

Completing DocuSign form
Summary for Purchases Exceeding \$100,000
(\$100K- \$300K template)

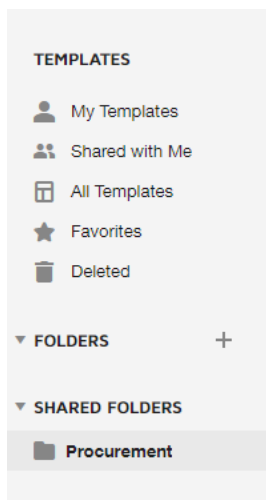
Accessing Template

Click on this link to access [DocuSign](#).

Click on **Templates** tab on top

Templates

Then **Click** on the **Procurement** folder under Shared Folders



Select **USE** **Summary of purchases exceeding \$100K and within \$300K**

Roles

Initiator

Initiator can be from Procurement or within the department.

Upon opening the Initiator will see the screen below. The initiator will enter in a name for each recipient. Then hit send at the bottom right of screen.

The screenshot shows a web interface titled "Add recipients" with a vertical scrollbar on the right. It contains three distinct recipient entry forms, each with a numbered tab on the left (1, 2, 3) and a colored header bar (yellow, blue, green). Each form includes a "Name" field with a person icon, an "Email" field, and a "NEEDS TO SIGN" status indicator with a dropdown arrow. The first form is for the "Initiator", the second for the "Requester", and the third for the "Assistant to Dean/Director/Department Head". A fourth entry, "Dean/Director/College Division Administrator", is partially visible at the bottom.

A box will pop up asking the Initiator if they would like to sign now or sign later. If signing now the initiator will be taken to complete the form.

An email is also sent to the Initiator. If initiator clicked Sign Later on the pop up, to access the form Click review documents on the received email.

A small white dialog box with a close button (X) in the top right corner. The text inside reads "Do you want to sign this document now?". At the bottom, there are two buttons: a blue "SIGN NOW" button and a grey "SIGN LATER" button.

The Initiator will be redirected from either the pop up or from the email that was sent to complete the form. Agree to signing digitally by hitting Continue.

Complete the following on the form:

- Requisition#
- Department Name
- Describe
- Amounts
- Cost Center
- Vendor Name

Please Review & Act on These Documents



UHCL Demo

Powered by DocuSign

Please update the Summary of Purchases-exceeding-100K as an Initiator

Please review the documents below. CONTINUE OTHER ACTIONS ▾

procurement method, and other pertinent information. (Use a separate page if additional space is needed.)

2. Estimated purchase or contract amount including all possible extensions: _____

3. Cost Center: _____

4. Selected Vendor Name: _____

5. Purchases by Athletics Department >\$100,000 AND/OR Other Purchases >\$300,000

6. Purchases \$1,000,000 or greater

Sequential Review and Approval:

Purchasing Director or Designee	Signature	Date
Dean Director College Division Administrator	Signature	Date

UH ___ UHCL x UHD ___ UHV ___

Requisition #: Department Name:

1. Describe commodities or services to be purchased, the proposed use, benefits to the University, procurement method, and other pertinent information. (Use a separate page if additional space is needed.)

Maintenance on HVAC system

2. Estimated purchase or contract amount including all possible extensions:
3. Cost Center:
4. Selected Vendor Name:
5. Purchases by Athletics Department >\$100,000 AND/OR Other Purchases >\$300,000
6. Purchases \$1,000,000 or greater

At the bottom of the form there will be a paperclip icon. Click on the icon to upload documentation pertaining to the contract.



Once the form is complete and uploads have been added, click finish on the bottom right. An email will be sent to the next recipient.

Optional roles

If a role is optional and will not be included, click on the trash can icon to right of the Recipient title and the role will be removed. If the role does not have a trash can icon, the role is required.

Requestor - This role is optional. This role is to be included when the Initiator is from within the department, but forwarding to someone else to complete the form or upload documentation or from outside the department. This role will be allowed to update the form and upload any documentation pertaining to the contract. This is not a signatory role.

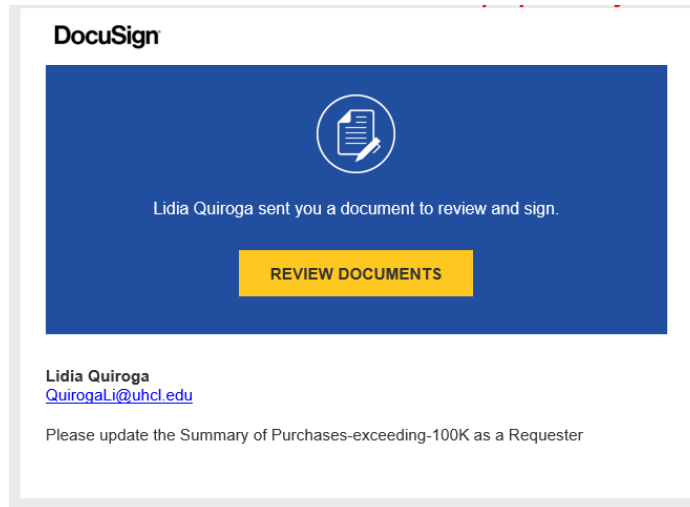
Assistant to Dean and Assistant to the VP - These roles are optional. Each role will only be able to view the DocuSign form. This is not a signatory role.

The screenshot displays two role configuration cards. The top card is for the 'Requester' role, which is optional and has a 'NEEDS TO SIGN' status. It includes 'Name' and 'Email' input fields, a 'CUSTOMIZE' dropdown menu, and a trash can icon. The bottom card is for the 'Assistant to Dean/Director/Department Head' role, which is optional and has a 'CC RECEIVES A COPY' status. It also includes 'Name' and 'Email' input fields, a 'CUSTOMIZE' dropdown menu, and a trash can icon. Red arrows point to the trash can icons on both cards.

Requestor

The Requestor will receive an email stating there is a document to review and sign.

Click the Review Documents button to be taken to DocuSign.



The Requestor will need to add any additional details to the form and/or upload any additional documentation. Once completed, click Finish.

An email will be sent to either the Assistant to the Dean/Director/Department Head or straight to the Dean/Director/Department Head if the Assistant was not included.

DocuSign Envelope ID: D2CABFE2-4543-493C-8CE4-B3BC5F634215

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200
© 2014 DocuSign, Inc.

UNIVERSITY OF HOUSTON

Summary for Purchases Exceeding \$100,000

UH UHCL x UHD UHV

Requisition # 000045671 Department Name Procurement

1. Describe commodities or services to be purchased, the proposed use, benefits to the University, **Optional** method, and other pertinent information. (Use a separate page if additional space is needed.)

Paint walls

2. Estimated purchase or contract amount including all possible extensions: \$10,000.00

3. Cost Center: fill in cost center

4. Selected Vendor Name Manns Carpentry

5. Purchases by Athletics Department >\$100,000 AND/OR Other Purchases >\$300,000

6. Purchases \$1,000,000 or greater

Sequential Review and Approvals:

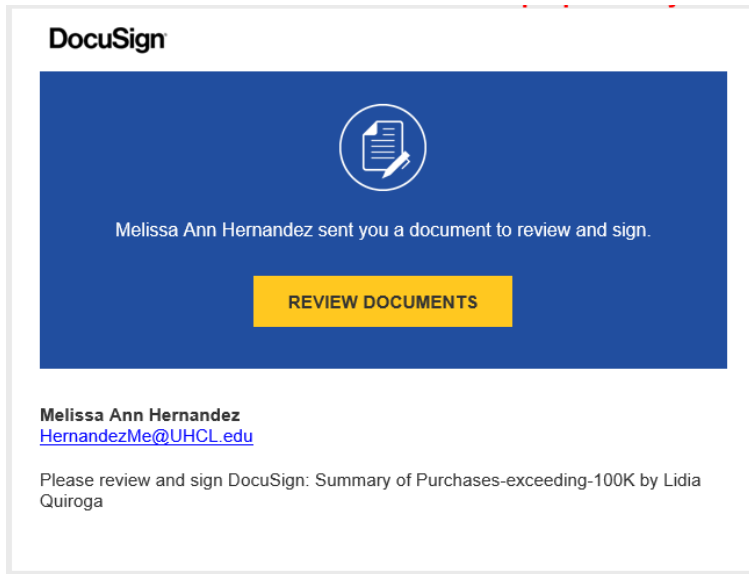
Purchasing Director or Designee Signature Date

Dean/Director/College Division Administrator Signature Date

Ready to Finish?
You've completed the required fields. Review your work, then select FINISH.

Dean/Director/Department Head and Vice President

An email notification will be received and indicate that there is a DocuSign form that needs to be reviewed and completed. Enter the form by clicking Review Documents.

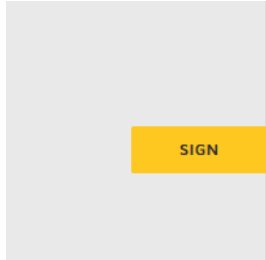
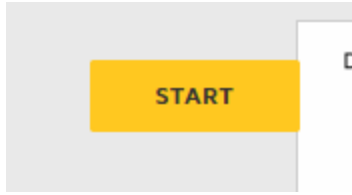


The following header will be seen asking to review the documents below. Click on the Continue box.




Review the form and upload additional documentation if needed.

Click Start at the top left of the form. The form will advance to the location that requires signature.



Sequential Review and Approvals.

Purchasing Director or Designee	Signature	Date
Melissa Ann Hernandez		1/31/2024
Dean/Director/College Division Administrator	Signature	Date
Responsible Vice President	Signature	Date

Click on the Sign icon to sign the document.



Once signed, click on Finish.

A screenshot of a document review interface. At the top, a blue bar contains the text "Done! Select Finish to send the completed document." and a yellow "FINISH" button. Below this is a document preview area showing a form with various fields and a "Sequential Review and Approvals" table. The table has columns for "Purchasing Director or Designee", "Signature", and "Date". The first row shows "Melissa Ann Hernandez" with a "Sign" icon and the date "1/31/2024". Below the table, there is a "Note" and a "Board of Regents Approval Date" field. At the bottom, a blue bar contains the text "Ready to Finish?" and a yellow "FINISH" button.

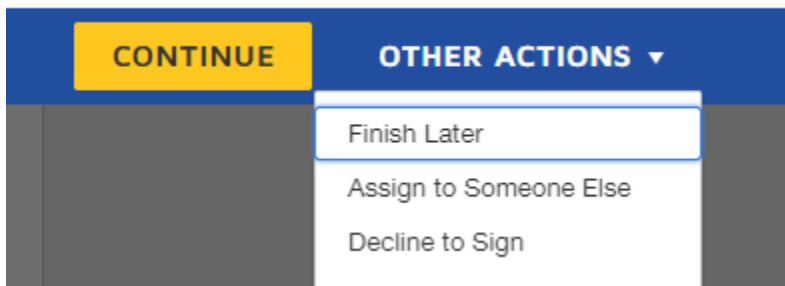
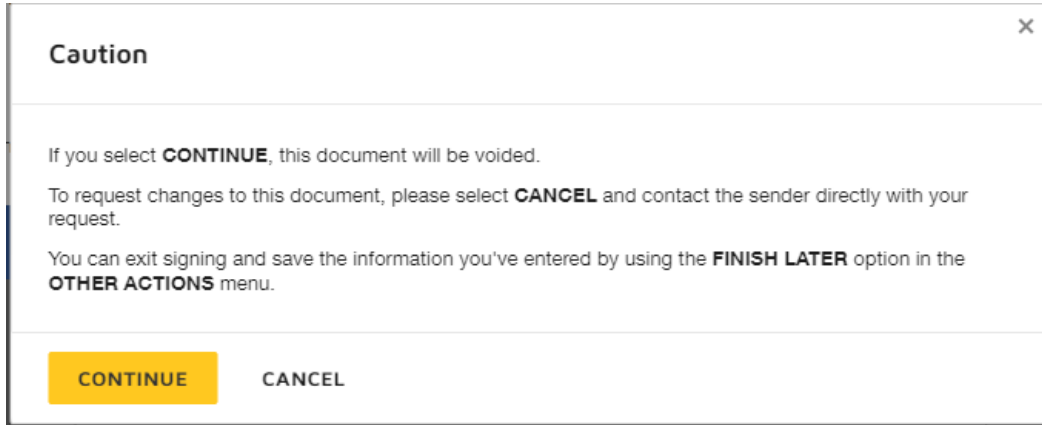
The form will be forwarded to the next person. When the form has been fully signed all roles will receive a copy of the signed form.

Declining to sign

Should the recipient decide not to sign the document, click other actions drop down and select decline to sign.

Choosing decline to sign will pop up a message cautioning that clicking continue will void the document.

Alternatively, the recipient can choose to cancel and go back to other actions and choose to finish later or Assign to Someone Else.



Workflow

The workflow of the document can be viewed within DocuSign. Under Envelopes select Inbox and select Manage at the top

Developer Environment

SHARED ACCESS ▾

NEW ▾

ENVELOPES

- Inbox
- Sent
- Drafts
- Deleted
- Bulk Send
- PowerForms

QUICK VIEWS

- Action Required
- Waiting for Others
- Expiring Soon
- Completed
- Authentication Failed

FOLDERS +

Inbox

Filtered by: Date (Last 6 Months) | [Edit](#)

Search Inbox and Folders FILTERS

Subject	Status	Last Change	
<input type="checkbox"/> Summary of Purchases-exceeding-100K Form as an Initiator From: Lidia Quiroga	6/9 done Need to Sign	2/1/2024 03:40:35 pm	SIGN ▾
<input type="checkbox"/> Summary of Purchases-exceeding-100K Form as an Initiator From: Debra Carpenter	1/9 done Need to Sign	1/31/2024 05:07:03 pm	SIGN ▾
<input type="checkbox"/> Summary of Purchases-exceeding-100K Form as an Initiator From: Lidia Quiroga	Completed	1/31/2024 11:52:33 am	DOWNLOAD ▾
<input type="checkbox"/> Summary of Purchases-exceeding-100K Form as an Initiator From: Debra Carpenter	Completed	1/30/2024 02:08:48 pm	DOWNLOAD ▾
<input type="checkbox"/> Summary of Purchases-exceeding-100K Form as an Initiator From: Lidia Quiroga	Completed	1/30/2024 01:47:43 pm	DOWNLOAD ▾
<input type="checkbox"/> Summary of Purchases-exceeding-100K Form as an Initiator To: Melissa Ann Hernandez, Lidia Quiroga +6 more	Completed	1/18/2024 12:34:23 pm	DOWNLOAD ▾

Looking for more? | [Edit your filters](#)

Select the document and a list of recipients will show. A green check mark will appear next to the recipient's name if that recipient has already signed. No check mark will appear next to the recipient's name if they have not signed.

Recipients

COMPLETED SIGNING ORDER

1	<input checked="" type="checkbox"/> Lidia Quiroga quirogal@uhcl.edu	Signed on 2/1/2024 03:10:25 pm Signed in location
2	<input checked="" type="checkbox"/> Melissa Ann Hernandez HernandezMe@UHCL.edu	Signed on 2/1/2024 03:19:56 pm Signed in location
3	<input checked="" type="checkbox"/> Lidia Quiroga quirogal@uhcl.edu	Signed on 2/1/2024 03:36:13 pm Signed in location
4	<input checked="" type="checkbox"/> Melissa Ann Hernandez HernandezMe@UHCL.edu	Signed on 2/1/2024 03:36:59 pm Signed in location
	<input checked="" type="checkbox"/> Lidia Quiroga quirogal@uhcl.edu	CC Copy Received Sent on 2/1/2024 03:36:15 pm
5	<input checked="" type="checkbox"/> Debra Carpenter Carpenter@uhcl.edu	CC Copy Received Sent on 2/1/2024 03:40:35 pm
CURRENT		
5	Melissa Hernandez hernandezme@uhcl.edu Private Message: From Reassigner: Test	Needs to Sign Sent on 2/1/2024 03:40:33 pm
WAITING		
6	Senior VC/VP Admin&Finance Conditional Recipient Group	Needs to Sign
7	UHCL Procurement UHCLProcurement@uhcl.edu	CC Receives a Copy