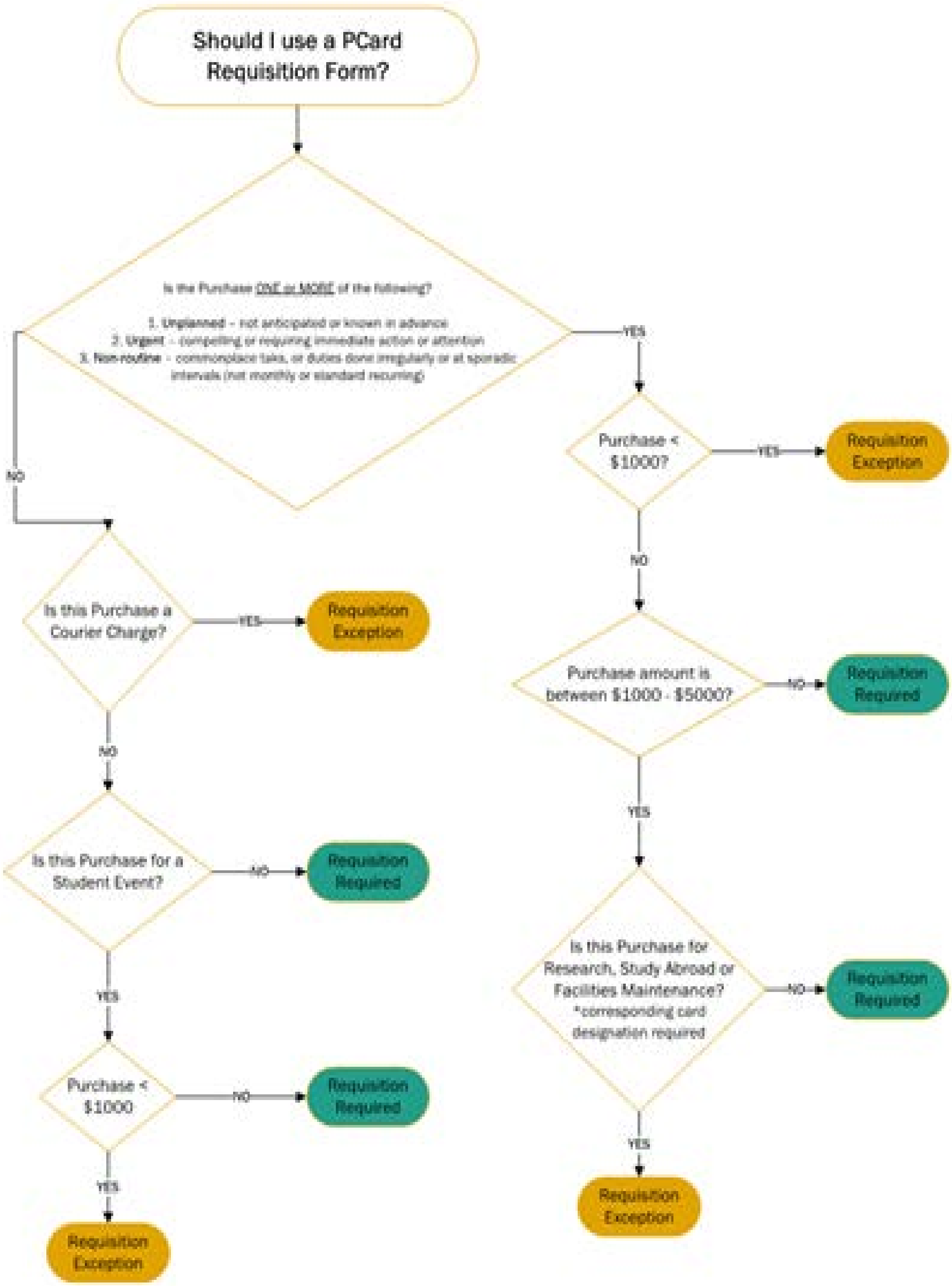
February 2018

DOCUSIGN TRAINING MANUAL: DELEGATE PCARD HOLDER

BUSINESS SERVICES

Table of Contents

PCard Policy

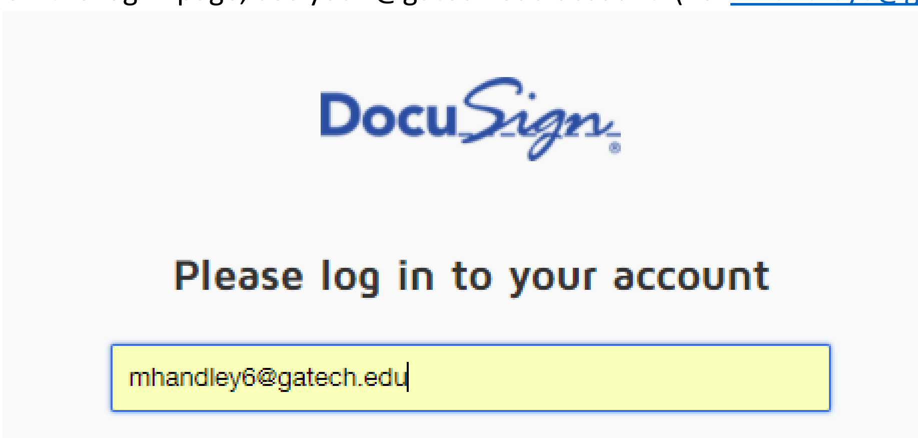


Logging into DocuSign

- 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

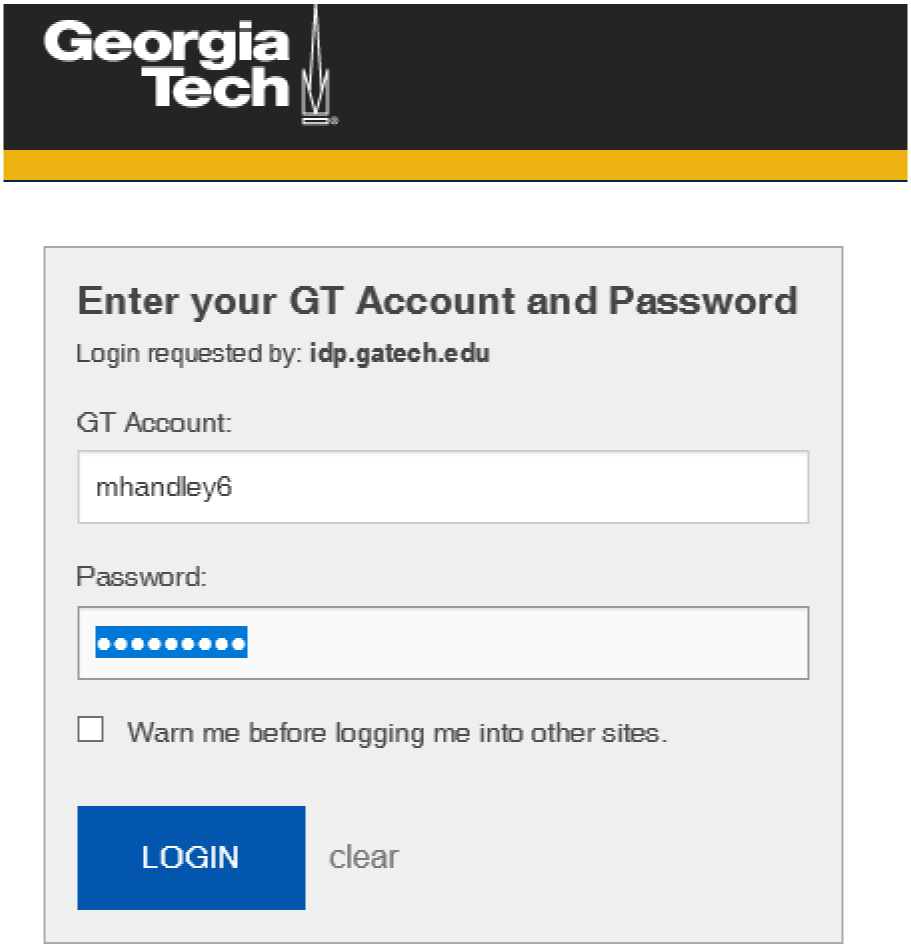
- On the log in page, use your @gatech.edu account. (i.e. mhandley6@gatech.edu)



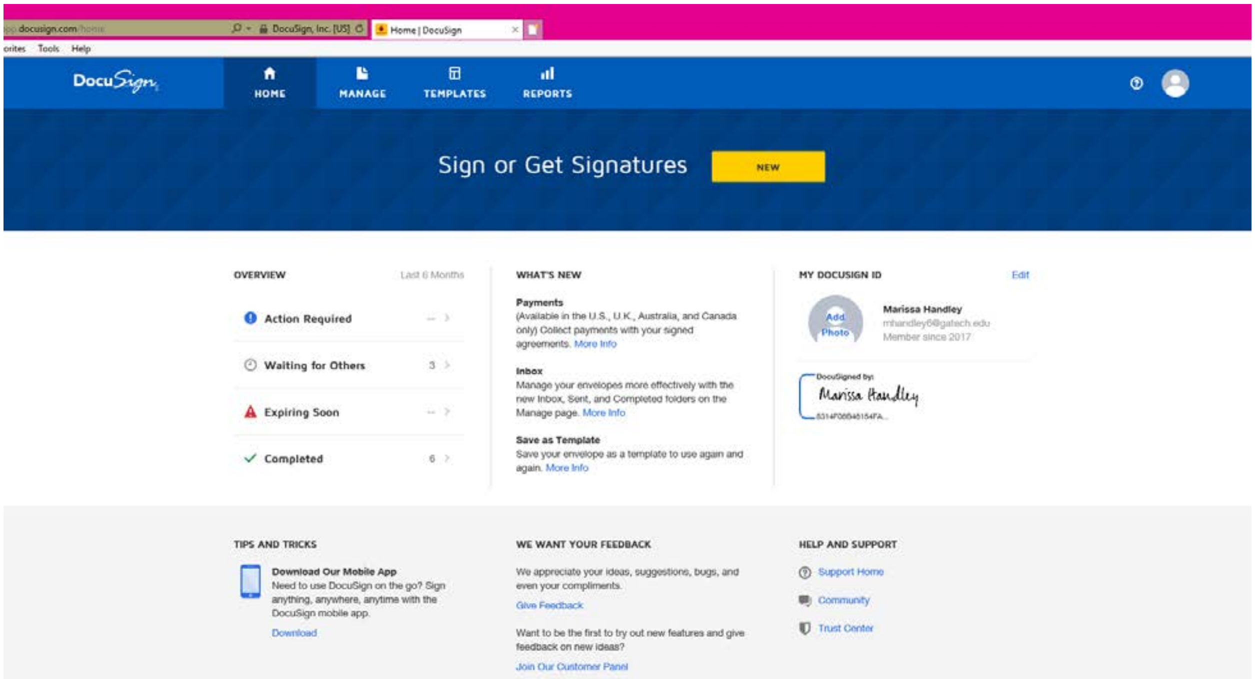
- Click continue

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

- Sign into Duo like you would going into TechWorks



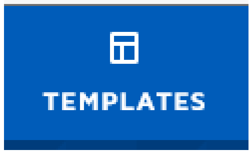
- Once you accept the Duo push or press 1 during the call, you should reach the DocuSign landing page



- End Process.

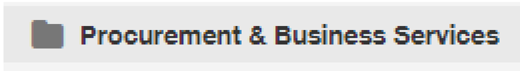
Creating an Envelope

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



- On the left side of the page, click Shared Folders 

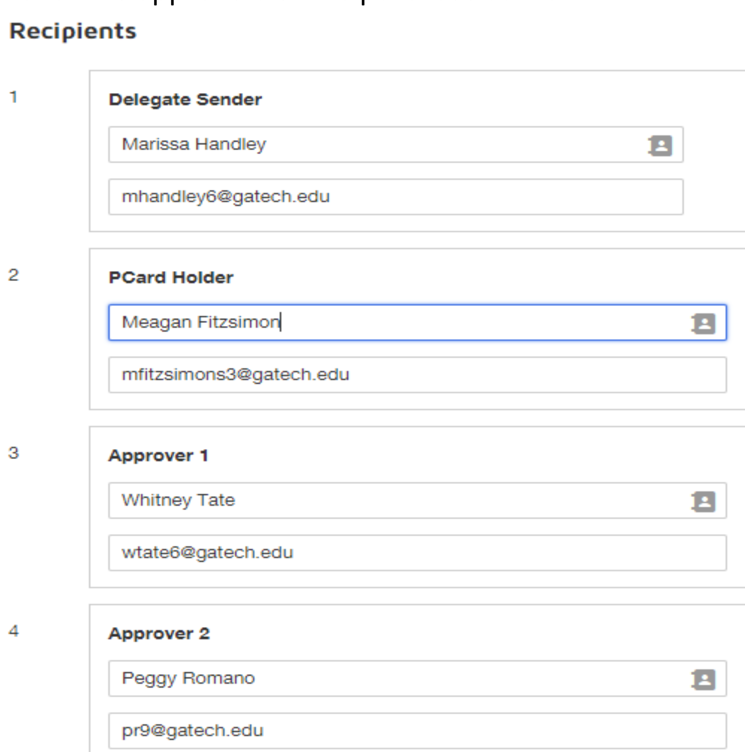
    - o Click on the Procurement & Business Services folder



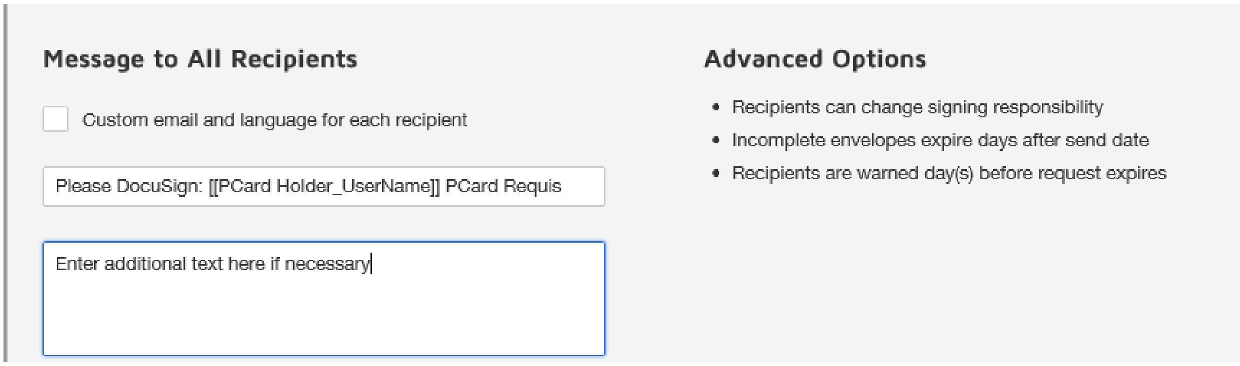
- As the Delegate submitting a requisition for a purchase, use the PBS-Delegate PCard Requisition Form template

- 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

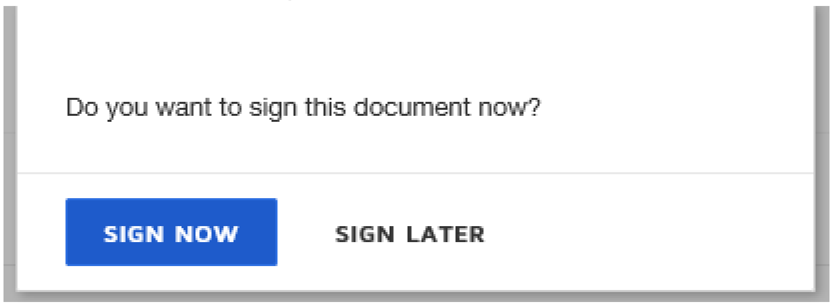


- If there is any additional information needed about the purchase, put it in the email message box below the workflow



- 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



- When the document opens, click continue

- Fill out the document with information about the purchase

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

Georgia Tech | Procurement & Business Services
Campus Services

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: 7596 — 1/10/2018 | 7:13 AM PST

Department: 830 - Procurement & Business Services

Vendor Name: Test

Date of Purchase: 02/01/2018

Allocations

Value of Purchase ($): $823.50

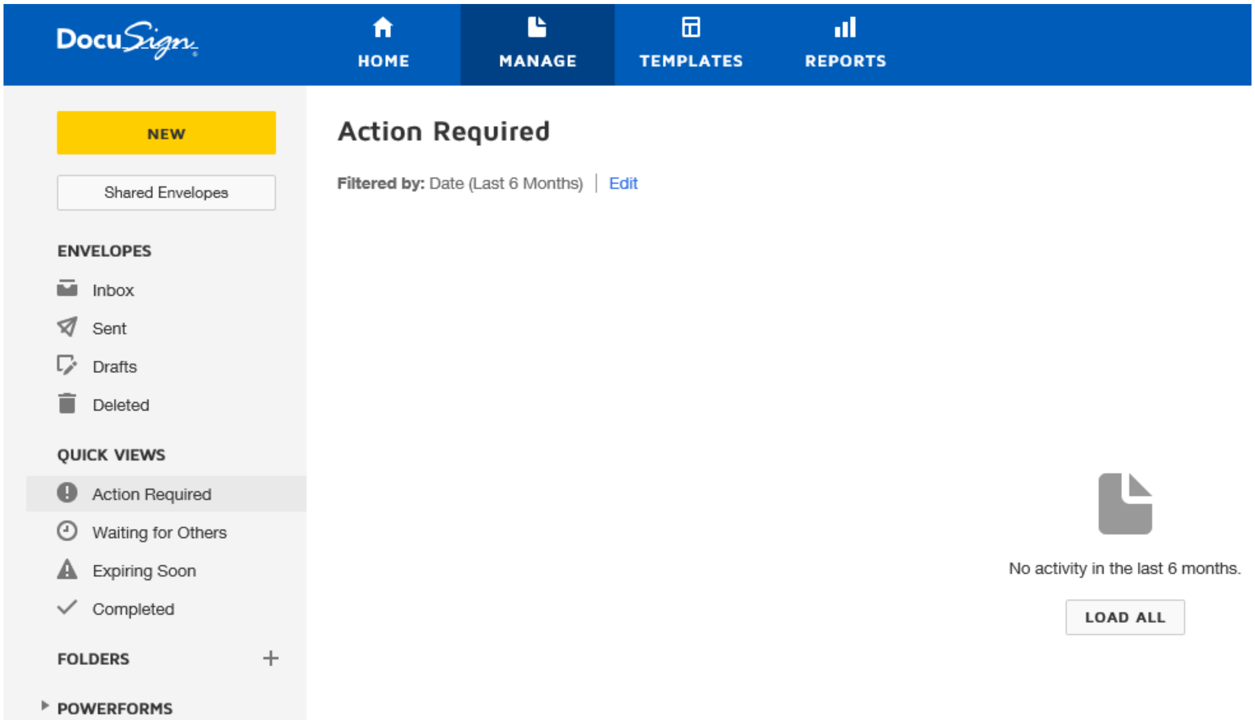
Project Number: 830152469

Benefit to the Project: Test

Required

Description: Testing

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



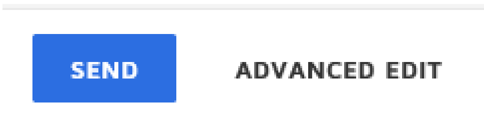
- End Process.

Attaching Documents to Envelope

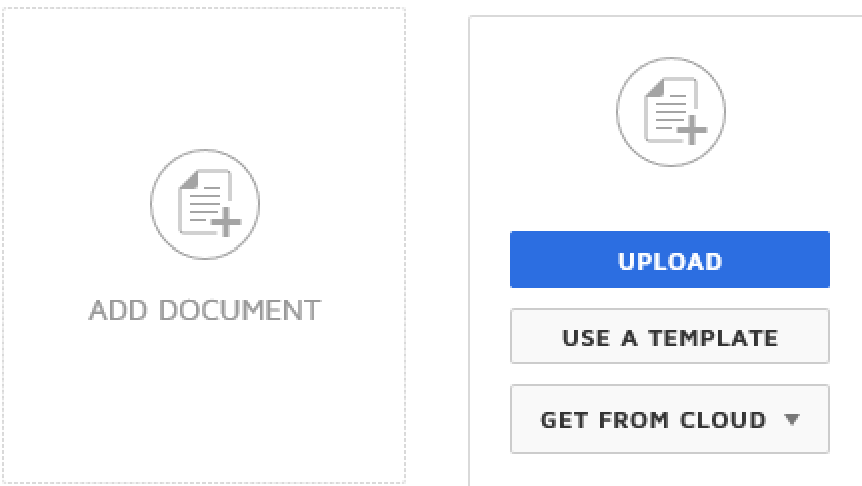
If there is any supporting documentation needed for the purchase you can upload receipts and emails to your envelope.

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

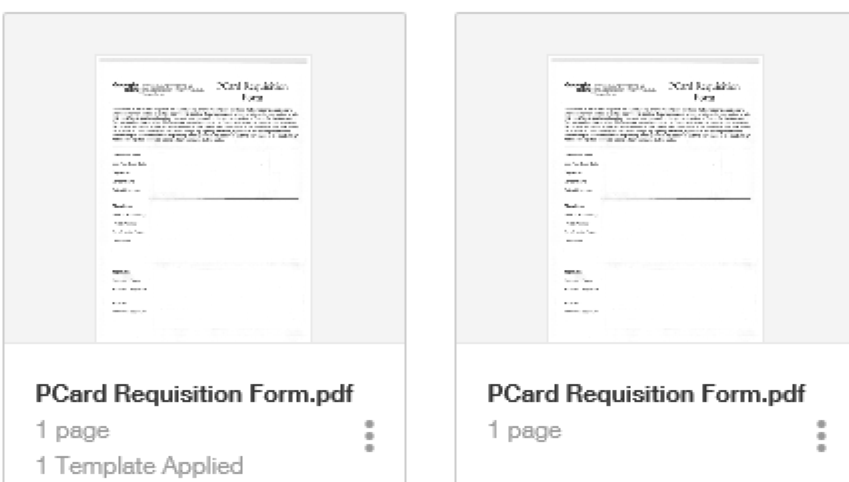
- When the workflow comes up, click Advanced Edit next to the blue Send button



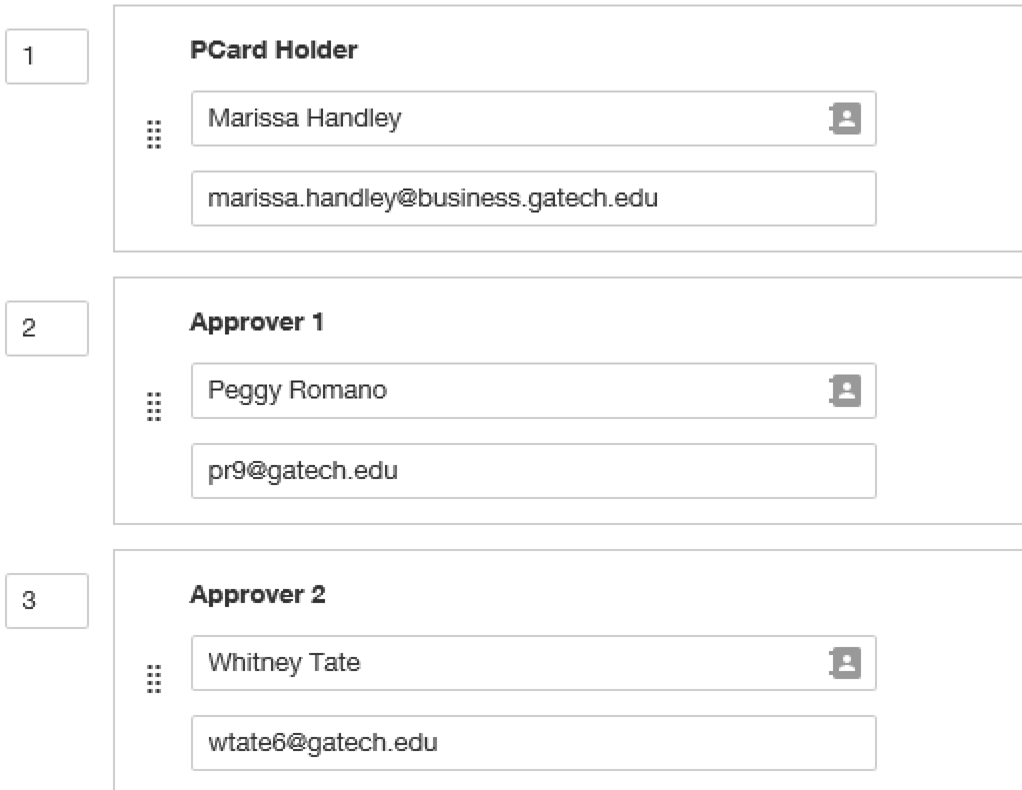
- Hoover over Add Document until the blue Upload option is available



- Choose the files you want to upload and click open. The document will appear next to the PCard Requisition form.

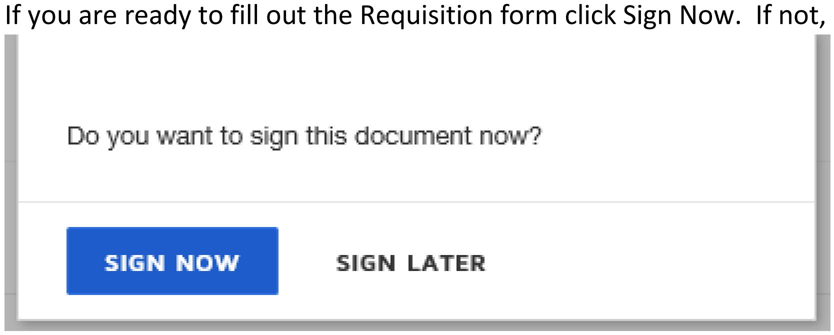


- Put your name and email in the PCard Holder field. Put the name and email of your approvers in the appropriate fields

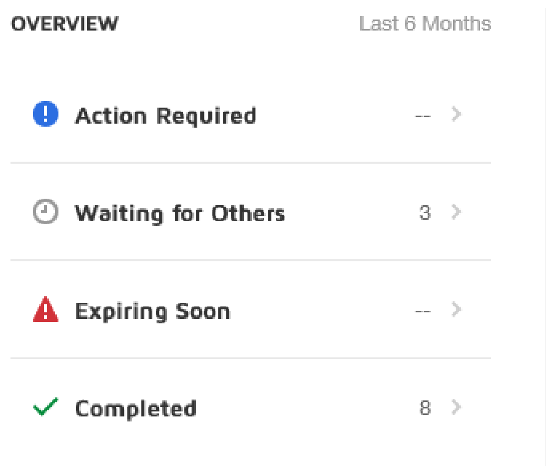


- Click the Next button in the top right-hand corner
- When the form populates on the next screen click the Send button in the top right-hand corner. DO NOT make any changes to the form

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



  - 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

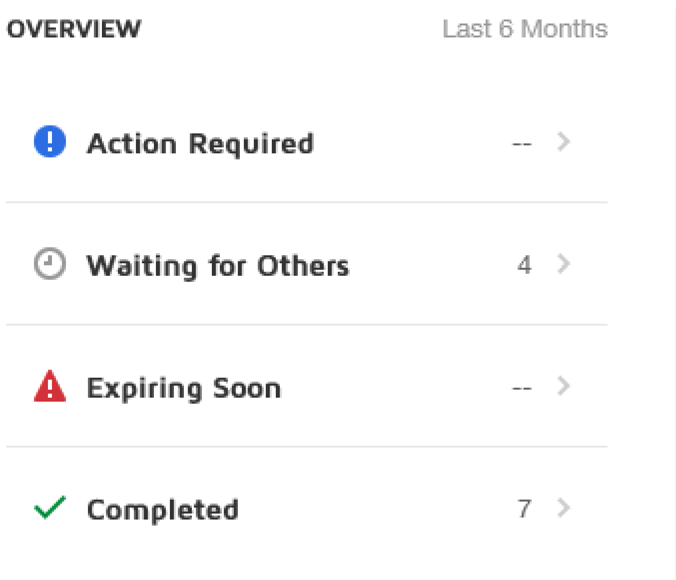

OVERVIEW
Last 6 Months
Action Required --
Waiting for Others 3
Expiring Soon --
Completed 8

- End Process.

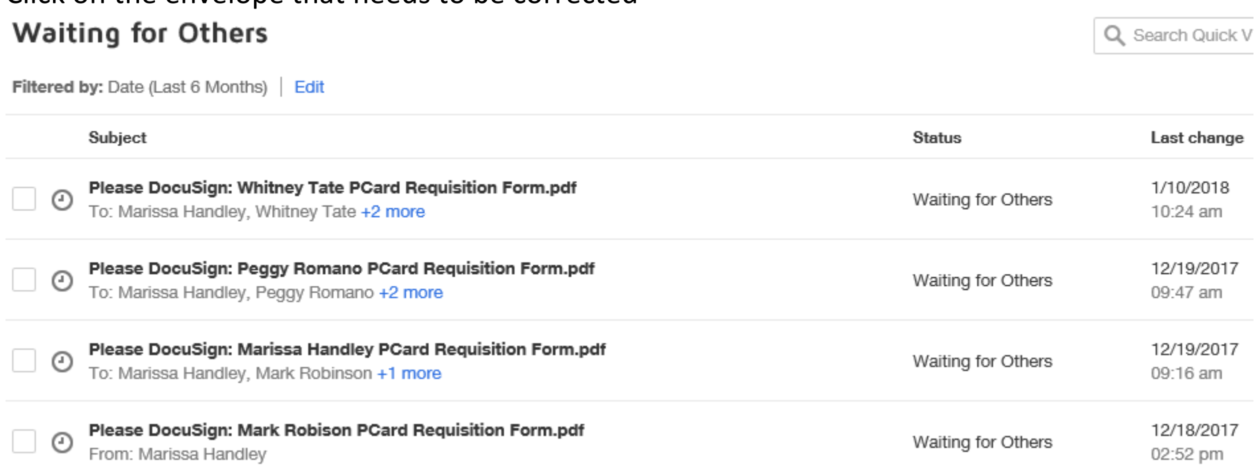
Correcting an Envelope

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

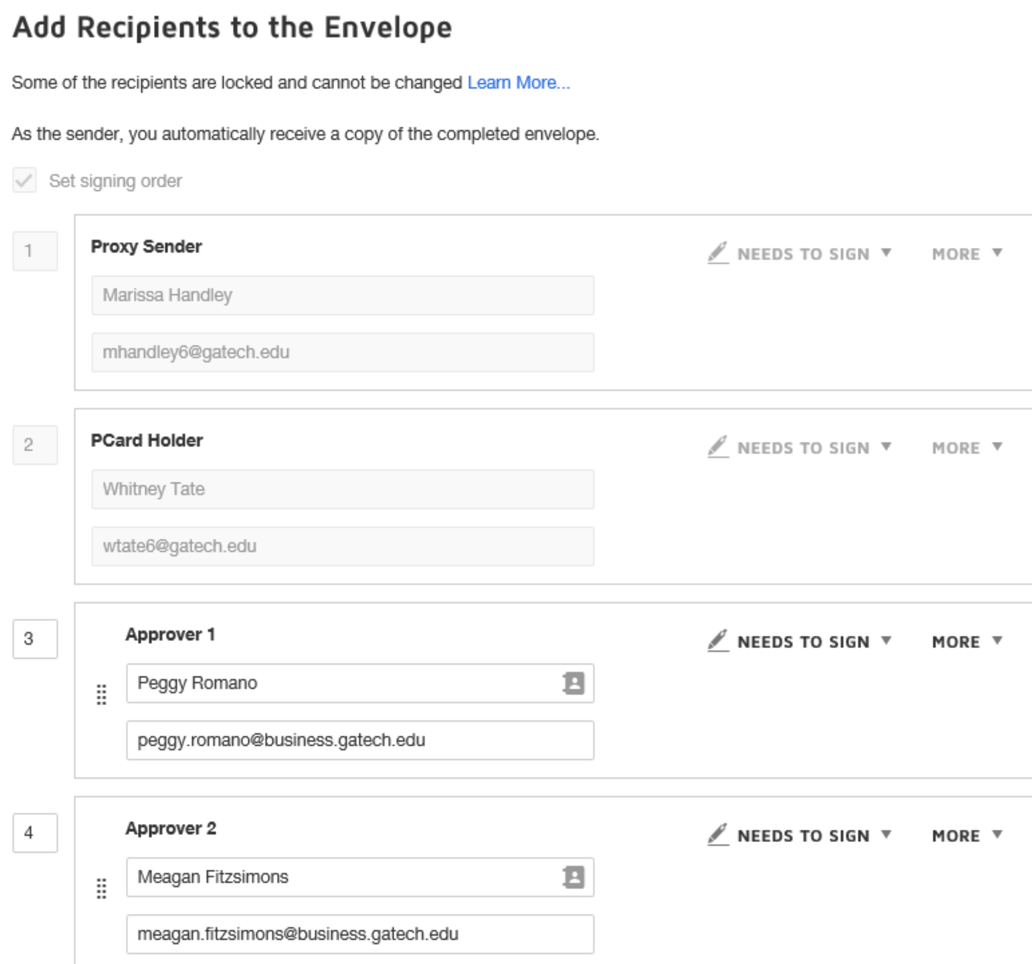


- Click on the envelope that needs to be corrected



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

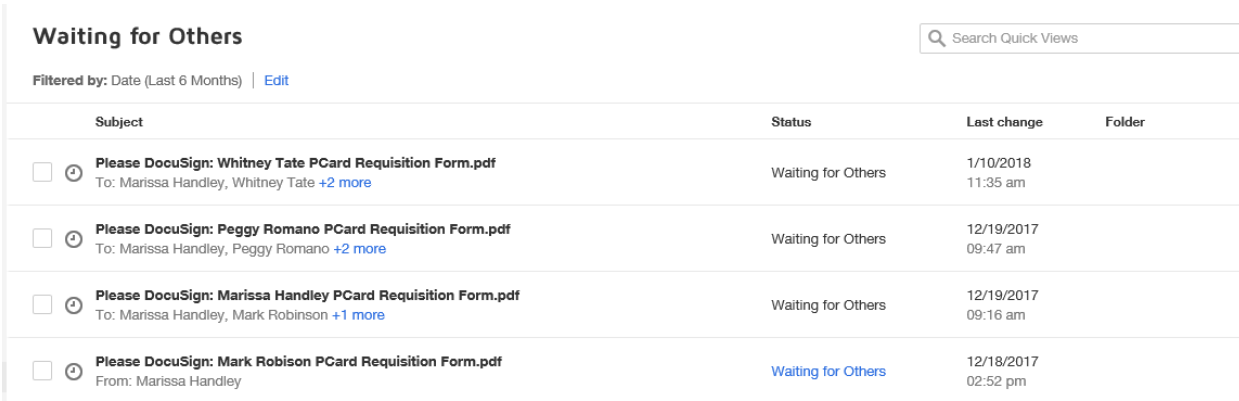
- Change the user to an approver that is in the office



- 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



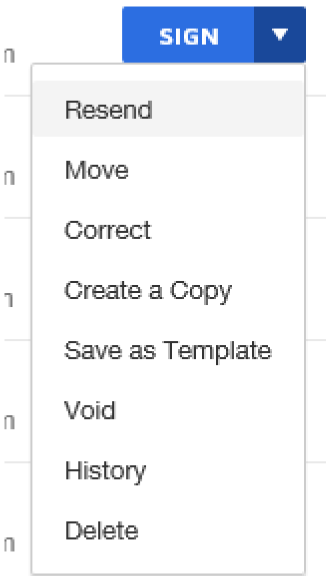
- End Process.

Voiding an Envelope

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

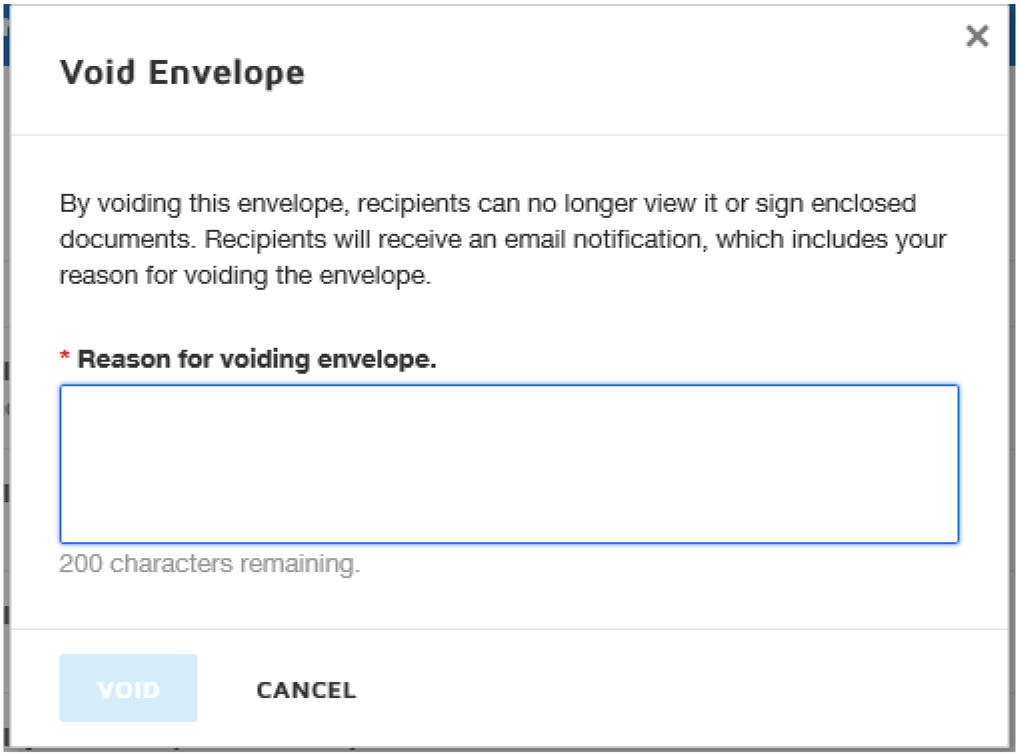
- Log into DocuSign
- On the landing page, click Manage on the top of the page

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



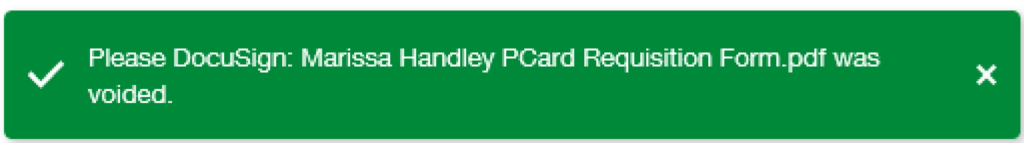
- Click Void

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



- Click the blue Void button 

- This message will pop up



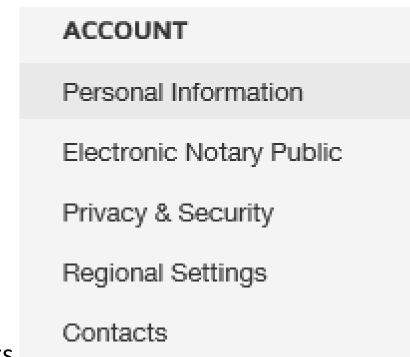
- The status of the envelope will change to Voided

End Process.

Creating a Contact

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

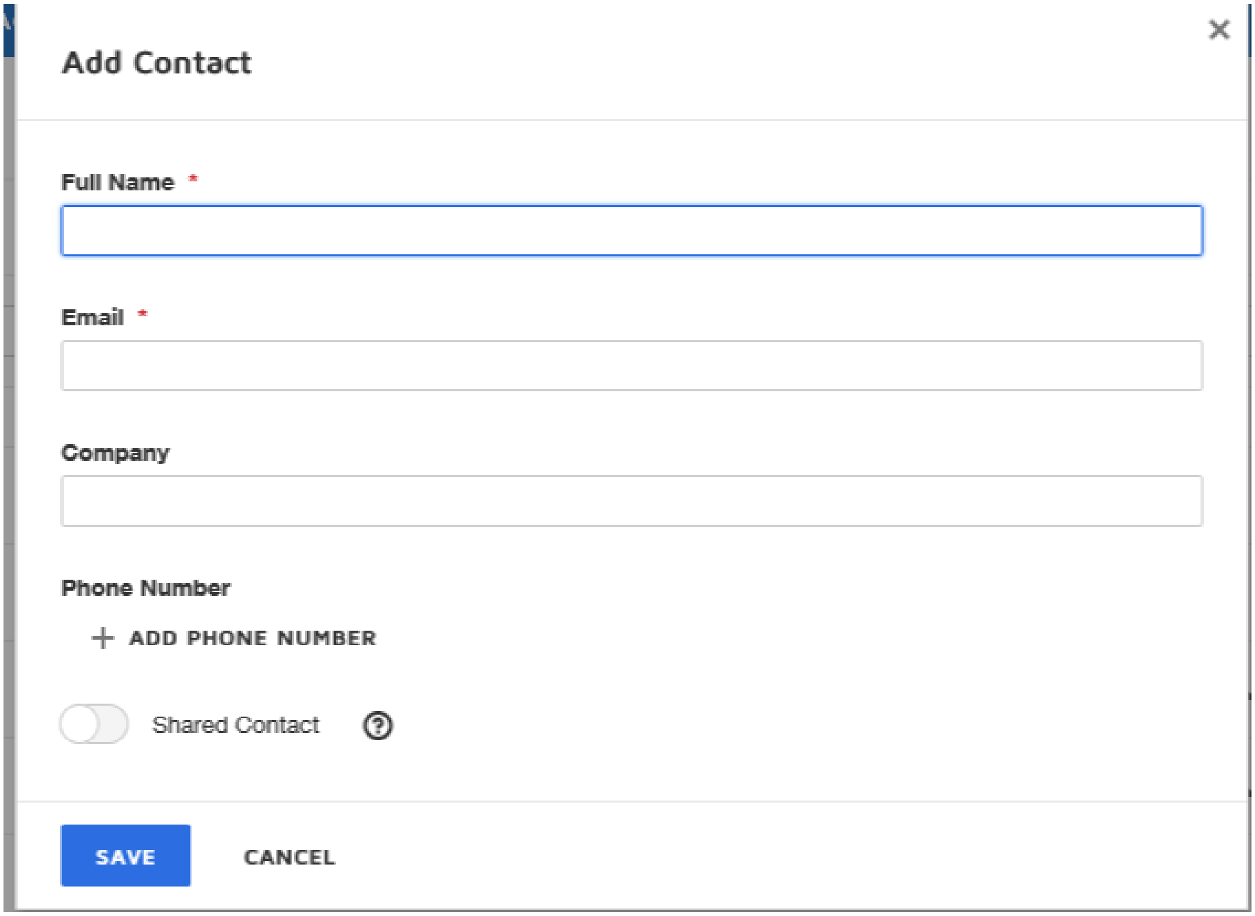
- Click my preferences



- 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

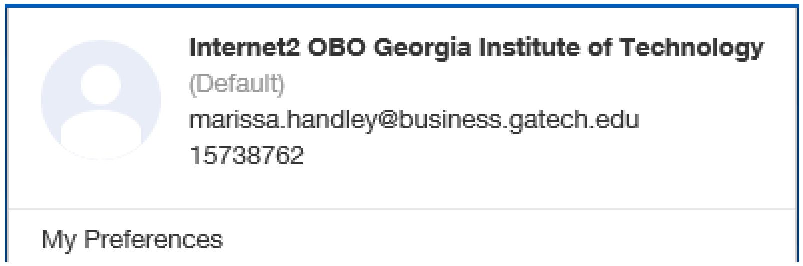


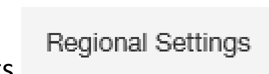
- The Company field can be left blank
- End Process.

Changing Time Zones

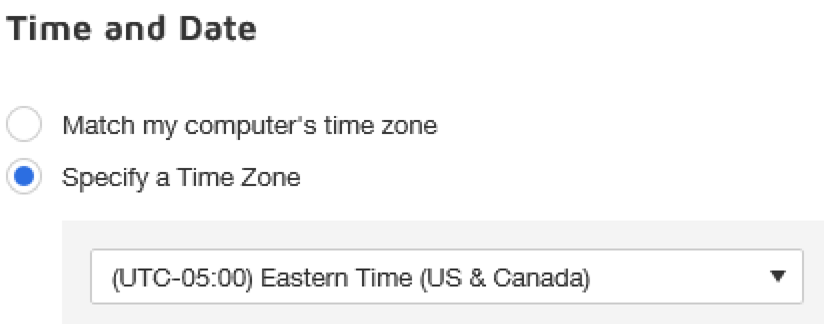
If you find that your envelopes have the PST time zone on them follow the steps below to change it.

- 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



- Click Save 

- End Process.