Configuring Bonterra eSignatures

Cybergrants Webinar for Admins

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Meet Your Trainer

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Learning Objective

To provide an overview of the new eSignature functionality, focusing on set up of the feature.

The steps in this webinar require access to the admin side of Cybergrants, and therefore is best suited to administrators.

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Agenda

Overview of the eSignature Feature

eSignatures Prerequisites

Configuring eSignatures

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Overview of the Bonterra eSignature Feature

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What is Bonterra eSignature?

- Ability to capture electronic signatures through DocuSign or AdobeSign providers

- Increases flexibility and accessibility for Grant Seekers and Grant Makers alike

- Expedites completion of approval processes

- Empowers administrators to self-manage this feature:
  - Creating new acceptance templates
  - Modifying existing templates

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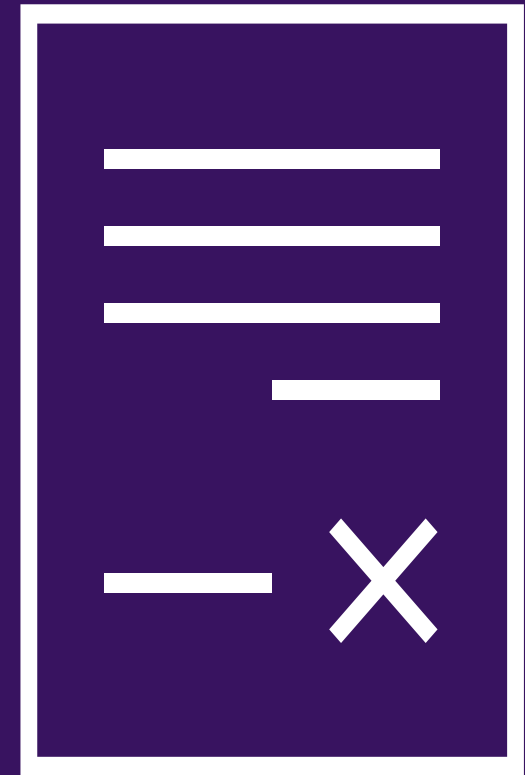
What are the eSignature updates?

- Admins can now:
  - Independently manage eSignature set-up for grant proposals and approval templates in CyberGrants
  - Seamlessly integrate eSignatures into critical grant workflows
  - Automatically apply acceptance templates based on proposal type

Configuring Bonterra eSignatures

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Prerequisites

Have standard eSignature functionality turned on

Have a relationship with an eSignature provider (DocuSign or AdobeSign)

Set up role permissions for viewing, editing and/or managing eSignatures

Prepare templates for integration with eSignature capabilities

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Preparing Templates – Merge Fields

- Outline which fields in your LOA are merge fields, meaning they are variables in the letter that differ based on the recipient

- For Grant Makers using:

  - DOCX formats - merge fields should be indicated by wrapping the appropriate text in curly brackets: {}

  - PDF formats - merge fields can be indicated by utilizing form fields via a PDF editor or Adobe Acrobat Sign's advanced functionality

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Preparing Templates – Signer Fields

- Outline where your signer fields are
  - Signature
  - Date of Signature

These fields are *not* merge fields, but instead are filled in by the signer at time of completion.

Requirements for proposal types including eSignature:

- Ready to send for eSignature

- eSignature Completed LOA

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Preparing Templates – Signer Fields

For DocuSign users, here is the required format for signature fields:

- /Signer1Signature/
- /Signer1DateSigned/
- /Signer2Signature/
- /Signer2DateSigned/, etc.

For AdobeSign users, here is the required format for signature fields:

- {{Sig_es_:signer1:signature}}
- {{Dte_es_:signer1:date}}
- {{Sig_es_:signer2:signature}}
- {{Dte_es_:signer2:date}}, etc.

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Setting up eSignatures

1. Navigate to Admin Tab and scroll down to Integration section

2. Select "Connection Status and Templates" under E-Signature manager

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Setting up eSignatures

3. Ensure your eSignature provider is listed in the top left corner

4. Upload a Template

    ✓ Attach proposal type(s)

    ✓ Map merge fields

Set Up Template

Manage and maintain **Grant Approval - MD.docx** for use with grant applications.

Grant Approval - MD.docx   Replace Document

Updated on	Updated by	Status	Used in
2024-08-20	**mdodds**	Needs attention	**0 Proposal Types**

1. Attach Proposal Type(s) *

Assign one or more Proposal Type(s) to your template.

Global Grant Application ✕   ✕ ⌄

2. Map Fields

We found the following merge fields in your template. Map them to fields from your proposal type(s). If you do not see a field listed, you may need to create or update it in your uploaded document.

Merge Fields from your template	Fields from selected proposal type(s)
{Date}	**Project Start Date** Field ID: 2179 ✕ ⌄
{Organization Name}	Please Select ⌄

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Setting up eSignatures – Field Mapping

Objects	Field Types
• Organization • Request	• Currency • Date • Number • Paragraph • Boolean (Y/N) • Single Select Fields

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Preview Your Template

5. Preview each template before publishing

   ✓ Navigate to the bottom of the Template editing page

   ✓ Select Preview

   ✓ Choose the request you wish to use for data, or select to manually enter data

   ✓ Open the letter that is generated and approve format

6. Save and/or Publish!

Preview Template

Choose request to preview

Select a request with the data you would like to preview.

Select Request: *

Please Select

Cancel   Prepare Preview

Set Up Template

Manage and maintain ▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓ for use with grant applications.

ⓘ You have pending changes that are not yet published. Would you like to publish these changes?

Publish

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Template Status

For a template to be ready to publish, it must:

- Have at least one associated proposal type

- Have all merge fields mapped to a field in the corresponding proposal type(s)

It will then be in one of two stages before publishing:

- Needs Attention

- Unpublished Changes

Merge Field2_3_FirstName (2).docx	7/29/2024		Needs attention	No	✎
Merge Field2_3_FirstName (1).docx	7/29/2024		Unpublished changes	No	✎

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Published Template

- Once you select Publish, you will receive an email confirming the changes have been made

- Your template is now live in the system!

- Any future edits need to be completed in Sandbox

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FOR THE **GREATEST** GOOD™

Dear Megan Dodds,

We are pleased to inform you that your grant application has been approved by our Grant Review Committee.

After carefully reviewing your proposal, we believe that your project aligns with our organization's mission and goals, and we are confident that it will have a positive impact on the community. We are excited to support your efforts and look forward to seeing the results of your work.

Accordingly, we are pleased to award you a grant in the amount of $5000.00 to be used for the purposes outlined in your application. The funds will be disbursed to you within the next 10-12 business days.

As a condition of this grant, we ask that you submit a progress report to us every 3 months, detailing the activities undertaken and the outcomes achieved. Additionally, we require that you acknowledge our organization's support in any public communications or promotional materials related to this project.

Please let us know if you have any questions or concerns regarding the grant or the reporting requirements. We are here to support you throughout the duration of this project.

Congratulations on your successful grant application, and we wish you the best of luck in your endeavors.

Sincerely,

Leo Grant

Executive Director

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Thank you for attending!

We hope to see you
in future trainings.

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