**How to Setup and Use E-Sign Signature Queued Approval**

In this example, E-Sign Signature Queued Approval will be set up for Employee Pay Code Pay Rate changes.

**Assign E-Sign Approvers**

1. Go to **Microsoft Dynamics GP | Tools | Setup | Auditor | System Settings**.
2. In the **Auditor System Settings** window, in the **E-Sign Approvers** section, mark the **Users** who will be E-Sign Approvers along with, **Message Center**, **Email** (including an Email address), or both.



1. Click OK.

**Setup Pre-Defined Reason Code (Optional)**

1. Go to **Microsoft Dynamics GP | Tools | Setup | Auditor | Reason Codes**.
2. In the **Reason codes** window, click the **New Reason Group** button.



1. Enter **EmployeePayRate** for the Reason Group.
2. Enter the **Note/Reason**, and then click **Insert**.
3. Repeat the step above for any other notes/reasons for an Employee Pay Rate change.



1. Click **OK**.

**Create E-Sign Signature**

1. Go to **Microsoft Dynamics GP | Tools | Setup | Auditor | E-Sign Signatures**.
2. In the **E-Sign Signature Definition Maintenance** window, enter a **Signature Name** and **Description**. For example:
	1. Signature Name: **Employee\_Pay\_Rate**
	2. Description: **Pay Rate Changes**
3. Select if a **Reason Code** is Required, Optional, or None.
	1. In this example, select **Optional**.
	2. Select the **EmployeePayRate** Reason Code if one was created from steps in Setup Pre-Defined Reason Code section above. **Note:** You can drill back on the Reason Groups to create pre-defined reasons for the Users who are making the Employee Pay Rate changes.
4. Mark **Approval Required**.
5. In the **Approver Assignment** section, mark which **User(s)** you want to approve Employee Pay Rate changes.
6. In the **Company Access** section, mark which **Company(ies)** you want to have access to the E-Sign Signature.
7. In the **User Access** section, mark which **User(s)** you want to have access to the E-Sign Signature.
8. Click Save.



**Assign the E-Sign Signature**

1. Go to **Microsoft Dynamics GP | Tools | Setup | Auditor | E-Sign Signature Assignments**.
2. In the **E-Sign Signature Assignment** window, click the **Add Assignment** button.



1. In the **Signature Assignment Wizard Welcome** window, click **Next**.



1. Click the **Signature Name lookup** button, select **Employee\_Pay\_Rate**, and then click **Select**.



1. Click **Next**.
2. Open the window where you would like to assign the Signature to. In this example, go to **Cards | Employee | Pay Code**.
3. Once the window is open, the Signature Assignment Wizard will be updated.



1. Click **Next**.
2. Move the cursor to the field you would like to assign the Signature to. In this example, move the cursor to the **Pay Rate** field and the Signature Assignment Wizard will be updated.



1. Click **Next**.
2. Click the button that is used to save the information on the window. In this example, click the **Save** button in the **Employee Pay Code Maintenance** window.



1. Click **Next**.
2. Select each field that must be selected to display the record in the window.
	1. In this example, put the cursor in the **Employee ID** field, and then click **Select**.



* 1. Put the cursor in the in the **Pay Code** field, and then click **Select**.



1. Click **Next**.
2. Select each field in the window that you want the Approver to see when the Signature is requested. In this example, put your cursor in the following fields and then click the **Select** button for each of them. **Note**: If a field is grayed out, use the scrolling arrows to pull up a record with the field available.
	1. Employee ID
	2. Pay Code
	3. Pay Rate
	4. Pay Period
	5. Base on Pay Code



1. Click **Next**.
2. Review the information.



1. Click **Next**.
2. Mark to **Display the Signature Assignment**, and then click **Finish**.



1. Click **OK**.

**Test the E-Sign Signature Queued Approval**

**LESSONUSER1 makes a Pay Rate change in the Employee Pay Code Maintenance window**

1. Log into Microsoft Dynamics GP (GP) as a User who has access to make Pay Rate changes. In this example, I am going to log in as **LESSONUSER1**.
2. Go to **Cards | Payroll | Pay Code.**
3. In the **Employee Pay Code Maintenance** window, select **ACKE0001** for the **Employee ID**.
4. Select **SALY** for the **Pay Code**.
5. Change the Pay Rate value from $22,500.00 to $25,000.00, and then tab off the field.
6. In the **E-Sign Approval Needed** window, enter LESSONUSER1’s **password**.
7. Select or enter a **Reason** for the change.



1. Click the **Approver** **lookup** button.
2. In the **Approvers** window, select a **User** to approve the change and then click **Select**. In this example, select Anna, and then click Select.



1. In the **E-Sign Approval Needed window**, click **Queue**.

**Note**: If Anna was nearby, you could click Approve and Anna could enter their password on your machine and the change would be approved.



1. Click **OK**.
2. **Close** the **Employee Pay Code Maintenance** window.

**Anna approves the Pay Rate change request**

1. Log into **Microsoft Dynamics GP**.
2. The **E-Sign Pending Approval Requests** window will open.
3. In the **E-Sign Pending Approval Requests** window, double click on the **item**.
4. In the **E-Sign Complete Approval** window, view the information. Note: To see the reference fields, click the **blue expansion** button.





1. Click **Approve**.
2. Enter **Anna’s password**, and then click **Approve**.
3. Click **OK**.
4. **Close** the **E-Sign Pending Approval Requests** window.

**LESSONUSER1 accepts approval**

1. In the **E-Sign Request Status** window, click **Apply** to apply the changes that LESSONUSER1 requested and that Anna approved.



1. Click **OK** to the **Process Complete** message.