



NexGEN DocuSign Quick Reference Guide

For Contracts in NexGEN, where the vendor is US Based, and the Contract Type, either CA or FL. DocuSign will be part of the process. DocuSign applies to Contracts, Change Orders, Lean Change Orders with CD/s, and Lean Change Orders without CD.

DocuSign Section In NexGEN

If all criteria meet for DocuSign (US Based Vendor and Contract Type), the DocuSign Authority will be editable for the Contract Administrator to prepare the envelope to the WDI Signatory and Vendor Signatory. Contract Administrator can edit the DocuSign Authority section during Draft state and Contract Generation state for Contracts and Approved state and CO Generation state for Change Orders.

- (A) WDI Signatory: The Studio Signatory signing the document.
- (B) Vendor Signatory: The Vendor Signatory signing the document.
- (C) Add New Vendor Signatory: To add new Vendor Signatory to select. (If not in selection.)

DocuSign Authority

WDI Signatory * (A)

Vendor Signatory (B)

(C) Add New Vendor Signatory

- (D) The envelope will be sent to the Vendor Signatory and WDI Signatory to be signed.

Add Agreement Only

Max File Size is 25MB

(D) MUST SAVE BEFORE ATTACHING

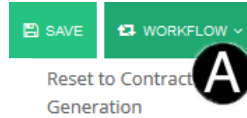


Tip: For the Standard Change Order process. Cannot attach envelope during the Approved state.

DocuSign In Process and Need To Reset The DocuSign Process

If the document needs to be voided, canceled or rerouted in DocuSign. The Contract Administrator can go into the Contract and Change Order in NexGEN and workflow back to the state to make the needed adjustment to the WDI Signatory, Vendor Signatory, or Envelope.

(A) Click the Workflow button and Click “Reset to Contract Generation” (for Contracts).
The workflow box will appear. You are required to leave a message and then click Execute to begin the workflow.



Tip:

- Click “Reset to Approved” for Lean Change Orders with CD/s and Lean Change Orders without CD.
- Click “Reset to CO Generation” for Standard Change Orders.
- The Contract, Change Orders, and Lean Change Orders can be returned only in these states in NexGEN, **Sent To Vendor (DocuSign)**, and **Fully Executed (WDI DocuSign)**.

DocuSign Activity In NexGEN Event History

Scroll to the Event History in NexGEN and Expand **(A)** the event history to view when the Vendor Signatory and the WDI Signatory signed the document in DocuSign. The activity is at the **(B)** Audit Note column.

Event History (A) ^					
STATE	DAYS IN STATE	BY USER	RECIPIENTS	COMMENT	(B) AUDIT NOTE
Fully Executed - Invoicing Authorized	4	NexGEN System Backend User			WDI has signed the DocuSign Contract Agreement.
Fully Executed (WDI DocuSign)		NexGEN System Backend User			Set ReceivedFromVendor Date
Fully Executed (WDI DocuSign)	0	NexGEN System Backend User			The Vendor has signed the DocuSign Contract Agreement.

Fully Executed Document In NexGEN

Once both the Vendor Signatory and WDI Signatory signed the document in DocuSign. The Fully Executed document will be located in the References / Attachments section and ready for you to download or view.

- (A)** Click the Download Icon on the attachment to download.
Either “Open” or “Save” into your device.

