Business Process Guide: Project Charter in DocuSign

Overview

San Francisco State University Project Charter is used for submitting budget request for physical planning / capital projects. This document provides step by step instructions to complete the Project Charter through DocuSign. This improved process will benefit all parties involved and make the process more streamlined, transparent, and sustainable:

Project Manager

1. Initiate and complete a Project Charter electronically
2. Attach any supporting documentation
3. Automate routing to obtain appropriate approvals

Funding Department

1. Enter accurate funding account information
2. Track documents in real time

Approvers

1. Review and approve Project Charter electronically anywhere, anytime
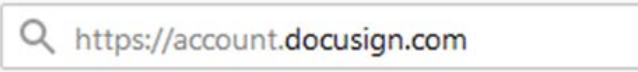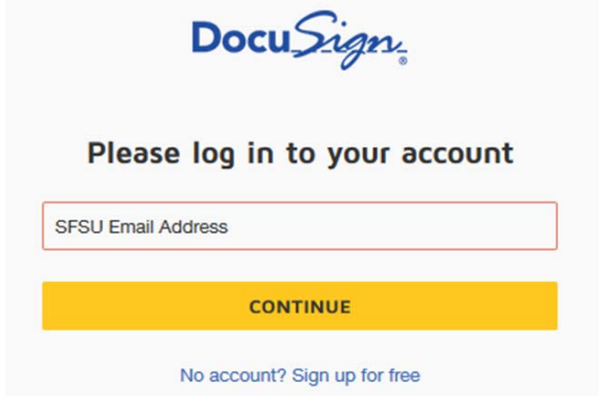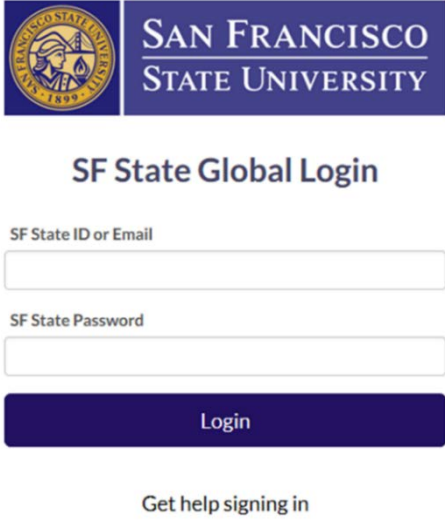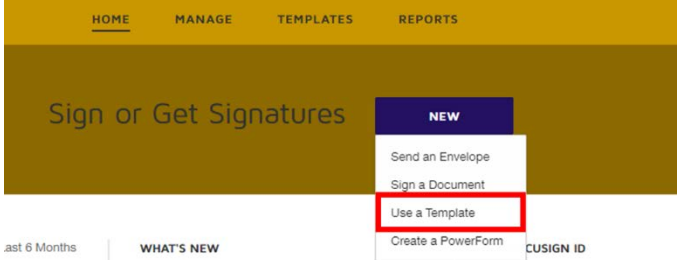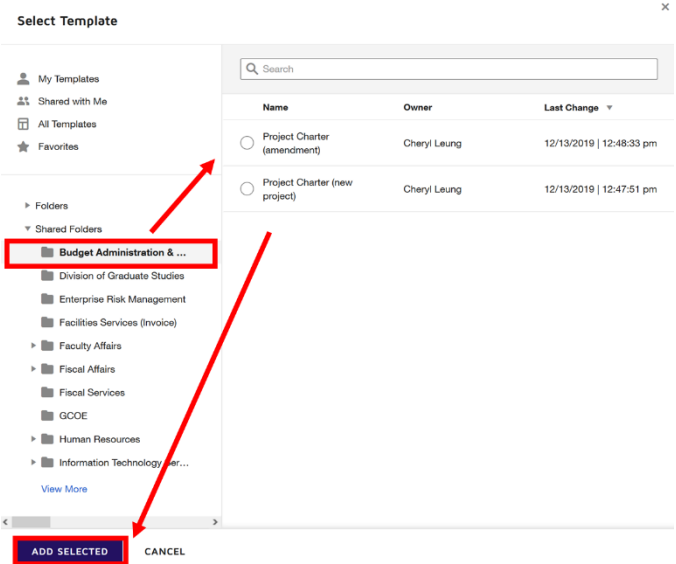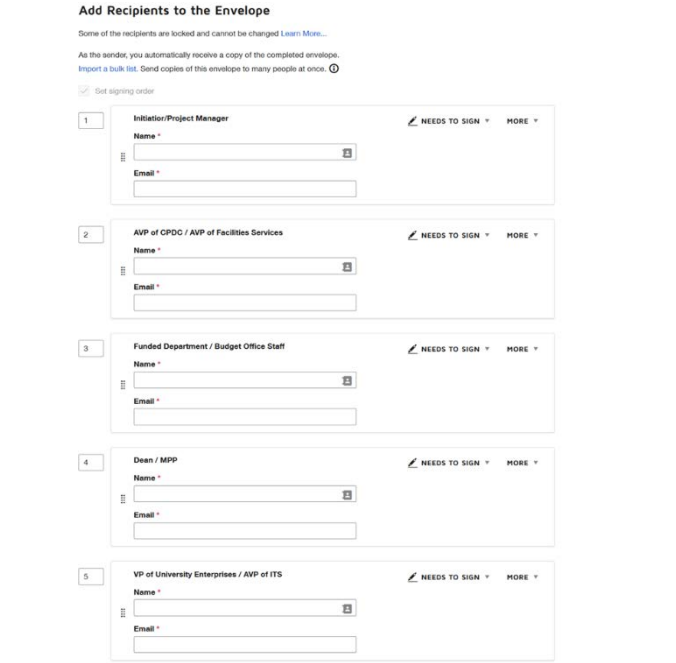2. Offers a secure and sustainable way to sign documents

Budget Administration & Operations

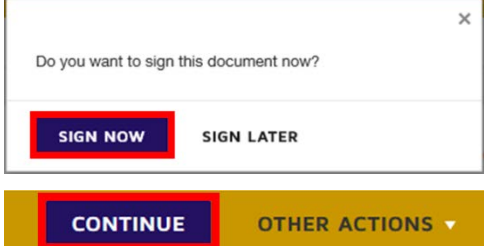1. Perform budget review efficiently
2. Reduce rework and errors

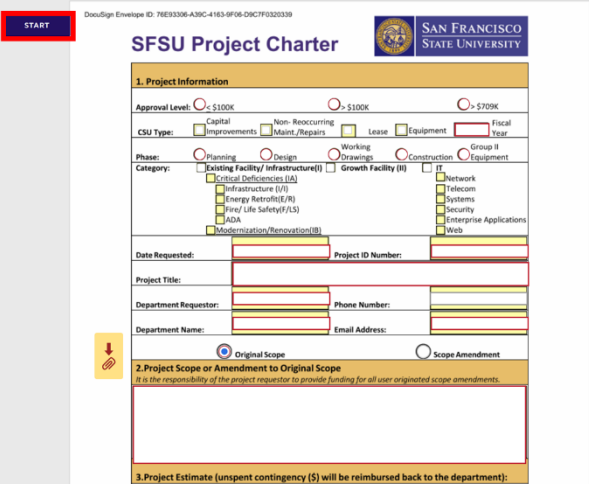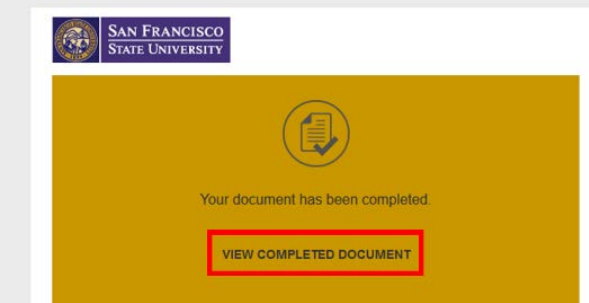*For general questions regarding Project Charter, please contact ShuMei (May) Xie, Capital Budget Analyst, at xies@sfsu.edu or 415.338.3145.*

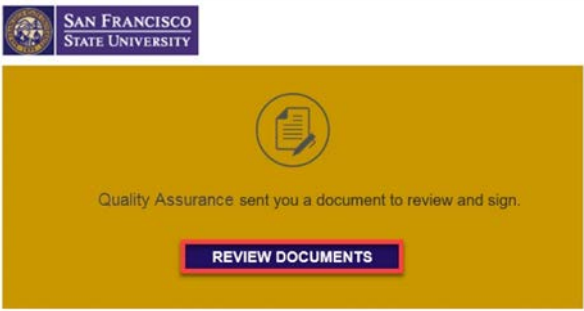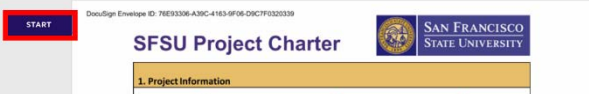*For general questions regarding DocuSign, please visit DocuSign @ San Francisco State or contact Quality Assurance at qateam@sfsu.edu.*
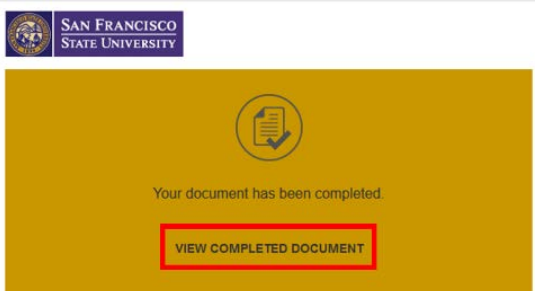
Procedures for Project Manager / Initiator

Steps	Examples
1. To access SFSU's DocuSign homepage, please go to https://account.docusign.com/	https://account.docusign.com
2. Enter your **SFSU email address** and select **CONTINUE**.	DocuSign® Please log in to your account SFSU Email Address **CONTINUE** No account? Sign up for free
3. Enter your **San Francisco State email address** & select **CONTINUE**. Enter your San Francisco State ID or email address and password to access your DocuSign account.	SAN FRANCISCO STATE UNIVERSITY SF State Global Login SF State ID or Email SF State Password Login Get help signing in
4. From the DocuSign homepage, click on the **NEW** button and then select **USE A TEMPLATE** from the drop down menu.	HOME MANAGE TEMPLATES REPORTS 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

Steps	Examples
5. Under Shared Folders, choose **Budget Administration & Operations**. Check the box for either **Project Charter (new project)** or **Project Charter (amendment).** When you are done, click **ADD SELECTED**.	Select Template My Templates, Shared with Me, All Templates, Favorites Folders, Shared Folders, **Budget Administration & ...**, Division of Graduate Studies, Enterprise Risk Management, Facilities Services (Invoice), Faculty Affairs, Fiscal Affairs, Fiscal Services, GCOE, Human Resources, Information Technology Ser…, View More Name / Owner / Last Change ○ Project Charter (amendment) — Cheryl Leung — 12/13/2019 | 12:48:33 pm ○ Project Charter (new project) — Cheryl Leung — 12/13/2019 | 12:47:51 pm **ADD SELECTED** CANCEL
6. Under Add Recipients to the Envelope, enter recipient contact information (e.g. add yourself as **Initiator/Project Manager**). When complete, click **NEXT** at the bottom left corner of the page.	Add Recipients to the Envelope Some of the recipients are locked and cannot be changed Learn More… 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 Initiator/Project Manager — Name*, Email* — NEEDS TO SIGN / MORE 2 AVP of CPDC / AVP of Facilities Services — Name*, Email* — NEEDS TO SIGN / MORE 3 Funded Department / Budget Office Staff — Name*, Email* — NEEDS TO SIGN / MORE 4 Dean / MPP — Name*, Email* — NEEDS TO SIGN / MORE 5 VP of University Enterprises / AVP of ITS — Name*, Email* — NEEDS TO SIGN / MORE
7. Click **SEND** at the bottom left corner of the page to initiate transaction. *Note: You will fill out the form after the transaction is sent.*	BACK **SEND**
8. Click **SIGN NOW** and then **CONTINUE** in DocuSign.	Do you want to sign this document now? **SIGN NOW** SIGN LATER **CONTINUE** OTHER ACTIONS ▾

Steps	Examples
9. Select **START** to begin filling out required information on the Project Charter and attach required supporting documentation by using the attach pin.	
10. Click **FINISH** when you are done.	
11. When the transaction is completed, you will receive a DocuSign email notification with the signed document and transaction summary attached. You may also access the signed document in your DocuSign account by selecting **VIEW COMPLETED DOCUMENT**.	

Procedures for Approvers

Steps	Examples
1. To access the Project Charter doucment, open the DocuSign email and select **REVIEW DOCUMENTS**.	
2. Enter your **San Francisco State email address** & select **CONTINUE**. Enter your San Francisco State ID or email address and password to access your DocuSign account.	
3. Select **START** to begin reviewing the Project Charter.	
4. Click **FINISH** at the top right to complete your review of the document.	
5. When the transaction is completed, you will receive a DocuSign email notification with the signed document and transaction summary attached. You may also access the signed document in your DocuSign account by selecting **VIEW COMPLETED DOCUMENT**.	