



February 2018

DOCUSIGN TRAINING MANUAL:
PCARD HOLDER

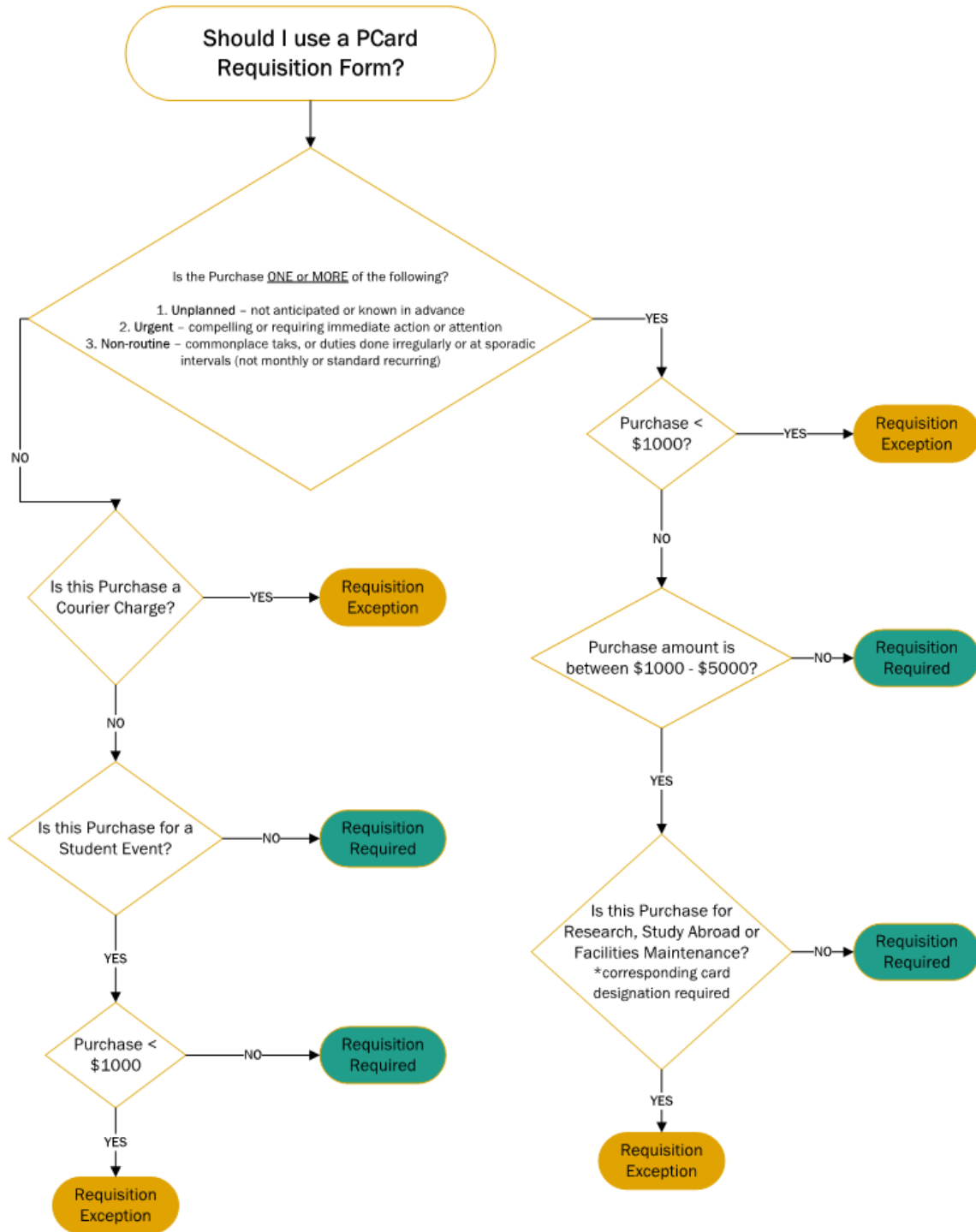
BUSINESS SERVICES



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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>

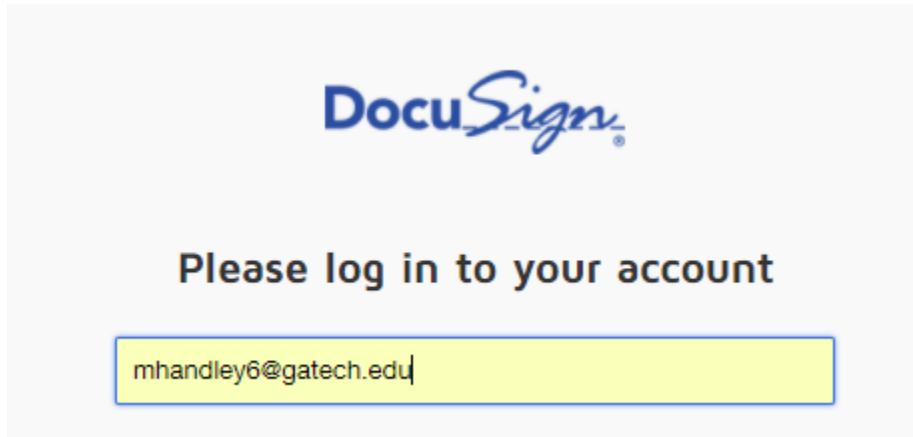
- On the eSignature page, click on the DocuSign icon



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

Log in to DocuSign

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



- Click continue

CONTINUE

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

USE COMPANY LOGIN

- Sign into Duo like you would going into TechWorks



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

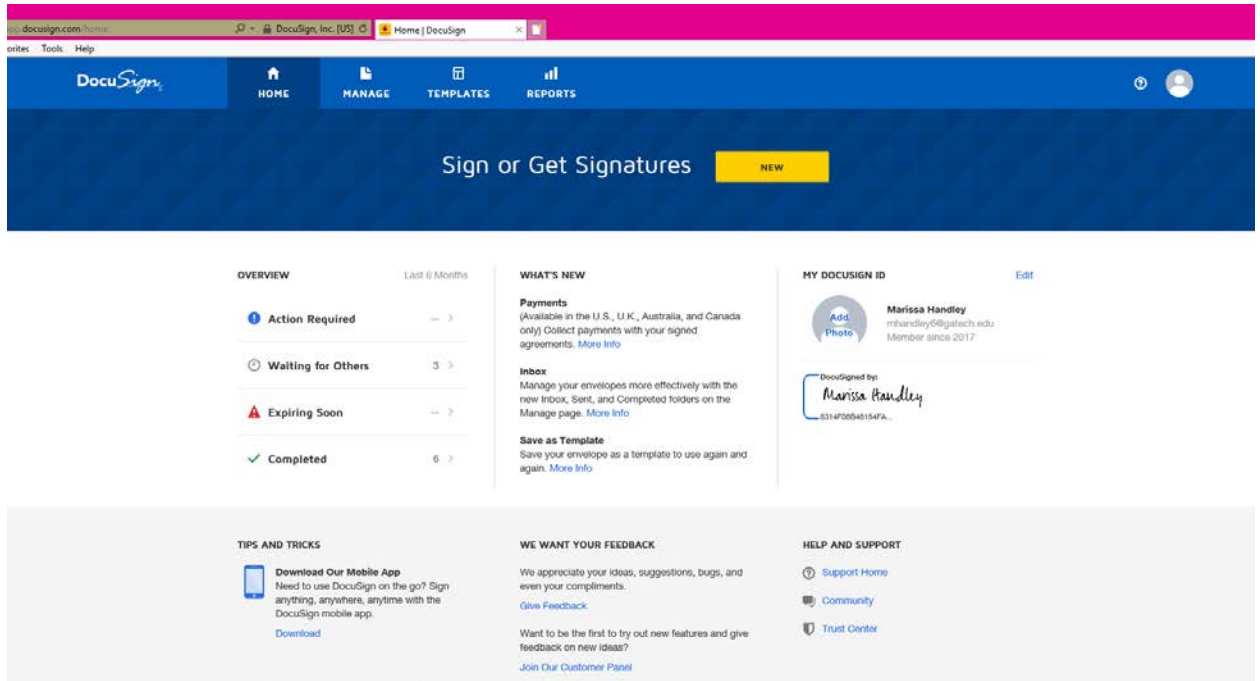
GT Account:

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.

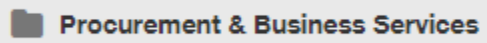
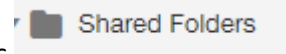
Creating an Envelope

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

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

PBS-PCard Requisition Form
Eligible for matching



- 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

1	<p>PCard Holder</p> <input type="text" value="Marissa Handley"/>  <input type="text" value="mhandley6@gatech.edu"/>
2	<p>Approver 1</p> <input type="text" value="Whitney Tate"/>  <input type="text" value="wtate6@gatech.edu"/>
3	<p>Approver 2</p> <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. 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

OVERVIEW	Last 6 Months
! Action Required	-- >
⌚ Waiting for Others	3 >
⚠ Expiring Soon	-- >
✓ Completed	8 >

- When the document opens, click continue

CONTINUE
OTHER ACTIONS ▾

- Fill out the document with information about the purchase

DocuSign Envelope ID: A402CA17-EEE5-442B-A39E-739880D0DB1E



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 style="width: 80%;" type="text" value="1234"/>	1/10/2018 6:31 AM PST
Department	<input style="width: 80%;" type="text" value="420 - Psychology"/>	
Vendor Name	<input style="width: 80%;" type="text" value="Panera Bread Company"/>	
Date of Purchase	<input style="width: 80%;" type="text" value="01/24/2018"/>	

Allocations

Value of Purchase (\$)	<input style="width: 95%;" type="text" value="\$972.46"/>
Project Number	<input style="width: 95%;" type="text" value="420541269"/>
Benefit to the Project	<input style="width: 95%;" type="text" value="Food for training class"/>
Description	<input style="width: 95%;" type="text" value="Food for training class that is scheduled all day"/>

FINISH

- Once all the information is filled in, click finish

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

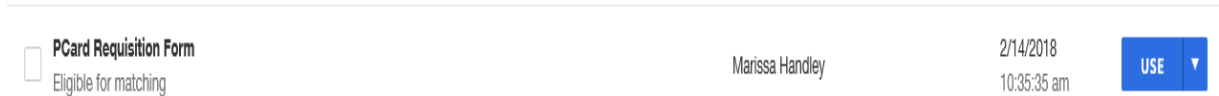
The screenshot shows the DocuSign user interface. At the top is a blue navigation bar with the DocuSign logo on the left and four menu items: HOME, MANAGE (which is highlighted), TEMPLATES, and REPORTS. Below the navigation bar is a sidebar on the left containing a 'NEW' button, a search box for 'Shared Envelopes', and several categories: ENVELOPES (Inbox, Sent, Drafts, Deleted), QUICK VIEWS (Action Required, Waiting for Others, Expiring Soon, Completed), FOLDERS (+), and POWERFORMS. The main content area is titled 'Action Required' and includes a filter 'Filtered by: Date (Last 6 Months) | Edit'. The central part of the page is empty, displaying a 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.

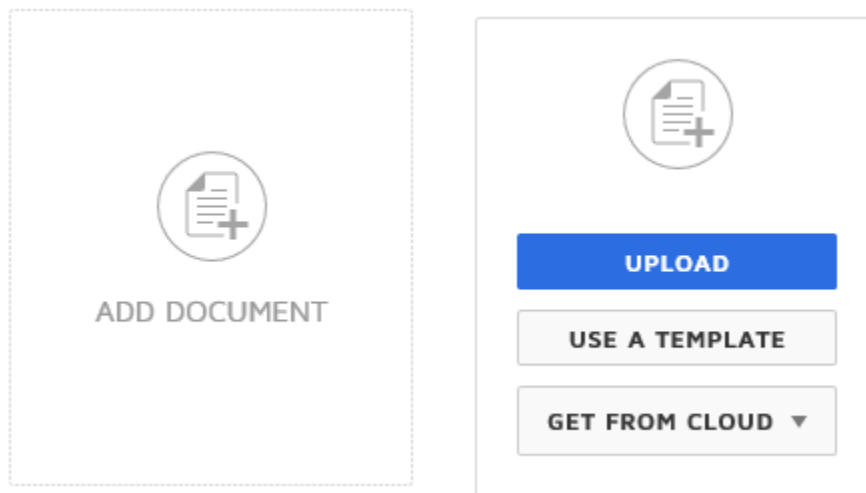
- If you are creating an envelope, click the use button on the PCard Requisition Form



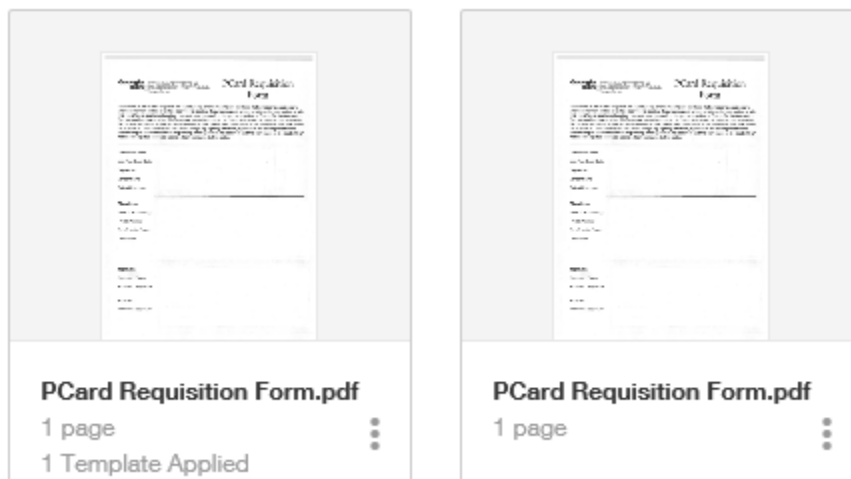
- When the workflow comes up, click Advanced Edit next to the blue Send button



- 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

 **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

OVERVIEW	Last 6 Months
 Action Required	-- >
 Waiting for Others	4 >
 Expiring Soon	-- >
 Completed	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"/>	 Please DocuSign: Whitney Tate PCard Requisition Form.pdf To: Marissa Handley, Whitney Tate +2 more	Waiting for Others	1/10/2018 10:24 am
<input type="checkbox"/>	 Please DocuSign: Peggy Romano PCard Requisition Form.pdf To: Marissa Handley, Peggy Romano +2 more	Waiting for Others	12/19/2017 09:47 am
<input type="checkbox"/>	 Please DocuSign: Marissa Handley PCard Requisition Form.pdf To: Marissa Handley, Mark Robinson +1 more	Waiting for Others	12/19/2017 09:16 am
<input type="checkbox"/>	 Please DocuSign: Mark Robison PCard Requisition Form.pdf 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	Proxy Sender Marissa Handley mhandley6@gatech.edu	NEEDS TO SIGN ▾	MORE ▾
2	PCard Holder Whitney Tate wtate6@gatech.edu	NEEDS TO SIGN ▾	MORE ▾
3	Approver 1 Peggy Romano peggy.romano@business.gatech.edu	NEEDS TO SIGN ▾	MORE ▾
4	Approver 2 Meagan Fitzsimons meagan.fitzsimons@business.gatech.edu	NEEDS TO SIGN ▾	MORE ▾

- 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

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

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

- End Process.

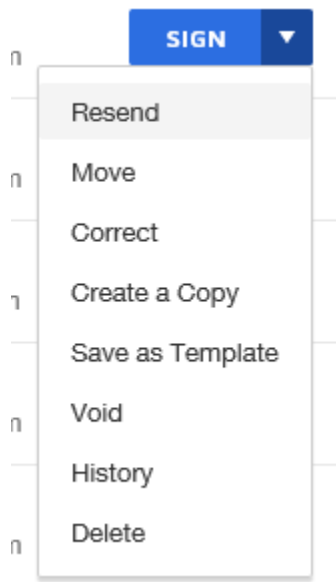
Voiding an Envelope

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

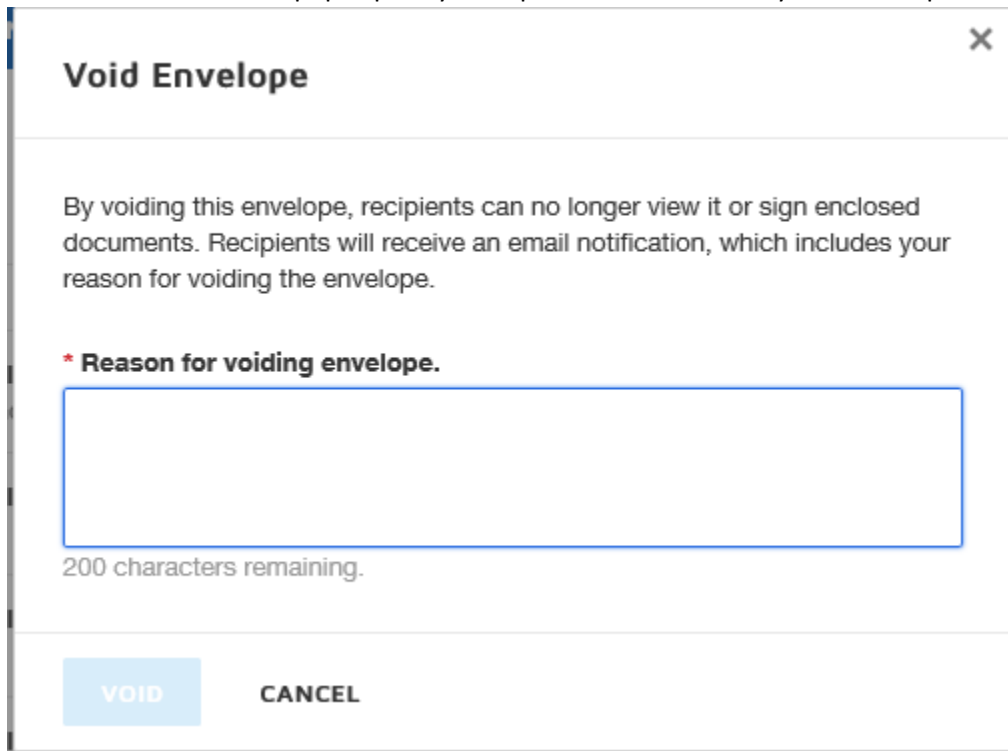


- Find the envelope and click the arrow next to the blue Sign button



- Click Void

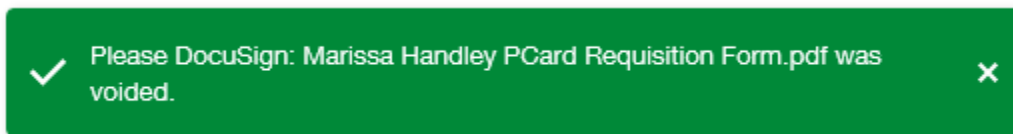
- There will be a box that pops up for you to put a reason as to why this envelope is being Voided



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 grey "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



- Click on My Preferences



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

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

Regional Settings

Time and Date

- Match my computer's time zone
- Specify a Time Zone

(UTC-05:00) Eastern Time (US & Canada) ▼

- Click Save
- End Process.

SAVE