February 2018

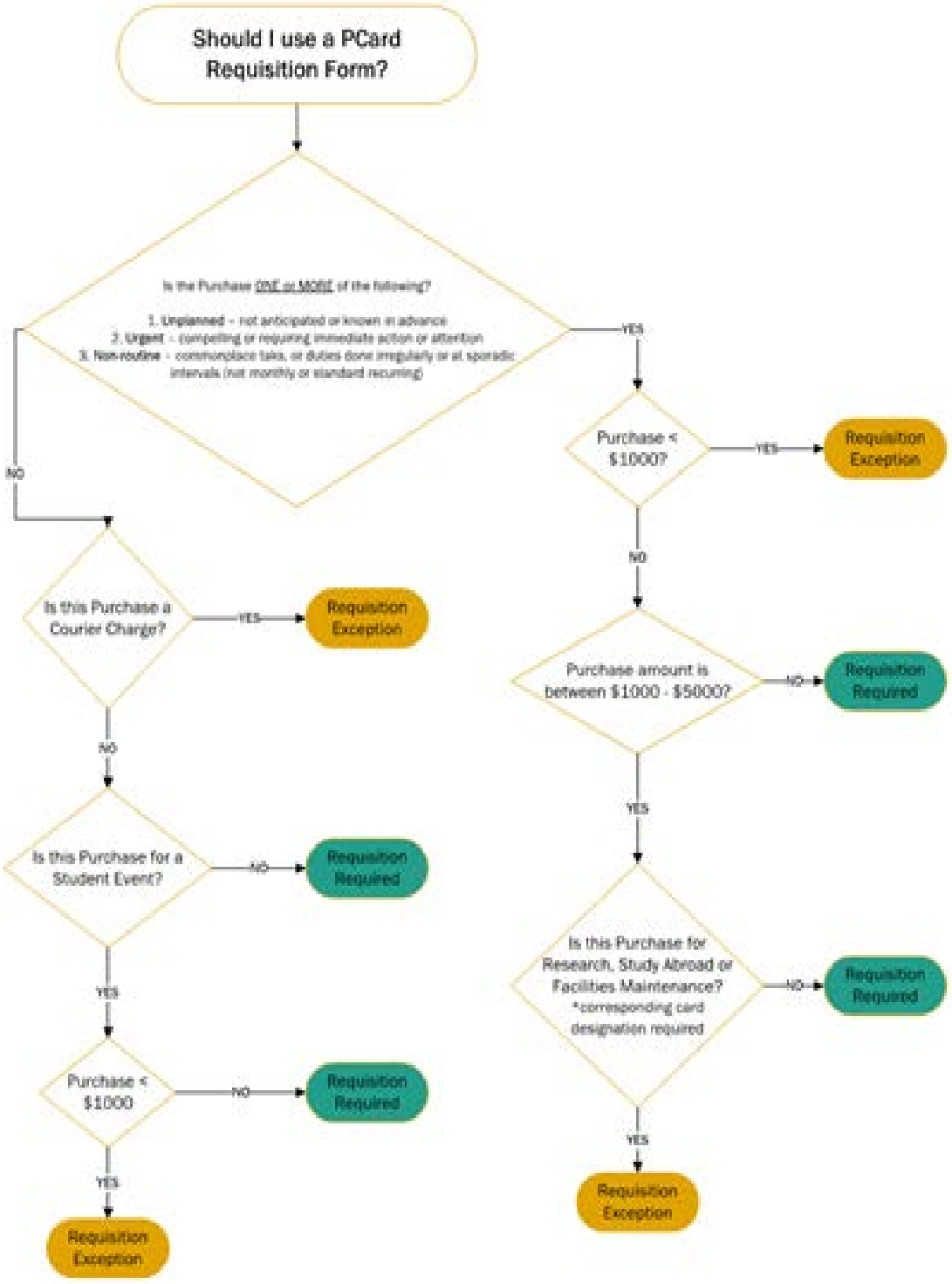
DOCUSIGN TRAINING MANUAL: APPROVER

BUSINESS SERVICES

Table of Contents

PCard Policy: 2
Logging into DocuSign: 3
Approving an Envelope: 6
Declining an Envelope: 7
Creating a Contact: 9
Changing Time Zones: 11

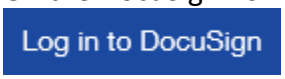
PCard Policy



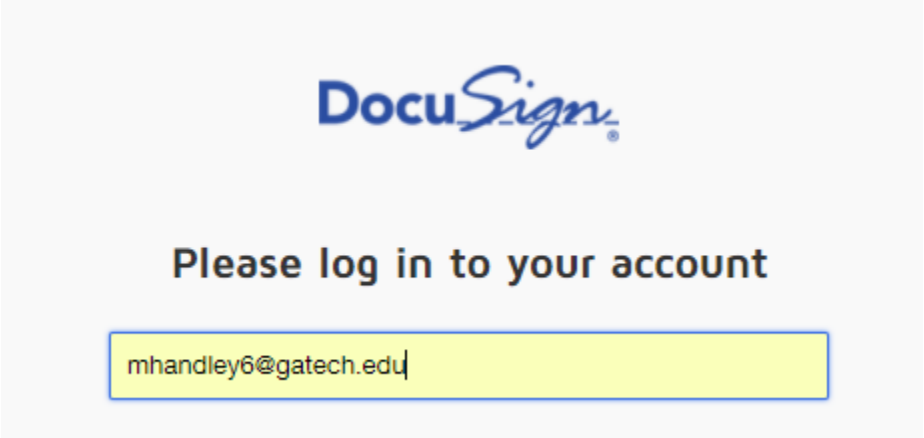
Logging into DocuSign

- 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

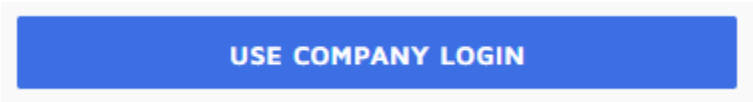


- On the log in page, use your @gatech.edu account. (i.e. mhandley6@gatech.edu)

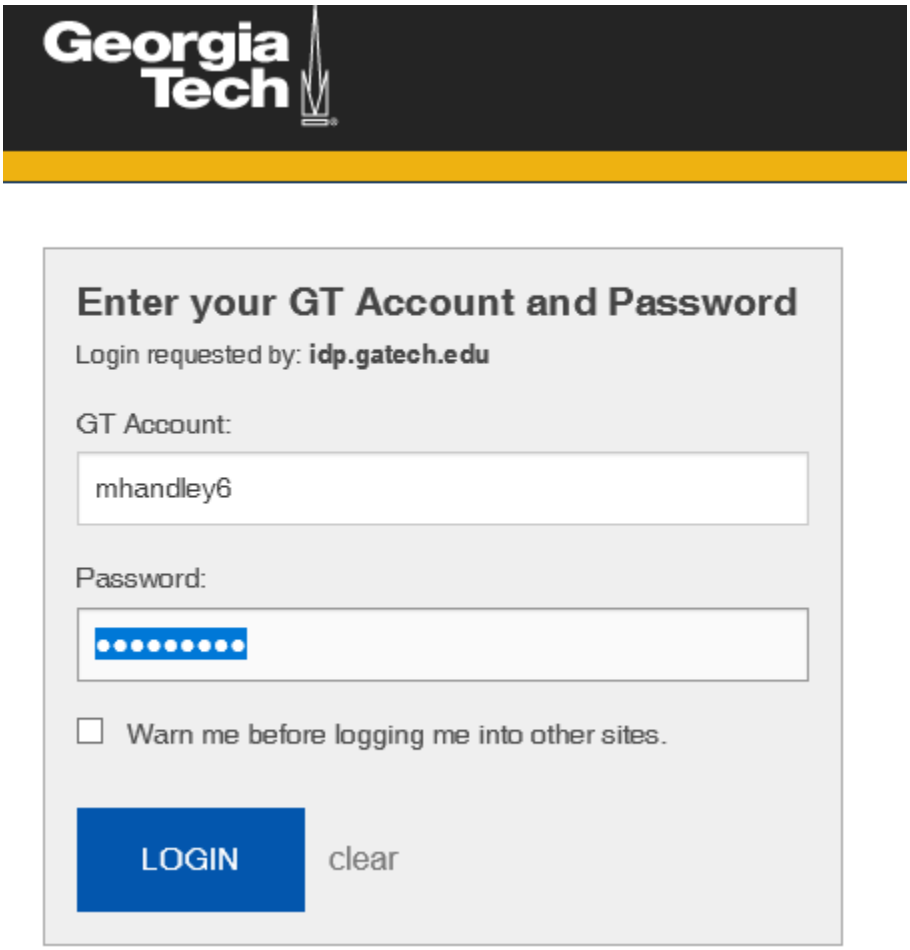


- Click continue

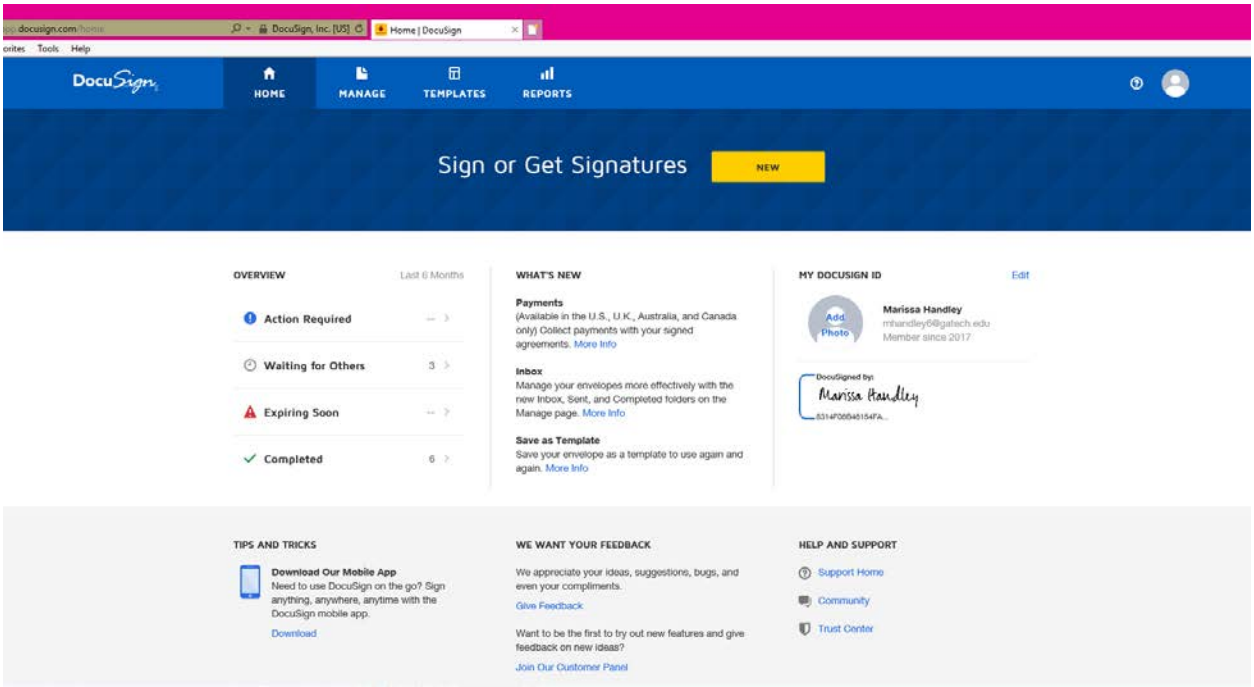
- On the password page, click the blue button that says Use Company Login



- Sign into Duo like you would going into TechWorks



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

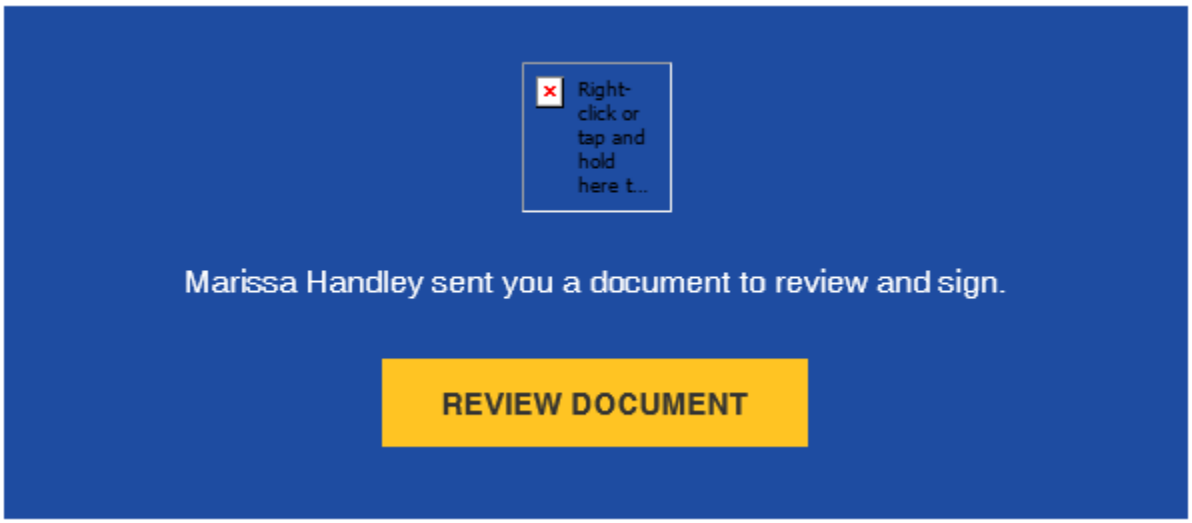


- End Process.

Approving an Envelope

When there is an envelope for you to review, you will receive an email with a link to view and sign the document. Click the link in the email and follow the steps below.

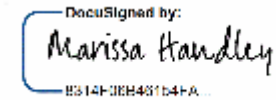
- When you receive the email, click the review document button



- When the document opens, click continue

- Review the document. If everything with the purchase is approved, click Sign

- Your signature will populate in the field if you have been in the system before, or it will ask you to adopt signature and sign



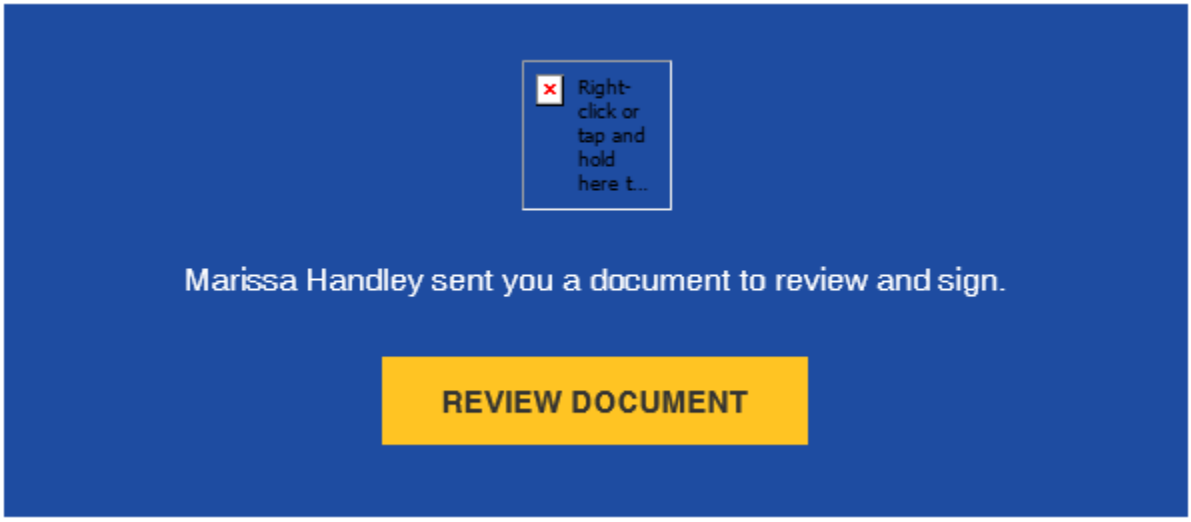
- Once the signature is populated click Finish

- End Process.

Declining an Envelope

When there is an envelope for you to review, you will receive an email with a link to view and sign the document. If you do not approve of the purchase follow the steps below to Decline the envelope.

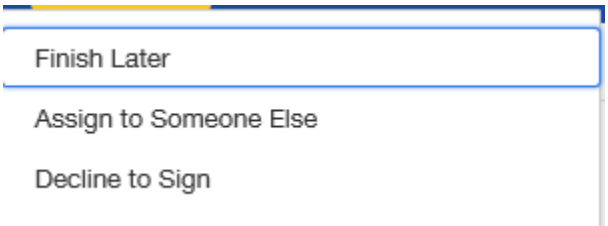
- When you receive the email, click the review document button



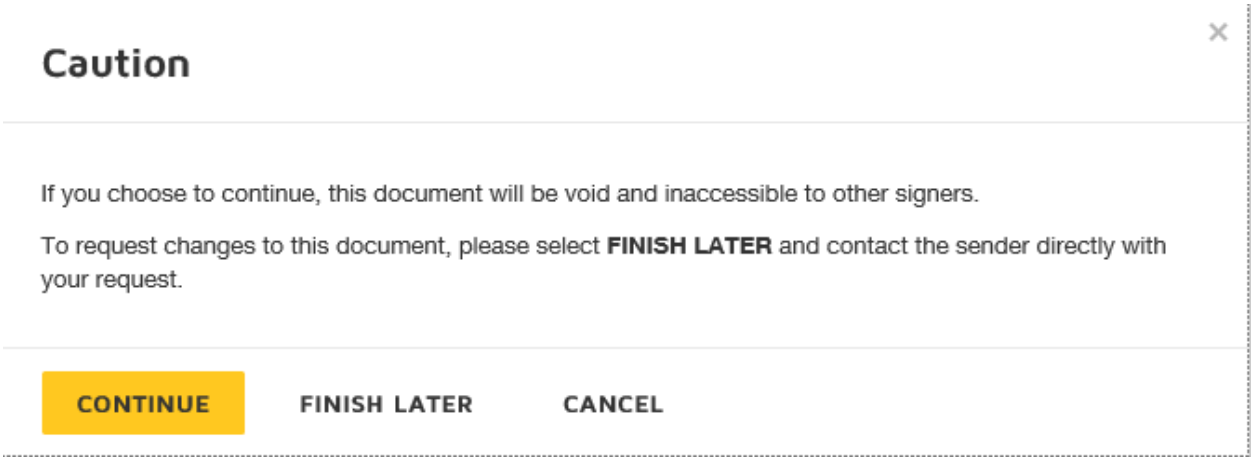
- When the document opens, click continue

- Review the document. If there is something about the purchase that is not approved click Other Actions in the top right hand corner of the screen

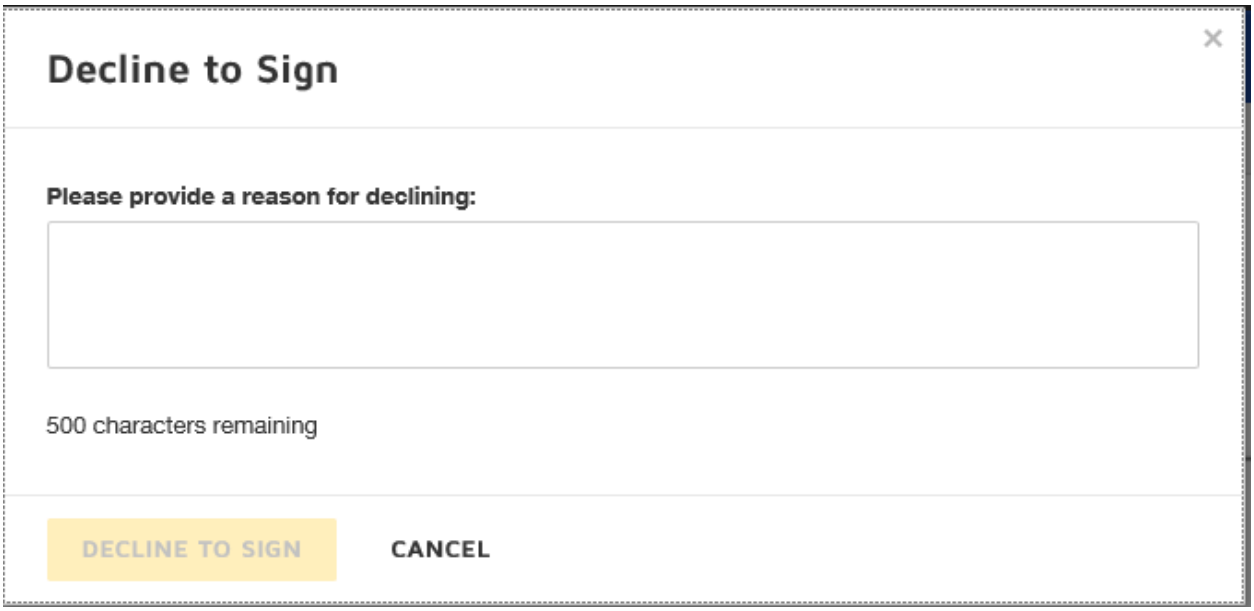
- Click Decline to Sign



- Click Continue

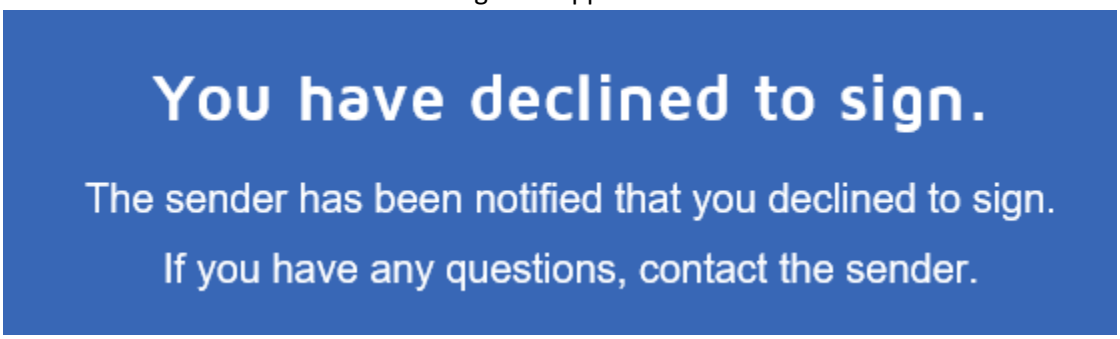


- Add a reason detailing why the purchase was declined



- Click Decline to Sign

- The document will close and this message will appear

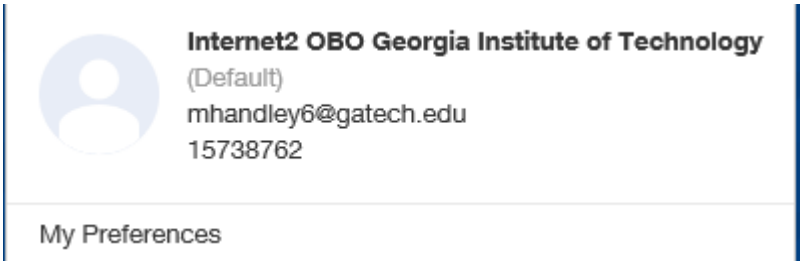


- End process.

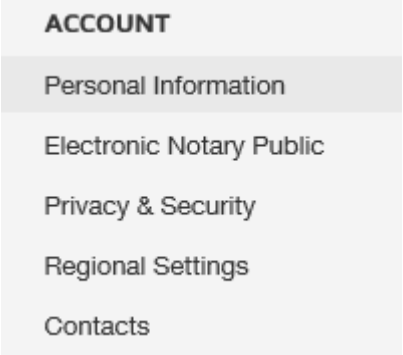
Creating a Contact

- Log into DocuSign
- On the landing page, click the profile icon in the top right-hand corner

- Click my preferences



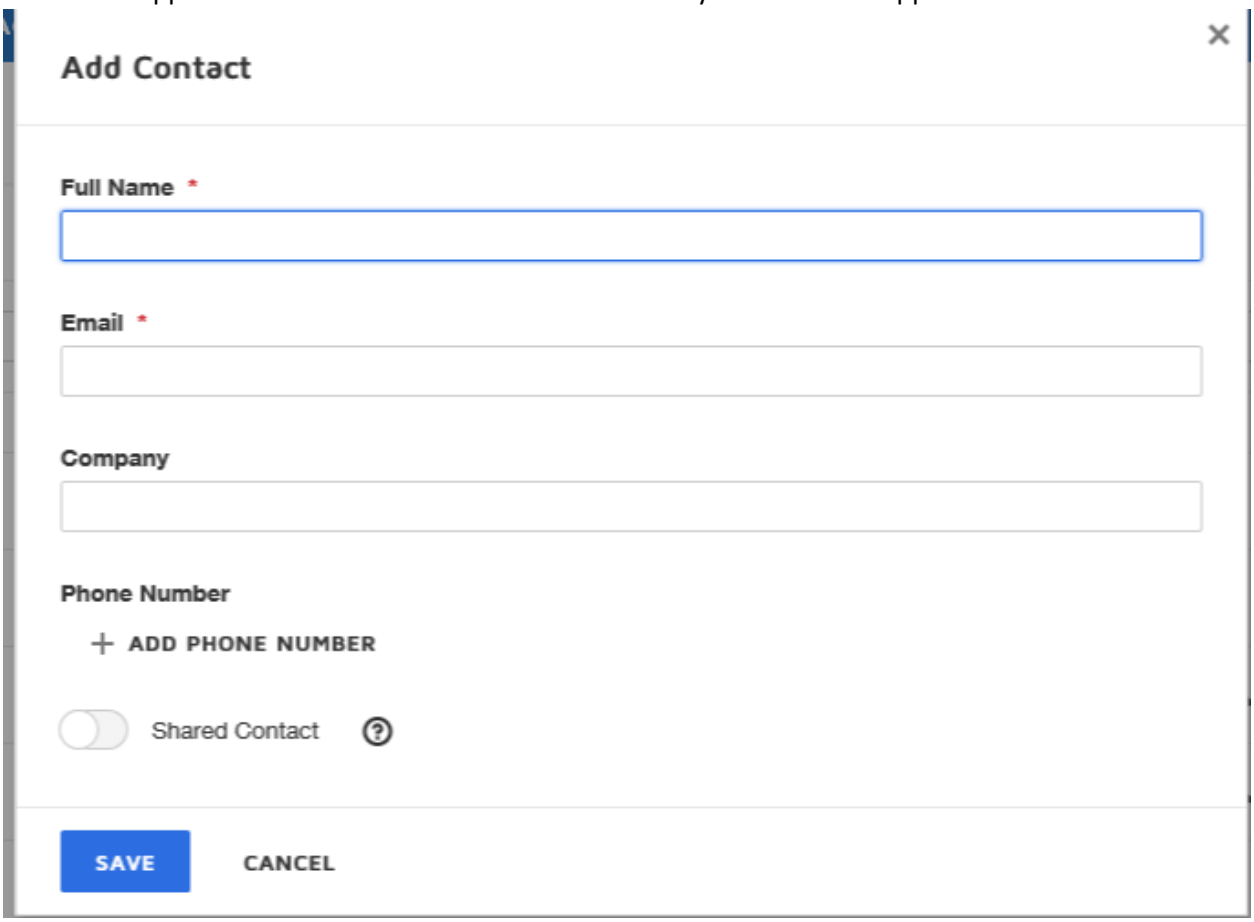
- On the left-hand side of the page, click contacts



- 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

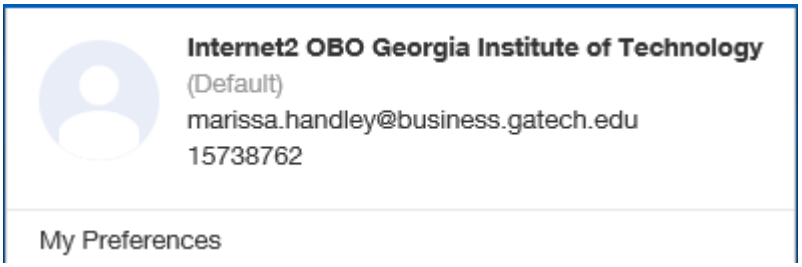
authorized approver. This document cannot be sent to any unauthorized approvers

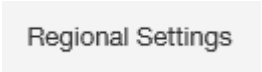


- The Company field can be left blank
- End Process.

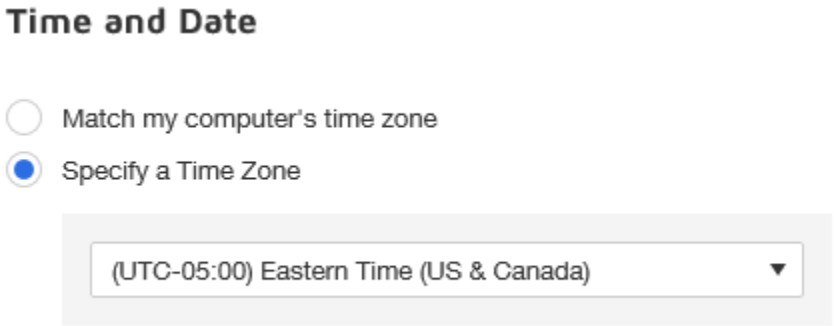
Changing Time Zones

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



- Click Save

- End Process.