



Favorites | Main Menu

My Page | Workflow

Personalize Content Layout Valerie Kessler (100750919)

My Menu

- Employee Self Service
- HR Transactions
- eRecruit
- Reports Portfolio
- Forms Portfolio
- PeopleSoft Support Requests
- Security Requests
- Reporting Tools
- PeopleTools
- ID Search
- CFS PeopleSoft Financials
- CFS Datawarehouse
- LinkedIn Learning (Lynda.com)
- PeopleSoft Campus Solutions
- PeopleSoft Human Resources
- Blackboard Transact
- Canvas
- Student Clubs & Organizations
- Bizflow Workflow
- GrantLaunch
- Concur Travel
- Kuali Ready
- Change My Password

Create your ABJ in Forms Portfolio as you normally would and save as a PDF.

Log into DocuSign <https://account.docusign.com/> with your Fresno State Credentials

DocuSign

Please log in to your account

CONTINUE

No account? Sign up for free

Home Manage Templates Reports Admin

Sign or Get Signatures **NEW**

Select "New" and "Send an Envelope"

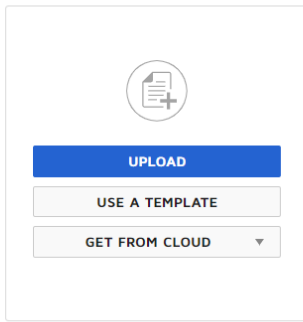
Home Manage Templates Reports Admin

Sign or Get Signatures **NEW**

- Send an Envelope
- Sign a Document
- Use a Template
- Create a PowerForm

Last 6 Months | WHAT'S NEW | CUSIGN ID

Add Documents to the Envelope



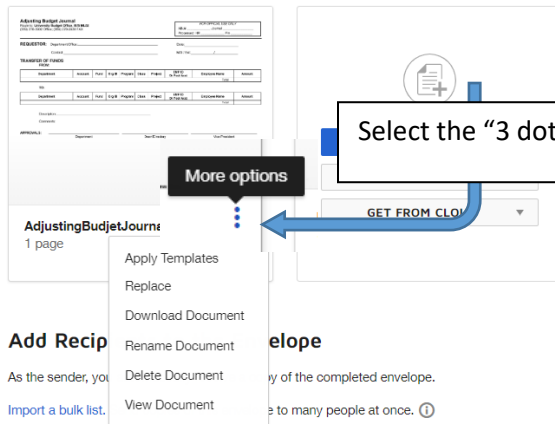
Select "Upload" to select your "Forms" PDF you saved.

Select upload again to add any back up detail.

NOTE: When you upload, DocuSign may pop up a template it thinks you need. Disregard it by canceling the pop up window and apply the template per the instructions below.

NOTE: If you are uploading **multiple** ABJ (Adjusting Budget Journal) Forms you must apply the template to each of the pages where you need the approval signatures. Repeat the process below until the template is applied to each signature page.

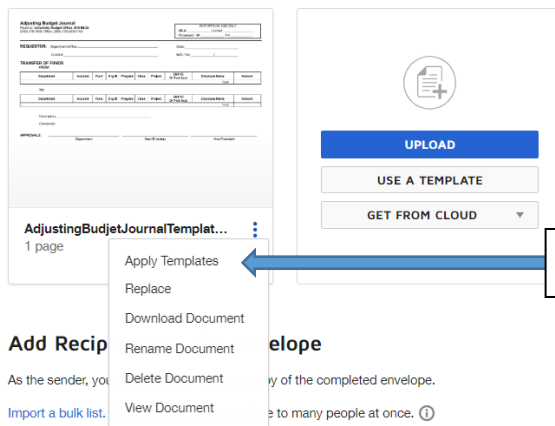
Add Documents to the Envelope



Select the "3 dots" for more options

Add Recipients to the Envelope
As the sender, you can add recipients to the completed envelope.
[Import a bulk list.](#) [Add recipients to many people at once.](#) ⓘ

Add Documents to the Envelope



Select "Apply Templates"

Apply Templates for AdjustingBudgetJournalTemplate.pdf

SUGGESTED **BROWSE** SELECTED (1)

1. Select "Browse"

2. Select "Shared Folders"

3. Select "Budget Office"

4. Select "Direct Pay" Approval Template

5. Select "Apply Selected"

Name	Owner	Last Change
<input checked="" type="checkbox"/> Adjusting Budget Journal Template	Valeri...	...

The template is designed to represent the signature flow of the **Adjusting Budget Journal Form**. You can remove any unwanted signature blocks below, by pressing the “X” to remove. (See screen shot at bottom)

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

[Import a bulk list](#). Send copies of this envelope to many people at once. ⓘ

Set signing order

1 Department NEEDS TO SIGN MORE

Name *

Email *

3 Dean NEEDS TO SIGN MORE

Name *

Email *

3 Vice President NEEDS TO SIGN MORE

Name *

Email *

4 Budget Office NEEDS TO SIGN MORE

Name * Lisa Chavez

Email * lisachavez@csufresno.edu

Enter the Appropriate contact information

ADD RECIPIENT

3 Vice President NEEDS TO SIGN MORE

Name *

Name is required

Email *

Email is required

Select “X” to remove additional unwanted approval blocks

Message to All Recipients

Custom email and language for each recipient

To: Department

Email Language *

English (US) ▼

Email Subject *

Please DocuSign: Adjusting Budget Journal

Characters remaining: 59

Email Message

Hello,
Please approve the adjusting budget journal for processing. Please contact me should you have any questions.

Thank you!

Characters remaining: 9873

To: Dean

Email Language *

English (US) ▼

Email Subject *

Please DocuSign: Adjusting Budget Journal

Characters remaining: 59

Email Message

Hello,
Please approve the adjusting budget journal for processing. Please contact me should you have any questions.

Thank you!

Characters remaining: 9873

Customize message as needed



SEND NOW

NEXT

Select "Next" to Review



Adjusting Budget Journal

Route to: **University Budget Office, M/S ML52**
 (559) 278-3902 Office; (559) 278-2928 FAX

FOR OFFICIAL USE ONLY			
ABJ#	Text	Journal	Text
Processed: HR	Date Signed	Fin	Date Signed

REQUESTOR: Department/Office: _____

Contact: _____

NOTE: You might need to move and align these fields with your uploaded ABJ Form.

TRANSFER OF FUNDS

FROM:

Department	Account	Fund	Org ID	Program	Class	Project	EMP ID Or Pool Acct	Employee Name	Amount
									Total

TO:

Department	Account	Fund	Org ID	Program	Class	Project	EMP ID Or Pool Acct	Employee Name	Amount
									Total

Description: _____

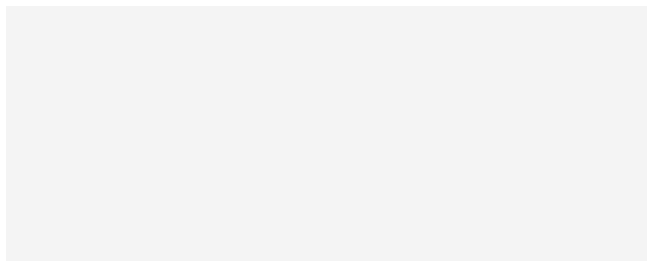
Comments: _____

APPROVALS:

<input type="button" value="Sign"/> <input type="button" value="Date Signed"/>	_____ Department	<input type="button" value="Sign"/> <input type="button" value="Date Signed"/>	_____ Dean/Directory	_____ Vice President
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Text

Text



SEND NOW

NEXT

Once you Select "Send" the form will be sent to your designated approvers you assigned and then to the Budget office. You will receive a notification once the document is complete.