



February 2018

DOCUSIGN TRAINING MANUAL:  
DELEGATE PCARD HOLDER

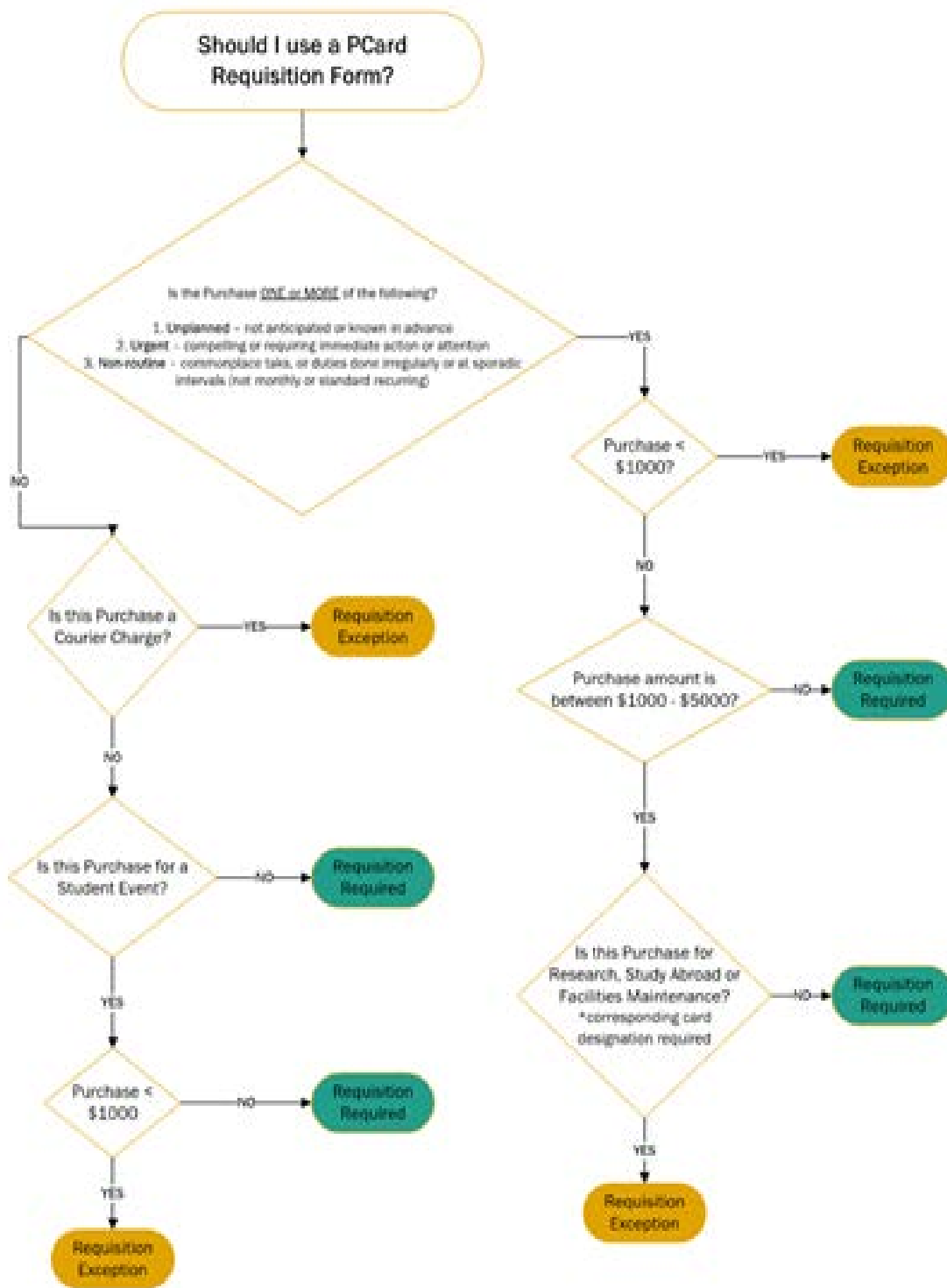
BUSINESS SERVICES



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# PCard Policy



## 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>

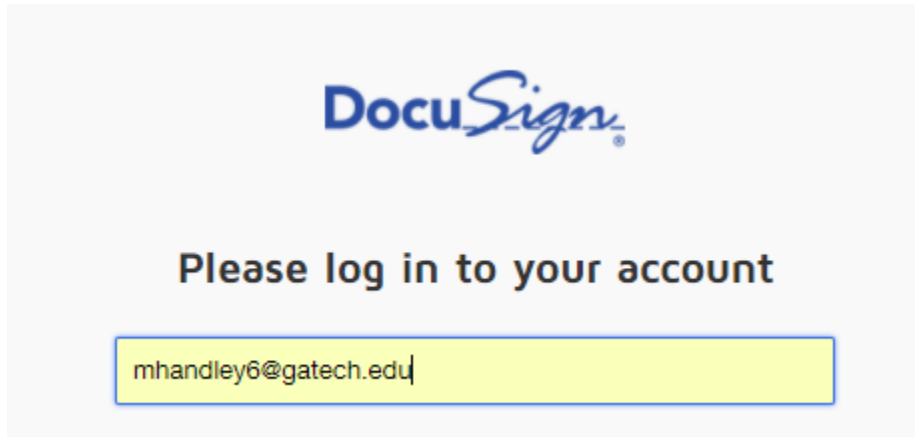
- On the eSignature page, click on the DocuSign icon



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



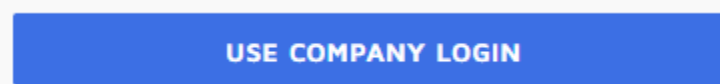
- On the log in page, use your @gatech.edu account. (i.e. [mhandley6@gatech.edu](mailto:mhandley6@gatech.edu))



- Click continue



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



- Sign into Duo like you would going into TechWorks



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

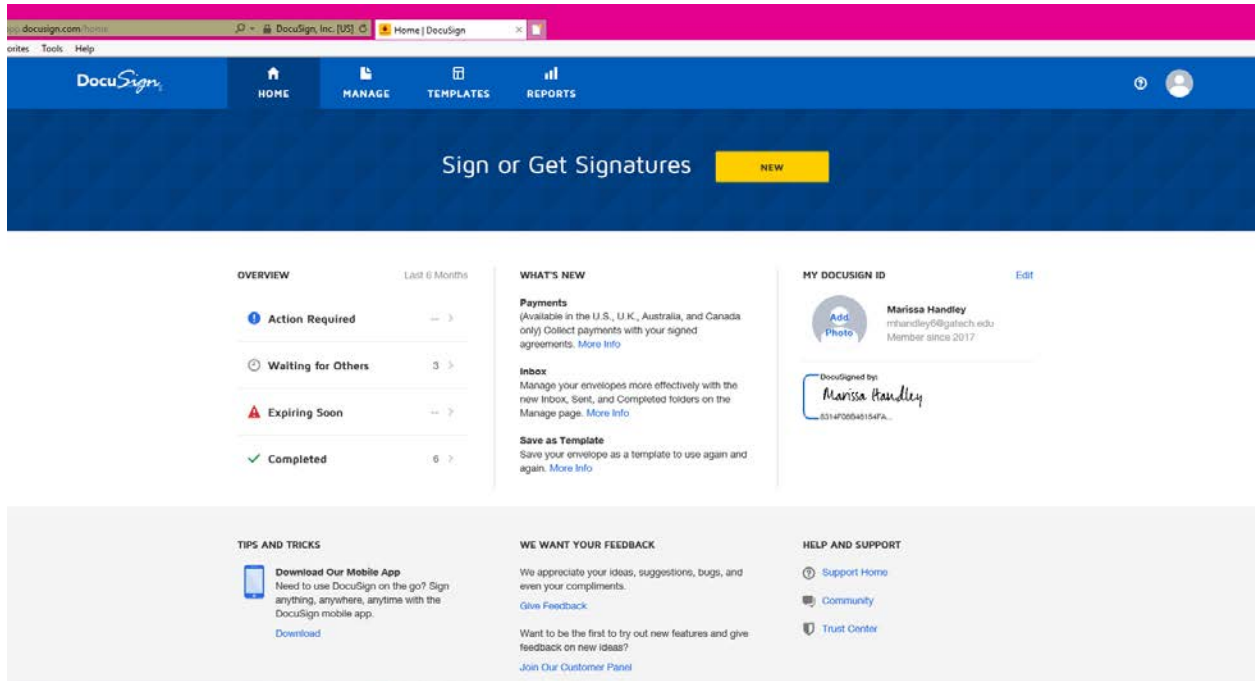
GT Account:

Password:

Warn me before logging me into other sites.

[clear](#)

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



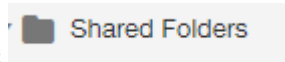
- End Process.

## Creating an Envelope

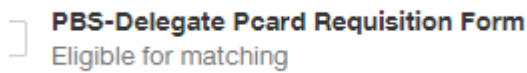
- From the landing page, click on Templates on the top toolbar



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



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



- 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	<b>Delegate Sender</b> <input type="text" value="Marissa Handley"/> <input type="text" value="mhandley6@gatech.edu"/>
2	<b>PCard Holder</b> <input type="text" value="Meagan Fitzsimon"/> <input type="text" value="mfitzsims3@gatech.edu"/>
3	<b>Approver 1</b> <input type="text" value="Whitney Tate"/> <input type="text" value="wtate6@gatech.edu"/>
4	<b>Approver 2</b> <input type="text" value="Peggy Romano"/> <input type="text" value="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

Please DocuSign: [[PCard Holder\_UserName]] PCard Requis

Enter additional text here if necessary

**Advanced Options**

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

**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

Do you want to sign this document now?

**SIGN NOW**      **SIGN LATER**

- When the document opens, click continue

**CONTINUE**      **OTHER ACTIONS ▾**



- Fill out the document with information about the purchase

DocuSign Envelope ID: 518258C6-CCB8-49B3-9D07-94DD45AD8BC1



## 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.**

Cardholder Name	Marissa Handley	
Last Four Card Digits	<input type="text" value="7596"/>	1/10/2018   7:13 AM PST
Department	<input type="text" value="830 - Procurement &amp; Business Services"/>	
Vendor Name	<input type="text" value="Test"/>	
Date of Purchase	<input type="text" value="02/01/2018"/>	

### Allocations

Value of Purchase (\$)	<input type="text" value="\$823.50"/>
Project Number	<input type="text" value="830152469"/>
Benefit to the Project	<input type="text" value="Test"/>
	<input type="text" value="Required"/>
Description	<input type="text" value="Testing"/>

- The document closes and sends you back to the Manage page of your DocuSign account

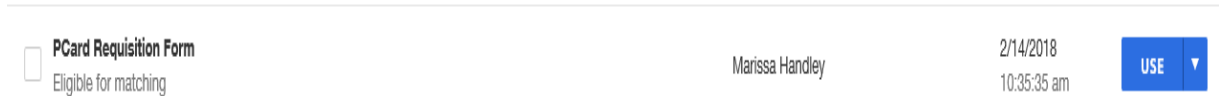
The screenshot shows the DocuSign user interface. At the top is a blue navigation bar with the DocuSign logo and four menu items: HOME, MANAGE (which is highlighted), TEMPLATES, and REPORTS. Below the navigation bar is a sidebar on the left with a yellow 'NEW' button at the top. Underneath is a search box containing 'Shared Envelopes'. The sidebar is divided into sections: 'ENVELOPES' with icons for Inbox, Sent, Drafts, and Deleted; 'QUICK VIEWS' with icons for Action Required (highlighted), Waiting for Others, Expiring Soon, and Completed; 'FOLDERS' with a plus sign; and 'POWERFORMS' with a right-pointing arrow. The main content area is titled 'Action Required' and includes a filter 'Filtered by: Date (Last 6 Months) | Edit'. The center of the page features a large document icon and the text 'No activity in the last 6 months.' with a 'LOAD ALL' button below it.

- 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.

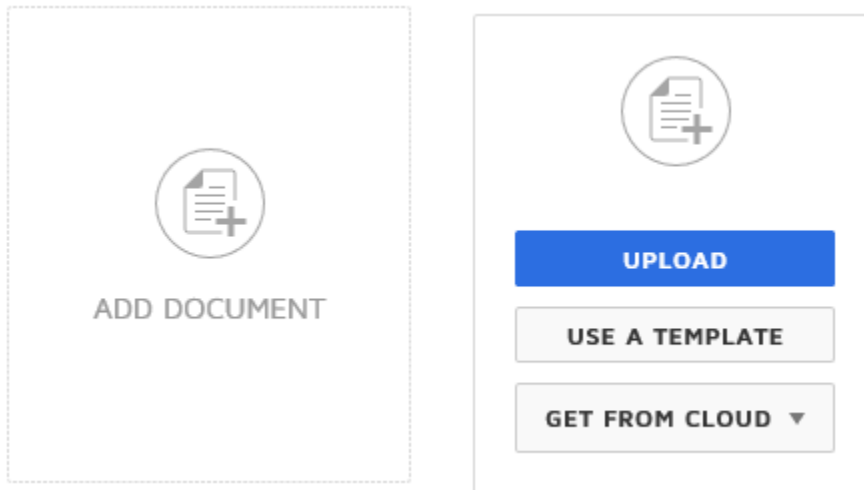
- If you are creating an envelope, click the use button on the PCard Requisition Form



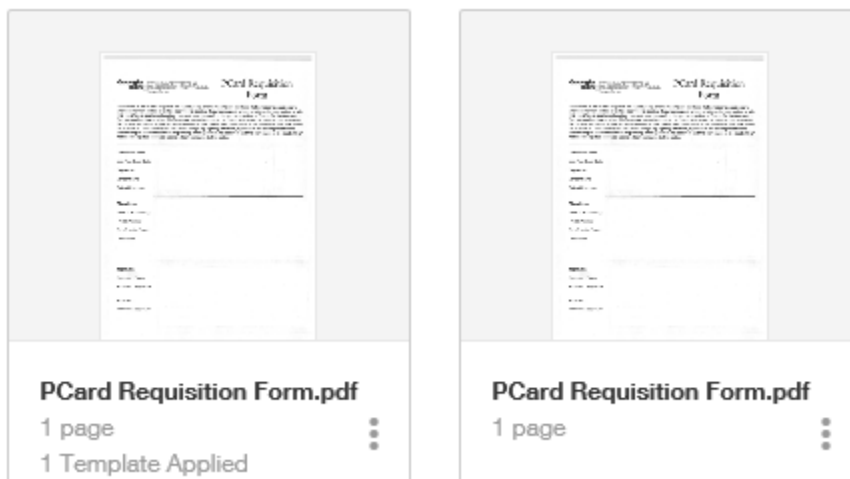
- When the workflow comes up, click Advanced Edit next to the blue Send button



- Hoover 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

The screenshot shows a form with three numbered sections:

- 1 PCard Holder:** Name field contains "Marissa Handley" and email field contains "marissa.handley@business.gatech.edu".
- 2 Approver 1:** Name field contains "Peggy Romano" and email field contains "pr9@gatech.edu".
- 3 Approver 2:** Name field contains "Whitney Tate" and email field contains "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

The dialog box contains the text "Do you want to sign this document now?" and two buttons: "SIGN NOW" (blue) and "SIGN LATER" (grey).

- 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

OVERVIEW

Last 6 Months





 <b>Action Required</b>	-- >
 <b>Waiting for Others</b>	3 >
 <b>Expiring Soon</b>	-- >
 <b>Completed</b>	8 >

- 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	Last 6 Months
 <b>Action Required</b>	-- >
 <b>Waiting for Others</b>	4 >
 <b>Expiring Soon</b>	-- >
 <b>Completed</b>	7 >

- Click on the envelope that needs to be corrected  
**Waiting for Others**

 Search Quick V

Filtered by: Date (Last 6 Months) | [Edit](#)

Subject	Status	Last change
<input type="checkbox"/>  <b>Please DocuSign: Whitney Tate PCard Requisition Form.pdf</b> To: Marissa Handley, Whitney Tate <a href="#">+2 more</a>	Waiting for Others	1/10/2018 10:24 am
<input type="checkbox"/>  <b>Please DocuSign: Peggy Romano PCard Requisition Form.pdf</b> To: Marissa Handley, Peggy Romano <a href="#">+2 more</a>	Waiting for Others	12/19/2017 09:47 am
<input type="checkbox"/>  <b>Please DocuSign: Marissa Handley PCard Requisition Form.pdf</b> To: Marissa Handley, Mark Robinson <a href="#">+1 more</a>	Waiting for Others	12/19/2017 09:16 am
<input type="checkbox"/>  <b>Please DocuSign: Mark Robison PCard Requisition Form.pdf</b> From: Marissa Handley	Waiting for Others	12/18/2017 02:52 pm

- Click the correct button. **FYI** You can only correct the approvers that have not signed

the document

**CORRECT**

- 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	<b>Proxy Sender</b>	NEEDS TO SIGN ▾	MORE ▾
	<input type="text" value="Marissa Handley"/>		
	<input type="text" value="mhandley6@gatech.edu"/>		
2	<b>PCard Holder</b>	NEEDS TO SIGN ▾	MORE ▾
	<input type="text" value="Whitney Tate"/>		
	<input type="text" value="wtate6@gatech.edu"/>		
3	<b>Approver 1</b>	NEEDS TO SIGN ▾	MORE ▾
	<input type="text" value="Peggy Romano"/>		
	<input type="text" value="peggy.romano@business.gatech.edu"/>		
4	<b>Approver 2</b>	NEEDS TO SIGN ▾	MORE ▾
	<input type="text" value="Meagan Fitzsimons"/>		
	<input type="text" value="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

**Waiting for Others** Search Quick Views

Filtered by: Date (Last 6 Months) | [Edit](#)

	Subject	Status	Last change	Folder
<input type="checkbox"/>	<b>Please DocuSign: Whitney Tate PCard Requisition Form.pdf</b> To: Marissa Handley, Whitney Tate <a href="#">+2 more</a>	Waiting for Others	1/10/2018 11:35 am	
<input type="checkbox"/>	<b>Please DocuSign: Peggy Romano PCard Requisition Form.pdf</b> To: Marissa Handley, Peggy Romano <a href="#">+2 more</a>	Waiting for Others	12/19/2017 09:47 am	
<input type="checkbox"/>	<b>Please DocuSign: Marissa Handley PCard Requisition Form.pdf</b> To: Marissa Handley, Mark Robinson <a href="#">+1 more</a>	Waiting for Others	12/19/2017 09:16 am	
<input type="checkbox"/>	<b>Please DocuSign: Mark Robison PCard Requisition Form.pdf</b> From: Marissa Handley	<a href="#">Waiting for Others</a>	12/18/2017 02:52 pm	

- End Process.



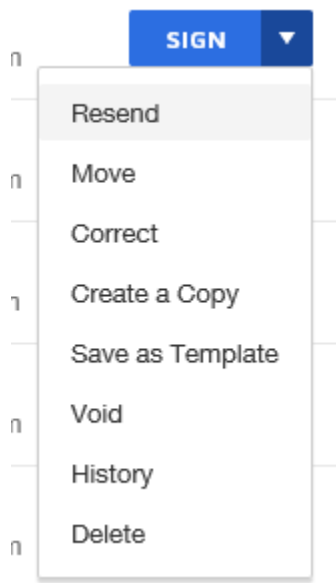
## Voiding an Envelope

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

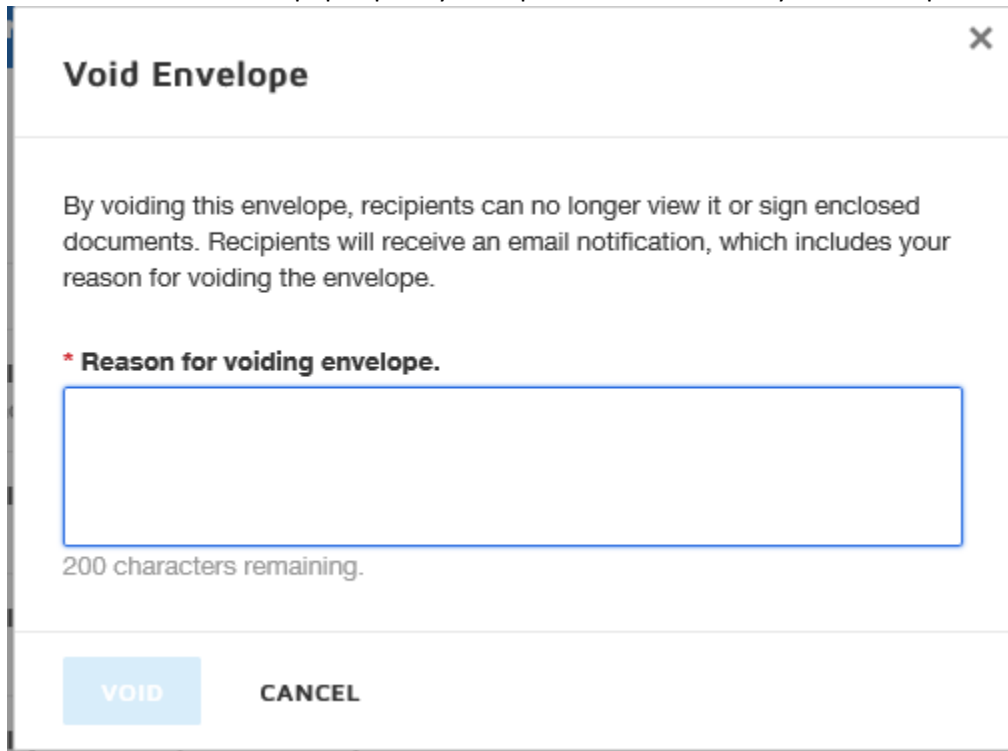


- Find the envelope and click the arrow next to the blue Sign button



- Click Void

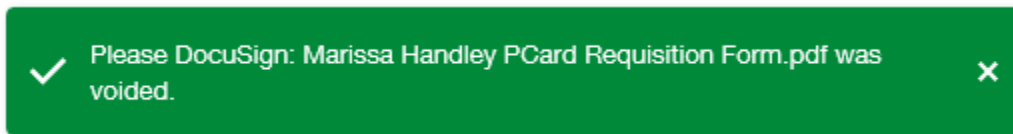
- There will be a box that pops up for you to put a reason as to why this envelope is being Voided



The dialog box is titled "Void Envelope" and has a close button (X) in the top right corner. Below the title, there is a paragraph of text: "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." Below this text is a label: "\* Reason for voiding envelope." followed by a large empty text input field. Below the input field, it says "200 characters remaining." At the bottom of the dialog, there are two buttons: a light blue "VOID" button and a "CANCEL" button.



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



- 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



**Internet2 OBO Georgia Institute of Technology**

(Default)

mhandley6@gatech.edu

15738762

My Preferences

### ACCOUNT

Personal Information

Electronic Notary Public

Privacy & Security

Regional Settings

Contacts

- Click my preferences
- On the left-hand side of the page, click contacts

 **ADD CONTACT**

- 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

### Add Contact ✕

**Full Name \***

**Email \***

**Company**

**Phone Number**

+ ADD PHONE NUMBER

Shared Contact ?

**SAVE** **CANCEL**

- 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





**Internet2 OBO Georgia Institute of Technology**  
(Default)  
marissa.handley@business.gatech.edu  
15738762

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My Preferences

- Click on My Preferences

Regional Settings

- 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) ▼

SAVE

- Click Save
- End Process.