

# 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**

 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.

UC <sub>SF</sub>	
	LOG IN
	EMAIL
	svc.docusign.testing@ucsf.edu
	PASSWORD
	Next Olick login to validate your corporate credentials.

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.

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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.

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5. Enter the approver's email and name.

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6. 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.** 

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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.

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#### **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.



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- 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.

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### 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.

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

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g psoft (\\campus\	(a) docusignsso.mpp	4/10/2014 11:27 AM	Microsoft Project	273 KE				
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			Open	Cancel		1	Email 👻	
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	2 ucsfdstest	2@gmail.com	Minnie Mouse	Sign			Email 👻	
	🔒 Order Diagram							
Next	Correct Discard Chang	es						



3. 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.

	ature							
		Order	Document			Document Action	IS	
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				gntest@gmail.c				
Recipient Email 🗐			ucsfdocusig Signing Rol	gntest@gmail.c				

## **Topic 3: Tracking the Status of an Envelope**

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





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

	Human Depautree     Approval for Debiring a LIC Defiree     Summary     Document
Grey italics:	Envelope Status: In Process Envelope Subject: Signatures needed for ITFS exempt Pages: 2
Future steps to be initiated when current steps are	Wiges: 2 I. Sent by Jill Cozen-Harel (jill.cozen-harel@ucsf.edu)   6/12/2014 2:11:19 PM PT Completed steps Signed by Jill TestingUCSF (svc.docusign.testing@ucsf.edu)   6/12/2014 2:14:01 PM PT
completed	<ul> <li>3. Next to sign Docu Sign TestGmail (ucsfdocusigntest@gmail.com)</li> <li>4. Next to sign John Doe (ucsfdstest2@gmail.com)</li> <li>Bold font: Current steps - already sent but recipients have not completed actions</li> </ul>

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

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

UCSF	Home	Manage	Send	Das	
Create 💌				Curr	
Envelopes Add Folder	rom 🕈		Subject		
▶ 🖂 Inbox (131)	DocuSign TestGmail		Please DocuSign this documer		
Sent	Minnie Mouse		Please DocuSign this documen		
Draft	Minnie Mouse		Need PI Approval - Voucher# X Vendor Name		
Deleted	📌 Jill Cozen-Harel		Approval for Rehiring a UC Reti		
Search Folders     Awaiting my Signature	Robert Lewis		Please DocuSign this documer UCSF.NDA.UCSFSig.3.24.14.		
	Alexandra Jala	li	Need PI Approval - V Notredame	oucher#03	
Expiring Soon	Robert Lewis		Attached for Security Group: S Report.pdf		
Completed	Jill Cozen-Harel		Need PI Approval - Voucher# > Vendor Name		
Cast Search	Jill Cozen-Hare	el	UCSF Authorization	for Surgery	
Templates Add Folder	y Jill Cozen-Hare	el	UCSF Authorization for Surger		
remplates Add Folder	F Jill Cozen-Hare	el	eProposal_Introducti	on_datash	
	Jill Cozen-Hare	el	eProposal Introducti	on datash	
Shared	Jill Cozen-Hare	el	Social Gathering Sign Ups		

2. 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.

Create 💌		Current Filter: From -	10/25/2013, To - Now, Status	a - InProcess	Search Envelopes	Q Actions
Envelopes Add Folder	🕈 From	Subject	Sent +	Completed	Expires	Status
▶ 🔤 Inbox 1000 Sent	Jill Cozen-Harel	Need PI Approval - Voucher# X00000, SUB#X000(sc, Vendor Name	4/4/2014 12:45:57 PM PT		Mon 4/28/14	In Process
Draft	Jill Cozen-Harel	Need PI Approval - Voucher# test to see if notification goes to TestGmail	4/1/2014 1.58:38 PM PT		Fri 4/25/14	In Process
▼ Search Folders	Jill Cozen-Harel	Need PI Approval - Voucher# X0000X, SUB#X000Xsc, Vendor Name	3/31/2014 3.11:09 PM PT		Thu 4/24/14	In Process
Awaiting my Signature     Expiring Soon (16)	Jill Cozen-Harel	Signatures needed for ITFS exemption	2/28/2014 12:47:49 AM PT		Tue 4/29/14	In Process
Completed	Jill Cozen-Harel	Please DocuSign this document: Sample PIR transmittal letter jch.pdf	2/26/2014 11:28:30 AM PT		Sun 4/27/14	In Process
Q Last Search	Jill Cozen-Harel	Please DocuSign this document: Sample PIR transmittal letter jch.pdf	2/25/2014 9 59 37 AM PT		Sat 4/26/14	In Process
Templates Add Folder	Jill Cozen-Harel	Please review & sign your document	12/26/2013 3 39:58 PM PT		Fri 4/25/14	In Process
Shared	Y Jill Cozen-Harel	Need PI Approval - Voucher# X000000, SUB# X000(sc, Vendor Name	12/26/2013 1:12:33 PM PT		Fri 4/25/14	In Process
Box	Jill Cozen-Harel	Need PI Approval - Voucher# X00000X, SUB# X000(sc, Vander Name	12/26/2013 1:10:01 PM PT		Fri 4/25/14	In Process



## 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.

Sei	nd Dashboards	Reports	Universi	ty of California, San Fr 20	andsco 539638
	Current Filter: From	n - 10/25/2013, To - Now	Search Envelo	opes	Q Actions *
	Subject	Sent +		Completed	Status
ail	Need PI Approval - Voucher# XXX SUB#XXXXsc, Vendor Name	XXXX, 4/20/2014 1	4/20/2014 1:54:43 AM PT		Declined
otter; mail	Need PI Approval - Voucher# XXX SUB#XXXXsc, Vendor Name	XXX, 4/20/2014 1	4/20/2014 1:33:33 AM PT		Declined
ign	Need PI Approval - Voucher# XXX SUB#XXXXsc, Vendor Name	4/20/2014 1	4/20/2014 1:31:23 AM PT		In Process
ign	Need PI Approval - Voucher# XXX SUB#XXXXsc, Vendor Name	XXXX, 4/20/2014 1	2:30:38 AM PT		In Process
	Need PI Approval - Voucher# XXX SUB#XXXXsc, Vendor Name	XXX. 4/18/2014 4	19:18 PM PT		Declined
	Need PI Approval - Voucher# XXX SUB#XXXXsc, Vendor Name	XXXX, 4/18/2014 1	4/18/2014 11:00:36 AM PT		In Process
Retiree - id - oyment ian Retired hnovich:	Approval for Rehiring a UC Retired	e 4/17/2014 9	20:39 PM PT	In Process	

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

Current Filter: From - 10/25	i/2013, To - Now	Search Envelo	opes	Q	Actions <b>v</b>	
	Sent +		Completed	St	atus	
oval - Voucher# XXXXXX, , Vendor Name	4/20/2014 1:	54:43 AM PT		De	clined 🔹	
oval - Voucher# XXXXXX, Vendor Name	4/20/2014 1:	33:33 AM PT		Clone		
oval - Voucher# XXXXXX, , Vendor Name	4/20/2014 1:	31:23 AM PT		Delete		
oval - Voucher# XXXXXX, , Vendor Name	2:30:38 AM PT	0:38 AM PT	History Certificate			
val - Voucher# XXXXXX, 4/18/2014 4: Vendor Name		19:18 PM PT		Open		
val - Voucher# XXXXXX, 4/18/2014 Vendor Name		1:00:36 AM PT			elected as CSV	
tehiring a UC Retiree	4/17/2014 9:	20:39 PM PT		Transfer Selected Ownersh		
oval - Voucher# XXXXXX, , Vendor Name	4/17/2014 2:	4/17/2014 2:53:12 PM PT		In Proc		

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.

Vendor Name			
DocuSign System [dse@docusign.net] on behalf of Jill To: vvc.docusign-testing	🔦 🦚 🌧 Actions		
	Monday, August 11, 2014 1:10 PM	Subject: Need PI Approval - Voucher# XXXXXX, SUB#XXXXXsc, Vendor Nar	me
Your document has been completed	F	Torrel Transmission     T	×
Jill TestingUCSF, All parties have completed the envelope 'Need PI Approval - Vouche SUB#XXXXsc, Vendor Name'.	ar# XXXXXX,	Consortuin/Constratial Other Expense TOTAL OPERATING TOTAL OPERATING TOTAL OPERATING TOTAL OPERATING TOTAL OPERATING TOTAL CODES TOTAL CODES TOTAL CODES PROGRAM INCOME (interved as a credit of	
To view, download or print the completed document click below.		TOTAL NET COST TOTAL EXPENSE REQUEST FOR THIS INVOICE TOTAL EXPENSE REQUEST FOR THIS INVOICE TOTAL that all equendums reported are for appropriate purposes and is accordince with the terms and conditions of the centrant.	
View in DocuSign		Advected bilinovestor Syntax         Data         Price haves and Tata           Weig Synge, The Simulation         Decosing m. Test theat 1         A/11/2014           Wardingsoftware         Data         Price haves and Tata	#
Alternately, you can access these documents by visiting docusign.com, clicking the "Access Do link, and using this security code:	ocuments"		
3B1E8FE8B77D45C299E09AAC378FFC351		Subcontractinv (1).pdf	10/1 -

**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>







## **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.