

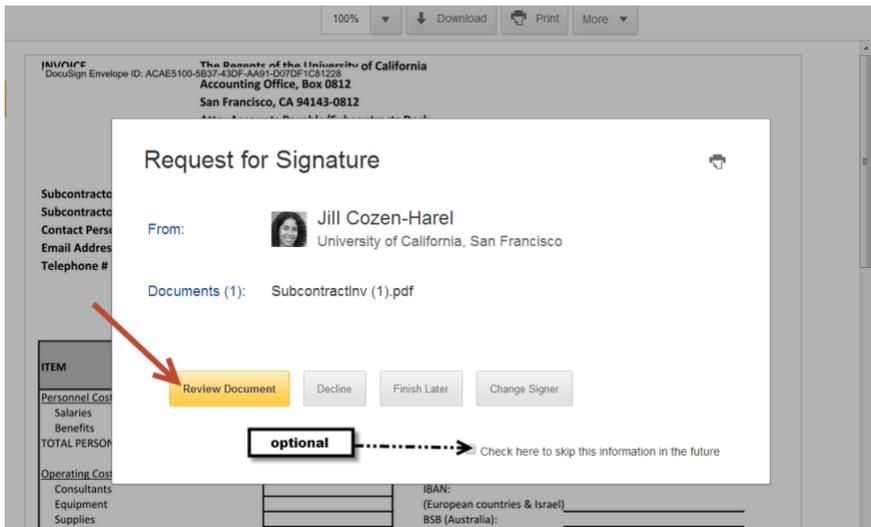
DocuSign Approver (PI) User Guide

Topics:

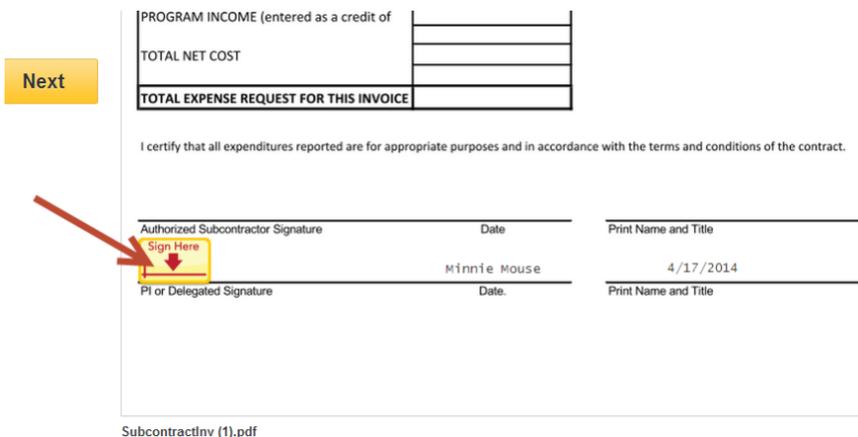
- Approving an invoice
- Declining to sign invoice
- Routing to a different approver
- Receiving completion notice with link to signed invoice
- Out of office – sharing DocuSign folders

Topic 1: Approving an Invoice

1. Click on link in email to open invoice.
2. Click on **Review Document**. Click checkbox if you don't want to see pop-up in the future.

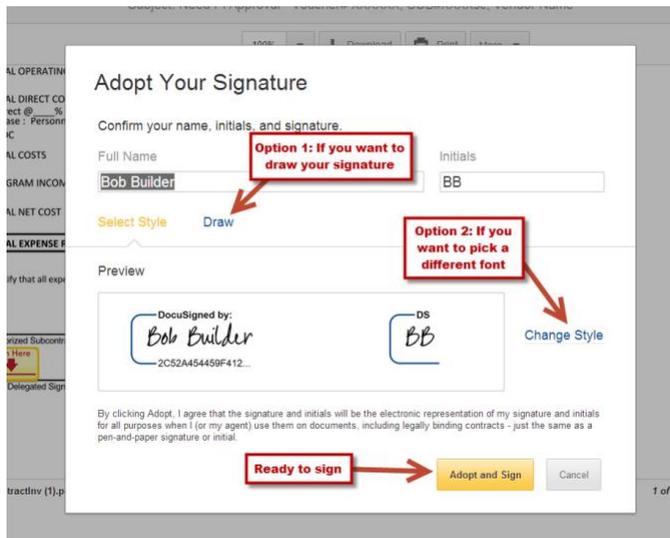


3. Review invoice.
4. Click on yellow **Sign Here** tab.

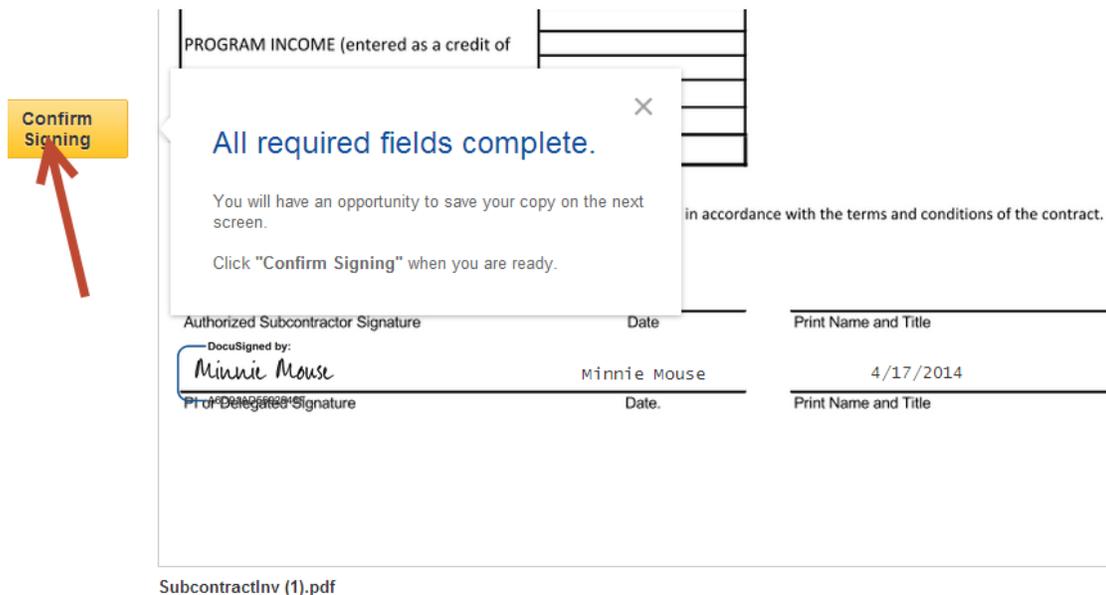


5. Create signature (first time only)

*see **Quick Guide – Setting up Signature** for more details.

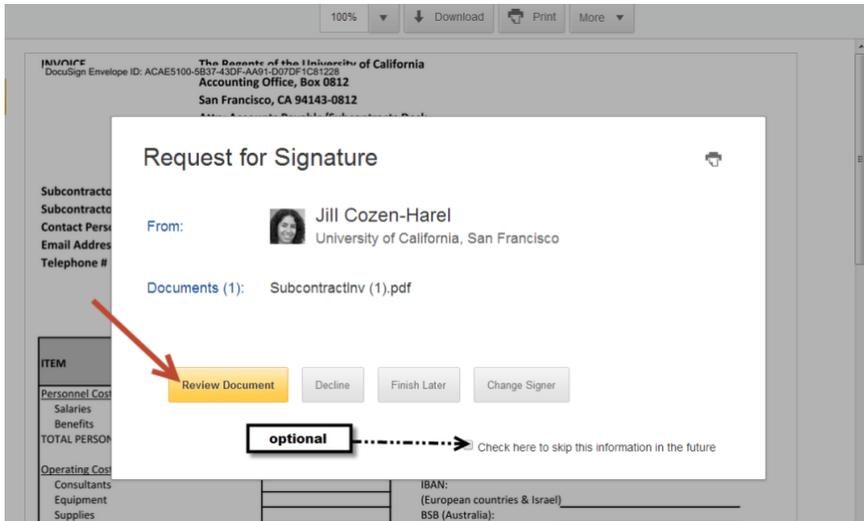


6. Click on **Confirm Signing**. (You must click the yellow **Confirm Signing** tag to finish the task).

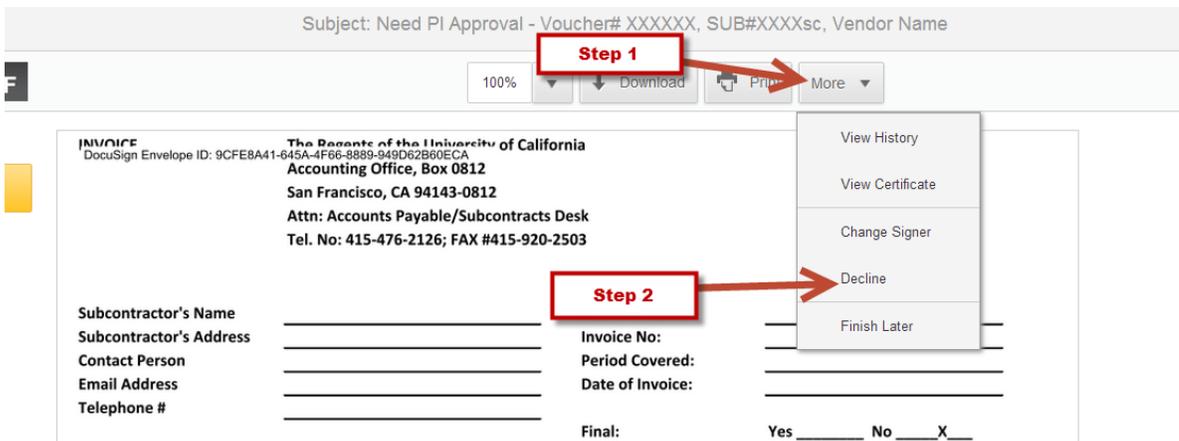


Topic 2: Declining to sign invoice

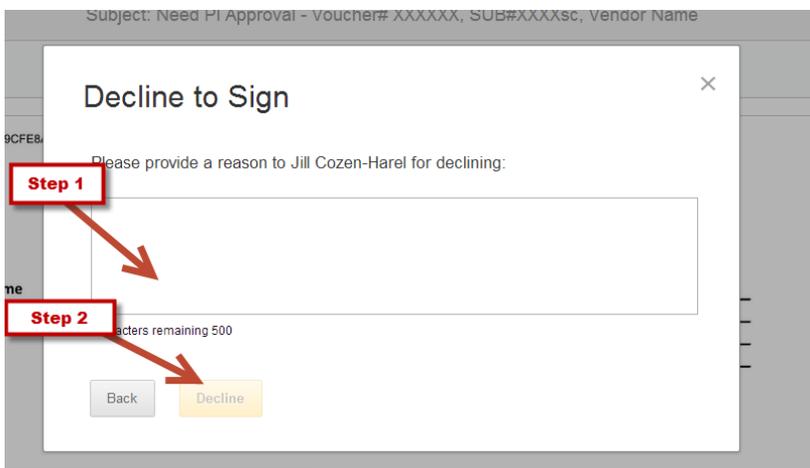
1. Click on link in email to open invoice (not shown).
2. Click on **Review Document**. Click checkbox if you don't want to see pop-up in the future.



3. Review invoice.
4. Press **More** and then select **Decline**.



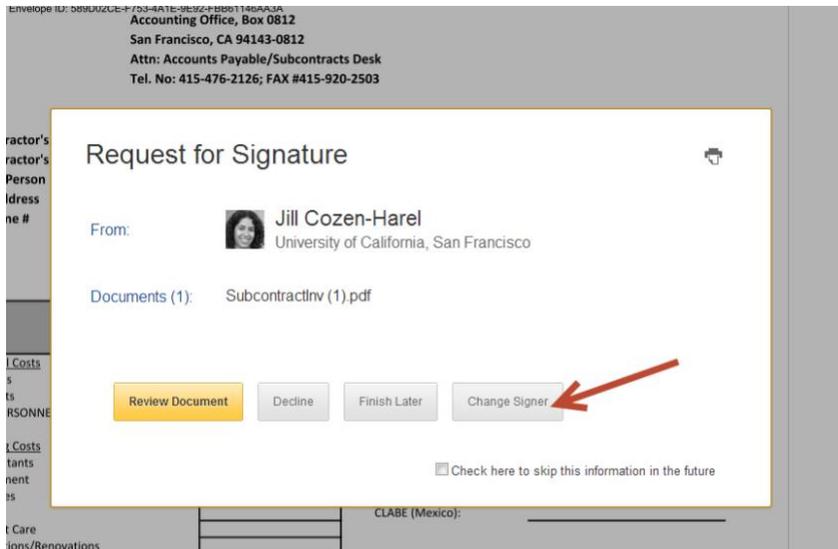
*Enter a reason for declining and then click **Decline**.



Topic 3: Routing to a different approver

If, for some reason, you received an invoice to sign, but you are not the appropriate person to sign it and you know who should sign it instead, you can designate another approver instead of yourself.

1. Select **Change Signer**.



2. In the pop-up Change Signer window, enter the name and email of the new signer as well as a reason for why you are making this change. This reason will be sent back to Accounts Payable (AP). After clicking **Change Signer**, you will become a cc recipient on this envelope and the new approver will receive a notification that you designated him or her as the new signer.

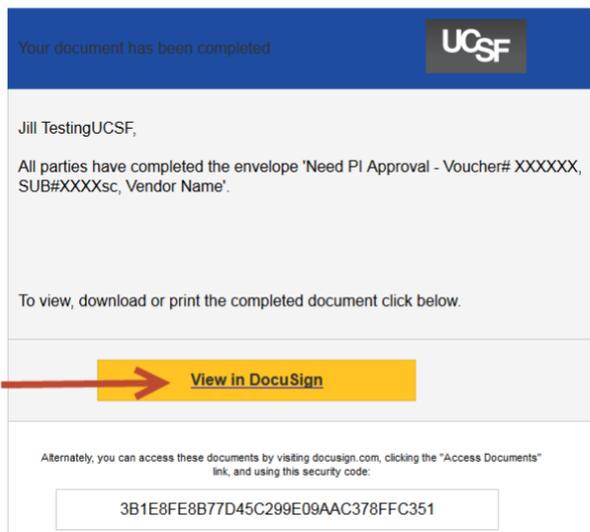


Topic 4: Receiving completion or declination notice with link to invoice

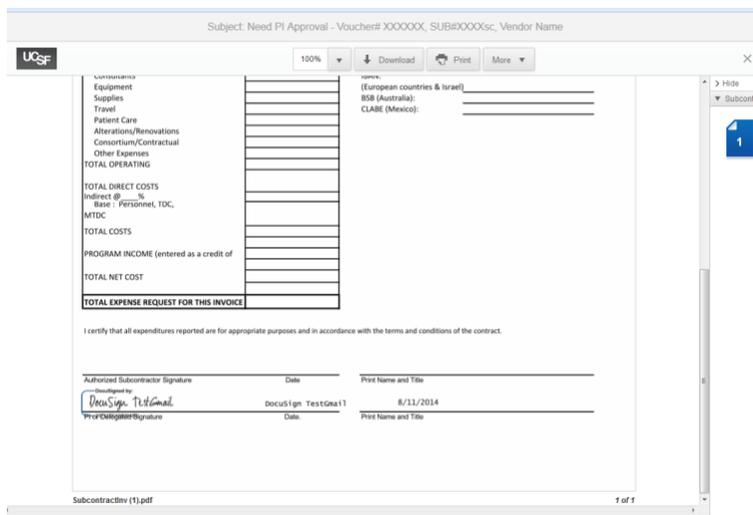
A. Completion – When the approver(s) have signed the invoice, all parties (AP, workflow owner (you), approver(s), and any reviewers) will receive an email notification that the signing process has been completed. The email will contain a link to the signed invoice, which can then be printed or downloaded as needed.

Completed: Need PI Approval - Voucher# XXXXXX, SUB#XXXXsc, Vendor Name

DocuSign System [dse@docuSign.net] on behalf of Jill ...
 To: svc-docuSign-testing
 Monday, August 11, 2014 1:10 PM



You will be directed to the signed invoice.



B. Declination – If you decline to sign, all parties will receive a notice stating that you declined. Only AP will receive the reason that you listed for declining.

See below for AP's view:

Declined: Need PI Approval - Voucher# XXXXXX, SUB#XXXXsc, Vendor Name

DocuSign System <dse@docusign.net>

Sent: Fri 4/18/2014 4:20 PM

To: Cozen-Harel, Jill

Envelope declined

Sent on behalf of DocuSign Support

Jill Cozen-Harel,

DocuSign TestGmail has declined the envelope 'Need PI Approval - Voucher# XXXXXX, SUB#XXXXsc, Vendor Name' (ID:59f36b95-39f0-4408-ace7-ae7b2a9510bf) for the following reasons:

Wrong voucher number

As a result, the envelope has been marked as declined and cannot be completed.

To view the declined document, click below:

[View Documents](#)

You, as the approver, and your post-award analyst/RSA will receive a notification such as this:

Envelope Declined

From:  **Jill Cozen-Harel (jill.cozen-harel@ucsf.edu)**
University of California, San Francisco

Jill TestingUCSF,

DocuSign TestGmail has declined the envelope 'Need PI Approval - Voucher# XXXXXX, SUB#XXXXsc, Vendor Name' (ID:178a5c8c-0b6d-4071-a37d-e2aa63382fed).

As a result, the envelope has been marked as declined and cannot be completed.

To view the declined document, click the link below:

[View in DocuSign](#)

Topic 5: Out of office – sharing DocuSign folders

DocuSign does not currently have a delegation feature. To preempt your being out of office for five business days or more, we ask that you submit a [ServiceNow ticket](#) with the name of the person who will be given access to your DocuSign folders. Ask that co-worker to check your folders every day or two while you are away.