



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 Requisition 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

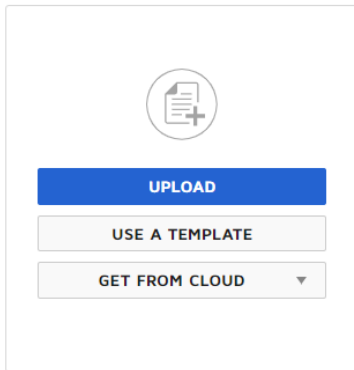
Sign or Get Signatures

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



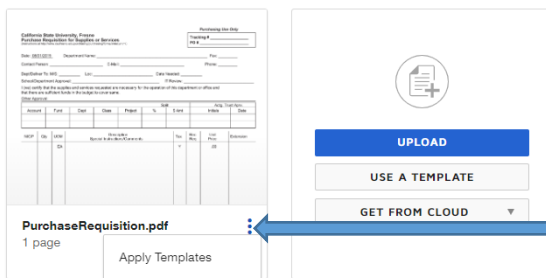
Select "Upload" to select your "Forms" PDF you saved.

Select upload again to add your scanned quotes or additional information.

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** Requisition 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

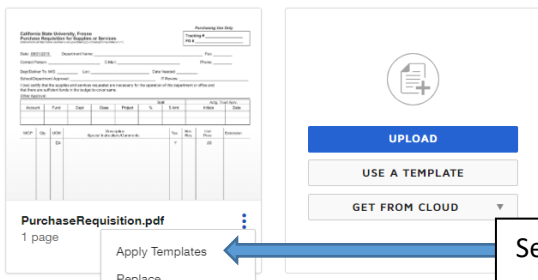


Select the "3 dots" for more options

Add Requisition to the Envelope

As the sender, you can add a requisition to the completed envelope. You can add a requisition to many people at once.

Add Documents to the Envelope



Select "Apply Templates"

Add Requisition to the Envelope

As the sender, you can add a requisition to the completed envelope. You can add a requisition to many people at once.

Apply Templates for PurchaseRequisition.pdf

SUGGESTED **BROWSE** SELECTED

1. Select "Browse"

2. Select "Shared Folders"

3. Select "Procurement"

4. Select "Purchase Requisition"

5. Select "Apply Selected"

Name	Owner	Last Change
<input type="checkbox"/> Please DocuSign: Procard Approval	Valerie Kessler	3/18/2020 02:45:10 pm
<input type="checkbox"/> Purchase Requisition - Template		9:41:40 am

The template is designed to represent the signature flow of the **Purchase requisition 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 **Approval 1** ✎ NEEDS TO SIGN ▾ MORE ▾

Name *


⋮ 

Email *

Enter the Appropriate contact information

2 **Approval 2** ✎ NEEDS TO SIGN ▾ MORE ▾


Name *

⋮ 

Email *

3 **Procurement** ✎ NEEDS TO SIGN ▾ MORE ▾

Name *

⋮ Brian Cotham 


Email *

bcotham@csufresno.edu


 **ADD RECIPIENT**

2 **Approval 2** ✎ NEEDS TO SIGN ▾ MORE ▾

Name *

⋮ 

Email *



Select “X” to remove additional unwanted approval blocks

It is **very important** to enter the **Vendor Name** in the Email Subject field.

Message to All Recipients

Custom email and language for each recipient

To: Robert Guinn

Email Language *
English (US)

Email Subject *
Please DocuSign: Purchase Requisition VENDOR NAME
Characters remaining: 50

Email Message
Hello Managers,
Please approve the purchase requisition for processing. Please contact me should you have any questions.
Thank you!
Characters remaining: 9868

To: Valerie Kessler

Email Language *
English (US)

Email Subject *
Please DocuSign: Purchase Requisition VENDOR NAME
Characters remaining: 50

Email Message
Hello Managers,
Please approve the purchase requisition for processing. Please contact me should you have any questions.

SEND NOW **NEXT**

Very important to enter the **Vendor or Payee name**

Customize message as needed

Select "Next" to Review

California State University, Fresno
 Purchase Requisition for Supplies or Services
(Instructions at http://www.csufresno.edu/purchasing/purchasing/forms/index.cfm)

Date: 08/01/2019 Department Name: _____
 Contact Person: _____ E-Mail: _____ Phone: _____

Dept/Deliver To: MS: _____ Date Needed: _____
 School/Department Approval: IT Review:

I (we) certify that the supplies and services requested are necessary for the operation of this department or office and that there are sufficient funds in the budget to cover same.

Other Approval:

Split							Acct. Trust Appr.	
Account	Fund	Dept	Class	Project	%	\$ Amt	Sign	Date
							<input type="button" value="Sign"/>	<input type="button" value="date signed"/>

NICP	Qty	UOM	Description Special Instructions/Comments	Tax	Rec Req	Unit Price	Extension
		EA		Y		.00	

Suggested Vendor (Include Address, Phone #, Contact Person and E-Mail Address).
* attach quote if applicable

Vendor: _____
 Contact: _____
 Address: _____
 Email: _____
 Phone: _____ FAX: _____

Sub-Total	NaN
Discount	.00
Sales Tax	.00
Shipping	.00
Total	NaN

FRSNO FRATH 204 **For Purchasing Use Only**

Buyer # Vendor # Loc Ad

PO Type PO # PO # PO #

PO Comments:

Del/Match Del/Match

Due Date: Payment Terms:

Freight Ship PA \$

Ship Vis Ship ED JIP Overright Dar WC

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

SEND NOW

NEXT

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