DOCUSIGN TRAVEL INSTRUCTIONS
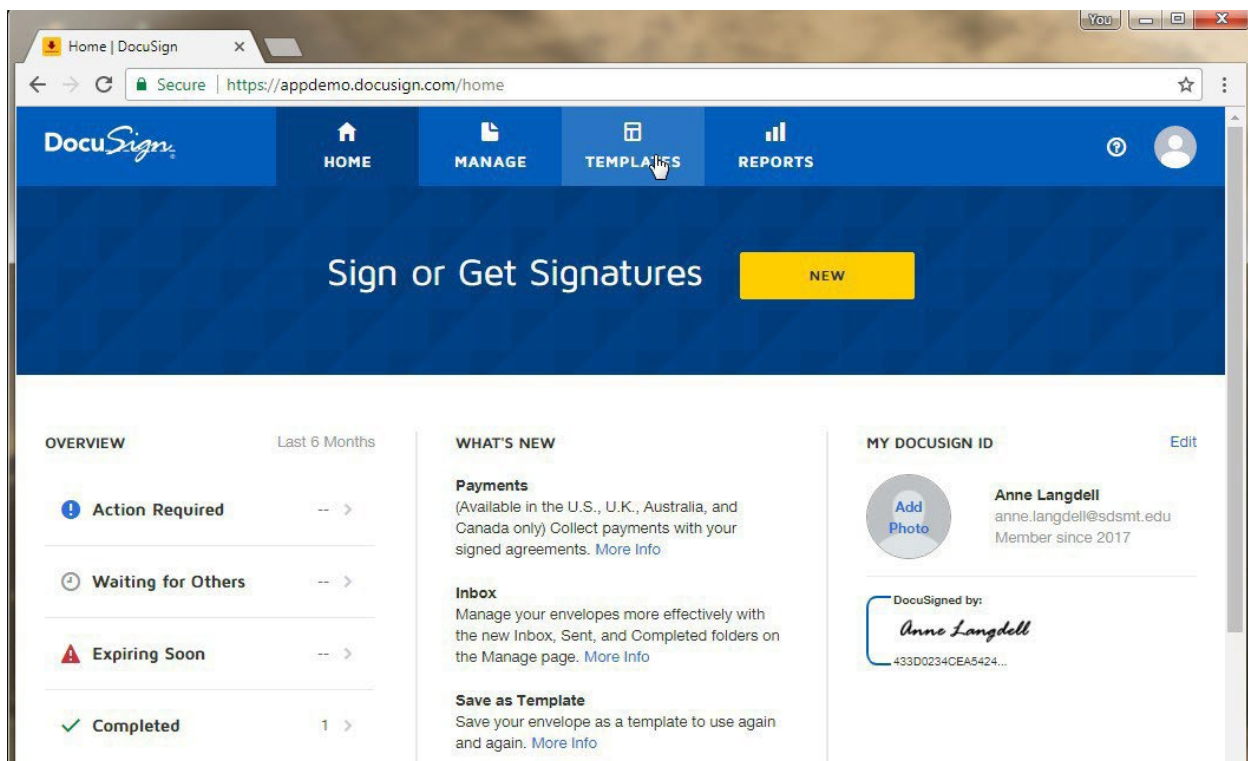
ENTERING TRAVEL REQUESTS

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

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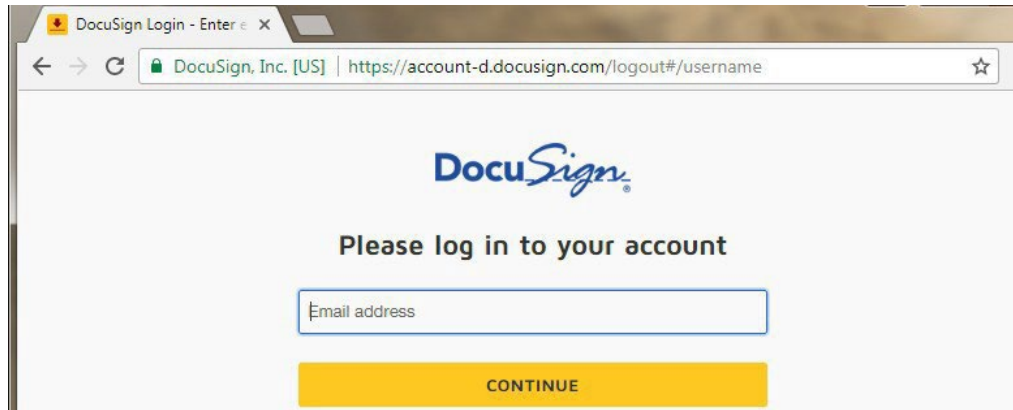

Click on the Templates Icon at the top of the page.

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).
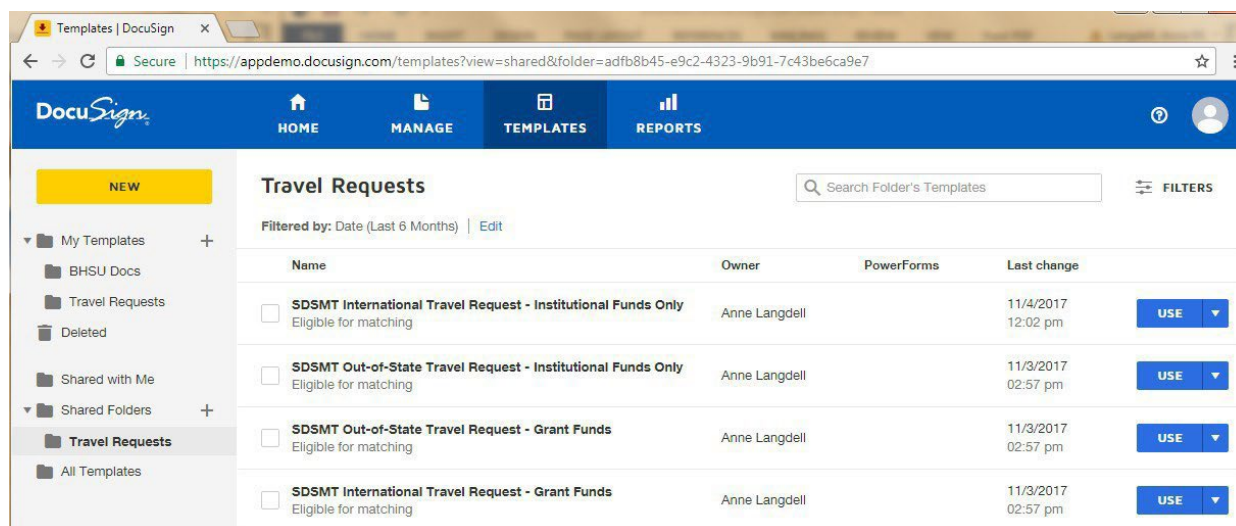
Select the correct Out-of-State/Country Travel Request

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 Vice President (VP) is the VP of Academic Affairs/Provost, enter Gina Fiorello's name/email

- If the traveler is the President, Provost, or VP of Research Affairs they will sign as "Requestor" and the VP of Finance will sign as "President or Vice President."

- If the traveler is the VP of Finance, they will sign as "Requestor" and the President or Provost will sign as "President or Vice President."

- If you are the traveler and are a direct report to the President or Vice President that will sign the last line of the OSA form ("President or Division Vice President Signature"), then you do NOT need to also add them to sign as the "Supervisor." When setting up signatures in the OSA, please just remove the Supervisor signature line and have them only sign the line where the President or Vice President signs.

SOSMT Out-of-State Travel Request - Instit utional Funds Only

Recipients

formOriginator

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4   **President or Executive Council Member**

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Click the "SEND" icon at the bottom of the window.
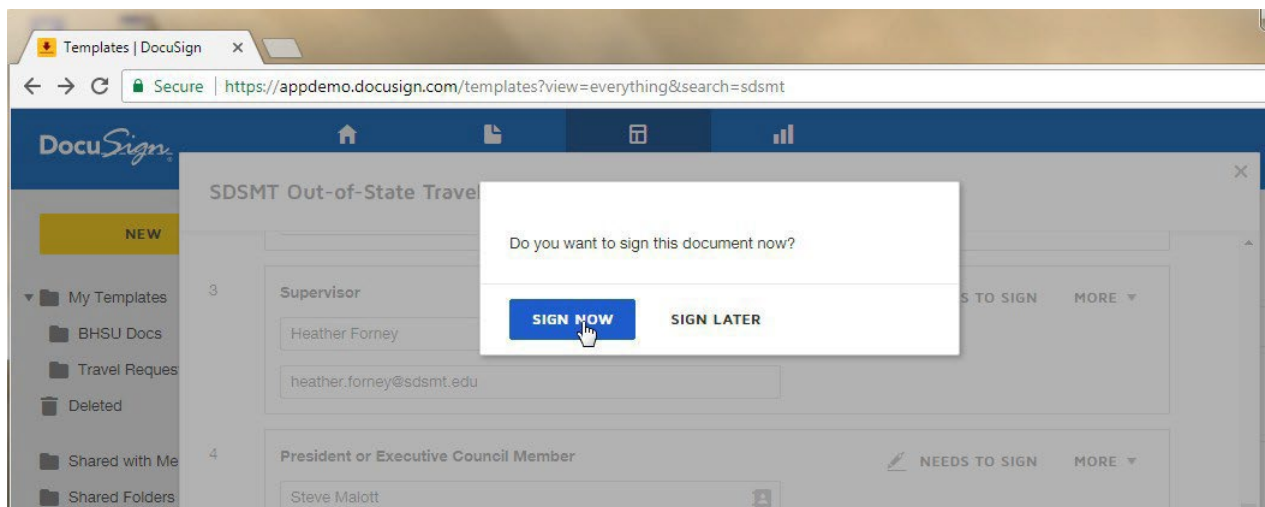
The below email will be sent to the form originator; select "REVIEW DOCUMENTS" to begin entering the travel request information
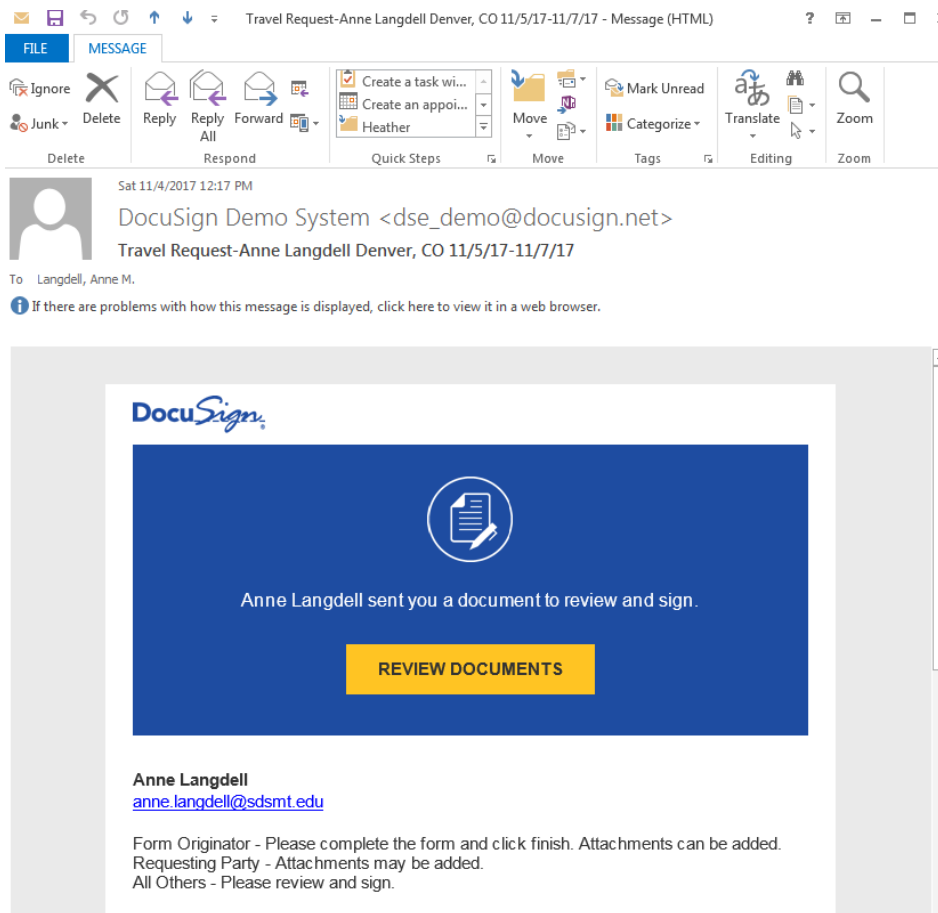
Select the "CONTINUE" icon at the top of the page to begin the request (if for any reason you need to leave the request and want to save the data already entered, go to the "OTHER ACTIONS" icon and select the "Finish Later" option).

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.

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).

To retrieve the FGIBAVL go to Banner and type in FGIBAVL

Then put in your index and "70" for account to get operating expenses. The rest will auto-populate.

Then select GO and take a screen shot of available balance and attach in required spot

Account	Title	Adjusted Budget	YTD Activity	Commitments	Available Balance
700000	Operating Expenses Budget	1,485.00	496.46	0.00	988.54
	Total	1,485.00	496.46	0.00	988.54

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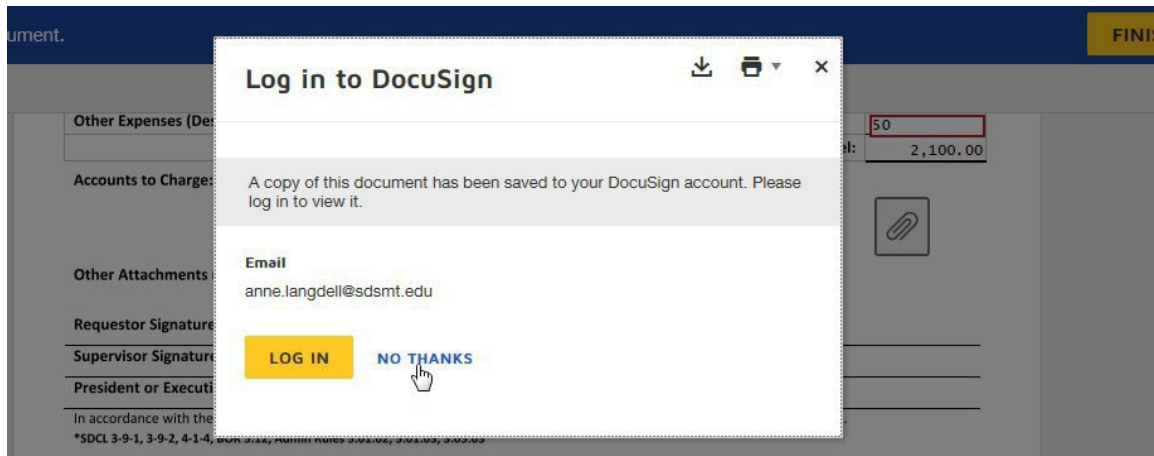
If you are also the "Requestor," you will receive an email to sign the travel request. Click the "REVIEW DOCUMENTS" icon and then click "SIGN" icon and "FINISH" to send the document on to the next signatory.

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).

DocuSign Demo System <dse_demo@docusign.net>
To Vock, Kharla B.

(i) If there are problems with how this message is displayed, click here to view it in a web browser.

| PDF | SDSMT Out-of-State Travel Request - Grant Funds - Rev 7-16-18.docx.pdf 706 KB | | PDF | GRANT TRACKING SPREADSHEET.pdf 136 KB | |
| PDF | COGNOS GRANT BUDGET REPORT.pdf 137 KB | | PDF | RENTAL CAR JUSTIFICATION.pdf 136 KB | |

*** This email is from an EXTERNAL sender. Use CAUTION before opening attachments or clicking links.***

DocuSign

Your document has been completed.

VIEW COMPLETED DOCUMENTS

All signers completed Please DocuSign: SDSMT Out-of-State Travel Request - Grant Funds

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 Administrator (Angie Mattoon) 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.

SOUTH DAKOTA

M

SCHOOL OF MINES & TECHNOLOGY

Out-of-State Travel Request

—GRANT FUNDS—

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 ☒   Student ☐

Other Personnel Traveling: _____

Department: Business and Finance   Destination: Denver, CO

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

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 SD 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 $175 to a maximum of $275): 200 (Cost per night without tax)	
Excess Lodging Approved: EV (Executive Council Member's Initials)	200
Registration(s):	Registration fee changed to $300
☒ Check the box if registration will be pre-paid by PO or P-Card	
Liability Statement/Missed Workshop Statement: "I understand that if I do not attend the workshop for a reason other than through no fault of my own that I am responsible for reimbursing the state for any portions of this registration/workshop fee 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." *	200
Other Expenses (Describe): _____	
Total Estimated Cost for this Travel:	900.00

Accounts to Charge:	XXXXXX	$ 900	Amount changed to $1,000	New total estimated cost is $1,000
	_____	$		
	_____	$		
	_____	$		

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

APPROVAL OF TRAVEL

		Date:
Requestor Signature:	Kharla Vock	10/25/2019 | 1:26:44 PM MDT
Supervisor Signature:	Kharla Vock	10/25/2019 | 1:39:05 PM MDT
Grant PI Signature:	Kharla Vock	10/25/2019 | 1:41:50 PM MDT
Sponsored Programs Signature:	Kharla Vock	10/25/2019 | 1:43:01 PM MDT
VP of Research Signature:	Kharla Vock	10/25/2019 | 1:43:16 PM MDT
President or Executive Council Member Signature:	Kharla Vock	10/25/2019 | 1:43:33 PM MDT

In accordance with the provisions of SDCL 3-9-5.2, consent is hereby given for travel as requested in the foregoing application.

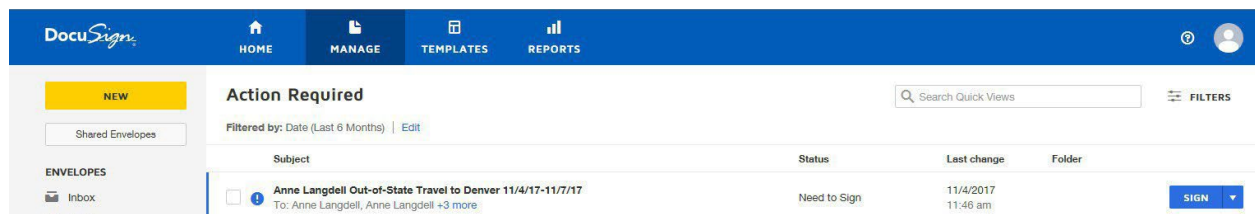*SDCL 3-9-1, 3-9-2, 4-1-4, BOR 5:12, Admin Rules 5:01:02, 5:01:03, 3:05:03

CHECK THE STATUS OF A TRAVEL REQUEST

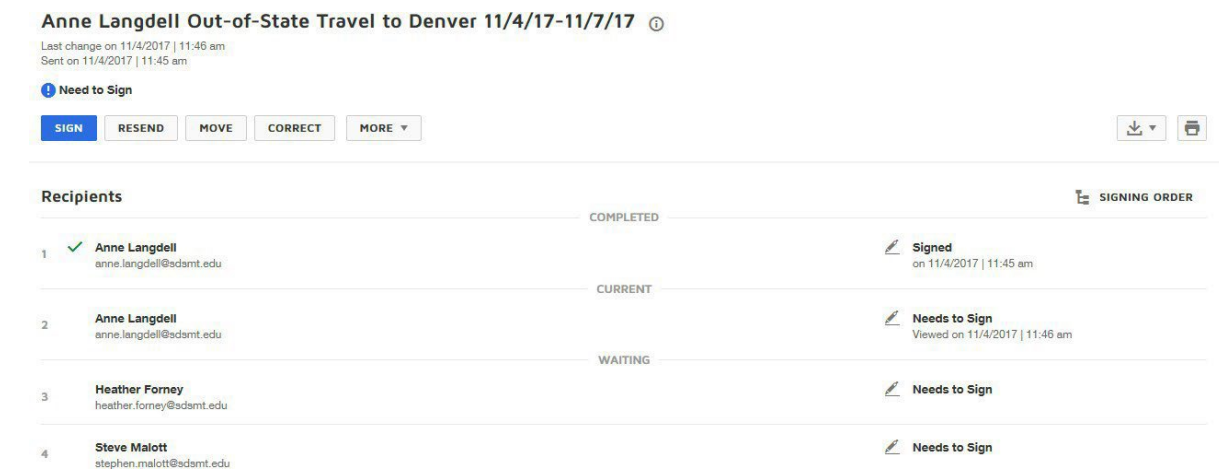**Select the Manage Icon at the top of the screen**
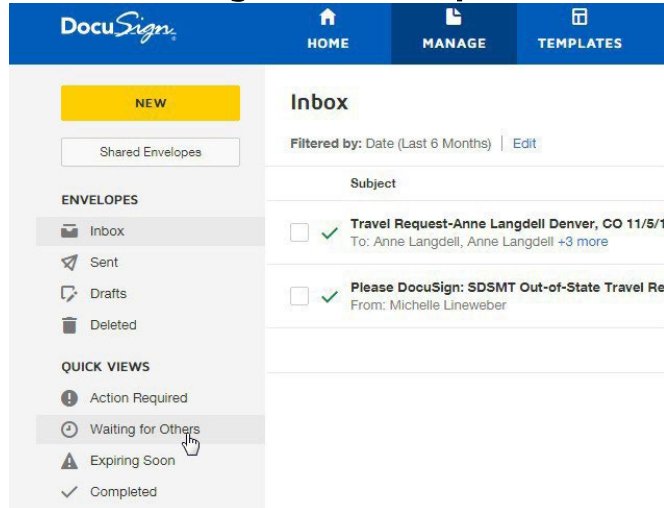
Select one of the "Quick Views" options:

Action Required—Displays documents <u>you</u> 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.**

TRAVEL REQUEST REVISIONS

If a travel request needs to be revised after it has been completed, you will need to print off the approved travel request and write "REVISED" at the top. Make whatever changes are needed and attach a new/current FGIBAVL or Cognos Grant Budget Report for trip funding. The authorizing signatures will then need to initial and date by their original signature. After the authorizing signatures have reviewed and initialed, please submit to Accounts Payable for support for the travel reimbursement.

QUESTIONS

Questions on DocuSign, please contact Angie Mattoon at 394-6872, or angela.mattoon@sdsmt.edu