



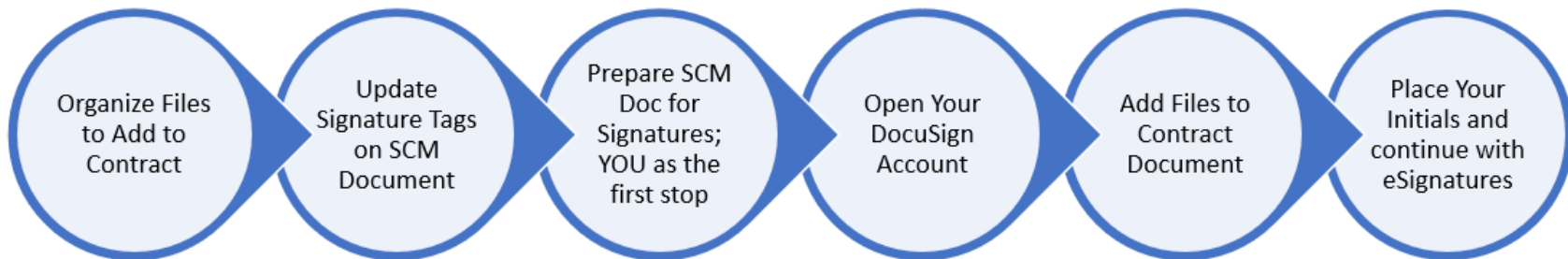
Indiana Department of Administration | Procurement Division

PEOPLESOFT  
FINANCIALS 9.2

# Inserting Large Attachments to a Contract using DocuSign

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## Introduction

The State of Indiana has a file size limit of 25MB for email attachments. This limit also affects the size of files attached to contract documents through SCM. Currently, we convert our contract exhibits and other required documents to TIF files to make them part of the contract document. Whether you have a file that exceeds the size limit, or you are looking for a different way to include documentation for your contract, we now have another option. This guide is intended to walk you through the process of inserting documents through your DocuSign account instead of inserting TIF files through SCM. It is **in addition to** the guidance provided by IDOA for SCM and DocuSign.

## Before You Begin.....

Before beginning, verify you have:

- all the documents you will need to add to your contract
- how each document will be identified within the contract (Exhibit A, for example)
- the corresponding exhibit identifier indicated on each document (Exhibit A is clearly marked on document)
- each document saved as a file on your computer, and you know where to find it
- each saved file as a file size of 25MB or smaller

## Edit the Contract Document

While you have the contract document checked out of PeopleSoft for edits, there are 2 areas that will need your attention. An initial tag will need to be inserted into the document. This tag will allow you to route the contract to yourself to add the documents to it before it routes to your external signer(s) and internal signer(s). You will also need to change the signing tag numbers for the signers on the contract so you will be able to set the sign order at the appropriate time.

### Add the Initials Tag

IDOA recommends that the initials tag be placed in the upper right-hand corner of the contract document. The correct format for the initial tag is \i1\. The letter i in the tag indicates that initials are requested. The number 1 in the tag indicates that whoever you assign as 1 in the sign order during the Prepare and

Route for eSignature process will be the first person to receive the notification from DocuSign that action is required. In this case, you will want to assign yourself or whoever will be adding the documents to the contract as the first person in the sign order. The person adding the documents must have a DocuSign account.



\i1\

**MEMORANDUM OF UNDERSTANDING**

**Contract #0000000000000000000052267**

This Memorandum of Understanding ("Memorandum") is entered into by and between the INDIANA DEPARTMENT OF ADMINISTRATION and HIRAM J HASH AND SONS INC. In consideration of those mutual undertakings, the parties agree as follows:

Once you have placed the tag, change the font color to white or very light gray. The tag should not be visible on the document. It is placed there only to tell DocuSign how to route the contract.

v1

**MEMORANDUM OF UNDERSTANDING**

**Contract #000000000000000000052267**

This Memorandum of Understanding ("Memorandum") is entered into by and between the INDIANA DEPARTMENT OF ADMINISTRATION and HIRAM J HASH AND SONS INC. In consideration of those mutual undertakings, the parties agree as follows:

### Signature Section of Contract Document

Another section of the contract that will need to be changed is the section containing the external and internal signatures. The numbers currently in the signing tags will need to be adjusted to allow for the number 1 you added in the initials tag. Since the tags contained within the signature section have white or light gray font, you may find it easier to select the entire signature section and change the font color.

**In Witness Whereof**, HIRAM J HASH AND SONS INC and the INDIANA DEPARTMENT OF ADMINISTRATION have, through their duly authorized representatives, entered into this Memorandum. The parties, having read and understood the foregoing terms of this Memorandum, do by their respective signatures dated below agree to the terms thereof.

<p>HIRAM J HASH AND SONS INC</p> <p>By: <span style="font-family: monospace;">ls2\</span></p> <p>Title: <span style="font-family: monospace;">t2\</span></p> <p>Date: <span style="font-family: monospace;">d2\</span></p>	<p>INDIANA DEPARTMENT OF ADMINISTRATION</p> <p>By: <span style="font-family: monospace;">ls3\</span></p> <p>Title: <span style="font-family: monospace;">t3\</span></p> <p>Date: <span style="font-family: monospace;">d3\</span></p>
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The tags contained within the signature section for the external signer are \s1\, \t1\, and \d1\. The 1 will need to be changed to 2 in each tag. If you have multiple external signers, each signer's tags should be changed to the next consecutive number.



Once you have finished with the external signer, you will need to make the same changes to the internal signer's tags continuing with the next number from where you finished with the external signers.

**In Witness Whereof**, HIRAM J HASH AND SONS INC and the INDIANA DEPARTMENT OF ADMINISTRATION have, through their duly authorized representatives, entered into this Memorandum. The parties, having read and understood the foregoing terms of this Memorandum, do by their respective signatures dated below agree to the terms thereof.

HIRAM J HASH AND SONS INC	INDIANA DEPARTMENT OF ADMINISTRATION
By:\s1\	By:\s2\
Title:\t1\	Title:\t2\
Date:\d1\	Date:\d2\

**In Witness Whereof**, HIRAM J HASH AND SONS INC and the INDIANA DEPARTMENT OF ADMINISTRATION have, through their duly authorized representatives, entered into this Memorandum. The parties, having read and understood the foregoing terms of this Memorandum, do by their respective signatures dated below agree to the terms thereof.

HIRAM J HASH AND SONS INC	INDIANA DEPARTMENT OF ADMINISTRATION
By:\s2\	By:\s3\
Title:\t2\	Title:\t3\
Date:\d2\	Date:\d3\

When all the numbers within the tags have been changed, change the text back to the correct colors: black for the text, white or very light gray for the tags.

**In Witness Whereof**, HIRAM J HASH AND SONS INC and the INDIANA DEPARTMENT OF ADMINISTRATION have, through their duly authorized representatives, entered into this Memorandum. The parties, having read and understood the foregoing terms of this Memorandum, do by their respective signatures dated below agree to the terms thereof.

HIRAM J HASH AND SONS INC

By: \s2\

Title: \t2\

Date: \d2\

INDIANA DEPARTMENT OF ADMINISTRATION

By: \s3\

Title: \t3\

Date: \d3\

**NOTE:** It is possible that the tags contained within the contract may vary slightly from what is included here. Some agency-specific templates have different requirements. The only thing that should be changed in each tag is the number. The accompanying letter and slashes should remain the same.

## Prepare and Route for eSignature

After you have finished making all the edits to your contract document and have clicked on the Prepare and Route for eSignature button per instructions provided by IDOA, you are ready to add your information as Signer 1 along with the information for everyone who will sign your contract. Be sure that the Signing Order numbers you assign correspond to the numbers you entered in the tags on the text document in the signature section.

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**STOP**

**Ensure that you have entered your information as a signer, and you have indicated your Signing Order as 1**

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## Log In to your DocuSign Account

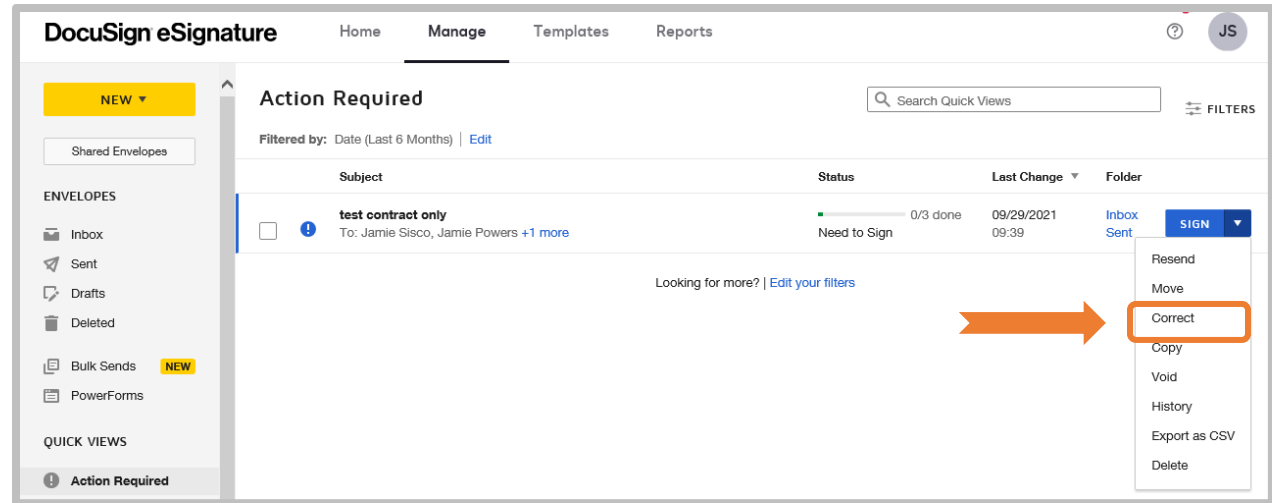
This would be a good time to confirm that you are able to locate all the files you will need to add to your contract document, that they contain the correct Exhibit indicator (if referenced in the contract), and that each file you will be adding is no larger than 25MB. If a file is larger than that, it must be broken down into smaller files. The entire DocuSign envelope doesn't have a size limit, but each individual file contained within the envelope does have a limit.

Log in to DocuSign [here](#).



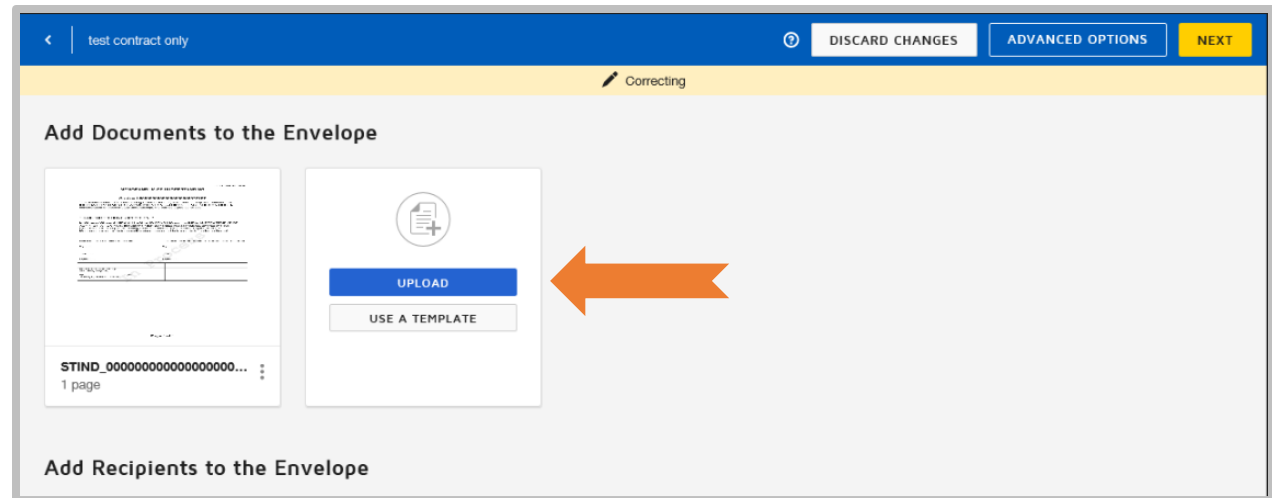
## Locate the Correct Contract

Once you are logged in to your DocuSign account, you should land on your Home tab. You can either click on the Manage tab or click on the Action Required section in the black ribbon toward the top of the page. Either should take you to the correct spot. Locate the contract you need and click on the operator next to the Sign button at the right end of the row. From the drop down choose Correct.



## Add the Documents

Click **Upload**, choose the location on your computer where the documents are stored, find the documents you need, then add them to your contract. You may choose to add them one at a time if the order is important, or you can select all the documents in one action if a certain order isn't required.

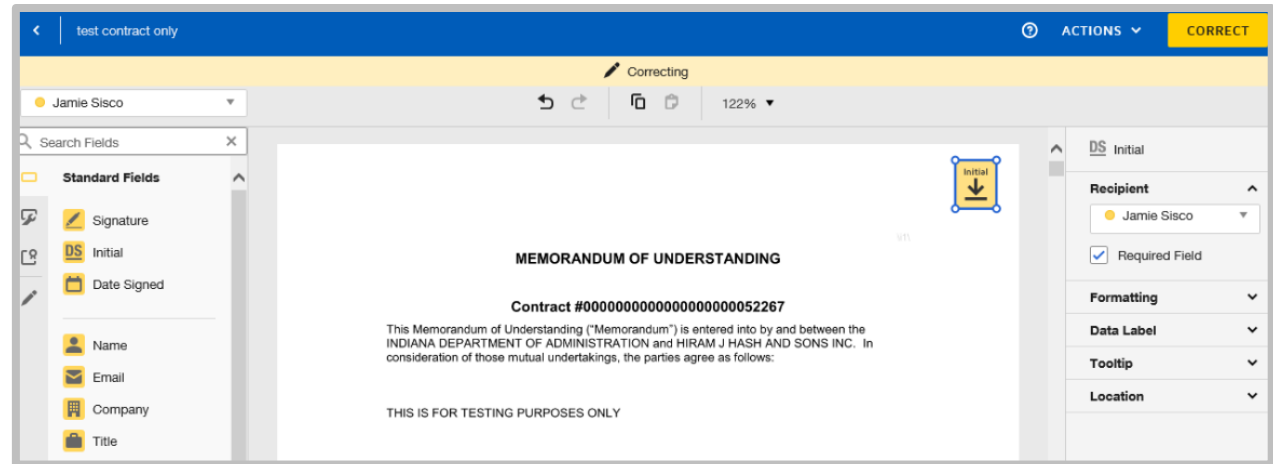




## Place the Initial Flag

Earlier in the process, you created an initials tag in your contract document. Now, you need to place the initial flag in the general area where you created the tag. The flag doesn't need to be in the exact spot. Drag the Initial flag from the left side of the screen to the upper right-hand corner of your contract and drop it.

When you are satisfied with its location, click **Correct**. DocuSign will indicate that it is sending the envelope to whoever is next in the Signing Order.

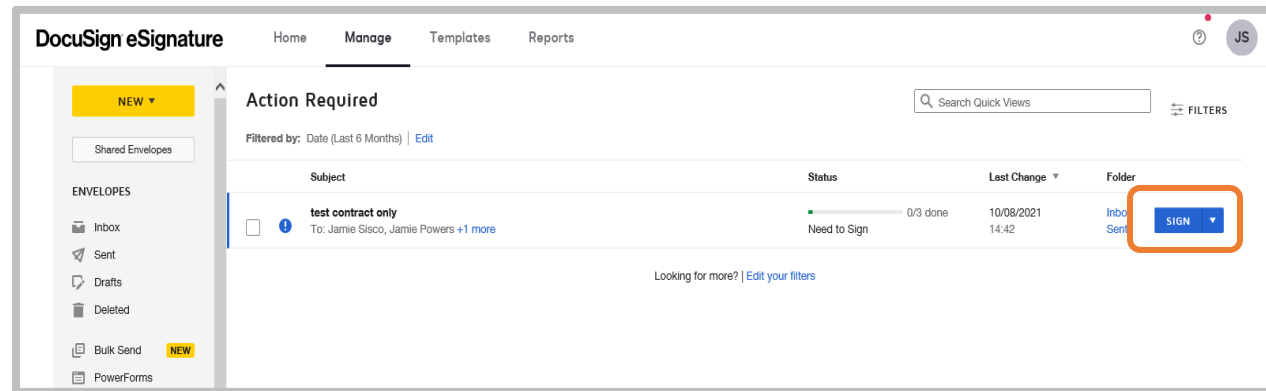


If you forget to drag and drop your initial flag before you click Correct, DocuSign will give you a message that you are missing fields for recipients. Click Add Fields to return to the screen to add the initial flag.

## Initial the Contract

At this point, it is time to place your initials on the contract document so it can continue to the external signer(s). You have two options: (1) go back to the Manage tab in your DocuSign account, or (2) click on the link in your email from DocuSign. The link in your email should still work to access the document if you can't initial the contract immediately and must return to it later.

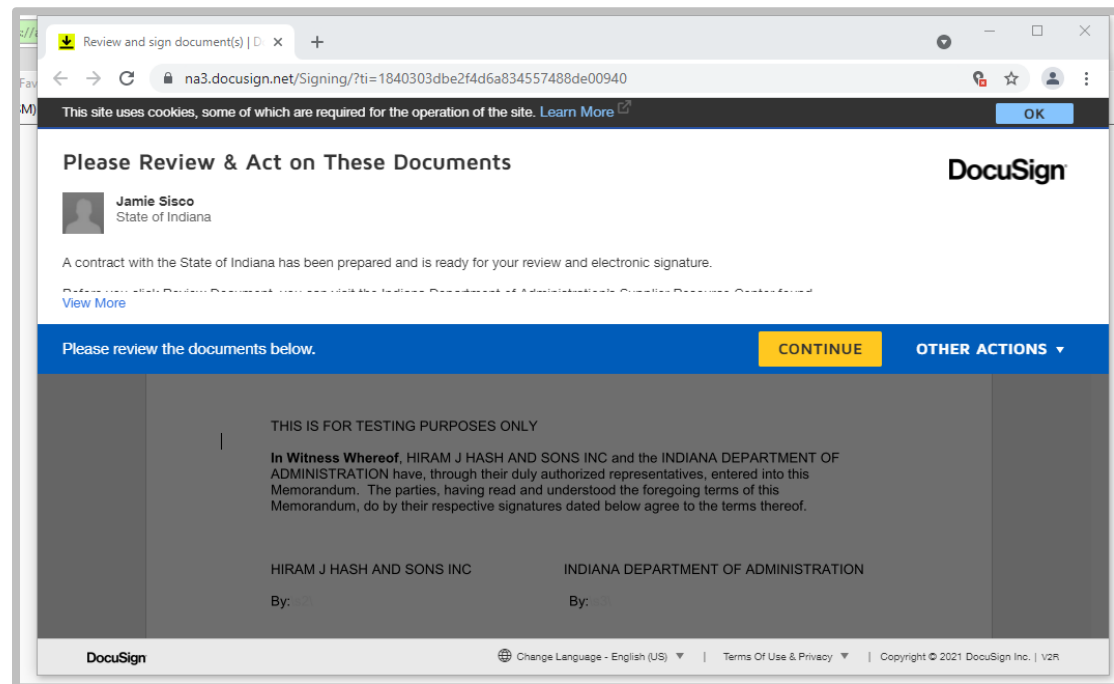
If you stayed logged in to your DocuSign account, locate the correct contract on the Manage tab. Click the **Sign** button.



If you clicked on the link from your email, it should open the document at the correct spot to begin.

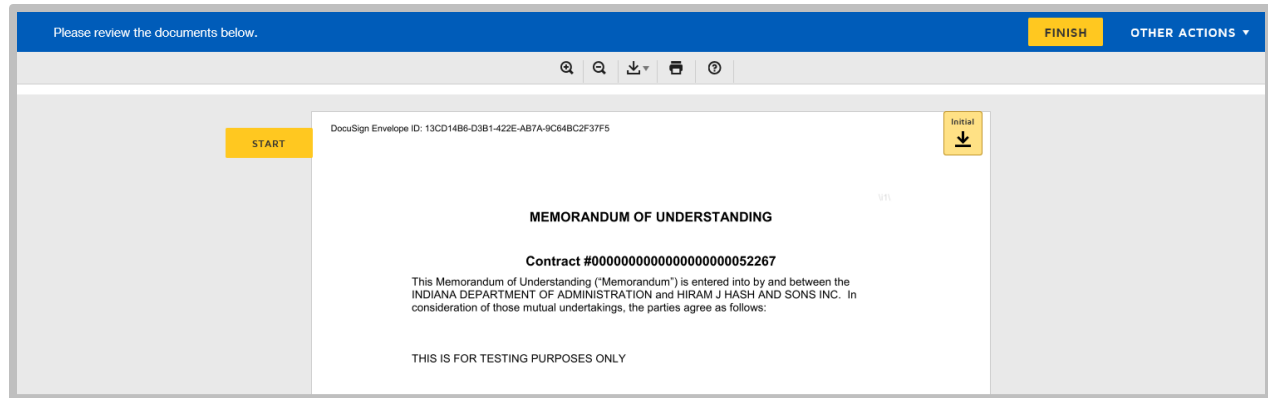
Click **Continue**.

Review the document to be sure that every attachment you wanted with your contract is visible. Whatever you are seeing during this review is the current state of your contract. If anything is missing or shouldn't be there, now is the time to go back through the process to add or delete any attachments.



Click the **Start** button.

Click the Initial flag. DocuSign will place your initials in the spot where the Initials tag was previously.



Click **Finish** to complete this part of the process.

You have completed the process to add large files to your contract document. The contract will automatically be routed to the next signer.

