

Creating a DocuSign Workflow for Your Bilateral Agreement

1. You can request access for a DocuSign account by [submitting a ticket](#) to ITCS.

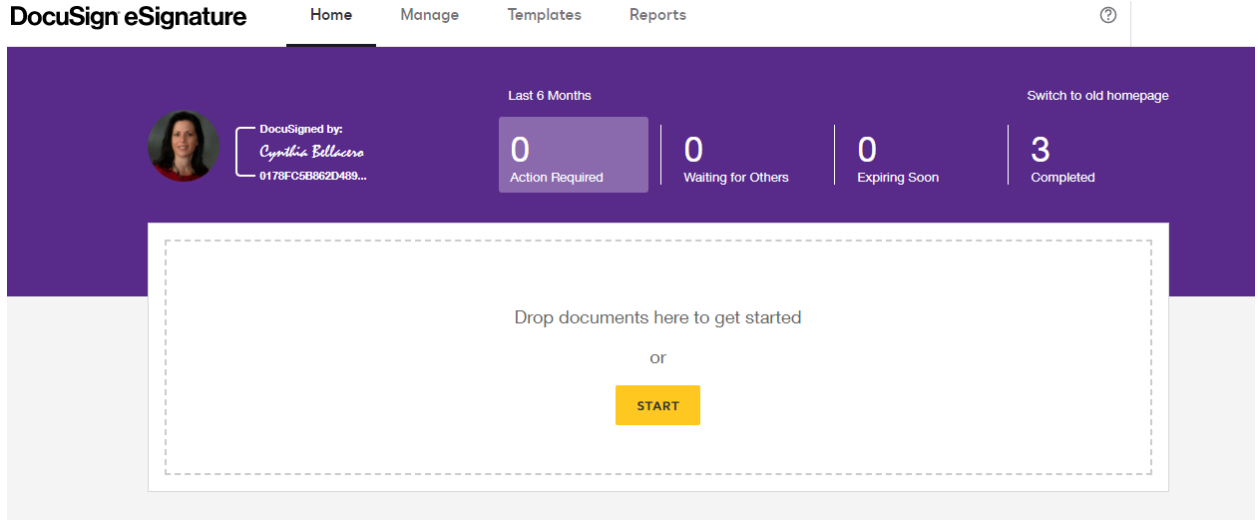
The screenshot shows the ECU Enterprise Service Management System portal. The page title is "DocuSign Electronic Signature Service". The breadcrumb trail is "Service Catalog / Business / DocuSign Electronic Signature Service". The page includes a "Support" section with contact information: "An ITCS technician will respond to support requests during regular operating hours.", "Phone: 252.328.9866 / 800.340.7081", "IT Help Desk Chat", and "Submit a Ticket". The "Overview" section states: "DocuSign is an electronic signature service that allows you to securely sign and initial an electronic document instead of a paper copy. Departments can replace paper documents with secure digital files for secure signatures. Electronic routing is allowed to one person or many people—and you can easily see the status of the documents in process." The "Available To" section lists "Faculty, Staff, Researchers". The "Get Started" section has a link to "Submit this request for a DocuSign Account." On the right side, there is a "Submit a Ticket" button and a "Details" section showing "Service ID: 30537", "Created: Wed 9/19/18 10:53 AM", and "Modified: Mon 3/30/20 12:57 PM". There is also an "Attachments (0)" section with a "No files found." message.

2. Once you have an account you should sign into [DocuSign](#).

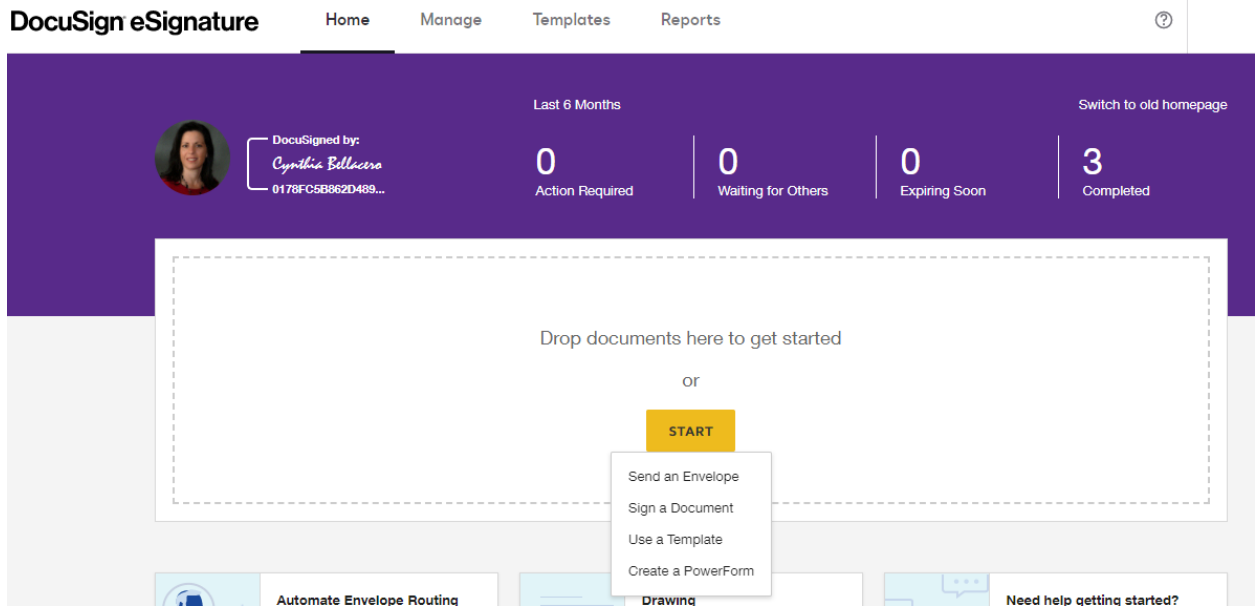
The screenshot shows the DocuSign login page. The DocuSign logo is at the top. Below it, the text "Please log in to your account" is displayed. There is a text input field containing the email address "bellaceroc18@ecu.edu". Below the input field is a yellow "CONTINUE" button. At the bottom, there is a link that says "No account? Sign up for free".

3.

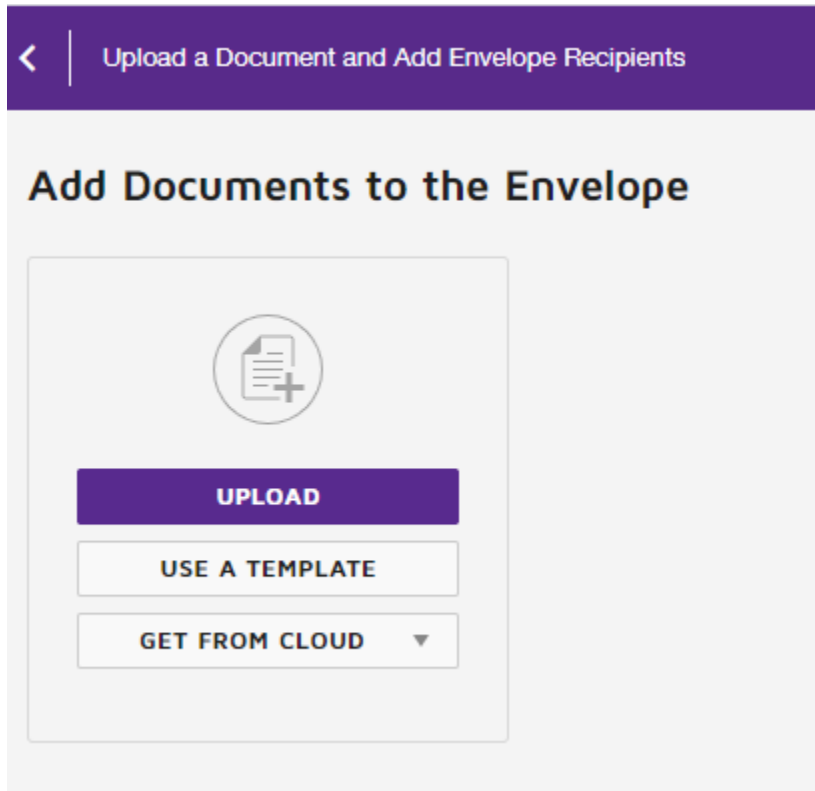
- a. Upload your bilateral agreement into DocuSign by either dragging the file into the screen or



- b. pressing the start button. It will give you a drop-down menu. Choose send an envelope.



- c. Now upload your bilateral agreement.



4. Create signature workflow.
 - a. Check the set signing order box. This will ensure that your agreement gets signed in the proper order.

EAST CAROLINA UNIVERSITY
BILATERAL AGREEMENT
For students adding courses at another institution for example at East Carolina University

THIS BILATERAL AGREEMENT (Agreement) is made as of the date of the last signature below this Electronic Document between EAST CAROLINA UNIVERSITY (ECU), a constituent institution of the University of North Carolina, on behalf of the state of North Carolina, and

WHEREAS, Students desire to take courses (ECU Courses) at the Agency and have those courses transfer to ECU;


WHEREAS, Agency agrees to allow students to take courses as indicated on Exhibit B, which Exhibit B is defined in Section 3 below; and

WHEREAS, ECU, will allow students to transfer the Courses to ECU;

NOW, THEREFORE, in consideration of the promises and covenants made each to the other, the parties hereto agree as follows:

1. The term of this Agreement is one (1) year unless either Party gives and shall continue for a period of three (3) years. Either party may terminate this Agreement, with or without cause, by providing 30 days written notice to the other party. Notwithstanding, this Agreement may be renewed or modified herein or because of breach. However, any students who have matriculated at ECU pursuant to this Agreement shall be continued through completion of the Degree Program.

DocuSign Test.docx ⋮
6 pages



UPLOAD



USE A TEMPLATE

GET FROM CLOUD ▾

Add Recipients to the Envelope

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

Set signing order

| | | | | |
|---|--|---|--|--------------------|
| 1 | Name * <input type="text"/> |  |  NEEDS TO SIGN ▾ | CUSTOMIZE ▾ |
| | Email * <input type="text"/> | | | |



The workflow will automatically default to the needs to sign setting. This is the setting you want to use for gaining all the signatures.
At the end of your workflow you will need to use the send a copy option as well. See Step 5 for more details.


b. Enter the name and email of your first signee.

Add Recipients to the Envelope

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

Set signing order

| | | | | |
|---|--|---|--|--------------------|
| 1 | Name * Cynthia Bellacero |  |  NEEDS TO SIGN ▾ | CUSTOMIZE ▾ |
| | Email * bellaceroc18@ecu.edu | | | |

 **ADD RECIPIENT**

- c. Repeat this step by clicking the add recipient button until you have an ordered workflow of all the individuals that will need to sign your document. The order in which you should obtain signatures is:
 - i. Partnering institution signatures
 - ii. ECU Department Chair
 - iii. ECU College Dean
 - iv. ECU Bilateral Agreements Committee Chair: Cynthia Bellacero
bellaceroc18@ecu.edu
 - v. Provost
5. You must also enter the names and email addresses of individuals who should receive a copy of the completely signed agreement. Press add recipient and select “receives a copy” instead of “needs to sign” on the right of the workflow step. Add the recipient’s name and email address. You should send the signed copy of your agreement to:
 - a. Registrar’s Office: Ashley Shivar shivara22@ecu.edu
 - b. Bilateral Agreements Committee Chair: Cynthia Bellacero bellaceroc18@ecu.edu
 - c. Yourself
 - d. Contact at Partnering Institution

6

Now, therefore, in consideration of the promises and covenants made each to the other, the parties hereto agree as follows:

1. The term of this Agreement is from the date hereon until 31 October, 2020 and shall continue for a period of three (3) years. Either party may terminate this Agreement, with or without cause, by providing 30 days written notice to the other party. Additionally, this Agreement may be terminated or modified orally or because of breach. However, any modification shall have no effect unless in writing and presented to this Agreement shall be considered through completion of the Signer Program.

DocuSign Test.docx
6 pages

USE A TEMPLATE

GET FROM CLOUD ▼

Add Recipients to the Envelope

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

Set signing order


1 | **Name *** CC RECEIVES A COPY ▼

Cynthia Bellacero

Email *

bellaceroc18@ecu.edu

+ ADD RECIPIENT



Message to All Recipients

Custom email and language for each recipient

Email Subject*

Please DocuSign: Docusign Test.docx

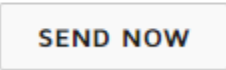

Characters remaining: 65

Email Message

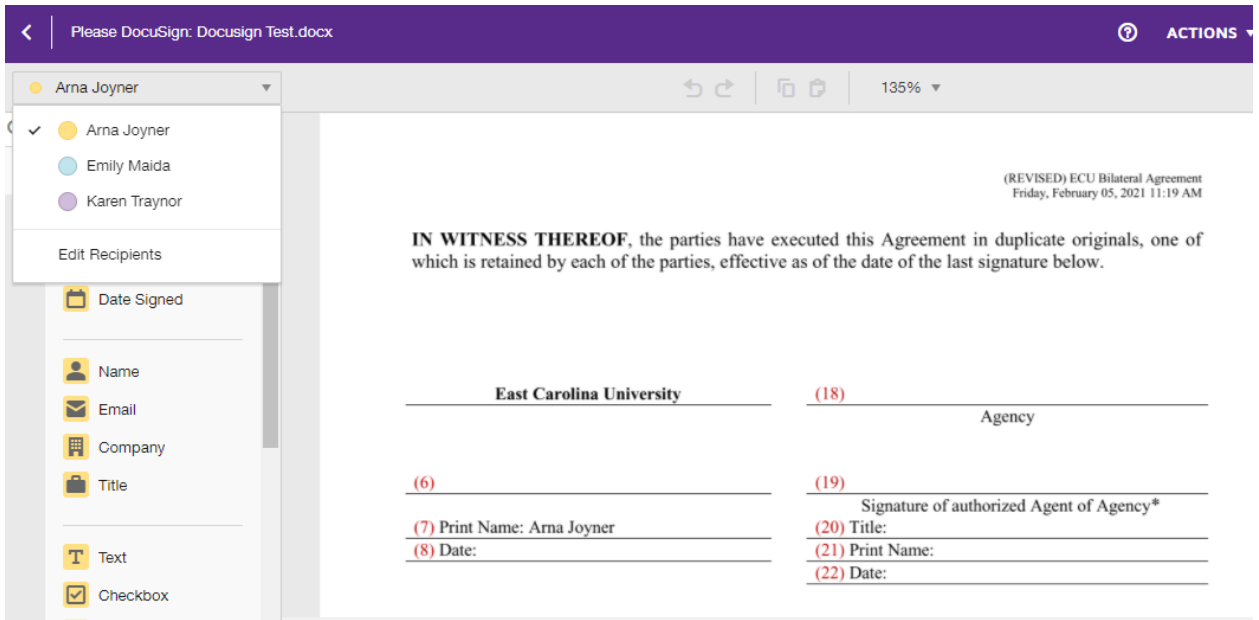
Write a brief message asking them to sign your agreement

Characters remaining: 9944

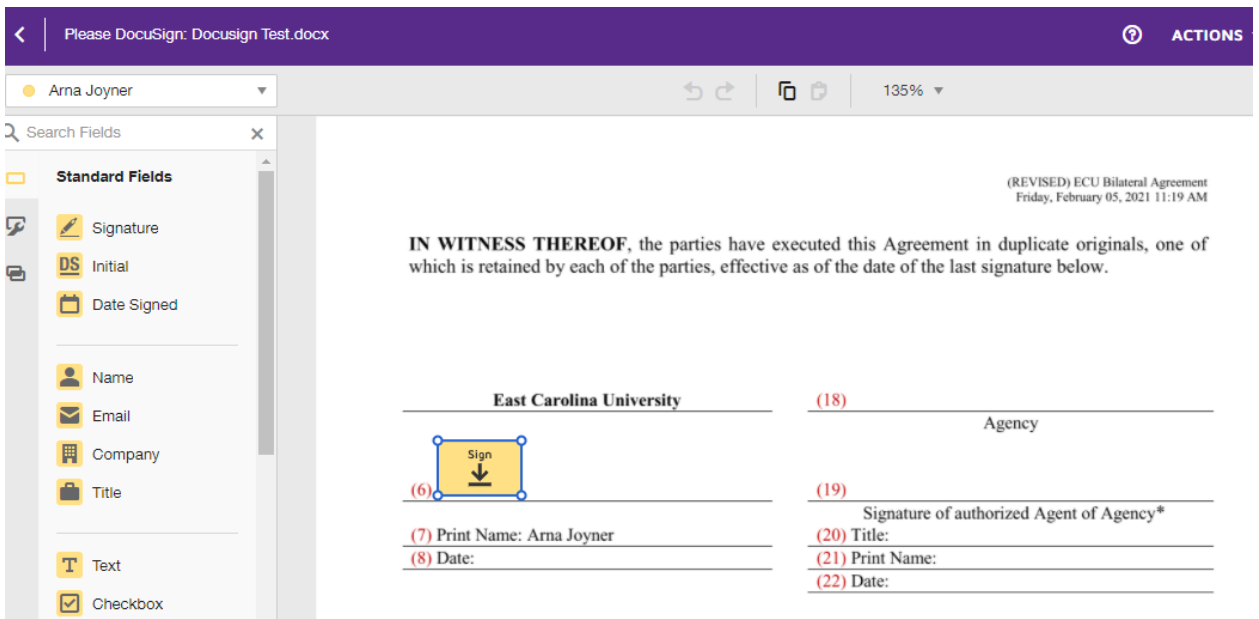
7. Click the yellow “next” button at the bottom right of the screen.

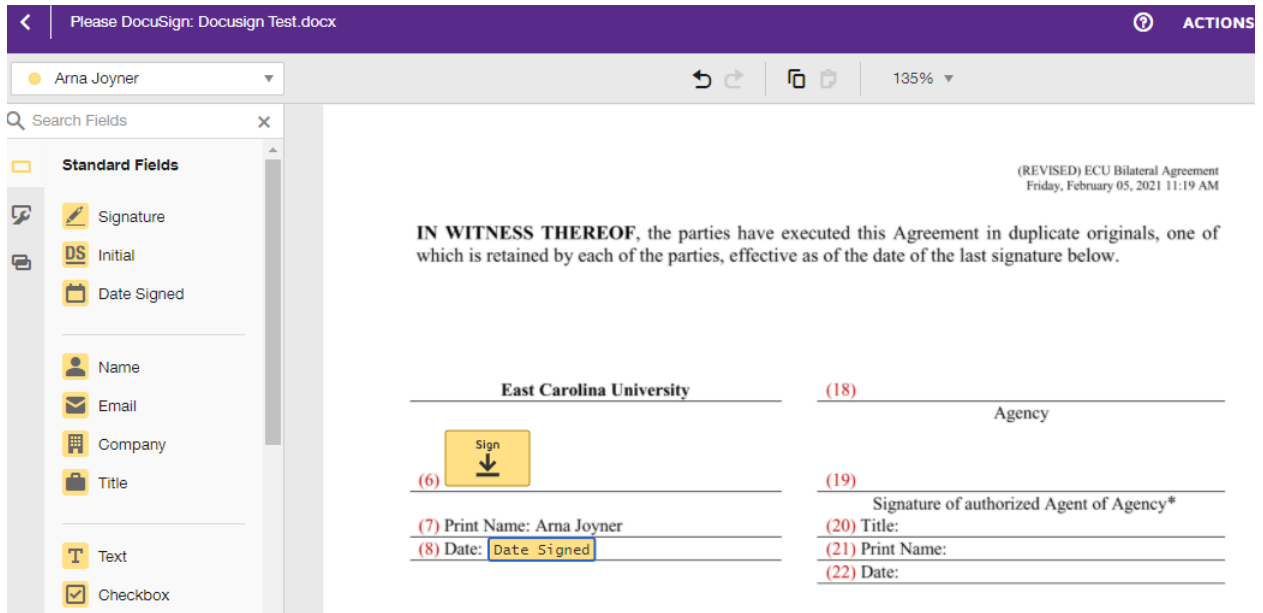
8. Now you will need to set where in the document each individual will sign and date the agreement. All signatures will be set on page 4 of your agreement (the signature page).
 - a. Select the individual you want to set the signature and date for from the drop-down list in the upper left-hand corner of your screen. Each individual in your workflow will have a different color associated with them.



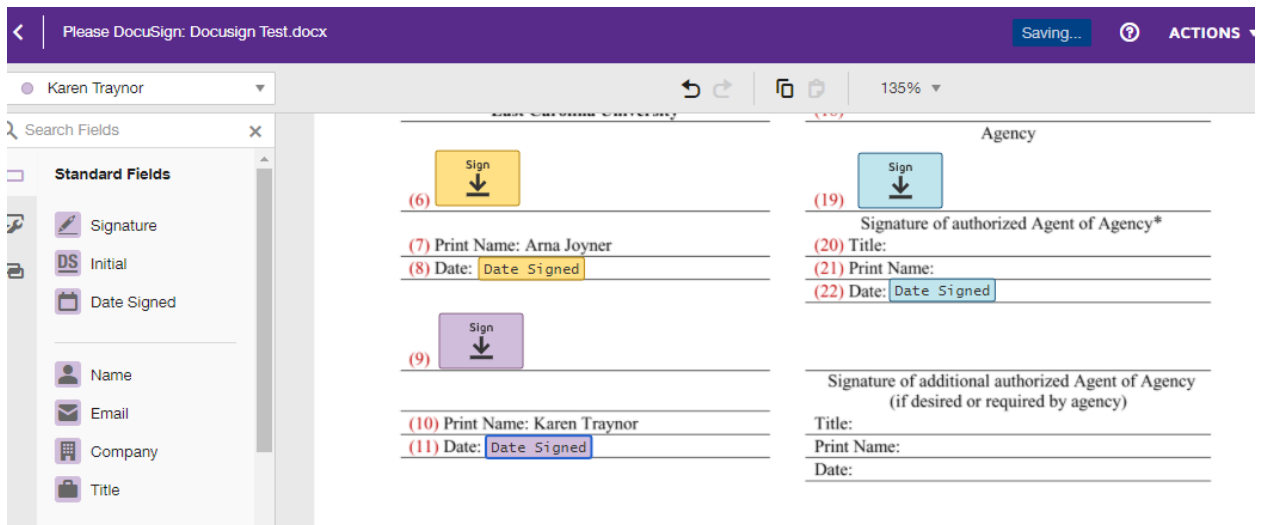
- b. Drag the signature block from the “standard fields” list on left-hand area of the menu into the line of the document where you want the signature to appear.



- c. Drag the date signed block from the “standard fields” list on left-hand area of the menu into the line of the document where you want the date the individual signed to appear.



- d. Repeat this process for each individual in the workflow. Each block will have a color that corresponds to a specific individual.



9. Press the send button in the bottom right-hand corner of your screen to launch your signature workflow.



10. Congratulations! You have created and launched your bilateral agreement signature workflow.

Additional Resources:

How do I Sign a DocuSign Document: <https://library.ecu.edu/wp-content/uploads/sites/166/2018/01/How-do-I-sign-a-DocuSign-document.pdf>

Sending Envelopes In DocuSign: <https://support.docusign.com/en/videos/New-DocuSign-Experience-Sending-Documents>