February 2018

DOCU SIGN TRAINING MANUAL: DELEGATE PCARD HOLDER

BUSINESS SERVICES
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Logging into DocuSign

- Open Web Browser and navigate to the web page below. This application is currently not behind TechWorks. Use the link below every time or save to your favorites. 
  http://esignature.gatech.edu
- On the eSignature page, click on the DocuSign icon

![DocuSign Icon]

- On the DocuSign homepage, click Log in to DocuSign in the top right corner

  Log in to DocuSign

- On the login page, use your @gatech.edu account. (i.e. mhandley6@gatech.edu)

  ![DocuSign Login Page]

  Please log in to your account

  mhandley6@gatech.edu

- Click continue

- On the password page, click the blue button that says Use Company Login

  ![DocuSign Password Page]

  USE COMPANY LOGIN
Sign into Duo like you would going into TechWorks

Enter your GT Account and Password
Login requested by: idp.gatech.edu

GT Account:
mhandle6

Password:

 Warn me before logging me into other sites.

LOGIN  clear
- Once you accept the Duo push or press 1 during the call, you should reach the DocuSign landing page.

- End Process.
Creating an Envelope

- From the landing page, click on Templates on the top toolbar

![TEMPLATES](image)

- On the left side of the page, click Shared Folders
  - Click on the Procurement & Business Services folder

![Procurement & Business Services](image)

- As the Delegate submitting a requisition for a purchase, use the PBS-Delegate PCard Requisition Form template

![PBS-Delegate Pcard Requisition Form](image)

- Click Use
- Fill out the workflow for the envelope. Put your first and last name in the Delegate Sender field, then your email in the next field. In the PCard Holder field, put the person’s first and last name whose name appears on the PCard and then their email. Do this for the approvers of the purchase as well

Recipients

1. Delegate Sender
   - Marissa Handley
   - mhandley5@gatech.edu

2. PCard Holder
   - Meagan Fitzsimons
   - mfitzsimons3@gatech.edu

3. Approver 1
   - Whitney Tate
   - wtate6@gatech.edu

4. Approver 2
   - Peggy Romano
   - pr9@gatech.edu
• If there is any additional information needed about the purchase, put it in the email message box below the workflow

**Message to All Recipients**

- Custom email and language for each recipient

**Advanced Options**

- Recipients can change signing responsibility
- Incomplete envelopes expire days after send date
- Recipients are warned day(s) before request expires

Enter additional text here if necessary

• Once everything is filled out, click the blue send button
• If you are ready to fill out the information regarding the purchase, click the Sign Now button. If not, click sign later

**Do you want to sign this document now?**

- **SIGN NOW**
- **SIGN LATER**

• When the document opens, click continue
Fill out the document with information about the purchase

**PCard Requisition Form**

Completion of this form is required, per PCard policy, prior to making any purchase that is not considered urgent, unplanned or non-routine or a state approved exception. If your purchase is urgent, unplanned or non-routine or falls into one of the exception categories, you must note it as such in the comment section of Concur for that transaction. Any transaction missing either this form or an exception comment in Concur will cause the statement to be returned by the approver to the cardholder. Approvers of this form cannot be a subordinate of the cardholder. The form should be attached in Concur along with the receipt image. By signing this form, Approvers are stating that he/she acknowledges the cardholder is requesting prior approval, as required, and the purchase, to the best of his/her knowledge has followed Georgia Tech policy up to this point.

<table>
<thead>
<tr>
<th>Cardholder Name</th>
<th>Marissa Handley</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Four Card Digits</td>
<td>7396</td>
</tr>
<tr>
<td>Department</td>
<td>830 - Procurement &amp; Business Services</td>
</tr>
<tr>
<td>Vendor Name</td>
<td>Test</td>
</tr>
<tr>
<td>Date of Purchase</td>
<td>02/01/2018</td>
</tr>
</tbody>
</table>

**Allocations**

<table>
<thead>
<tr>
<th>Value of Purchase ($)</th>
<th>$823.50</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Number</td>
<td>830152469</td>
</tr>
<tr>
<td>Benefit to the Project</td>
<td>Test Required</td>
</tr>
<tr>
<td>Description</td>
<td>Testing</td>
</tr>
</tbody>
</table>
The document closes and sends you back to the Manage page of your DocuSign account.

End Process.
Attaching Documents to Envelope

If there is any supporting documentation needed for the purchase you can upload receipts and emails to your envelope.

- If you are creating an envelope, click the use button on the PCard Requisition Form

- When the workflow comes up, click Advanced Edit next to the blue Send button

- Hover over Add Document until the blue Upload option is available

- Choose the files you want to upload and click open. The document will appear next to the PCard Requisition form.
- Put your name and email in the PCard Holder field. Put the name and email of your approvers in the appropriate fields

<table>
<thead>
<tr>
<th>1</th>
<th>PCard Holder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marissa Handley</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:marissa.handley@business.gatech.edu">marissa.handley@business.gatech.edu</a></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2</th>
<th>Approver 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peggy Romano</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:pr9@gatech.edu">pr9@gatech.edu</a></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>3</th>
<th>Approver 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Whitney Tate</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:wtate6@gatech.edu">wtate6@gatech.edu</a></td>
<td></td>
</tr>
</tbody>
</table>

- Click the Next button in the top right-hand corner
- When the form populates on the next screen click the Send button in the top right-hand corner. **DO NOT** make any changes to the form

- If you are ready to fill out the Requisition form click Sign Now. If not, click Sign Later

Do you want to sign this document now?

- **SIGN NOW**
- **SIGN LATER**

  - If you hit sign later and are now ready to fill out the PCard Requisition Form, go to the home page and click the Actions Required section on the left side of the page
<table>
<thead>
<tr>
<th>Status</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Required</td>
<td>--</td>
</tr>
<tr>
<td>Waiting for Others</td>
<td>3</td>
</tr>
<tr>
<td>Expiring Soon</td>
<td>--</td>
</tr>
<tr>
<td>Completed</td>
<td>8</td>
</tr>
</tbody>
</table>

- End Process.
Correcting an Envelope

If you send a document to someone and that person is out of the office, you will need to correct the envelope.

- Log into DocuSign
- On the landing page, click on Waiting for Others on the left side of the page

<table>
<thead>
<tr>
<th>OVERVIEW</th>
<th>Last 6 Months</th>
</tr>
</thead>
<tbody>
<tr>
<td>⚠️ Action Required</td>
<td>--</td>
</tr>
<tr>
<td>😊 Waiting for Others</td>
<td>4</td>
</tr>
<tr>
<td>⚠️ Expiring Soon</td>
<td>--</td>
</tr>
<tr>
<td>✔️ Completed</td>
<td>7</td>
</tr>
</tbody>
</table>

- Click on the envelope that needs to be corrected

Waiting for Others

Filtered by: Date (Last 6 Months)  Edit

<table>
<thead>
<tr>
<th>Subject</th>
<th>Status</th>
<th>Last change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please DocuSign: Whitney Tate PCard Requisition Form.pdf To: Marissa Handle, Whitney Tate</td>
<td>Waiting for Others</td>
<td>1/19/2018 09:24 am</td>
</tr>
<tr>
<td>Please DocuSign: Peggy Romano PCard Requisition Form.pdf To: Marissa Handle, Peggy Romano</td>
<td>Waiting for Others</td>
<td>12/19/2017 09:47 am</td>
</tr>
<tr>
<td>Please DocuSign: Marissa Handle PCard Requisition Form.pdf To: Marissa Handle, Mark Robinson</td>
<td>Waiting for Others</td>
<td>12/19/2017 09:16 am</td>
</tr>
<tr>
<td>Please DocuSign: Mark Robison PCard Requisition Form.pdf From: Marissa Handle</td>
<td>Waiting for Others</td>
<td>12/18/2017 02:52 am</td>
</tr>
</tbody>
</table>

- Click the correct button. FYI You can only correct the approvers that have not signed the document
• Change the user to an approver that is in the office

Add Recipients to the Envelope

Some of the recipients are locked and cannot be changed Learn More...

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

✓ Set signing order

1 Proxy Sender
Marliese Handley
mhandley6@gatech.edu

2 PCard Holder
Whitney Tate
wtate6@gatech.edu

3 Approver 1
Peggy Romano
peggy.romano@business.gatech.edu

4 Approver 2
Meagan Fitzsimons
meagan.fitzsimone@business.gatech.edu

• Once the approver has been changed, click next in the top right-hand corner of the document

• Click correct in the top right-hand corner of the page
- The system sends you back to the Waiting for Others screen

```
<table>
<thead>
<tr>
<th>Subject</th>
<th>Status</th>
<th>Last change</th>
<th>Folder</th>
</tr>
</thead>
<tbody>
<tr>
<td>[File Name]</td>
<td>Waiting for Others</td>
<td>1/10/2018 11:30 am</td>
<td></td>
</tr>
<tr>
<td>[File Name]</td>
<td>Waiting for Others</td>
<td>12/19/2017 09:47 am</td>
<td></td>
</tr>
<tr>
<td>[File Name]</td>
<td>Waiting for Others</td>
<td>12/19/2017 09:16 am</td>
<td></td>
</tr>
<tr>
<td>[File Name]</td>
<td>Waiting for Others</td>
<td>12/18/2017 02:52 pm</td>
<td></td>
</tr>
</tbody>
</table>
```

- End Process.
Voiding an Envelope

If you have already created an envelope and the purchase is no longer valid, you can void the document. Follow the steps below:

- Log into DocuSign
- On the landing page, click Manage on the top of the page
- Find the envelope and click the arrow next to the blue Sign button
- Click Void
• There will be a box that pops up for you to put a reason as to why this envelope is being Voided

**Void Envelope**

By voiding this envelope, recipients can no longer view it or sign enclosed documents. Recipients will receive an email notification, which includes your reason for voiding the envelope.

*Reason for voiding envelope.*

200 characters remaining.

**VOID**

• Click the blue Void button

• This message will pop up

✔ Please DocuSign: Marissa Handley PCard Requisition Form.pdf was voided.

• The status of the envelope will change to Voided

Voided

End Process.
Creating a Contact

- Log into DocuSign
- On the landing page, click the profile icon in the top right-hand corner
- Click my preferences
- On the left-hand side of the page, click contacts
- Click add contact
- Fill out the information for the contact and click save. **FYI** If you do not want everyone to see the contact you just created, do not select the Shared Contact option. This must be a Gatech
authorized approver. This document cannot be sent to any unauthorized approvers

- The Company field can be left blank
- End Process.
Changing Time Zones

If you find that your envelopes have the PST time zone on them follow the steps below to change it.

- Log into DocuSign

- On the landing page, click the profile in the top right-hand corner

- Click on My Preferences

- On the left-hand side of the page, go to Regional Settings
- Under Time and Date, select Specify a Time Zone
- Change it to the Time Zone you are located. For example, I am in Georgia so I selected Eastern Time

**Time and Date**

- [ ] Match my computer’s time zone
- [ ] Specify a Time Zone

- (UTC-05:00) Eastern Time (US & Canada)

- Click Save
- End Process.