:57AM	Document Viewed	Werner, Jeania-061	0.03	2	
<input checked="" type="checkbox"/>	04/17/20 8:28AM	Signed Document	Werner, Jeania-061	0.03	2	
<input checked="" type="checkbox"/>	04/17/20 8:28AM	Signed Document	Werner, Jeania-061	0.03	2	
<input type="checkbox"/>	04/17/20 8:25AM	Routed for Signatures	Werner, Jeania-061	0.03	2	
<input type="checkbox"/>	04/17/20 8:25AM	Converted for Signatures	Werner, Jeania-061	0.03	2	
<input type="checkbox"/>	04/17/20 8:24AM	Checked In	Werner, Jeania-061	0.03	2	
<input type="checkbox"/>	04/17/20 8:23AM	Checked Out Amendment	Werner, Jeania-061	0.02	2	
<input type="checkbox"/>	04/17/20 8:23AM	Amendment Created	Werner, Jeania-061	0.02	2	

HERE'S THE STORY

TO GET HERE, click the [Document Version History](#) link from the Document Management page.

EACH TIME you click the **Get e-Signature Status** button on the **Document Management** page, a new effective dated row is added in Document History showing that you signed the document.

The **Get e-Signature Status** button on the Document Management page refreshes the Document History page (displayed here); No record of signing activities will exist in version history **until you click the button**.

It's tricky. That's why it's important to click the **Get e-Signature Status** button throughout the signing process to keep things up-to-date.