

DocuSign Workflow Owner (RSA/Post-Award Analyst) User Guide

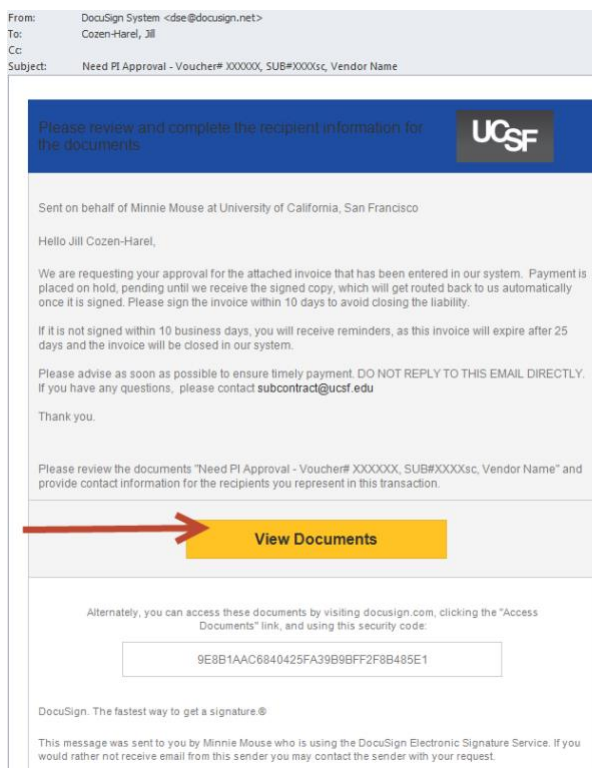
Topics:

- Assigning Single Approver and Optional Note
- Adding Additional Workflow
- Tracking the Status of an Envelope*
- Receiving Completion or Declination Notice with Link to Invoice
- Error Handling
- Out of Office – Sharing DocuSign folders

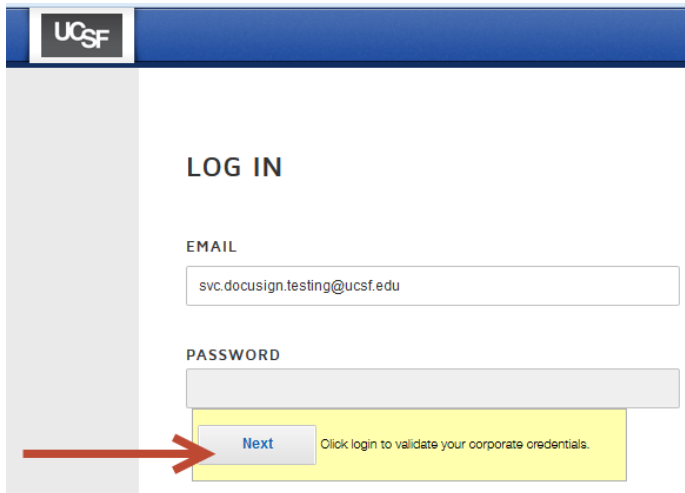
*A DocuSign envelope is like a physical envelope – it is the vehicle to deliver one or more documents for signature within the DocuSign system. Envelopes can be sent to several recipients and contain a defined routing process that is set by the sender.

Topic 1: Assigning Single Approver and Optional Note

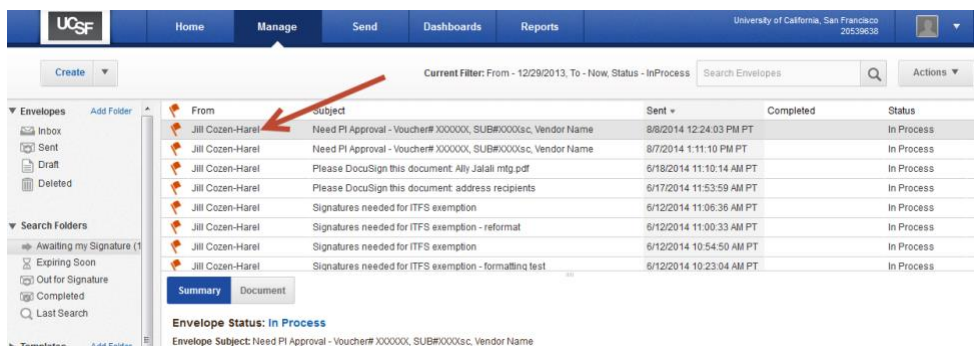
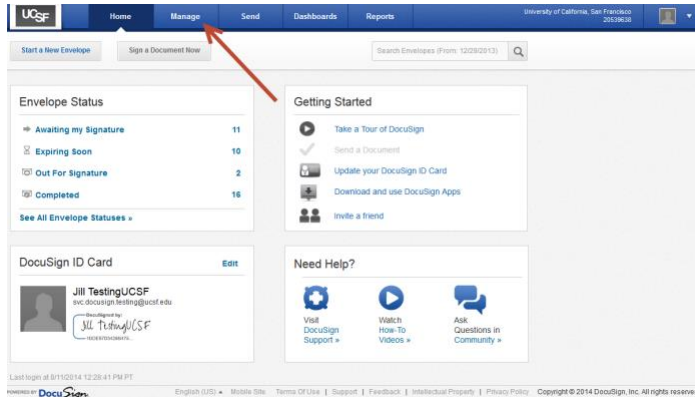
1. When there is an invoice for you to act upon, you will receive an email notification. You have 24 calendar days to approve it or the envelope will expire. Click on the link in the email to open invoice.



2. Login to DocuSign. Your email address will auto populate into the email field and the password field will be greyed out. Click **Next**. If you are not already logged in to MyAccess, you will be directed to log in at this point.



3. Once logged in, select **Manage** from the home screen then double-click on the invoice for which you need to enter the approval workflow. Note that a red flag indicates an envelope requiring your action.



4. Scroll through the invoice to review. Then click on **Edit Envelope**. This will redirect you to the full set of sending and routing options.

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

100% Download Print More

You have been asked to review and add recipient information.
Please enter the email address and name for the associated role and click 'Complete and Send'.

Role	Email	Name
Approver	<input type="text" value="ucsfstest@gmail.com"/>	<input type="text" value="Bob Builder"/>

Complete and Send **Edit Envelope** Show Document

Subcontract Contact
Email Address
Telephone #

Date of Invoice:
Final: Yes ___ No ___ X ___

Wire Transfer Info:

5. Enter the approver's email and name.

UCSF Home Manage Send Dashboards Reports University of California, San Francisco 20539638

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

Documents for Signature

Order	Document	Document Actions
1	Subcontractinv (1).pdf 1 Page	Actions

Recipients and Routing

Order	Email	Name	Action	Identify	Re-Send
1	svc.docusign.testing@ucsf	Jill TestingUCSF	Manage envelope	Email	
2	<input type="text" value="Approver"/>	<input type="text" value="Name"/>	Sign	Email	

Enter approver's email and name

Email Message

Please enter a personalized subject and message so the recipient can verify that the signing request is legitimate.

Email Subject to All Recipients
Need PI Approval - Voucher# XXXXXX, SUB#XXXXsc, Vendor Name

Email Message to All Recipients
We are requesting your approval for the attached invoice that has been entered in our system. Payment is placed on hold, pending until we receive the signed copy, which will get routed back to us automatically once it is signed. Please sign the invoice within 14 days to avoid closing the liability.

Envelope Settings

Brandinn
Next Correct < Back Discard Changes

- You can leave a note for the approver to indicate you reviewed the invoice. To do that, select the approver's name from the drop down in the **Add a note to _____** section and then click **Add**.

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

Documents for Signature

Order	Document	Document Actions
1	Subcontractiv (1).pdf 1 Page	Actions

Recipients and Routing

Order	Email	Name	Action	Identify	Re-Send
1	svc.docusign.testing@ucsf.edu	Jill TestingUCSF	Manage envelope	Email	
2	jane.wong2@ucsf.edu	Jane Wong	Sign	Email	

Add Signer Add CC

Email Message

Please enter a personalized subject and message so the recipient can verify that the signing request is legitimate.

Email Subject to All Recipients
Need PI Approval - Voucher# XXXXXX, SUB#XXXXsc, Vendor Name

Email Message to All Recipients
We are requesting your approval for the attached invoice that has been entered in our system. Payment is placed on hold, pending until we receive the signed copy, which will get routed back to us automatically once it is signed. Please sign the invoice within 14 days to avoid closing the liability.

Customize email language for each recipient

Add a Note to: Jill TestingUCSF, Jane Wong

Envelope Settings

Next Correct Discard Changes

- Enter your note in the text box that appears. This note will appear in the email notification the approver receives and also as a pop-up when the approver views the invoice itself. **It will not automatically indicate your name – be sure to include your name or initials and the date.**

Recipients and Routing

Order	Email	Name	Action	Identify	Re-Send
1	svc.docusign.testing@ucsf.edu	Jill TestingUCSF	Manage envelope	Email	
2	jane.wong2@ucsf.edu	Jane Wong	Sign	Email	

Add Signer Add CC

Email Message

Please enter a personalized subject and message so the recipient can verify that the signing request is legitimate.

Email Subject to All Recipients
Need PI Approval - Voucher# XXXXXX, SUB#XXXXsc, Vendor Name

Email Message to All Recipients
We are requesting your approval for the attached invoice that has been entered in our system. Payment is placed on hold, pending until we receive the signed copy, which will get routed back to us automatically once it is signed. Please sign the invoice within 14 days to avoid closing the liability.

Customize email language for each recipient

Note to Jane Wong (Characters Used: 60/1000)
Invoice looks good - ready to approve. Thanks. Jill 9/3/14

Add a Note to: Jill TestingUCSF

Envelope Settings

Next Correct Discard Changes

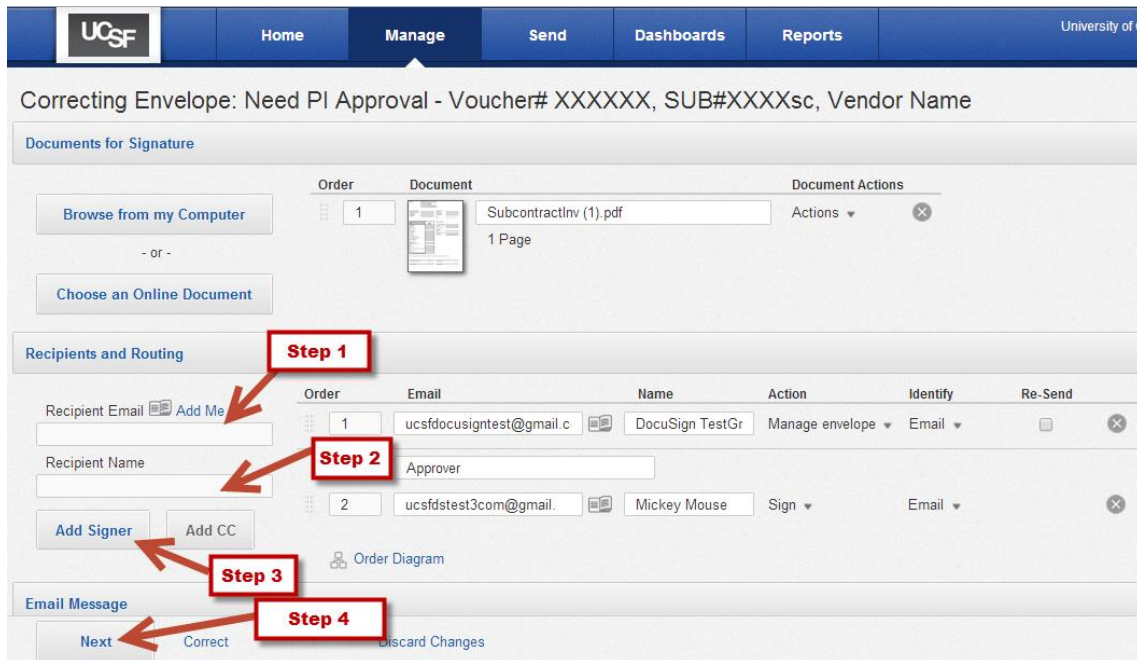
8. Then press **Correct** to send.

Topic 2: Adding Additional Workflow

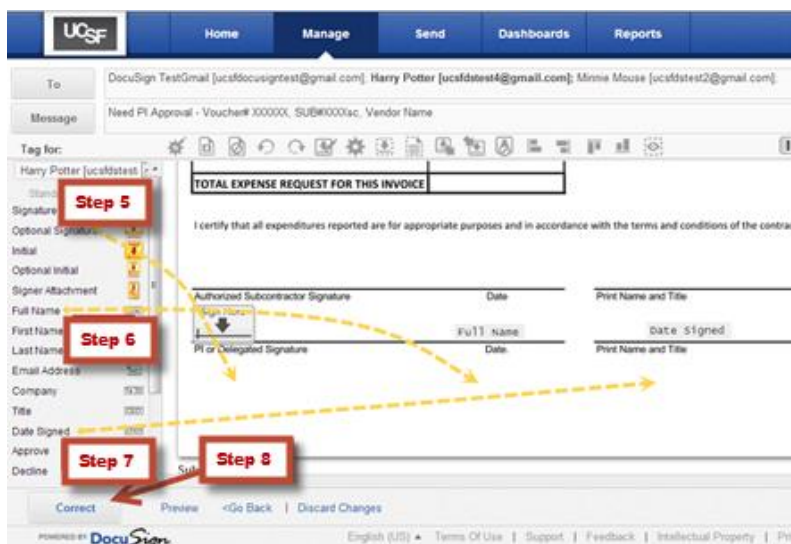
You can add additional approver(s) or reviewers. An approver will sign on the invoice and payment will not move forward until all approvers sign. A reviewer is a user who will receive a copy of the invoice – whether or not they open the invoice will not affect payment. You will need to determine if you want the reviewer to receive an unsigned copy at the same time that the approver receives it or to only receive a copy when it is signed and completed. You will indicate that based on the order number that you assign to that individual in the **receive a copy** role.

Adding an additional approver

1. Enter the additional approver’s email address.
2. Enter additional approver’s name.
3. Press **Add signer**. This will add the second approver’s name and email to the routing order. The default is for both signers to receive the invoice simultaneously.
4. Press **Next**.



5. Check to ensure that the new approver's name is **bold** in the **To** field. If it is not, click on the new approver's name to make it bold. This designates which recipient's signing tags you are setting up. Drag the **Signature** icon and place it below the signature tag already on the invoice.
6. Drag the **Full name** icon to below the full name tag already on the invoice.
7. Drag the **Date Signed** icon to below the full name tag already on the invoice.
8. Press **Correct** to send.



Adding a reviewer (FYI role)

1. Enter the reviewer's email address.
2. Enter the reviewer's name.
3. Press **Add CC**.
4. Modify workflow order, if needed. The default will be to place the cc (receive a copy) recipient as order 3, after the approver, which means that he or she will receive only a completed, signed copy. In order to have the reviewer receive an unsigned copy in parallel to the approver, change the reviewer's order to 2. You can also see a visual representation of the routing order by clicking on the **Order Diagram**.
5. Press **Correct**.

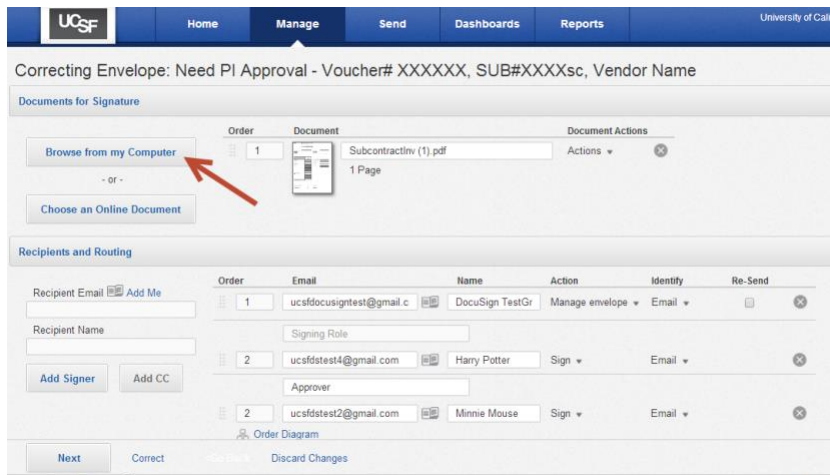
The screenshot shows the DocuSign interface for a document titled "Correcting Envelope: Need PI Approval - Voucher# XXXXXX, SUB#XXXXsc, Vendor Name". The "Recipients and Routing" section is active, displaying a table of recipients and their roles. The table has columns for Order, Email, Name, Action, Identify, and Re-Send. The first recipient is "Jill TestingUCSF" (Approver) at order 1. The second recipient is "DocuSign TestG" (Signer) at order 2. The third recipient is "Name" (Receive a copy) at order 3. Red callout boxes with arrows point to specific elements: Step 1 points to the "Add CC" button; Step 2 points to the "Recipient Email" field; Step 3 points to the "Add CC" button; Step 4 points to the "Order Diagram" link; and Step 5 points to the "Correct" button at the bottom of the page.

Order	Email	Name	Action	Identify	Re-Send
1	svc.docusign.testing@ucsf.edu	Jill TestingUCSF	Manage envelope	Email	✕
2	ucsfdocusigntest@gmail.com	DocuSign TestG	Sign	Email	✕
3		Name	Receive a copy	Email	✕

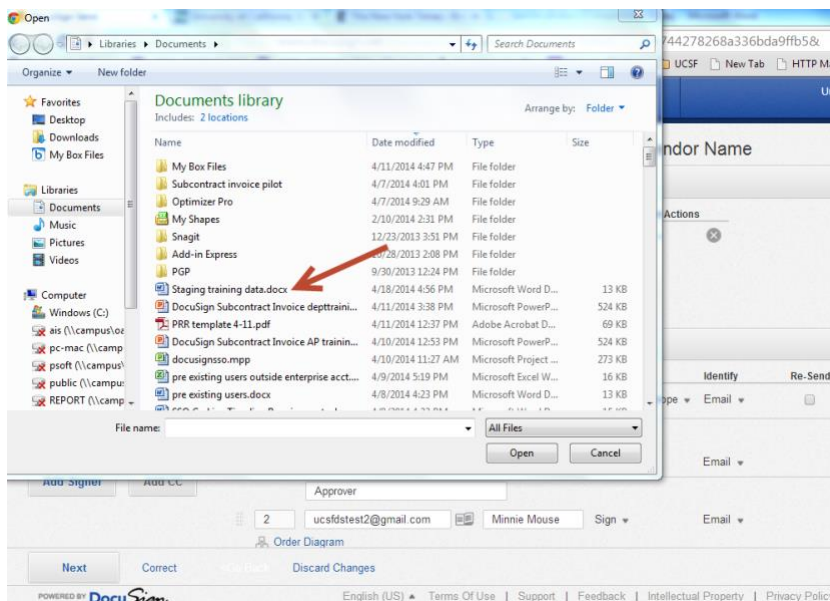
Adding an attachment

You may have a need to attach additional documentation to the invoice, either for the Approver or for Accounts Payable (AP). If you attach something here, both parties will see it and it will be appended to the invoice in DocuSign.

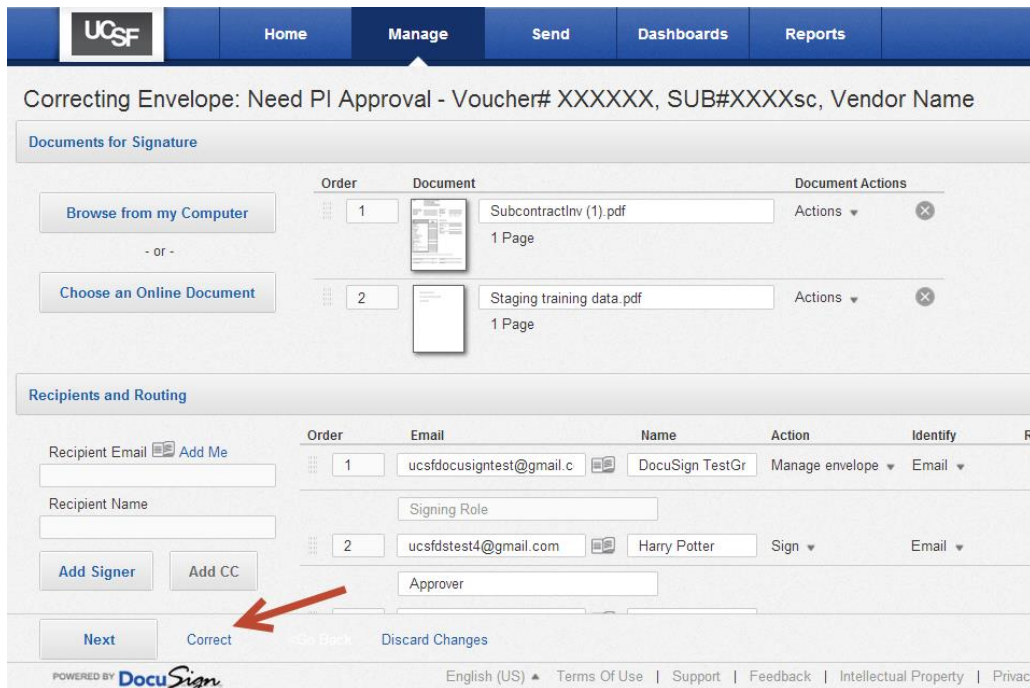
1. Click on **Browse from my Computer**. This will open a window to select the attachment from your hard drive.



2. Double click on the file that you want to attach.

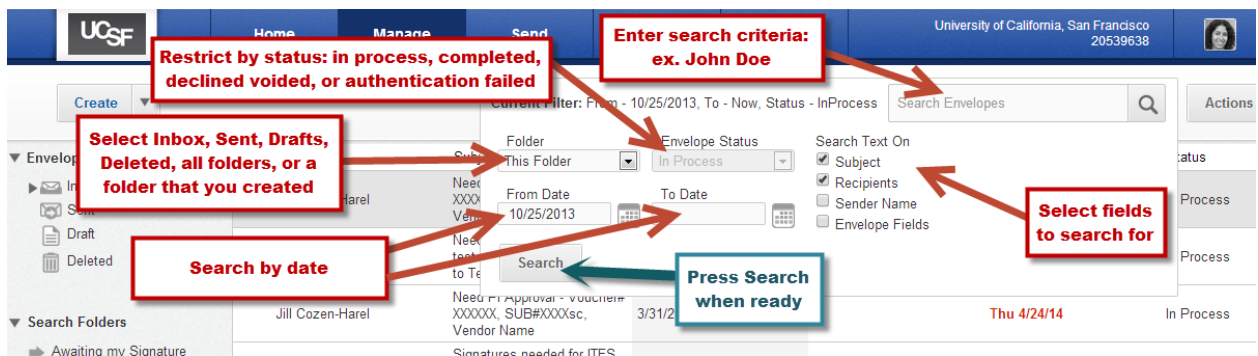


- You will see the file now in the DocuSign console. It will now be appended to the invoice. You can drag it above the invoice if you want that to be the first document viewed by the approver. Press **Correct** when you are done making changes and are ready to send.



Topic 3: Tracking the Status of an Envelope

- From the DocuSign Home Screen, select **Manage** from the top menu bar.
- Find the envelope that you want to track. If needed, use search fields.

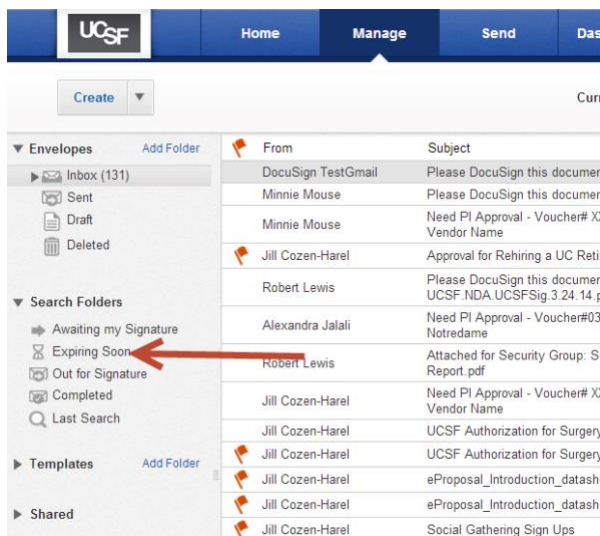


- Once you have highlighted (single-clicked) the envelope that you want, you will see its status on the bottom half of the screen.

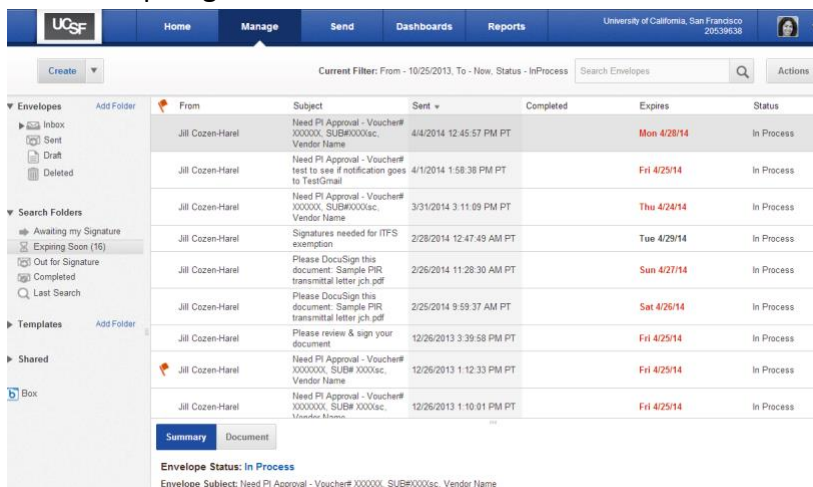


Searching for Envelopes That are Nearing Expiration (less than a week)

- Click on **Expiring Soon** from **Manage** screen. You can also click on it from the **Home** screen.

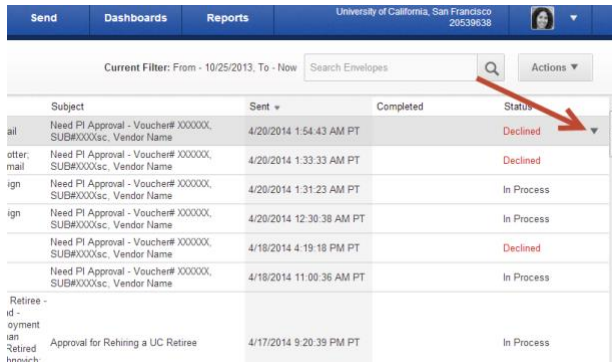


- This will give you a list of the envelopes in which you are either a sender or a recipient and are expiring in the next week.

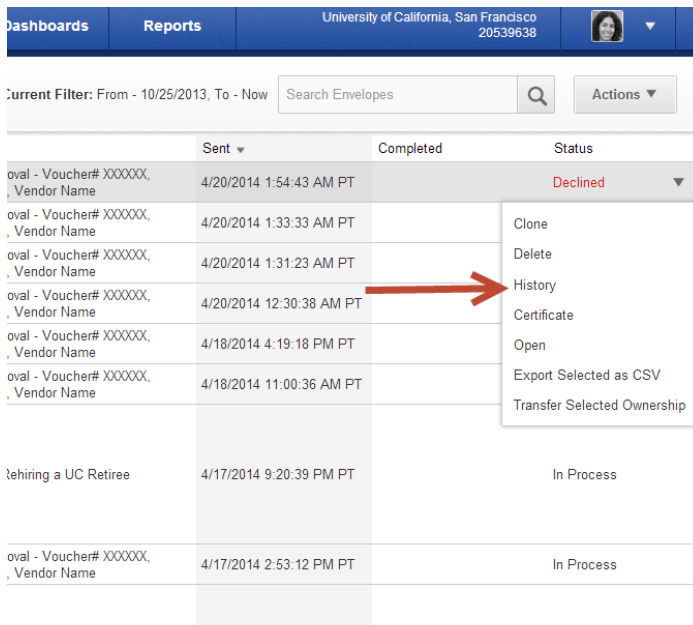


Checking History of an Envelope

1. For a given envelope, drag your cursor to the right of the **status** column until an arrow appears.
2. Click on the arrow to open the drop-down menu.



3. Select **History** from the drop-down menu.



4. View History, including reason for declination, timestamps, viewings, etc.

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 1:03 PM

Your document has been completed

Jill TestingUCSF,

All parties have completed the envelope 'Need PI Approval - Voucher# XXXXXX, SUB#XXXXsc, Vendor Name'.

To view, download or print the completed document click below.

[View in DocuSign](#)

Alternatively, you can access these documents by visiting docuSign.com, clicking the "Access Documents" link, and using this security code:

3B1E8FE8B77D45C299E09AAC378FFC351

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

Commodities	
Equipment	
Supplies	
Travel	
Patient Care	
Alterations/Removals	
Construction/Contractual	
Other Expenses	
TOTAL OPERATING	
TOTAL DIRECT COSTS	
Indirect %	
Base * Pfrtomes, TOC, ATOC	
TOTAL COSTS	
PROGRAM INCOME (entered as a credit of	
TOTAL NET COST	
TOTAL EXPENSE REQUEST FOR THIS INVOICE	

I certify that all expenditures reported are for appropriate purposes and in accordance with the terms and conditions of the contract.

Authorized Subcontractor Signature	Date	Print Name and Title
	DocuSign: TestGmail 1	8/11/2014
Subcontractor Signature	Date	Print Name and Title

Subcontractor (1).pdf 1 of 1

- B. Declination** - If an approver declines to sign the invoice, you will receive a similar notification:

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](#)

Topic 5: Error Handling

Possible issues that might arise with invoices include:

1. Internal issues (Invoice or workflow will be corrected and resent)
 - a. Wrong recipient
 - b. Blurry image of invoice
 - c. Incorrect chartfield(s)
2. External issues (Invoice cannot be paid)
 - a. Wrong amount on invoice
 - b. Work wasn't rendered
 - c. Wrong institution

For internal issues, reply to the notification email that you received and describe the issue. AP will correct the problem and resend the invoice. The new invoice will have the word **RESEND** appended to beginning of the subject title.

For external issues, list yourself as the approver. Then, when prompted to sign, choose **decline** and list the reason for declining.

Topic 6: Out of Office – Sharing DocuSign folders

DocuSign does not currently have a delegation feature. To preempt your being out of office for 5 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. Tell that co-worker to check your folders every day or two while you are away.