

DocuSign Approver (PI) User Guide

Topics:

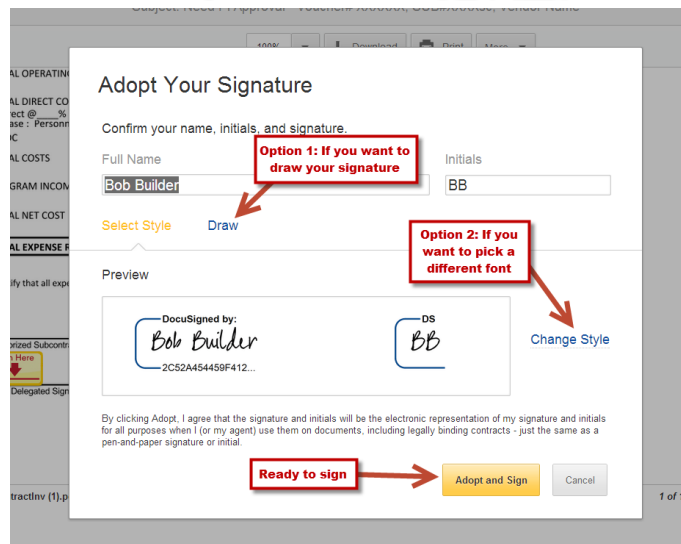
1. Approving invoice
2. Declining to sign invoice
3. Routing to a different approver
4. Receiving completion notice with link to signed invoice
5. Out of office – sharing DocuSign folders

Topic 1: Approving Invoice

1. Click on link in email to open invoice
2. Click on **Continue**
3. Review invoice
4. Click on yellow **Sign** tab.



5. Create signature (first time only)
*see **Quick Guide - Setting up Signature** for more details.



6. Click on **Finish**.

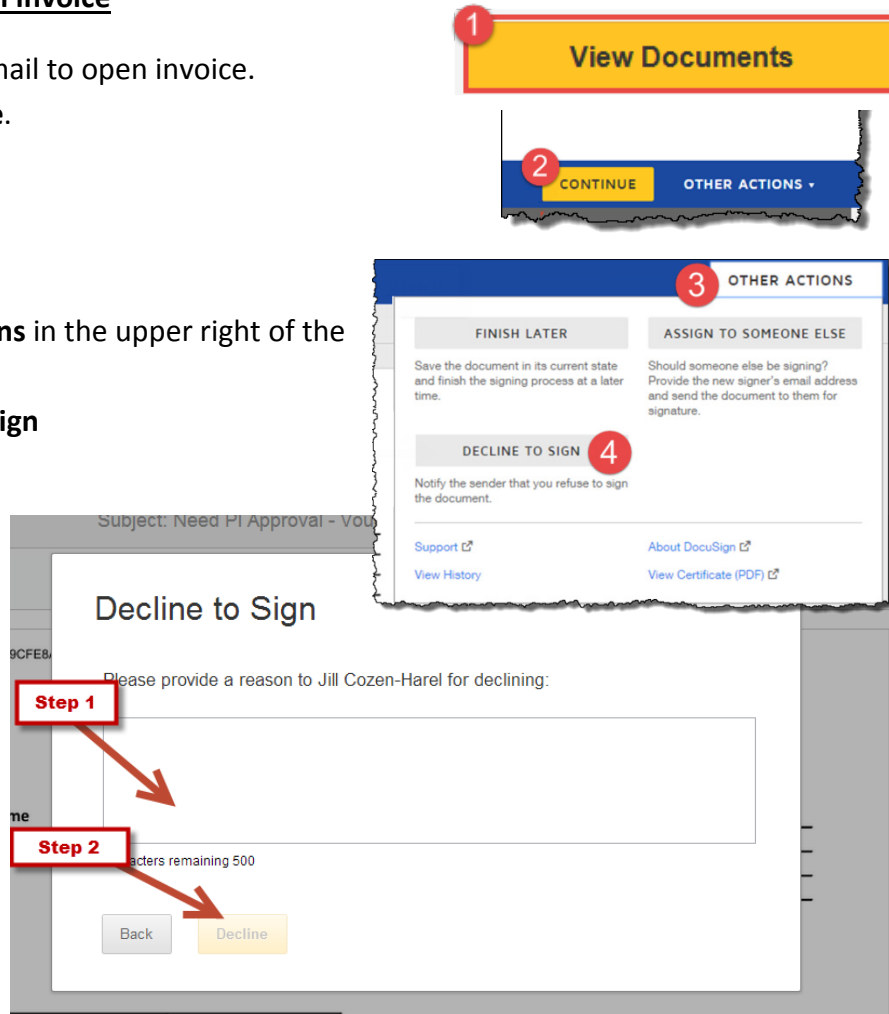


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Topic 2: Declining to sign invoice

1. Click on link in email to open invoice.
2. Click on **Continue**.
3. Click **Other Actions** in the upper right of the invoice view.
4. Click **Decline to Sign**

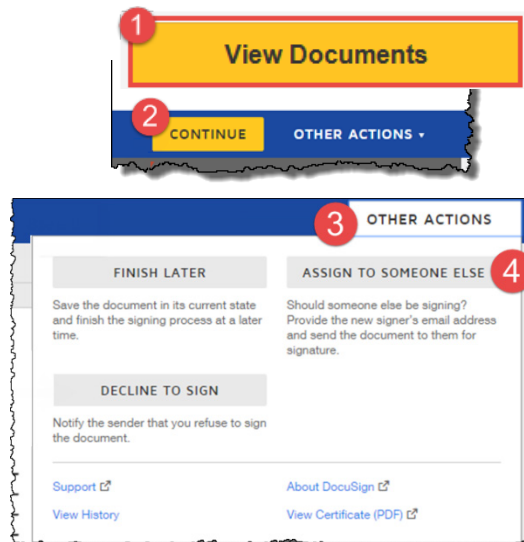
*Enter a reason for declining and then click **Decline**.



Topic 3: Routing to a different approver

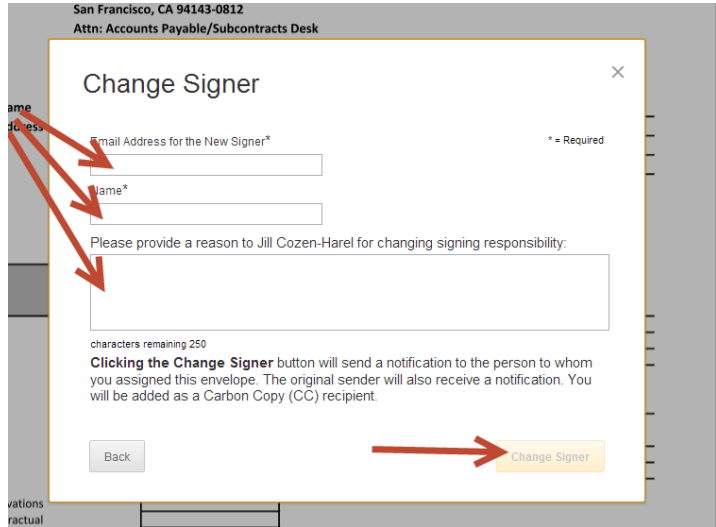
If, for some reason, you received an invoice to sign but you are not the appropriate person to sign it and you know who should sign it instead, you can designate another approver instead of yourself.

1. Click on link in email to open invoice.
2. Click on **Continue**.
3. Click **Other Actions** in the upper right of the invoice view.
4. Click **Assign to Someone Else**



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- In the pop-up 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 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.



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

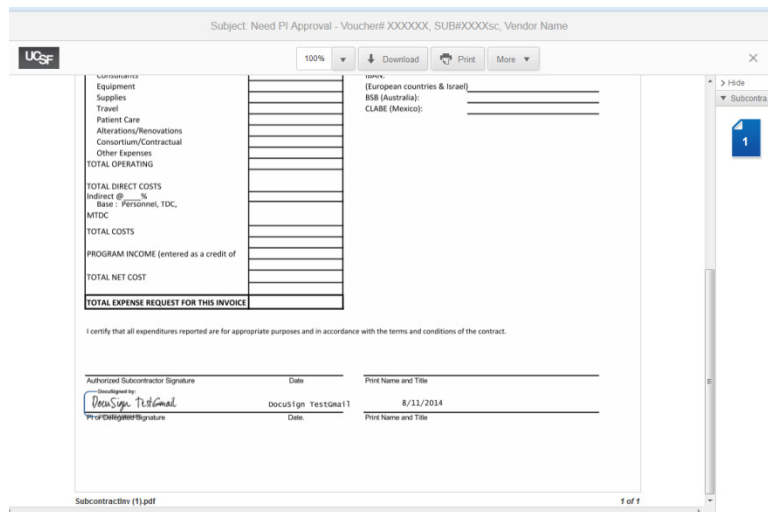
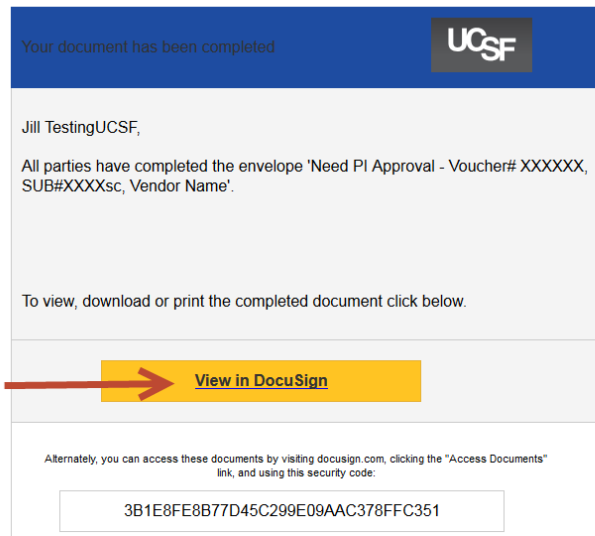
Topic 4: Receiving completion or declination notice with link to invoice

- 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.

You will be directed to the signed invoice.

DocuSign System [dse@docuSign.net] on behalf of Jill ...
To: svc-docuSign-testing

Monday, August 11, 2014 1:10 PM



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- 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.

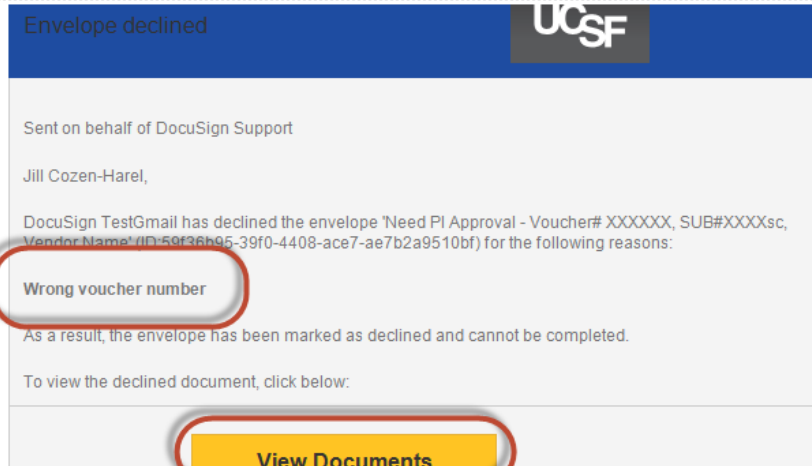
AP's view of a declination:

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

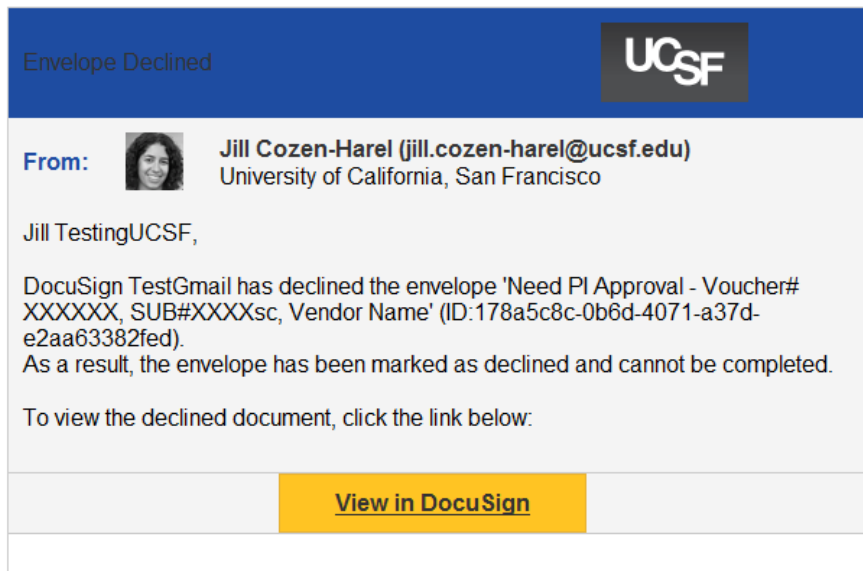
DocuSign System <dse@docusign.net>

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

To: Cozen-Harel, Jill



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



Topic 5: 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 coworker to check your folders every day or two while you are away.