February 2018

DOCUSIGN TRAINING MANUAL: APPROVER
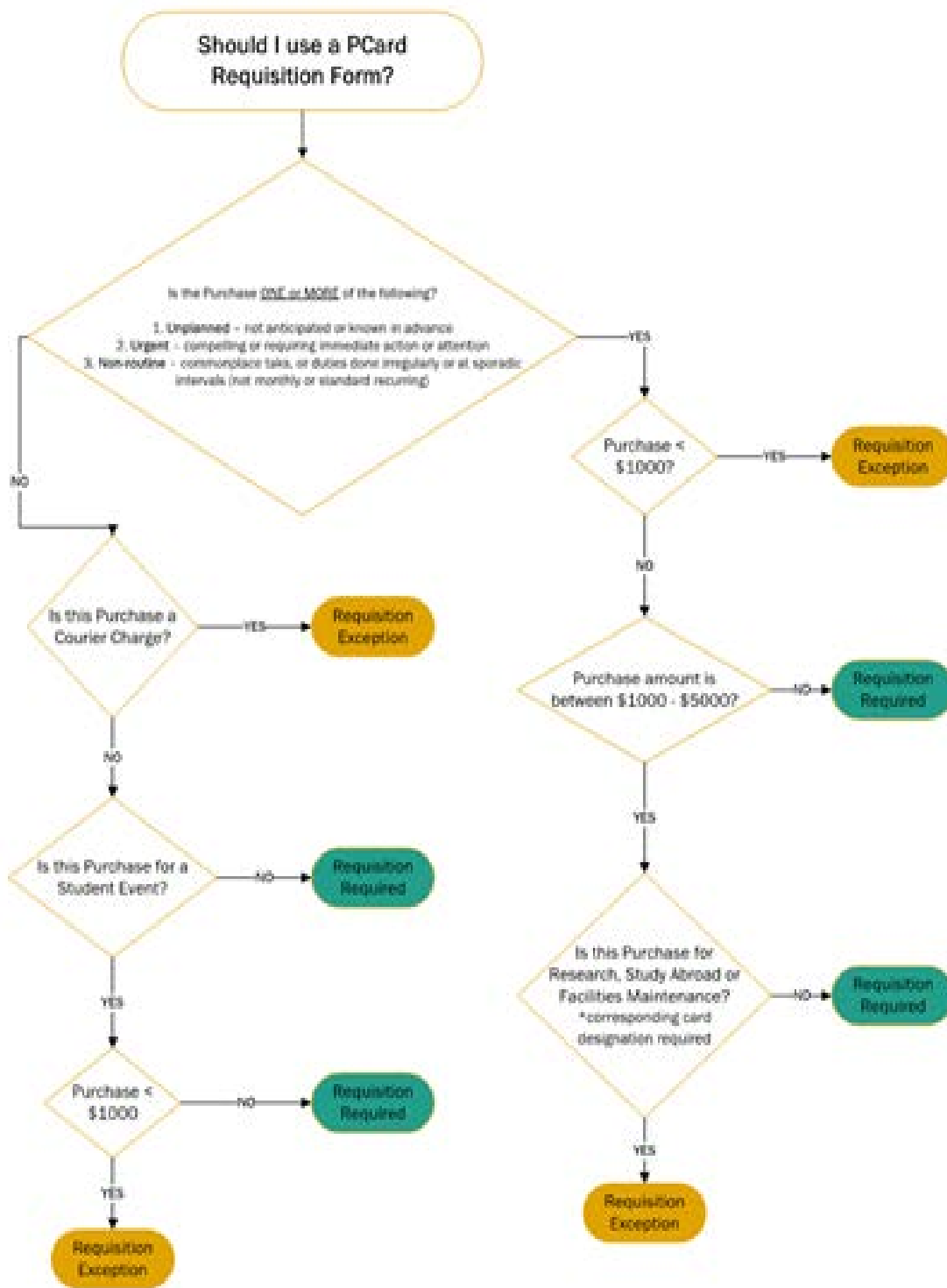
BUSINESS SERVICES

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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)

YES

Purchase < $1000? → YES → Requisition Exception

NO

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

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

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
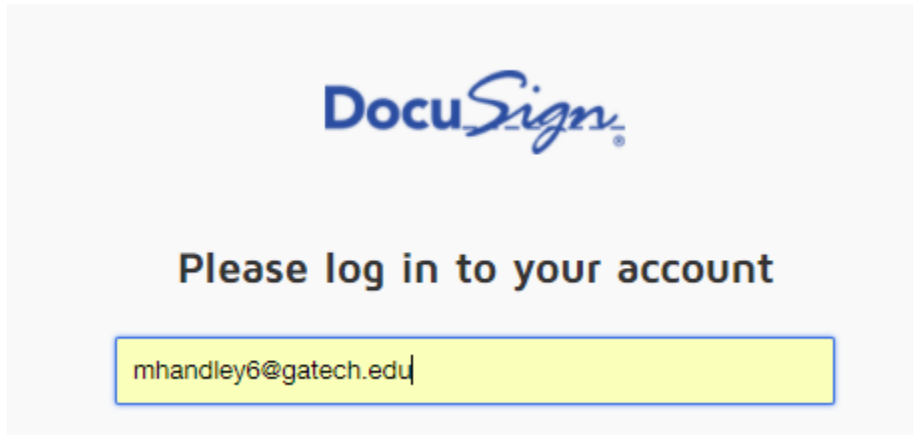- On the eSignature page, click on the DocuSign icon

- 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

Georgia Tech

Enter your GT Account and Password

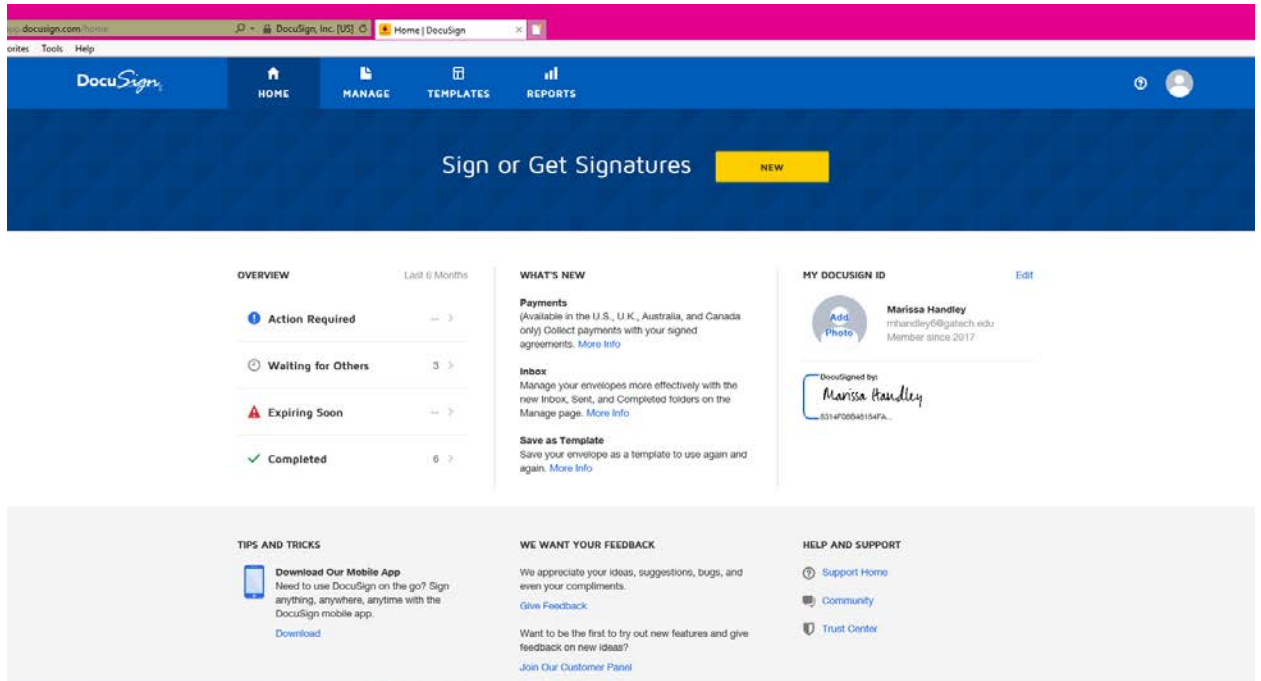Login requested by: **idp.gatech.edu**

GT Account:

mhandley6

Password:

●●●●●●●●●

☐ Warn me before logging me into other sites.

LOGIN   clear

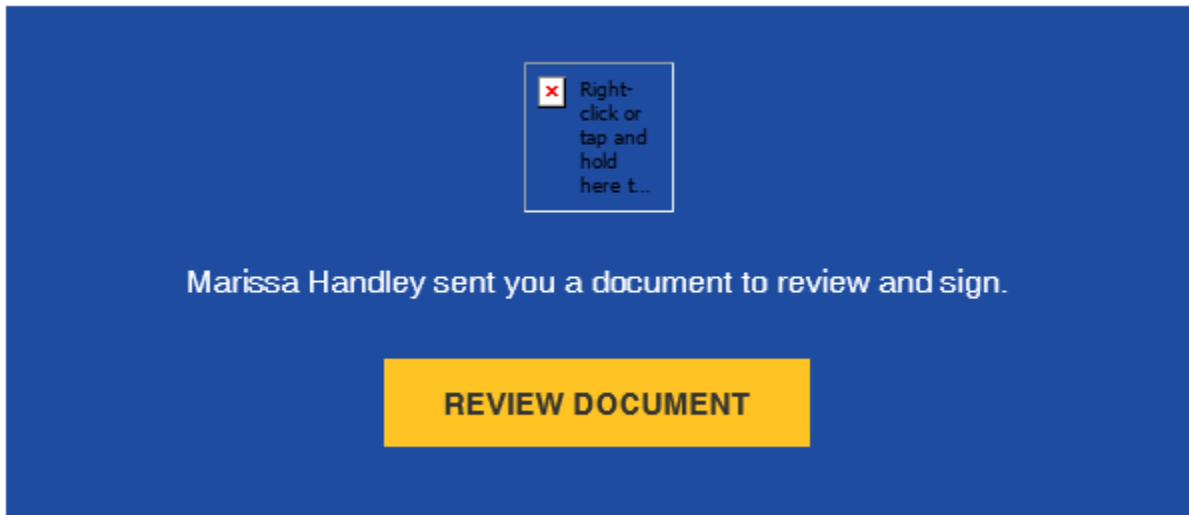- Once you accept the Duo push or press 1 during the call, you should reach the DocuSign landing page

- End Process.

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
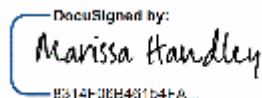

- When the document opens, click continue

- 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
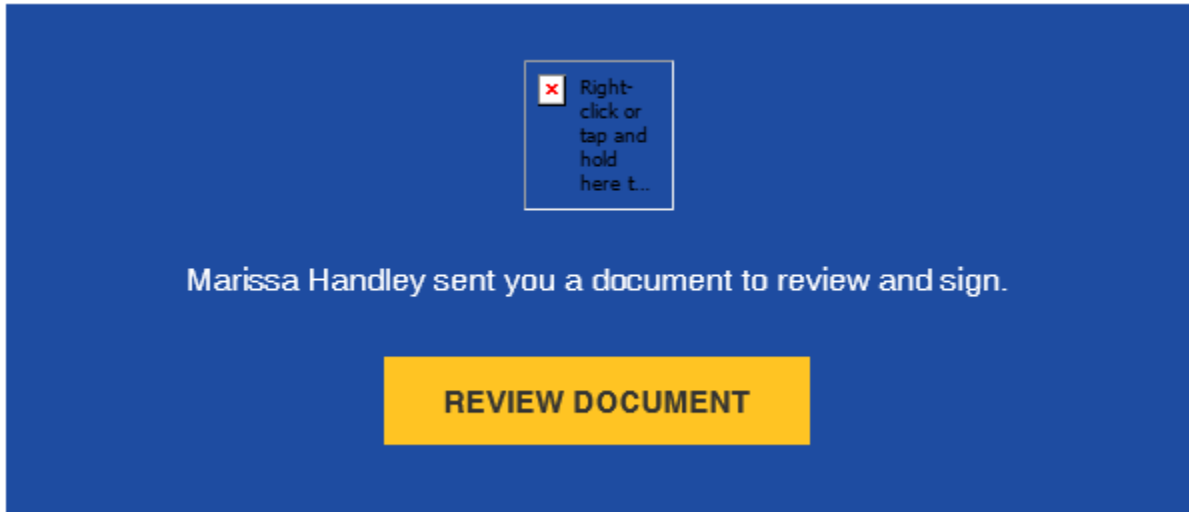

- Once the signature is populated click Finish
- End Process.

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
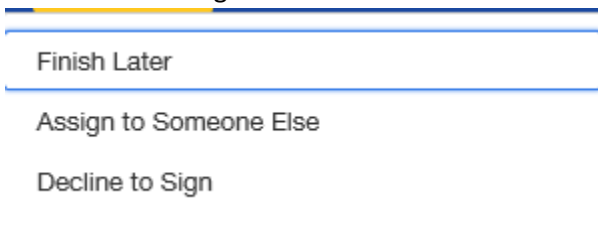

- When the document opens, click continue

- 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

Caution

If you choose to continue, this document will be void and inaccessible to other signers.

To request changes to this document, please select **FINISH LATER** and contact the sender directly with your request.

CONTINUE   FINISH LATER   CANCEL

- Add a reason detailing why the purchase was declined

Decline to Sign

Please provide a reason for declining:

500 characters remaining

DECLINE TO SIGN   CANCEL

- Click Decline to Sign

DECLINE TO SIGN

- The document will close and this message will appear

You have declined to sign.

The sender has been notified that you declined to sign.

If you have any questions, contact the sender.

- 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

- Click my preferences

ACCOUNT

Personal Information

Electronic Notary Public

Privacy & Security

Regional Settings

Contacts

- 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. <mark>FYI</mark> 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

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

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.