

## TRES Template - Sender Instructions

### Become a DocuSign sender

If you have not already done so, review the overview, signing and sending videos on the Resources/Senders page of the OSU DocuSign website (<http://is.oregonstate.edu/docusign>). This will take about 15 minutes. Submit an application for promotion to sender, which is called “Sender Access Request” and is located on the same page as the links to the videos.

### Prepare the TRES Form

Prepare the TRES document. When you have finished inserting the data, “print” it using *Microsoft Print to PDF*, or any other tool that will save the file as a PDF to one of your directories.

### Log on to DocuSign

Navigate to the OSU DocuSign home page, <http://is.oregonstate.edu/docusign>. It looks like:



Click the “Sign in to DocuSign” link

Log in using your ONID credentials.

## Start the Document

Upon login, the DocuSign Home page is displayed. Here is the top section of the page:



Click the "New" button,

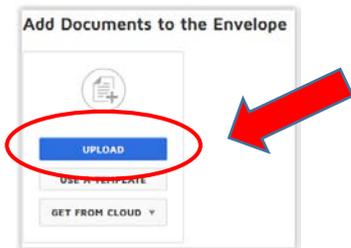
then choose "Send an Envelope":



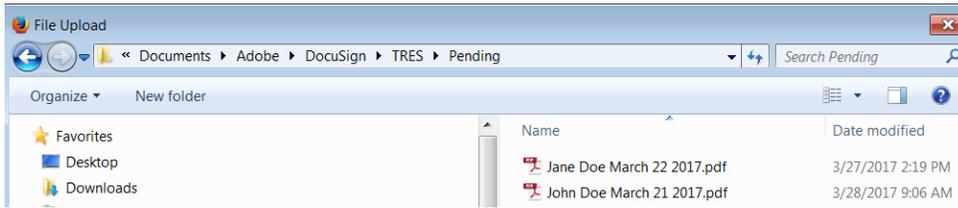
The system will display the "Upload a Document and Add Envelope Recipients" dashboard:



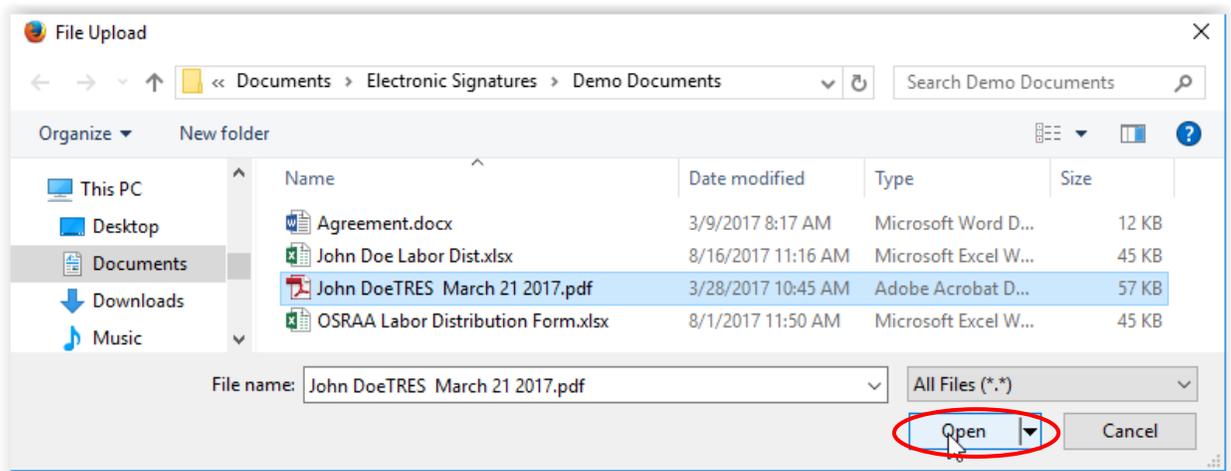
Under "Add Documents to the Envelope", choose "Upload":



Your browser's "File Upload" screen will be displayed:



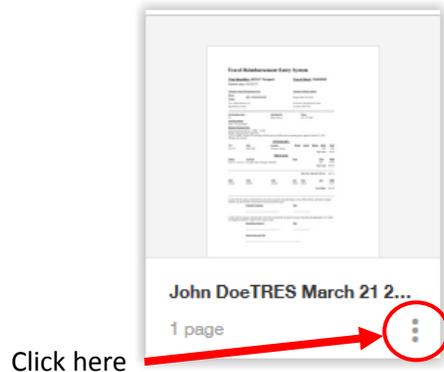
Browse to your document. Click on it to select it. Then, choose "Open"



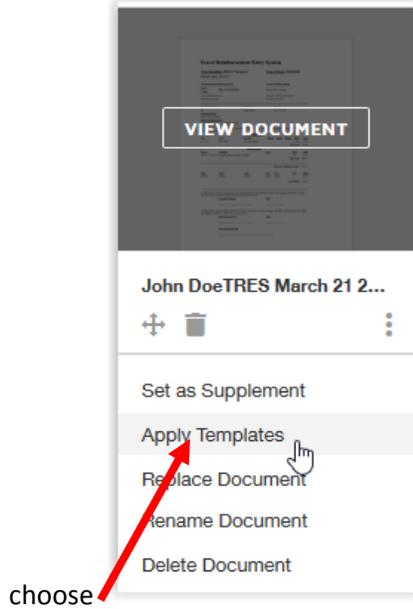
DocuSign will upload the document you have selected.

### Apply the Template

Apply the TRES template to the document you have uploaded. Use the ellipsis, which is located at the bottom of the document preview.

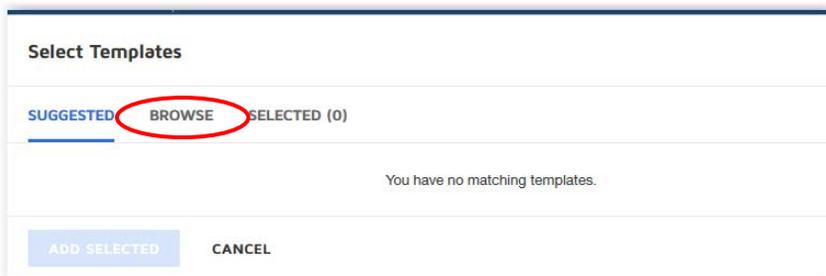


When you click it, DocuSign will open the “More Options” menu. Choose “Apply Templates.”



### Select the Template

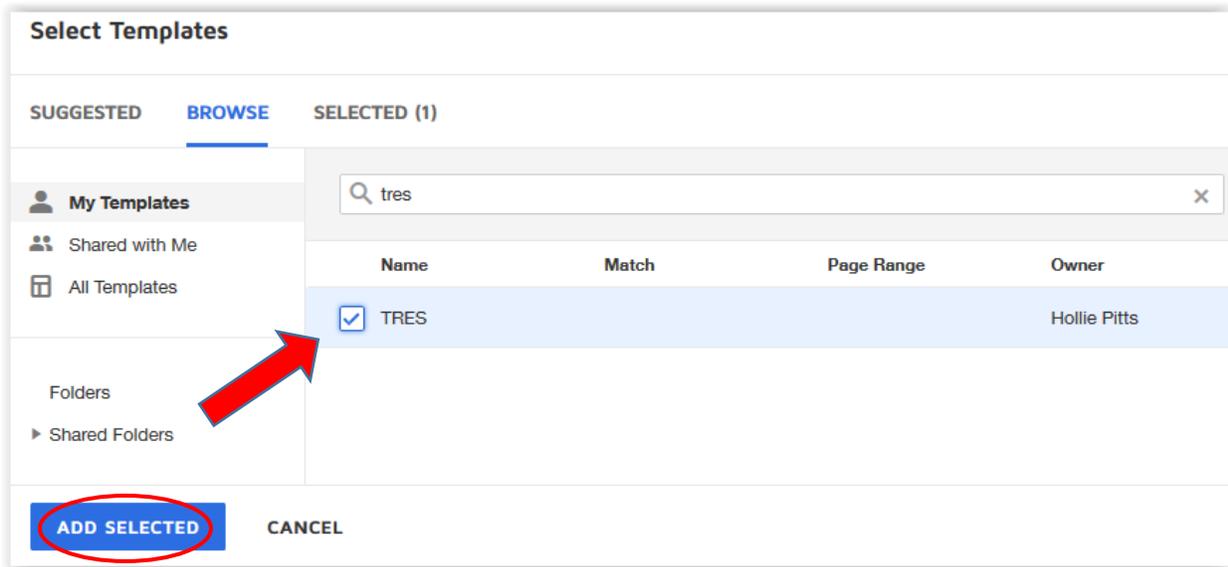
DocuSign will now allow you to pick the template. Click the “Browse” tab



The system will display a list of templates available for your use. You may see the “TRES” template near the top of the list. If not, search for it by entering “tres” in the search area. Then, press Enter.



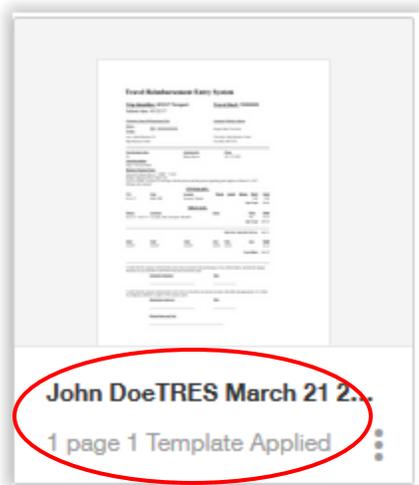
The system should locate the template.



Check the box next to the template, and then press “Add Selected”.

DocuSign presents a message when the template is successfully applied.

Now DocuSign has changed the “Add Documents” area of your screen. It should look as shown below:



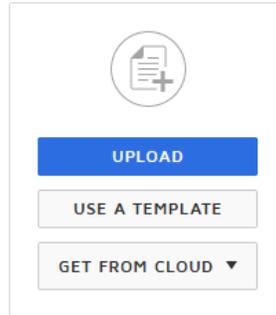
Notice the information below the image of your document (circled above). It should show:

1. Your document Name
2. The correct number of pages in the document
3. And, that **ONE** template has been applied.

If anything is incorrect, discard the document, using the option under “Other Actions” at the upper right of the screen, and begin again.

## Additional Supporting Documents

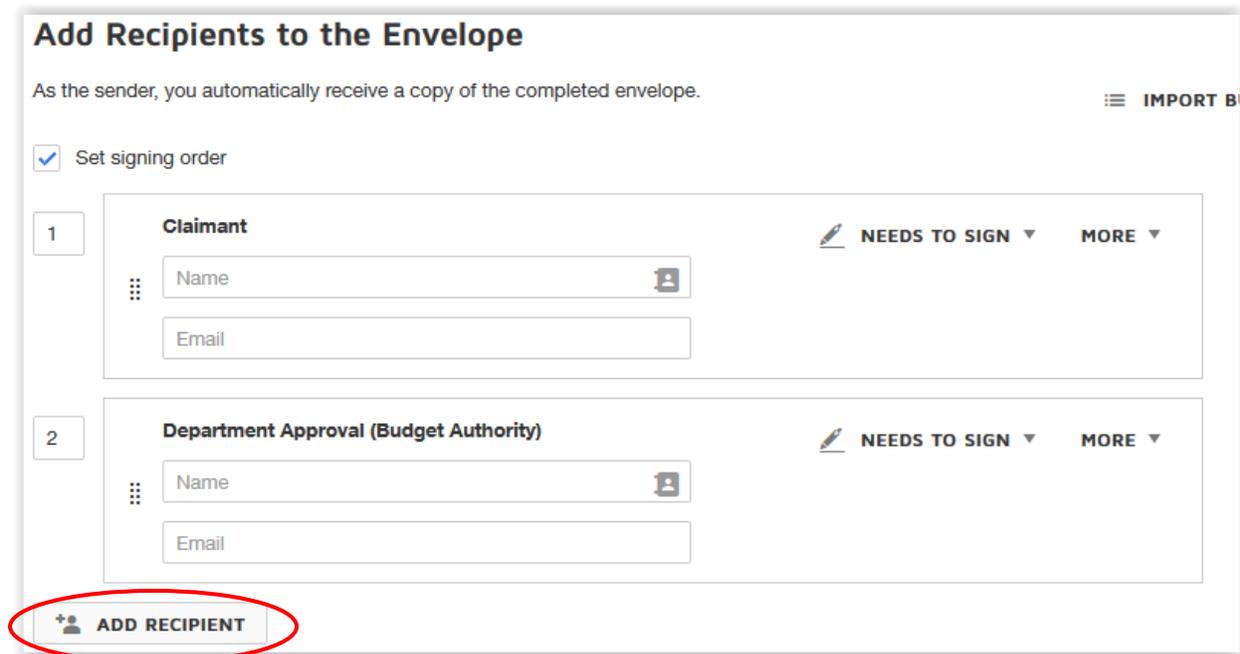
Additional, supporting documents may be uploaded by using the “Document Upload” icon:



which is shown adjacent to the icon of your initial form. You may add several items, as a new button will open after each addition. These additions are appended to the TRES form to create one document.

## Add Recipients

Fill in the recipient information for each role.

A screenshot of a web form titled "Add Recipients to the Envelope". Below the title is the text "As the sender, you automatically receive a copy of the completed envelope." and an "IMPORT B" button. A checkbox labeled "Set signing order" is checked. The form contains two recipient entries. The first entry is numbered "1" and titled "Claimant". It has a "Name" field with a person icon, an "Email" field, and a "NEEDS TO SIGN" button with a dropdown arrow and a "MORE" button with a dropdown arrow. The second entry is numbered "2" and titled "Department Approval (Budget Authority)". It also has a "Name" field with a person icon, an "Email" field, and a "NEEDS TO SIGN" button with a dropdown arrow and a "MORE" button with a dropdown arrow. At the bottom left, there is a button with a plus sign and a person icon, labeled "ADD RECIPIENT", which is circled in red.

If you would like to add more recipients in order to send someone else a copy, use the ADD RECIPIENT button,

The screenshot shows a user interface for adding recipients. On the left, there are input fields for 'Name' and 'Email', and a button labeled 'ADD RECIPIENT'. On the right, a dropdown menu is open under the heading 'NEEDS TO SIGN'. The menu items are: 'Needs to Sign', 'In Person Signer', 'Receives a Copy' (circled in red), 'Needs to View', 'Specify Recipients', 'Allow to Edit', and 'Update Recipients'. Below the dropdown, there is a section titled 'Envelope Custom Fields' with labels for 'Business Center' and 'Department'.

and specify their role as “Receives a Copy” instead of “Needs to Sign”, which is one of the choices on the dropdown by “Needs to Sign”.

**Now, check the document itself**

Press “Next” in the upper right corner of the screen:

The screenshot shows a dark blue navigation bar with three elements: 'HELP', 'OTHER ACTIONS' with a downward arrow, and a yellow 'NEXT >' button.

The system will display the form you have uploaded:

The screenshot shows a light blue form titled 'Travel Reimbursement Entry System'. It contains the following information:

- Trip Identifier:** 032117 Newport
- Travel Doc#:** T#####
- Submit date: 03/22/17
- Claimant's Name ID/Department/Title: Doc, John ID: #####
- Claimant's Mailing Address: Oregon State University

At the bottom of the TRES document, the form will show the tags (Document Fields) from the template:

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I certify that the expenses itemized above have been incurred in the performance of my official duties, and that the charges therefore are just and that no part thereof has been heretofore paid.

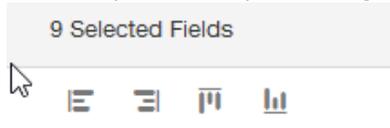
<u>Claimant's Signature</u> ↓	<u>Date</u> Date Signed
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I certify that the expenses itemized above have been reviewed by me and are accurate, allowable and appropriate. It is within my budgetary authority to approve this expense report.

<u>DeSignent Approval</u> ↓	<u>Date</u> Date Signed
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<u>Printed Name and Title</u> Full Name	Title
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While you should not need to make adjustments, you may make any necessary adjustments to the positions of the tags either, individually (select the tag by clicking on it) or as a group by using your mouse to drag a box around them. You may also move selected tags with your keyboard arrow keys, or the alignment keys at the top of the right panel:



### **Send your Document**

When you are satisfied with the placement of the tags, press "Send" in the upper right corner of the screen:



### **Monitor the Status of your Documents**

On the DocuSign home page, you will see an OVERVIEW panel showing the status of your documents, grouped by "action required", "waiting for others", "expiring soon" and "completed". Click on the area of interest and you to review documents.

### **Next steps after the Document is Completed in DocuSign**

If you do not create Banner invoices, your business center will complete the TRES process. *Check with your business center on how they would like to have TRES documents submitted.* There are two probable options:

1. Add a third recipient, as shown on pages 6-7 above, which is either an individual within the Business Center, or is a "Signing Group" at the Business center, or
2. Print this document once it is "Completed" in DocuSign and scan it to the Business Center using the designated scanner (which routes the image to a particular shared drive at the business center).

The business center employee will:

- create the invoice, and
- download the document and put it into the appropriate Nolij folder.

It will then route through the Banner approval process and the claimant will be paid.