February 2018

DOCUSIGN TRAINING MANUAL:
PCARD HOLDER

BUSINESS SERVICES
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PCard Policy

Should I use a PCard Requisition Form?

Is the Purchase ONE or MORE of the following?
1. Unplanned – not anticipated or known in advance
2. Urgent – compelling or requiring immediate action or attention
3. Non-routine – commonplace tasks, or duties done irregularly or at sporadic intervals (not monthly or standard recurring)

NO

Is this Purchase a Courier Charge?

YES → Requisition Exception

NO

Is this Purchase for a Student Event?

NO → Requisition Required

YES

Purchase < $1000

NO → Requisition Required

YES → Requisition Exception

Requisition Required

Purchase amount is between $1000 - $5000?

NO

Requisition Required

YES

Is this Purchase for Research, Study Abroad or Facilities Maintenance?

*corresponding card designation required

NO → Requisition Required

YES → Requisition Exception
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](http://esignature.gatech.edu)
- On the eSignature page, click on the DocuSign icon

![DocuSign Icon](image)

- On the DocuSign homepage, click Log in to DocuSign in the top right corner
  
  ![Log in to DocuSign](image)

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

  ![Please log in to your account](image)

- Click continue

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

  ![USE COMPANY LOGIN](image)
• Sign into Duo like you would going into TechWorks

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

GT Account:
mhandley6

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

PCard holders will need to complete this form prior to making a purchase.

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

  ![Templates](image1)

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

  ![Procurement & Business Services](image2)

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

  ![PBS-PCard Requisition Form](image3)

  - Click Use

- Fill out the workflow for the envelope. Put your first and last name in the PCard Holder field, then your email in the next field. Do this for the approvers of the purchase as well. You can use the contact icon to add approvers from your contact list or you can manually type them into the fields

  **Recipients**

<table>
<thead>
<tr>
<th></th>
<th>PCard Holder</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Marissa Handley</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:mhandley6@gatech.edu">mhandley6@gatech.edu</a></td>
</tr>
<tr>
<td>2</td>
<td>Whitney Tate</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:wtate6@gatech.edu">wtate6@gatech.edu</a></td>
</tr>
<tr>
<td>3</td>
<td>Peggy Romano</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:pr9@gatech.edu">pr9@gatech.edu</a></td>
</tr>
</tbody>
</table>
• If there is any additional information needed about the purchase, put it in the email message box below the workflow

Message to All Recipients

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.

SEND

• 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. The cardholder must sign/fill out information in order to keep the document moving

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>OVERVIEW</th>
<th>Last 6 Months</th>
</tr>
</thead>
<tbody>
<tr>
<td>✅ Action Required</td>
<td>-- &gt;</td>
</tr>
<tr>
<td>☐ Waiting for Others</td>
<td>3 &gt;</td>
</tr>
<tr>
<td>⚠ Expiring Soon</td>
<td>-- &gt;</td>
</tr>
<tr>
<td>✅ Completed</td>
<td>8 &gt;</td>
</tr>
</tbody>
</table>
• When the document opens, click continue

• Fill out the document with information about the purchase

• Once all the information is filled in, click finish
• 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

| 1 | PCard Holder |
|---|
| Marissa Handley |
| marissa.handley@business.gatech.edu |

| 2 | Approver 1 |
|---|
| Peggy Romano |
| pr9@gatech.edu |

| 3 | Approver 2 |
|---|
| Whitney Tate |
| wtate6@gatech.edu |

• 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>Category</th>
<th>Count</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Required</td>
<td>--</td>
<td></td>
</tr>
<tr>
<td>Waiting for Others</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Expiring Soon</td>
<td>--</td>
<td></td>
</tr>
<tr>
<td>Completed</td>
<td>8</td>
<td></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

**OVERVIEW**

<table>
<thead>
<tr>
<th>Action Required</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</td>
<td>Waiting for Others</td>
<td>1/10/2018 10:24 am</td>
</tr>
<tr>
<td>Please DocuSign: Peggy Romano PCard Requisition Form.pdf</td>
<td>Waiting for Others</td>
<td>12/19/2017 10:47 am</td>
</tr>
<tr>
<td>Please DocuSign: Marissa Handley PCard Requisition Form.pdf</td>
<td>Waiting for Others</td>
<td>12/19/2017 09:16 am</td>
</tr>
<tr>
<td>Please DocuSign: Mark Robinson PCard Requisition Form.pdf</td>
<td>Waiting for Others</td>
<td>12/18/2017 02:52 pm</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
Marliesa Handley
mhandley5@gatech.edu

2 PGard Holder
Whitney Tate
wtrate6@gatech.edu

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

4 Approver 2
Meagan Fitzsimons
meagan.fitzsimons@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>Please DocuSign: Whitney Tate PCard Requisition Form.pdf</td>
<td>Waiting for Others</td>
<td>1/18/2018 11:35 am</td>
<td></td>
</tr>
<tr>
<td>Please DocuSign: Peggy Romano PCard Requisition Form.pdf</td>
<td>Waiting for Others</td>
<td>12/19/2017 09:47 am</td>
<td></td>
</tr>
<tr>
<td>Please DocuSign: Marissa Handley PCard Requisition Form.pdf</td>
<td>Waiting for Others</td>
<td>12/19/2017 09:16 am</td>
<td></td>
</tr>
<tr>
<td>Please DocuSign: Mark Robinson PCard Requisition Form.pdf</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.*

![Input field for void reason]

200 characters remaining.

• Click the blue Void button
• This message will pop up

![Confirmation message]

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.