DOCUSIGN TRAVEL INSTRUCTIONS

ENTERTING TRAVEL REQUESTS

Go to the DocuSign Website: https://docusign.com

Click “LOG IN” and enter the email address and password used when activating account.

Click on the Templates Icon at the top of the page.

The following instructions were completed with the Out-of-State Travel Request – Institutional Funds Only template, but the information/instructions applies to all templates in DocuSign whether the templates is in the Shared Folders or in the All Templates Folder.
On the left side of the screen, select Shared Folders, and then the Travel Requests subfolder. (The travel requests can also be found under the All Templates Folder).

Select the Out-of-State Travel Request – Institutional Funds template.

Click the “USE” icon to the right of the template.

Type in the name/email (or select the name from the directory icon) for each recipient.

If you are completing the travel request for someone else, enter your name/email in the “Form Originator” field and the name/email of the person traveling in the “Requesting Party” field. If you are completing the travel request for yourself, enter your name/email in both the “Form Originator” and the “Requesting Party” fields.

If your Executive Council Member is:
  • The VP of Academic Affairs/Provost, enter Michelle Lineweber’s name/email
After entering all of the recipient names/emails, change the title of the document to be reflective of the request e.g. enter the type of travel, the name of the requesting party, the destination, and the dates of travel. This will help you track your requests in your email.
Click the “SEND” icon at the bottom of the window.

A pop-up window will ask if you want to sign now or later. Either option is fine, but clicking “SIGN NOW” will not prevent you from receiving an email to begin the document as the Document Originator.

The below email will be sent to the form originator; select “REVIEW DOCUMENTS” to begin entering the travel request information.
Select the “CONTINUE” icon at the top of the page to begin the request (if for any reason you need to leave the request and want to save the data already entered, go to the “OTHER ACTIONS” icon and select the “Finish Later” option).
Tab or click through the report and enter the required information (red boxes are required).

If the Rental Car checkbox is selected, a written justification must be attached using the paper clip icon next to the line.

<table>
<thead>
<tr>
<th>Accounts to Charge</th>
<th>$400</th>
<th>$400</th>
<th>$400</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Attachments (e.g. Agenda, Registration Form, Flight Itinerary, etc.)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
To attach a document, click on the paper clip icon, select “Upload,” then click “CONTINUE,” find and select the required file, and select “DONE.”

If processing a **Grant funded travel request**, you will need to attach the required Grant tracking spreadsheet and the Cognos Grant budget report. Click on the paper clip icon (they will **NOT** display “Optional” underneath), select “Upload,” then click “CONTINUE,”
find and select the spreadsheet, and select “DONE.” Follow the same steps when attaching the Cognos Grant budget report. If there is also institutional funding in the same request, you MUST include the FGIBAVL for the institutional index(es).

After entering all of the required data, click the “FINISH” icon at the bottom or the top of the template.

Select “NO THANKS” in the pop-up window.

If you are also the “Requestor,” you will receive an email to sign the travel request. Click the “REVIEW DOCUMENTS” icon and then click “SIGN” icon and “FINISH” to send the document on to the next signatory.

The travel request will now flow through the specified recipient order for signatures and a final copy with all signatures and attachments will be sent to your email (and will also be available in DocuSign).
If there is a correction that needs to be made, DO NOT VOID the travel request. Contact OSP and they will work with the DocuSign Administrators (Kharla Vock or Anne Langdell) to determine if a correction (with documentation) can/should be completed.
Below is an example of a completed document with signatures, dates and requested changes.

Out-of-State Travel Request

This travel request must be filed in the Finance Office five days before the date of travel and must be completed and signed by all parties before pre-payment of airfare or registration(s) can occur.

Requestor: Kharla Vock
Employee [X] Student [ ]

Other Personnel Traveling:

Department: Business and Finance Destination: Denver, CO

Departure Date: 11/05/19 Return Date: 12/07/19

Purpose of Travel (nature of business and interest of the state to justify the cost involved): training

Estimated Cost for this Travel: (If actual costs exceed this authorized estimate, a revised authorization will need to be obtained per State rules. Please estimate a sufficient dollar amount.)

Transportation:

☐ Airfare: [ ] Commercial Air [ ] Charter Air [ ] Check the box if airfare will be pre-paid by PO

Liability Statement for Advance Airfare Purchase: "I understand that if I do not travel for any reason other than through no fault of my own, that I am responsible for reimbursing the School of Mines and Technology for any portion of this airline ticket which is non-refundable." * 

☐ Personal Vehicle

☐ State Vehicle

☐ Rental Car (Written justification is required when this request is submitted)

☐ Other Transportation

300

Meal(s):

200

Lodging:

☒ Excess Lodging Requested (Over $75 to a maximum of $275): 200 (Cost per night without tax)

Excess Lodging Approved: [ ] (Executive Council Member’s Initals)

Registration(s):

☒ Check the box if registration will be pre-paid by PO or P-Card

Liability Statement/Meeting Workshop Statement: "I understand that if I do not attend the workshop for any reason other than through no fault of my own, that I am responsible for reimbursing the state for any portion of this registration/registration for which is non-refundable. I also understand that in the event that I do not attend the meeting, it is my responsibility to secure a refund of the prepaid fees. I also agree to deduct any meals provided by the conference from the reimbursement for the given time period." *

Registration fee charged to $300

200

Other Expenses (Describe):

Total Estimated Cost for this Travel:

900.00

Accounts to Charge: $ 900 changed to $ 1,000

Other Attachments (e.g. Agenda, Registration Form, Flight Itinerary, etc.)

Requestor Signature: Kharla Vock

Date: 10/25/2019 | 1:26:44 PM MDT

Supervisor Signature: Kharla Vock

Date: 10/25/2019 | 1:35:05 PM MDT

Grant PI Signature: Kharla Vock

Date: 10/25/2019 | 1:41:50 PM MDT

Sponsored Programs Signature: Kharla Vock

Date: 10/25/2019 | 1:43:01 PM MDT

VP of Research Signature: Kharla Vock

Date: 10/25/2019 | 1:43:15 PM MDT

President or Executive Council Member Signature: 

Date: 10/25/2019 | 1:43:33 PM MDT

In accordance with the provisions of SDCL 3-9-5.2, copies are hereby signed for travel as requested in the foregoing application.

*SDCL 3-9-1, 3-9-2, 4-1-4, BOR 5:12, Admn Rules 5:01:07, SDCL 09, 3-9:09
CHECK THE STATUS OF A TRAVEL REQUEST

Select the Manage Icon at the top of the screen

Select one of the “Quick Views” options:

Action Required—Displays documents you need to complete

Waiting for Others—Shows where a request is in the signing order

Completed—Lists finalized documents with a copy of the completed document
HOW TO FIND A TEMPLATE

Docusign “hides” templates that were created 6 months ago or prior to that time.

There are two ways to find/search for a template:

1. Click on the Shared Folder that you wish to search. If you do not see the template you require, click the Filters option at the top right of the page and in the Date filter select “All,” and then click “APPLY.” The template should appear and can be selected for use. If unsuccessful, see #2 below.

2. Click on the All Templates Folder. If you do not see the template you require, click the Filters option at the top right of the page and in the Date filter select “All,” and then click “APPLY.” All templates that have been created will be displayed and can be selected for use.

If you have any questions, please contact Kharla Vock at 394-2371 or at Kharla.vock@sdsmt.edu, or contact Anne Langdell at 394-1207 or at anne.langdell@sdsmt.edu.