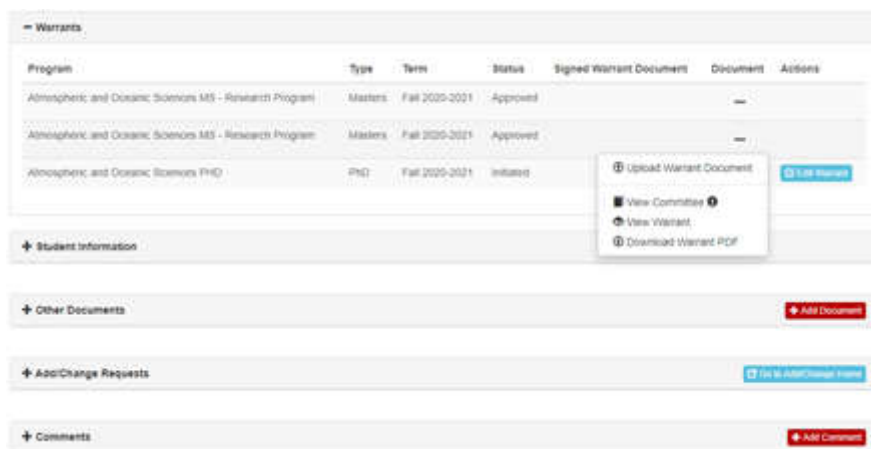


Warrant E-Signature Coordinator Instructions

These instructions are for coordinators and advisors of warrants who will have the ability to review warrant committees in Portal and send e-signature emails to the committees so that committee members are notified that they should review and e-sign a warrant.

1. After a warrant is approved and ready to be signed you will want to notify the committee of the warrant. To begin the workflow, you will need to access the new Committee page. It can be accessed from either the Student's page or the Warrant search in Portal. Here is a screenshot from the student page in the warrant section:



Click the actions button and you will see the View Committee button. If a committee member's email is missing you will see an exclamation point as that is needed to send them the e-signature email.

2. Once in the committee page you will see some details for the warrant and its committee:

Yuzhe Ma Prelim Warrant Committee

Submit Warrant

Yuzhe Ma • Prelim Warrant • Committee

Committee Members

Email Members

Name	Email	Company	Signature Date	Last Emailed	Actions
Hanna, Josiah			Not Signed		Edit
Fernandes, Eadence	eadence@cs.wisc.edu	UW-Madison	Not Signed	5/19/2021 3:39:44 PM	Email
Li, Sharon	sharonli@cs.wisc.edu	UW-Madison	Not Signed	5/19/2021 3:41:17 PM	Email
Zhu,Xiaojin	jerryzhu@cs.wisc.edu	UW-Madison	Not Signed	5/19/2021 3:42:15 PM	Email

Showing 1 to 4 of 4 entries

Warrant Approval Members

Add Warrant Members

Name	Email	Type	Company	Signature Date	Last Emailed	Actions
WRENN, PATRICK LEWIS	patrick.wrenn@wisc.edu	Minor Approval	UW-Madison	6/3/2021 11:01:47 AM	5/19/2021 1:01:07 PM	...

Showing 1 to 1 of 1 entries

3. If a member is missing their email you will see an Edit button available to edit their details. The fields available to edit vary based on whether it is a UW or non-UW member. If it is a UW member you can search for them by netid or name and select them. If it is a non-UW member you need to manually update the fields.

Non-UW:

Is this UW Staff? *

Full Name * Email *

Company * Department *

Title *

Advisor? Reader?

Cancel Save

UW:

Edit Committee Member

Is this UW Staff? * Yes

Person * WRENN, PATRICK LEWIS

Title * Test Title

Advisor? Reader?

Cancel Save

4. Once all members have their information updated you can click the Email Committee button at the top right or the Email button next to the specific members.

5. The email members button will list all members and their emails. If you click this button before updating someone who is missing their email you will see EMAIL MISSING for anyone who needs to be updated. You can preview the email in this modal, but it will always be the same message. You can use the checkboxes on the left to decide who the email will be sent to. You can also choose to send the email from your person email using the radio buttons at the top. The email will not send to members who have signed.

Send Signature Email

Send signature email to all warrant members who have not yet signed the warrant?

Use your UW email as sender? * Yes No

<input checked="" type="checkbox"/>	Warrant Member Name	Email	Advisor	Signed?
<input checked="" type="checkbox"/>	Zhu, Xiaojin	jemyzhu@cs.wisc.edu	Yes	No
<input checked="" type="checkbox"/>	Fernandes, Earlance	earlence@cs.wisc.edu		No
<input checked="" type="checkbox"/>	Hanna, Josiah	EMAIL MISSING		No
<input checked="" type="checkbox"/>	Li, Sharon	sharonli@cs.wisc.edu		No
<input type="checkbox"/>	WRENN, PATRICK LEWIS	patrick.wrenn@wisc.edu		Yes

+ Preview Email Content

Cancel Send

6. Once you are ready to send you just need to click the Send button.

7. Let's say a week has passed and only half of the committee has signed. If you come back to this page it will show who has signed and when. You want to send another reminder email, so you follow the same workflow. However, only members who have not signed will receive another email.

Yuzhe Ma Prelim Warrant Committee

Submit Warrant

[Yuzhe Ma](#) / [Prelim Warrant](#) / [Committee](#)

Committee Members Email Members

Name	Email	Company	Signature Date	Last Emailed	Actions
Hanna, Josiah			Not Signed		Edit
Fernandes, Earlance	earlence@cs.wisc.edu	UW-Madison	Not Signed	5/19/2021 3:39:44 PM	Email
Li, Sharon	sharonli@cs.wisc.edu	UW-Madison	Not Signed	5/19/2021 3:41:17 PM	Email
Zhu,Xiaojin	jeryzhu@cs.wisc.edu	UW-Madison	Not Signed	5/19/2021 3:42:13 PM	Email

Showing 1 to 4 of 4 entries

Warrant Approval Members Add Warrant Members

Name	Email	Type	Company	Signature Date	Last Emailed	Actions
WRENN, PATRICK LEWIS	patrick.wrenn@wisc.edu	Minor Approval	UW-Madison	6/3/2021 11:01:47 AM	5/19/2021 1:01:07 PM	...

Showing 1 to 1 of 1 entries

Send Signature Email

Send signature email to all warrant members who have not yet signed the warrant?

Use your UW email as sender? Yes No

Warrant Member Name	Email	Advisor	Signed?
<input checked="" type="checkbox"/> Zhu,Xiaojin	jeryzhu@cs.wisc.edu	Yes	No
<input checked="" type="checkbox"/> Fernandes, Earlance	earlence@cs.wisc.edu		No
<input checked="" type="checkbox"/> Hanna, Josiah	EMAIL MISSING		No
<input checked="" type="checkbox"/> Li, Sharon	sharonli@cs.wisc.edu		No
<input type="checkbox"/> WRENN, PATRICK LEWIS	patrick.wrenn@wisc.edu		Yes

[+ Preview Email Content](#)

Cancel Send

8. Once all signatures have been received, you can submit the Warrant to be processed by the Graduate School from two places – the committee page and the action dropdown on the student’s page. This button is only enabled when all signatures have been received:

The screenshot shows a web interface for a 'Yuzhe Ma Prelim Warrant Committee'. At the top right, there is a green button labeled 'Submit Warrant' which is circled in red. Below the header, there is a breadcrumb trail: 'Yuzhe Ma / Prelim Warrant / Committee'. The main content area is titled 'Warrants' and contains a table with the following data:

Program	Type	Term	Status	Signed Warrant Document	Document	Actions
Atmospheric and Oceanic Sciences MS - Research Program	Masters	Fall 2020-2021	Signed	Signed Warrant PDF
Atmospheric and Oceanic Sciences MS - Research Program	Masters	Fall 2020-2021	Signatures Requested	Signed Warrant PDF		View Committee Mark Ready for Review
Atmospheric and Oceanic Sciences PHD	PhD	Fall 2020-2021	Initiated			...