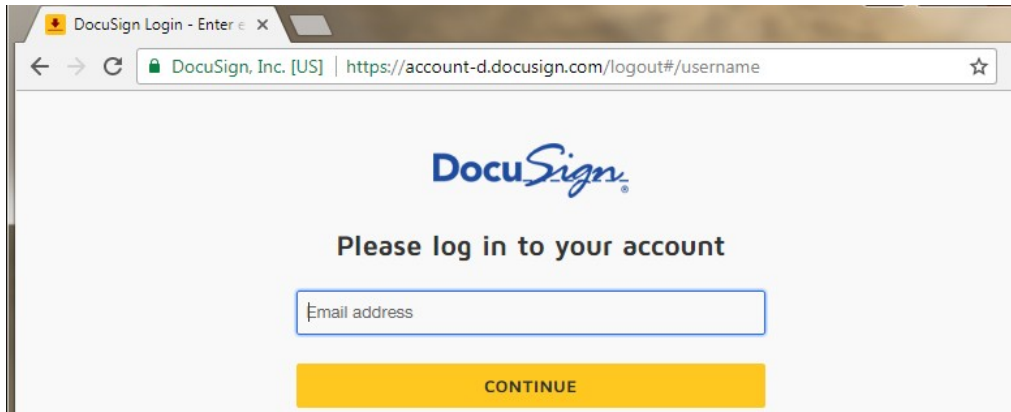


DOCUSIGN TRAVEL INSTRUCTIONS

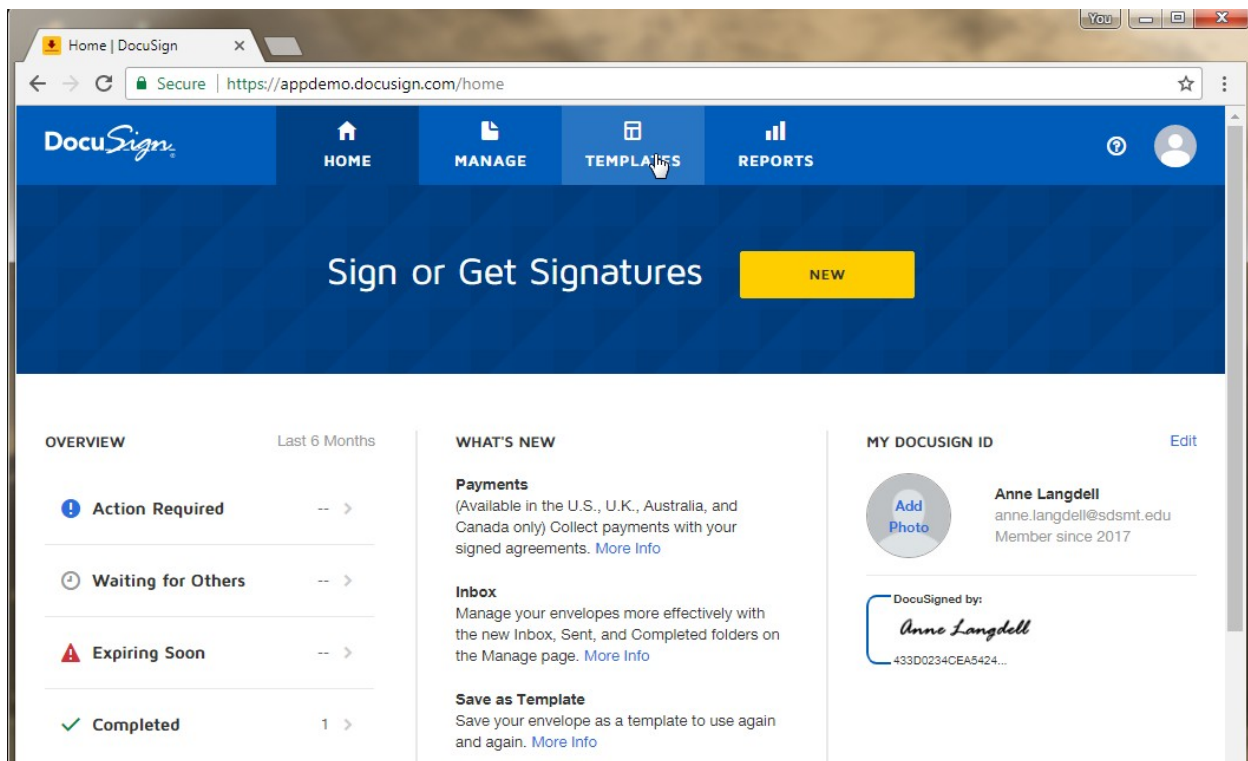
ENTERING TRAVEL REQUESTS

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

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

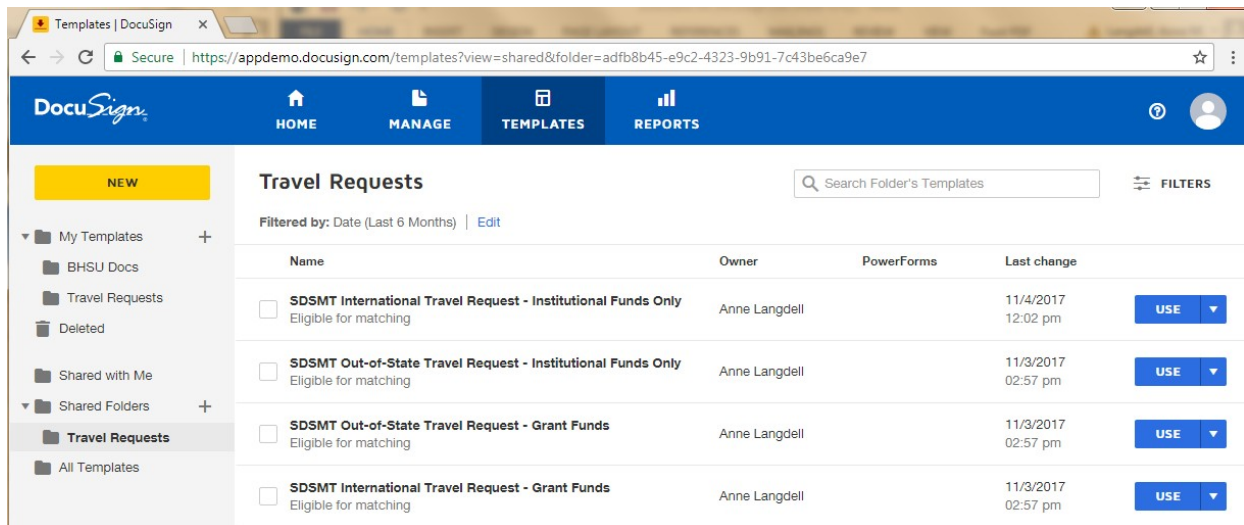


Click on the Templates Icon at the top of the page.



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 Michelle Lineweber’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.”**

DocuSign

NEW

My Templates

BHSU Docs

Travel Request

Deleted

Shared with Me

Shared Folders

All Templates

SDSMT Out-of-State Travel Request - Institutional Funds Only

Recipients

1

Form Originator

Name

Anne Langdell : anne.langdell@sdsmt.edu

NEEDS TO SIGN

MORE

2

Requesting Party

Name

Email

NEEDS TO SIGN

MORE

3

Supervisor

Name

Email

NEEDS TO SIGN

MORE

4

President or Executive Council Member

Name

Email

NEEDS TO SIGN

MORE

5

Travel Accountant

David Mettler

david.mettler@sdsmt.edu

CC RECEIVES A COPY

MORE

Message to All Recipients

☐ Custom email and language for each recipient

Please DocuSign: SDSMT Out-of-State Travel Request - Ini

Form Originator - Please complete the form and click finish. Attachments can be added.
Requesting Party - Attachments may be added.
All Others - Please review and sign.

Advanced Options

Recipients can sign on paper

Recipients can change signing responsibility

Incomplete envelopes expire days after send date

Recipients are warned day(s) before request expires

SEND

ADVANCED EDIT

DISCARD

5

Travel Accountant CC RECEIVES A COPY MORE ▾

David Mettler

david.mettler@sdsmt.edu

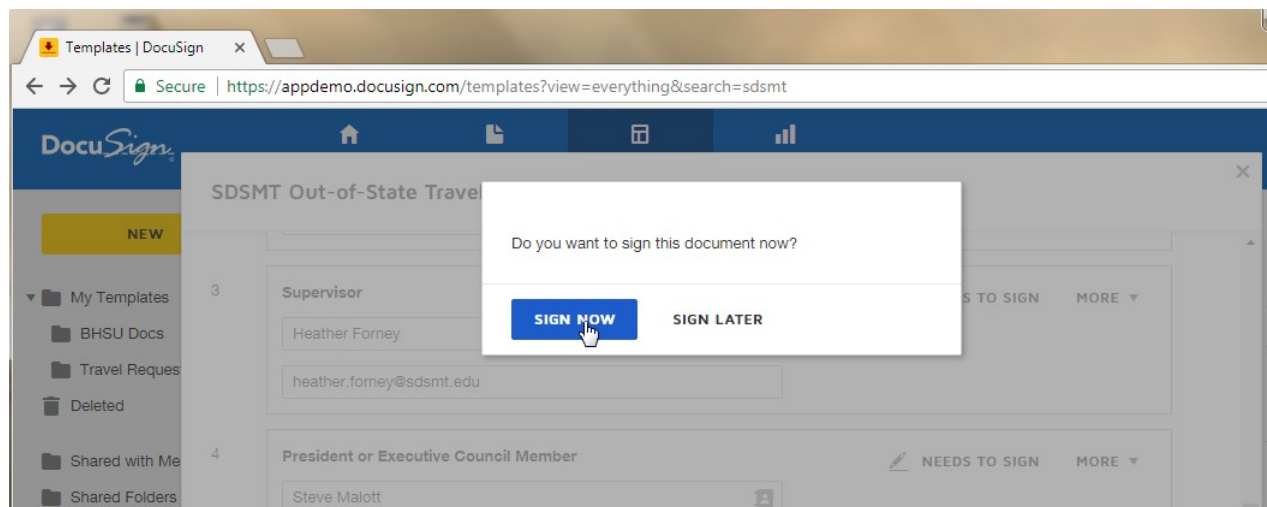
Message to All Recipients
☐ Custom email and language for each recipient
Travel Request-Anne Langdell Denver, CO 11/5/17
Form Originator - Please complete the form and click finish. Attachments can be added.
Requesting Party - Attachments may be added.
All Others - Please review and sign

Advanced Options

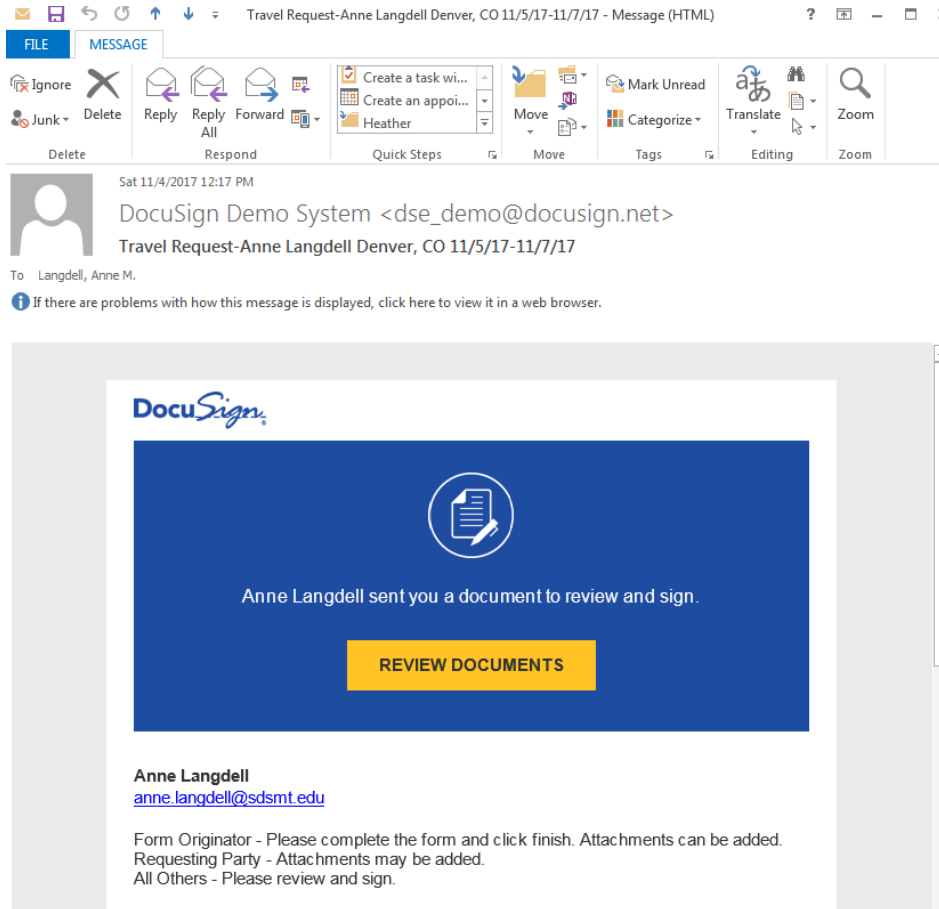
- Recipients can sign on paper
- Recipients can change signing responsibility
- Incomplete envelopes expire days after send date
- Recipients are warned day(s) before request expires

SEND ADVANCED EDIT DISCARD

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).

DocuSign

DocuSign, Inc. [US] | <https://demo.docusign.net/Signing/?inession=1&ti=35673ec7714f4e479f1c829c19e38e98>

Please Review & Act on These Documents

Anne Langdell
 SD Mines

Form Originator - Please complete the form and click finish. Attachments can be added.
 Requesting Party - Attachments may be added.
[View More](#)

Please review the documents below. **CONTINUE** **OTHER ACTIONS**

DocuSign Envelope ID: 050D31ED-DCF7-4FF7-8840-F5E508066636

Out-of-State Travel Request
 —INSTITUTIONAL FUNDS ONLY—

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: Employee ☐ Student ☐

Other Personnel Traveling:

Department: Destination:

Departure Date: Return Date:

Purpose of Travel:

Finish Later

Print & Sign

Assign to Someone Else

Help & Support

About DocuSign

View History

View Certificate (PDF)

Session Information

Tab or click through the report and enter the required information (red boxes are required).

DocuSign Envelope ID: 050D31ED-DCF7-4FF7-8840-F5E508066636

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200

Out-of-State Travel Request
—INSTITUTIONAL FUNDS ONLY—

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: Employee ☐ Student ☐

Other Personnel Traveling:

Department: Destination:

Departure Date: Return Date:

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

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

Meal(s):

Lodging:

☐ Excess Lodging Requested (Over \$175 to a maximum of \$275): (Cost per night without tax)
Excess Lodging Approved: (Executive Council Member's Initials)

Registration(s):

☐ 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." *

Other Expenses (Describe):

Total Estimated Cost for this Travel: 0.00

Accounts to Charge:

<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>

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

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

to add a document

FINISH

ATTACH

☐ 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

Meal(s):

Lodging:

☒ Excess Lodging Requested (Over \$175 to a maximum of \$275): (Cost per night without tax)
Excess Lodging Approved: (Executive Council Member's Initials)

Registration(s):

☒ 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." *

Other Expenses (Describe):

Total Estimated Cost for this Travel: 2,100.00

Accounts to Charge:

4BDG01	\$ 1050
4BDG02	\$ 1050
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>

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

APPROVAL OF TRAVEL

Optional

To attach a document, click on the paper clip icon, select “Upload,” then click “CONTINUE,” find and select the required file, and select “DONE.”

The screenshot shows a web form with a yellow 'ATTACH' button. A modal dialog titled 'Attachments' is open, asking 'How would you like to add your attachments?' with radio buttons for 'Upload' (selected) and 'Fax'. At the bottom of the dialog are 'CONTINUE' and 'CANCEL' buttons. The background form includes sections for 'Meal(s)', 'Lodging', and 'Registration(s)' with various checkboxes and input fields.

The screenshot shows the 'Upload Attachment' dialog box. It displays the filename 'RENTAL CAR JUSTIFICATION.pdf' with a '1 page' indicator and a close button. Below the filename is an 'UPLOAD A FILE' button. At the bottom left of the dialog is a yellow 'DONE' button. The background form shows the 'Transportation' section with a checkbox for 'Airfare' and other travel-related options.

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

The image shows the Banner 'Welcome' screen. At the top, it says 'Welcome'. Below that, there are two radio buttons: 'Search' (which is selected) and 'Direct Navigation'. To the right of these buttons is a search input field containing the text 'FGIBAVL'.

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

The image shows the Banner 'Budget Availability Status' screen. The title bar says 'ellucian Budget Availability Status FGIBAVL 9.3.13 (PROD) (BOR)'. Below the title bar, there are several input fields. On the left, there are four fields: 'Chart: * S', 'Index: 4BUS27', 'Fund: 437000', and 'Account: 70'. Arrows point to the 'Index' and 'Account' fields. On the right, there are four fields: 'Fiscal Year: * 22', 'Commit Type: Both', 'Organization: 452011', and 'Program: 06'. Below these fields, there are labels for 'Keys ... >', 'Control Fund:', 'Control Account:', 'Control Organization:', and 'Control Program:'.

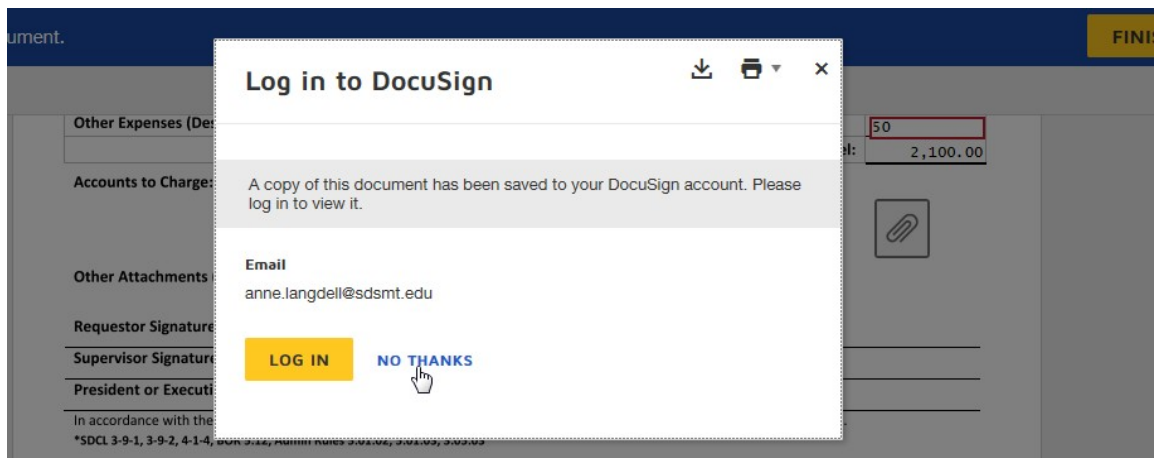
Then select **GO** and take a screen shot of available balance and attach in required spot

The image shows the Banner 'Budget Availability Status' screen with the 'BUDGET AVAILABILITY STATUS' table. The table has columns: Account, Title, Adjusted Budget, YTD Activity, Commitments, and Available Balance. The data is as follows:

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.

A screenshot of a travel request form. At the top, there is a blue header bar with the text 'ate and add your signature.' and a yellow 'FINISH' button. Below the header, there is a table with the following data:

Excess Lodging Approved: _____ (Executive Council Member's Initials)	550
Registration(s): <input checked="" type="checkbox"/> Check the box if registration will be pre-paid by PO or P-Card <i>Liability Statement/Missed Workshop Statement:</i> "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." *	800
Other Expenses (Describe):	50
Total Estimated Cost for this Travel:	2,100.00

Below the table, there are fields for 'Accounts to Charge' with two entries: '4BDG01 \$ 1050' and '4BDG02 \$ 1050'. There is a section for 'Other Attachments (e.g. Required - Sign Here - Click here to add signature and then select finish. etc.)' with a yellow 'Sign' button and a red arrow icon. To the right of this section is a yellow 'APPROVAL OF TRAVEL' button. Below the 'Other Attachments' section are signature lines for 'Requestor Signature', 'Supervisor Signature', and 'President or Executive Council Member Signature', each with a corresponding 'Date' field. The 'Requestor Signature' field has a yellow 'Sign' button with a red arrow icon. At the bottom, there is a footer with the text 'In accordance with the provisions of SDCL 3-9-5.2, consent is hereby given for travel as requested in the foregoing application.' and '*SDCL 3-9-1, 3-9-2, 4-1-4, BOR 5:12, Admin Rules 5:01:02, 5:01:03, 3:05:03'. A large yellow 'SIGN' button is located on the left side of the form.

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).

■ [EXT] Completed: Please DocuSign: SDSMT Out-of-State Travel Request - Grant Funds



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



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

SDSMT Out-of-State Travel Request - Grant Funds - Rev 7-16-18.docx.pdf 706 KB	GRANT TRACKING SPREADSHEET.pdf 136 KB
COGNOS GRANT BUDGET REPORT.pdf 137 KB	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 (Kharla Vock) 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.

DocuSign Envelope ID: 0D681C51-51E0-4C12-86D9-C99FC1F75D19

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
999 3rd Ave, Suite 1700 - Seattle - Washington 98104 - (206) 219-0200

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: <input type="checkbox"/> Airfare: <input type="checkbox"/> Commercial Air <input type="checkbox"/> Charter Air <input type="checkbox"/> Check the box if airfare will be pre-paid by PO <i>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." *</i> <input type="checkbox"/> Personal Vehicle <input type="checkbox"/> State Vehicle <input checked="" type="checkbox"/> Rental Car (Written justification is required when this request is submitted) <input type="checkbox"/> Other Transportation _____		300
Meal(s):		200
Lodging: <input checked="" type="checkbox"/> Excess Lodging Requested (Over \$175 to a maximum of \$275): <u>200</u> (Cost per night without tax) Excess Lodging Approved: <u>EV</u> (Executive Council Member's Initials)		200
Registration(s): <input checked="" type="checkbox"/> Check the box if registration will be pre-paid by PO or P-Card <i>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." *</i>		Registration fee changed to \$300 200
Other Expenses (Describe): _____		
Total Estimated Cost for this Travel:		900.00

Accounts to Charge: <u>XXXXXX</u>	Amount	New total estimated cost is \$1,000
_____	\$ 900 changed to	
_____	\$ 1,000	
_____	\$ _____	

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

APPROVAL OF TRAVEL

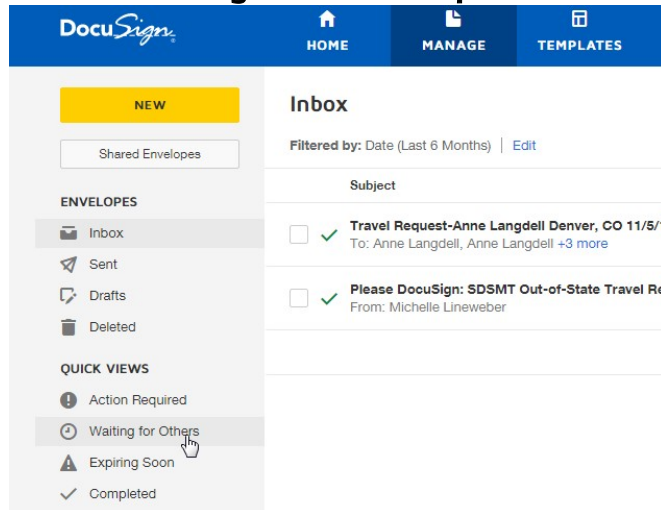
Requestor Signature: <u>Kharla Vock</u>	Date: 10/25/2019 1:26:44 PM MDT
Supervisor Signature: <u>Kharla Vock</u>	Date: 10/25/2019 1:39:05 PM MDT
Grant PI Signature: <u>Kharla Vock</u>	Date: 10/25/2019 1:41:50 PM MDT
Sponsored Programs Signature: <u>Kharla Vock</u>	Date: 10/25/2019 1:43:01 PM MDT
VP of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

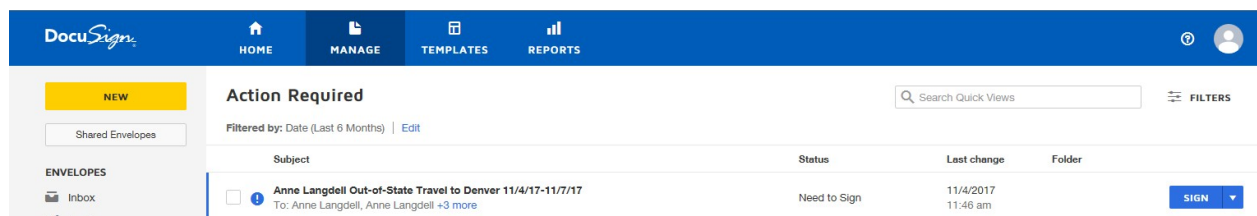
CHECK THE STATUS OF A TRAVEL REQUEST

Select the Manage Icon at the top of the screen



Select one of the “Quick Views” options:

Action Required—Displays documents you need to complete



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

Anne Langdell Out-of-State Travel to Denver 11/4/17-11/7/17 ⓘ

Last change on 11/4/2017 | 11:46 am
Sent on 11/4/2017 | 11:45 am

Need to Sign

[SIGN](#) [RESEND](#) [MOVE](#) [CORRECT](#) [MORE](#)



Recipients

COMPLETED

SIGNING ORDER

1 ✓ Anne Langdell
anne.langdell@sdsmt.edu

Signed
on 11/4/2017 | 11:45 am

CURRENT

2 Anne Langdell
anne.langdell@sdsmt.edu

Needs to Sign
Viewed on 11/4/2017 | 11:46 am

WAITING

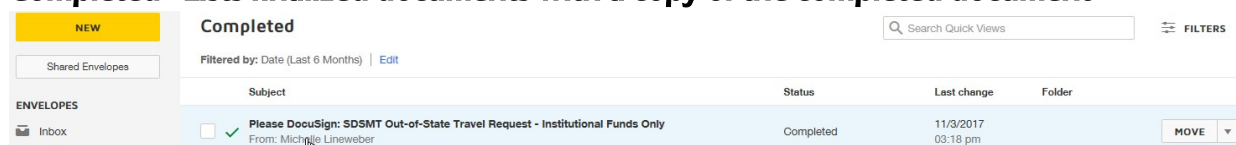
3 Heather Forney
heather.forney@sdsmt.edu

Needs to Sign

4 Steve Malott
stephen.malott@sdsmt.edu

Needs to Sign

Completed—Lists finalized documents with a copy of the completed document

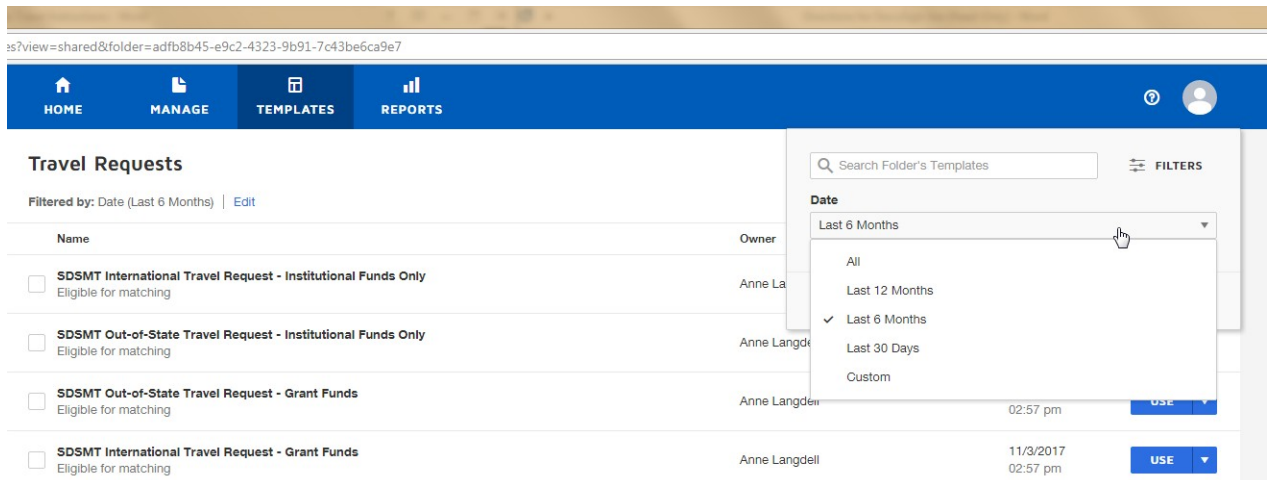


HOW TO FIND A TEMPLATE

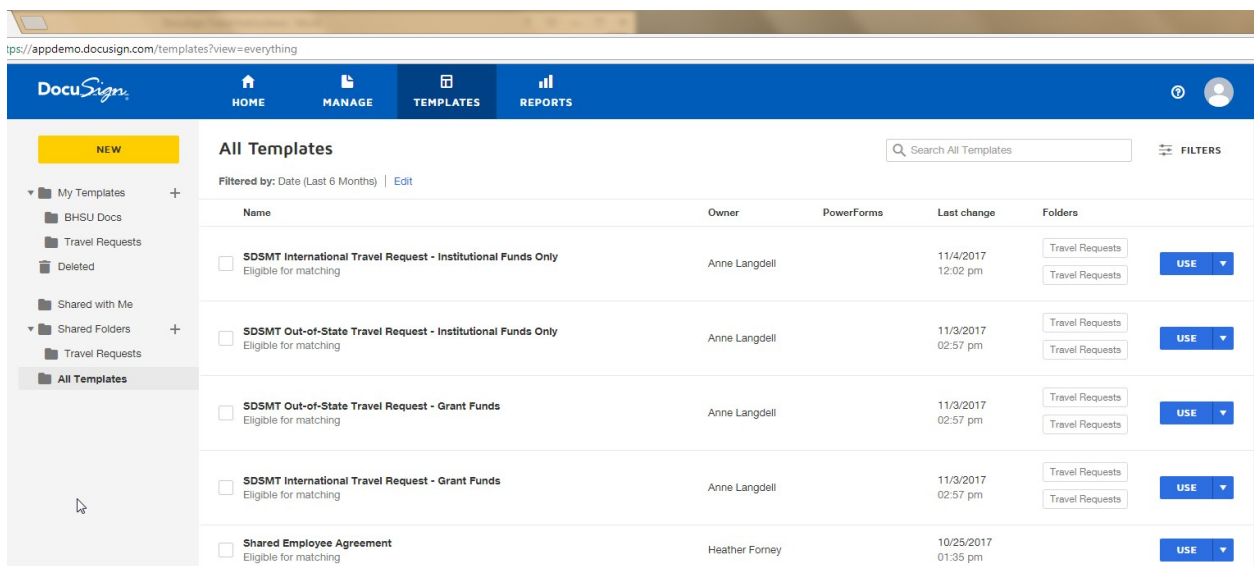
Docusign “hides” templates that were created 6 months ago or prior to that time.

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