

e-Signature at Tech: Digitizing the Approval Process

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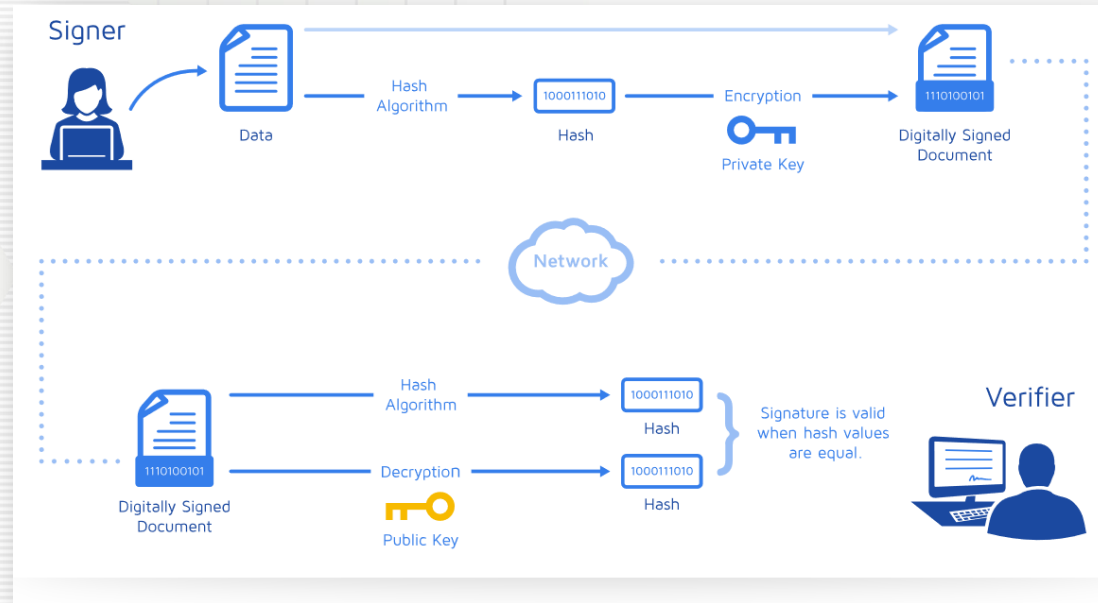
March 28, 2018

CREATING THE NEXT

WHAT IS AN ELECTRONIC SIGNATURE?



- eSignatures are digital “fingerprints” that are similar to handwritten signatures
- SECURE and AUDITABLE based on PKI and detailed tracking!
- STANDARD and widely accepted across many industries
- FAST and allow you to e-sign and approve documents in minutes not days!
- EASY technology to master and put to use in your environment today!



THE WHO BEHIND E-SIGNATURE AT TECH



- OIT is facilitating and providing **DocuSign** as a service to the campus and by way of our Internet2 partnership, contracted an enterprise license.
- **DocuSign** has a wealth of information on eSignature technology and is a leading vendor in the space.



Go beyond collecting legally binding signatures. With DocuSign, you can prepare, execute and manage the entire agreement process digitally—from end-to-end.

PREPARE

EXECUTE

MANAGE

HOW AND WHY TO USE ESIGNATURE?

Why Not? eSignatures will help accelerate our business and decision making at Georgia Tech across departments



Admissions, Registrar, Bursar

- Applications
- Waivers
- Fee Assessments
- Agreements
- Transcript Requests

Research and Innovation

- Grants and Contracts
- Sponsored Programs
- Invention Disclosures
- Conflict of Interest
- Non-Disclosure
- Fund Advance

Procurement

- P-Card Approvals
- Vendor contracts
- RFP and RFQ packages
- Supplier Compliance

Human Resources

- Employee onboarding
- Benefits enrollment
- Policy acknowledgments
- Child Care Forms
- Salary Adjustments
- Retirement Forms
- Tuition Reimbursements

Legal

- Nondisclosure agreements
- Contract management
- Policy management
- Release of Liability
- Waivers
- Claim Forms

Facilities

- Lease and facilities agreements
- Request for service forms
- Facilities planning
- Work Orders
- Capital Planning Requests
- Keys/Lock Requests

IT and Operations

- Service and work orders
- Field service acknowledgments
- Change authorization
- Requirements acceptance
- Roadmap approval
- Asset Tracking

Financial Aid

- Applications
- Loan agreements
- Change authorization
- Scholarship Forms
- FAFSA Forms
- Income Verification
- Deferral Forms

Campus Services

- Housing Applications
- Room Transfers
- Patient intake
- Claims
- Greek Life
- Health Services
- Parking Permit

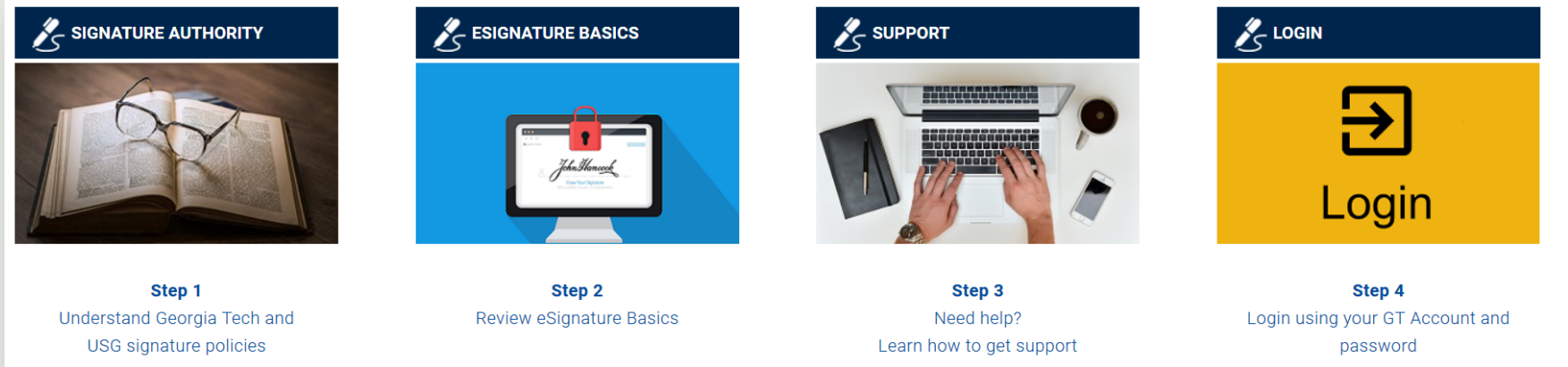
PROCUREMENT – PCARD USE CASE

Procurement was instrumental with helping the Institute acquire and proof the product. So much so, they DocuSigned themselves right up to be first in line!

Here's their story....



BASIC CONCEPTS



- Signing is EASY, but always remember Signature Authority!
- Always send documents to an individual's GT Account based address: GTACCT@gatech.edu (campus recipients)
- Click the BLUE Company Login button to use login using SSO and on mobile devices:


USE COMPANY LOGIN

DEMO




Requesting Signatures (Sending an Envelope)

Tip: Envelopes are containers for documents in a signing transaction

Step 1	Step 2	Step 3	Step 4	Step 5
<p>Sign in with your GT account (gburdell3@gatech.edu) Select NEW > Send an Envelope</p> 	<p>Upload document(s) to be signed by the recipient group</p>	<p>Add recipients to the Envelope and if desired set a signing order and choose advanced options</p>	<p>Drag signature (and any other desired additional) fields for each recipient onto the document(s) as needed</p>	<p>Send the envelope</p>

Sending a Signed Document

Step 1	Step 2	Step 3	Step 4	Step 5
<p>Sign in with your GT account (gburdell3@gatech.edu) Select NEW > Sign a Document</p> 	<p>Upload document(s) to be signed & click SIGN</p>	<p>Drag signature (and any other desired additional) fields onto the document(s) as needed & click FINISH</p>	<p>In the SIGN AND RETURN window, enter the recipient information, subject line and include an optional message. Click SEND AND CLOSE</p>	<p>Send the envelope</p>

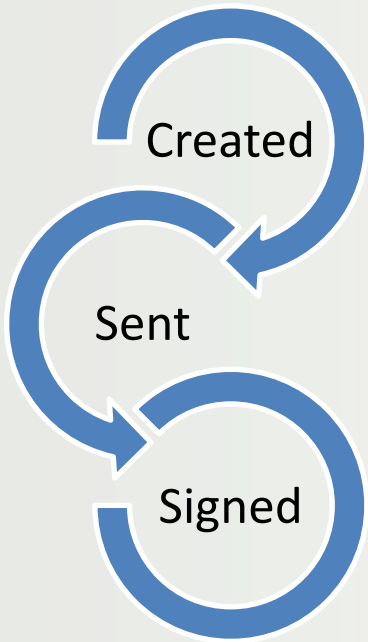
Optionally, click NO THANKS if you do not want to send the signed document. In either scenario, the signed document is saved in your DocuSign Documents.

SECURITY AND AUDITING



Unlike wet-signatures, eSignatures can be tracked and audited for security purposes! Here's a snippet of a details audit trail:

Envelope History				
Activities				
Time	User	Action	Activity	Status
3/15/2018 04:24 pm	Roland Robinson (English (US)) [api:143.215.19.102]	Registered	The envelope was created by Roland Robinson	Created
3/15/2018 04:35 pm	Roland Robinson (English (US)) [api:143.215.19.102]	Sent Invitations	Roland Robinson sent an invitation to Roland Robinson [rr70@gatech.edu]	Sent
3/15/2018 04:36 pm	Roland Robinson (English (US)) [web:143.215.19.102]	Opened	Roland Robinson opened the envelope [documents: (sunapsis-storage-feb2018-VIRTUAL INSTANCE ADDENDUM_2018.pdf)]	Sent
3/15/2018 04:37 pm	Roland Robinson (English (US)) [web:143.215.19.102]	Viewed	Roland Robinson viewed the envelope [documents: (sunapsis-storage-feb2018-VIRTUAL INSTANCE ADDENDUM_2018.pdf)]	Delivered
3/15/2018 04:39 pm	Cas D'Angelo (English (US)) [web:143.215.19.102]	Signed	Cas D'Angelo signed the envelope	Completed
3/15/2018 04:39 pm	Roland Robinson (English) [web:143.215.19.102]	Printable Copy Attached to Email	Roland Robinson was sent the document (sunapsis-storage-feb2018-VIRTUAL INSTANCE ADDENDUM_2018.pdf) attached to the completed email	Completed



Campus Wide Launch in April

Look for future eSignature communications about the service as well as training opportunities!

QUESTIONS AND ANSWERS



Contact

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The eSignature Project Team

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