

Routing a BennyBuy Access Form Using DocuSign

Become a DocuSign sender

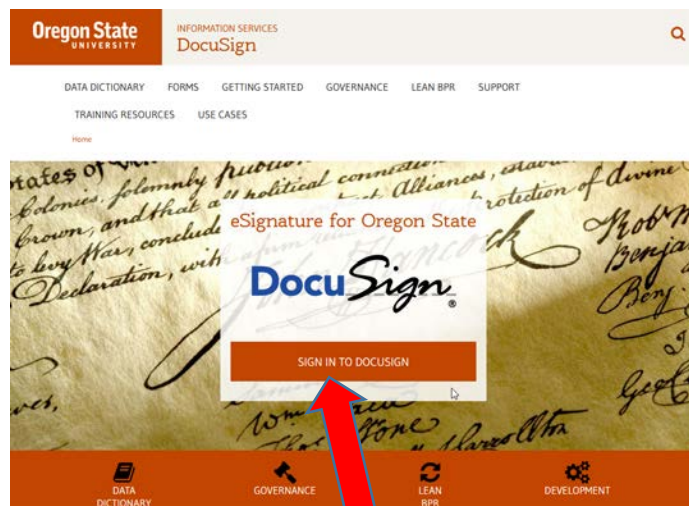
If you have not already done so, review the overview, signing and sending videos on the Resources/Senders page of the OSU DocuSign website (<http://is.oregonstate.edu/docusign>). This will take about 15 minutes. Submit an application for promotion to sender, which is called “Sender Access Request” and is located on the same page as the links to the videos.

Prepare the Access Request Form and save it as pdf

Prepare the Access Request Form document and save it as a PDF.

Log on to DocuSign

Navigate to the OSU DocuSign home page, <http://is.oregonstate.edu/docusign>. It looks like:

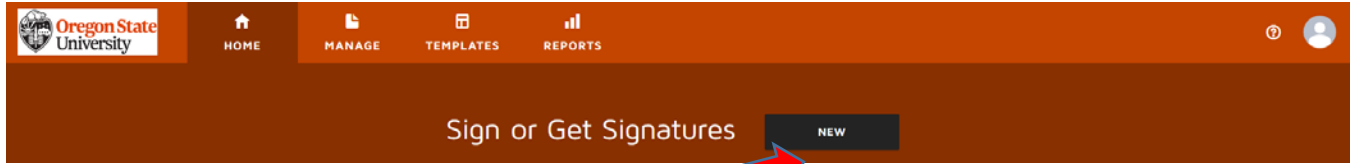


Click the “Sign in to DocuSign” link

Log in using your ONID credentials.

Start the Document

Upon login, the DocuSign Home page is displayed. Here is the top section of the page:

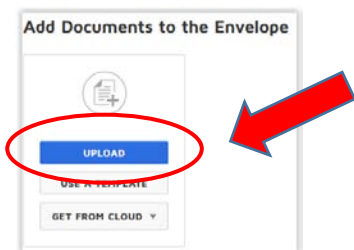


Click the "New" button,

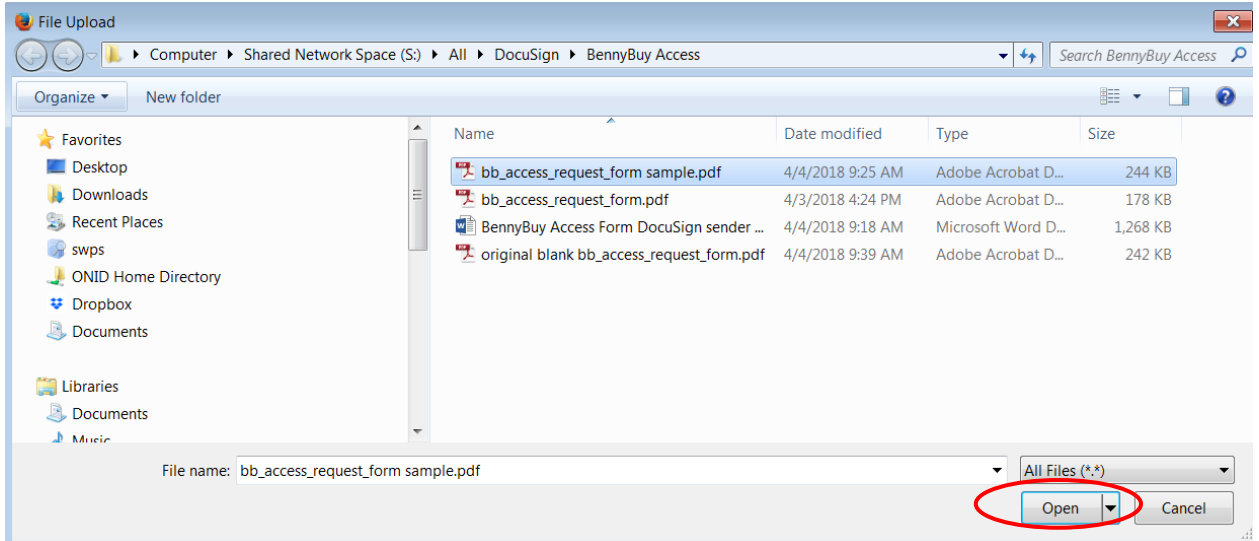
then choose "Send an Envelope":



DocuSign will advance to the next dashboard. Under "Add Documents to the Envelope", choose "Upload":



Your browser's "File Upload" screen is displayed. Browse to your document. Click on it to select it. Then, choose "Open"



DocuSign will upload the document you have selected.

Apply the Template

When you upload the access form, you should receive an option to Select Matching Templates:

Select Matching Templates

Select the matching templates to apply to your uploaded documents.

^ bb_access_request_form sample.pdf

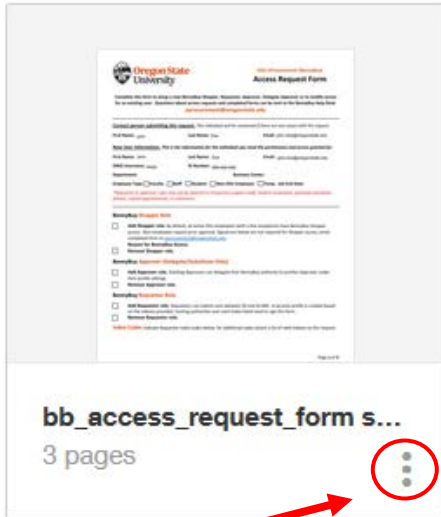
Routing only: eProcurement (BennyBuy) Access Request Form (also retrievable ... Matching: 100% Pages: 1-3

Click on the Apply button to use it:



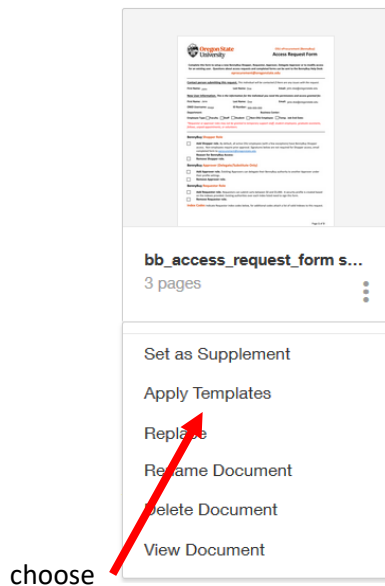
DocuSign presents a message when the template is successfully applied.

Skip to the next page if the matching template was applied. If the matching template is not applied, you may use the following process to locate the template. Click on the ellipsis, which is located at the bottom of the document preview.



Click here

When you click it, DocuSign will open the “More Options” menu. Choose “Apply Templates.”

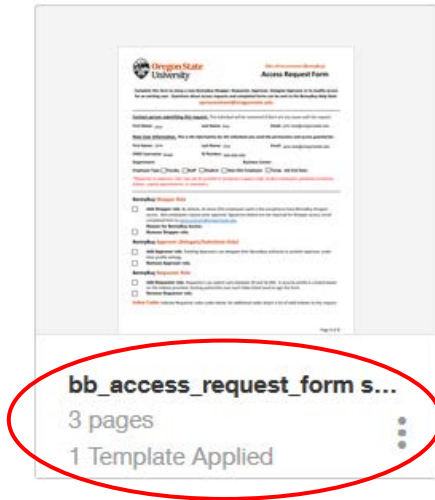


choose

Select the Template

DocuSign will now allow you to pick the template by using the Browse tab.

Now DocuSign has changed the “Add Documents” area of your screen. It should look as shown below:



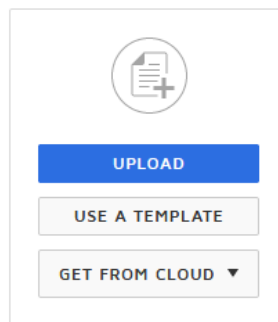
Notice the information below the image of your document (circled above). It should show:

1. Your document Name
2. The correct number of pages in the document
3. And, that **ONE** template has been applied.

If anything is incorrect, discard the document, using the option under “Other Actions” at the upper right of the screen, and begin again.

Additional Supporting Documents

If you are attaching supporting documents such as an extra list of indexes, use the “Document Upload” icon:



which is shown adjacent to the icon of your initial form. You may add several items, as a new button will open after each addition. These additions are appended to the access request form to create one document.




Add Recipients

Fill in the recipient information for the BennyBuy User, the Budget Authority Approval, and the Business Center Manager. To access the name of your Business Center Manager, use the [contact list](#). If you have already collected a manual signature on the form you uploaded, use the X to the right of the recipient box to remove that recipient.

Add Recipients to the Envelope


As the sender, you automatically receive a copy of the completed envelope.

Set signing order

| | |
|---|--|
| 1 | BennyBuy User Name Email  NEEDS TO SIGN MORE |
| 2 | Budget Authority Approval Name Email  NEEDS TO SIGN MORE |
| 3 | Business Center Manager Name Email  NEEDS TO SIGN MORE |

The last recipient is the eProcurement signing group. Do not modify this recipient to ensure the document goes in for processing:

| | |
|---|--|
| 4 | eProcurement signing group (do not modify recipient) eProcurement Signing Group CC RECEIVES A COPY MORE |
|---|--|

 ADD RECIPIENT

If you would like to add more recipients in order to send someone else a copy, use the ADD RECIPIENT button. If you do so, it will look like the following. If not, skip down to checking the document.

5

Name

Email

ADD RECIPIENT

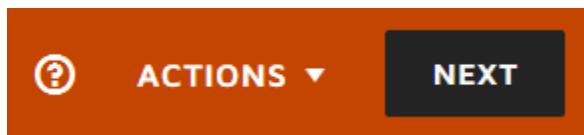
NEEDS TO SIGN

- Needs to Sign
- In Person Signer
- Receives a Copy
- Needs to View


and specify their role as “Receives a Copy” instead of “Needs to Sign”, which is one of the choices on the dropdown by “Needs to Sign”.

Now, check the document itself

Press “Next” in the upper right corner of the screen:



The system will display the form you have uploaded:

 **Oregon State University**

OSU eProcurement (BennyBuy)
Access Request Form

Complete this form to setup a new BennyBuy Shopper, Requestor, Approver, Delegate Approver or to modify access for an existing user. Questions about access requests and completed forms can be sent to the BennyBuy Help Desk:
eprocurement@oregonstate.edu

Contact person submitting this request. *This individual will be contacted if there are any issues with the request.*

First Name: John Last Name: Doe Email: john.doe@oregonstate.edu

New User Information. *This is the information for the individual you need the permissions and access granted for.*

First Name: Jane Last Name: Doe Email: jane.doe@oregonstate.edu

ONID Username: doeja ID Number: 999-999-999

Send your Document

When you are satisfied with the placement of the tags, press “Send” in the upper right corner of the screen:



Monitor the Status of your Documents

On the DocuSign home page, you will see an OVERVIEW panel showing the status of your documents, grouped by “action required”, “waiting for others”, “expiring soon” and “completed”. Click on the area of interest and you to review documents.