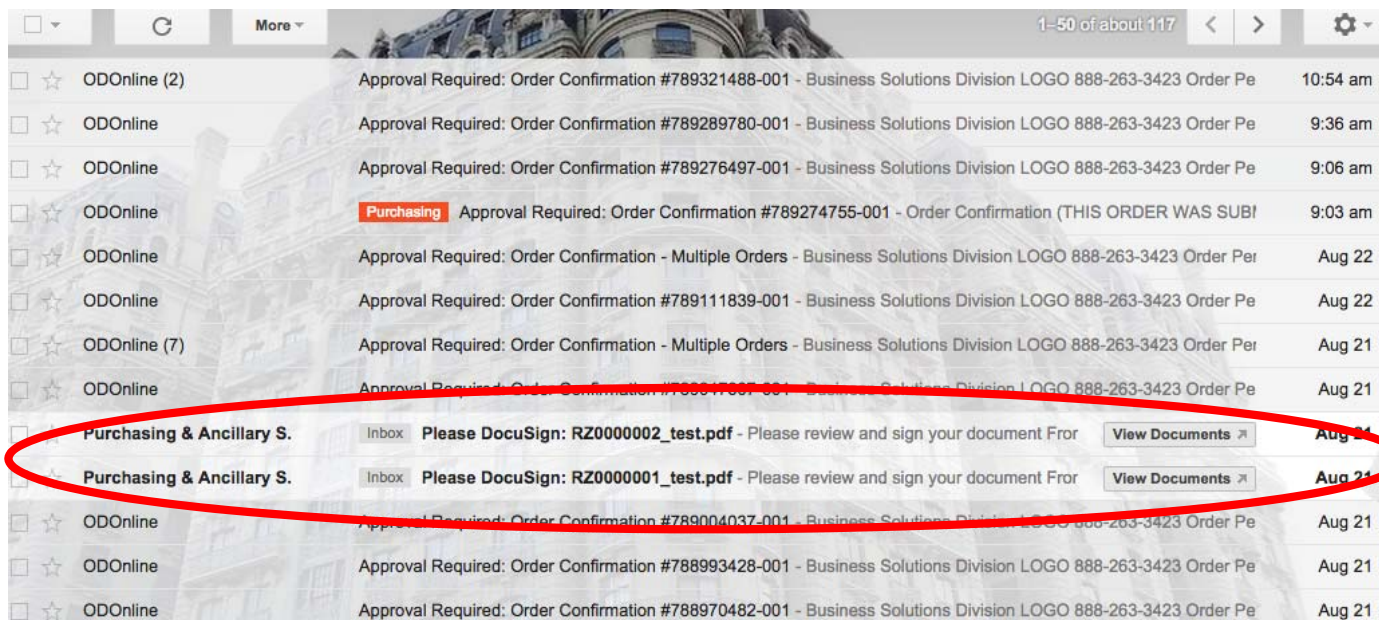


## How to Approve or Reject a p-REQ via DocuSign – General Notes:

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- A DocuSign log-in and password **is not** required to approve/sign, decline/reject a p-REQ.
- You must agree to the DocuSign User Agreement to sign the p-REQ.
- Multiple approvals can be requested however the p-REQ is sent to one (1) Approver at a time, starting with the department's core approvals (i.e. Budget Manager). Special reviews (i.e., Legal, Contracts, Grants, etc.) will be routed last.
- A confirmation email and a completed PDF copy of the p-REQ with signatures will be sent to all Approvers and the requestor.
- If a p-REQ is declined/rejected, the document is immediately cancelled and subsequent Approvers cannot access or view the p-REQ.
- Once a p-REQ is transferred to a purchase order (PO) or cancelled, the p-REQ is closed and cannot be modified.

## How to Approve or Reject A p-REQ Via DocuSign – (From a Desktop Computer)



- Approver(s) will receive an email notification.
- Please note if the tab feature is used in Google mail, the notification email will be located in the UPDATE tab

## How to Approve A p-REQ Via DocuSign - (From a Desktop Computer)

The screenshot shows a Gmail interface with a search bar containing 'label:approvals'. The email being viewed is titled 'Please DocuSign: RZ000002\_test.pdf' and is from 'Purchasing & Ancillary Services via DocuSign <dse\_na2@docuSign.net>'. The email content includes a green header with the DocuSign logo and the text 'Please review and sign your document'. Below this, the sender is identified as 'Purchasing & Ancillary Services (preq@usfca.edu) University of San Francisco'. The email body contains the following text: 'Hello Luis Diaz, Purchasing & Ancillary Services has sent you a new DocuSign document to view and sign. Please click on the 'View Documents' link below to begin signing. Please review pREQ RZ000002'. A yellow button labeled 'View Documents' is circled in red. Below this, an alternative access method is provided: 'Alternatively, you can access these documents by visiting [docusign.com](https://docusign.com), clicking the 'Access Document' link, and using this security code: A6CF54A1C2004548A75FC0ED27E3C9682'. A red arrow points from the text 'Security Code' to the security code field. The footer of the email reads: 'This message was sent to you by Purchasing & Ancillary Services who is using the DocuSign Electronic Signature Service. If you would rather not receive email from this sender you may contact the sender with your request. If you need assistance, please contact DocuSign Support ([service@docusign.com](mailto:service@docusign.com)) The Global Standard For Digital Transaction Management™'.

Select 'View Documents' or alternately, you can access the p-REQ by visiting [docusign.com](https://docusign.com), clicking the 'Access Document' link and use the security code located in the email notification.

# How to Approve A p-REQ Via DocuSign - (From a Desktop Computer)

Please Review & Act on These Documents

Purchasing & Ancillary Services  
University of San Francisco

Please review pREQ RZ000002

Please read the **Electronic Records and Signature Disclosure**.  
 I agree to use electronic records and signatures.

**CONTINUE** OTHER ACTIONS ▾

DocuSign Envelope ID: CDA7504F-D151-41B6-BB78-094A4E8EBAB2

UNIVERSITY OF SAN FRANCISCO Purchasing and Ancillary Services  
1225 Fulton Street, San Francisco, CA 94115-1080 (415) 432-5000

### PURCHASE REQUISITION

REQUISITION #: RZ000002-TEST

REQUISITION DATE: 5/27/2015 / DATE NEEDED 6/15/2015 [RESET FORM](#)

REQUESTING DEPT	CONTACT INFORMATION	SUGGESTED VENDOR
Purchasing	Contact : Alex Quintanilla	Frito-Lay, Inc.
<b>CAMPUS DELIVERY ADDRESS</b> Hayes Healy Lower Level, Rm 101	E-mail: jquintanilla2@usfca.edu	123 Frito Lane Plano, TX 75024-4099
	Phone: x2526	<b>ACCOUNT# (FOAP)</b> 110000-561901-111111-1600

QTY	UOM	CATALOG#	DESCRIPTION	UNIT PRICE	AMOUNT
100	box	GMS-4131 F/7E	Grandma's Mini Sandwich Cremes cookies (24 packets per box)	20.00	2000
1	tax		Tax	175	175

English (US) | Terms Of Use & Privacy | Copyright © 2015 DocuSign Inc.

In a new tab check 'I agree to use Electronic Records and Signature Disclosure' and select 'CONTINUE'.

## How to Approve A p-REQ Via DocuSign – (From a Desktop Computer)

Select the yellow sign field to create and add your signature. OTHER ACTIONS ▾

SPECIAL INSTRUCTIONS FROM DEPT


PURCHASE ORDER DELIVERY

Mail to Vendor  
 E-mail to : \_\_\_\_\_  
 Fax to : \_\_\_\_\_  
 Phone order : 415.400.4551  
WILL CALL:  Return to department  
 Hold for pick-up

Paper  PDF copy of purchase order to department

SPECIAL APPROVALS (if necessary)

Please refer to [web.usfca.edu/purchasing/buyingguide](http://web.usfca.edu/purchasing/buyingguide) for a list of restricted commodities and special approvals

SIGNATURES	Name	E-mail	Signature
Budget Approval	Luis Diaz	ldiaz6@usfca.edu	
VP / Provost Approval			
Additional Approval			

For form instructions visit [web.usfca.edu/purchasing/preq](http://web.usfca.edu/purchasing/preq) rev. V82515

SAVE AS PRINT RESET FORM

C.R.E.A.M.pdf 1 of 2

UNIVERSITY OF SAN FRANCISCO Purchasing and **p-REQ** # 0300007

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Scroll to the bottom of the p-REQ and select 'sign'.

## How to Approve A p-REQ Via DocuSign – (Desktop Computer)

Select the yellow sign field to create and add your signature. OTHER ACTIONS ▾

### Adopt Your Signature

Confirm your name, initials, and signature.

**Full Name**  
Luis Diaz

**Initials**  
LD

Select Style Draw

Preview

DocuSigned by:  
*Luis Diaz*  
869564E6C7BB47E...

DS  
*LD* Change Style

By clicking Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

**ADOPT AND SIGN** CANCEL

RZ0000002\_test.pdf 1 of 1

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Select 'Adopt & Sign'



## How to Approve A p-REQ Via Docusign – (Desktop Computer)

DocuSign

USF

https://na2.docusign.net/Signing/?ti=827539748c824007b465870c7738f3ce

Apps Bookmarks USF USF Connect Inbox Calendar Drive hydra USF PAAS QTrak Directory Don\$ 532 USF VPN sciQuest Other Bookmarks

SPECIAL INSTRUCTIONS FROM DEPT

PURCHASE ORDER DELIVERY

Mail to Vendor  
 E-mail to : \_\_\_\_\_  
 Fax to : \_\_\_\_\_  
 Phone order : 415.400.4551

WILL CALL:  Return to department  
 Hold for pick-up

Paper  PDF copy of purchase order to department

SPECIAL APPROVALS (if necessary)

Please refer to [web.usfca.edu/purchasing/buyingguide](http://web.usfca.edu/purchasing/buyingguide) for a list of restricted commodities and special approvals

SIGNATURES	Name	E-mail	Signature
Budget Approval	Luis Diaz	ldiaz6@usfca.edu	DocuSigned by: Luis Diaz 899664E9C7B847E...
VP / Provost Approval			
Additional Approval			

For form instructions visit [web.usfca.edu/purchasing/req](http://web.usfca.edu/purchasing/req) rev. V82515

SAVE AS PRINT RESET FORM

C.R.E.A.M.pdf 1 of 2

UNIVERSITY OF SAN FRANCISCO Purchasing and

Done! Click Finish to send the completed document.

**FINISH** OTHER ACTIONS ▾

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Note: After you click on Finish button you will be prompted to log-in to Docusign. This is not required.

Done! Click finish.

## How to Reject (Decline to sign) A p-REQ Via DocuSign – (Desktop Computer)

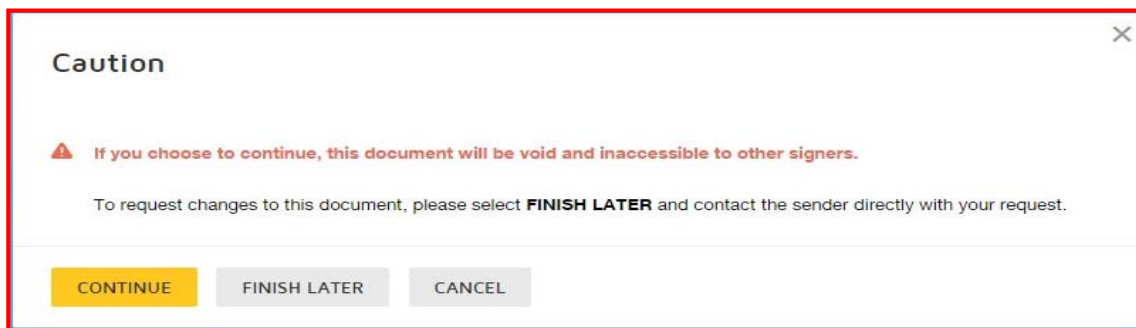
The screenshot shows the DocuSign interface for a document. The browser address bar displays the URL: <https://na2.docusign.net/Signing/?ti=5b14eda77e9e4453a206442524a33937>. The interface includes a green header bar with the text "sign field to create and add your signature." and a navigation menu with icons for search, zoom, download, and print. A red circle highlights the "OTHER ACTIONS" button in the top right corner. A dropdown menu is open, showing two main options: "FINISH LATER" and "DECLINE TO SIGN". Below these are several links: "Help & Support", "View History", "View Electronic Record and Signature Disclosure", "About DocuSign", and "View Certificate". The main content area contains a section for "SPECIAL INSTRUCTIONS FROM DEPT" with a checkbox for "Send email copy of purchase order to department" which is checked. Below this is a section for "ADDITIONAL APPROVALS (if necessary)" with a note: "Please refer to usfca.edu/purchasing/xxxxxx for a list of restricted commodities and special approvals". At the bottom, there is a "SIGNATURES" table with two rows: "Budget Approval" and "Over \$5,000 Approval". The "Budget Approval" row has a "Name" column with "Sample signature" and a "Signature" column with a yellow "SIGN" button and a downward arrow. A yellow "SIGN" button is also visible on the left side of the interface.

SIGNATURES	Name	Signature
Budget Approval	Sample signature	<b>SIGN</b> ↓
Over \$5,000 Approval		

To reject the p-REQ, click 'OTHER ACTIONS' button. From the pull down menu, select 'DECLINE TO SIGN' button.



# How to Reject (Decline to Sign) A p-REQ Via DocuSign – (Desktop Computer)



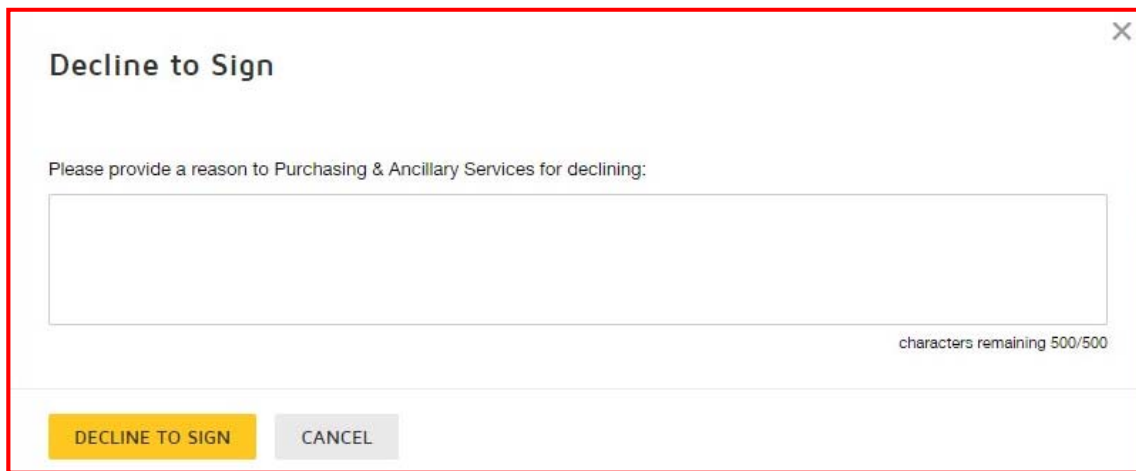
**Caution**

⚠ If you choose to continue, this document will be void and inaccessible to other signers.

To request changes to this document, please select **FINISH LATER** and contact the sender directly with your request.

**CONTINUE** FINISH LATER CANCEL

A caution notice will pop-up: *Declining a p-REQ will void the document and make it inaccessible to other signers.* Click *continue* to decline the p-REQ.



**Decline to Sign**

Please provide a reason to Purchasing & Ancillary Services for declining:

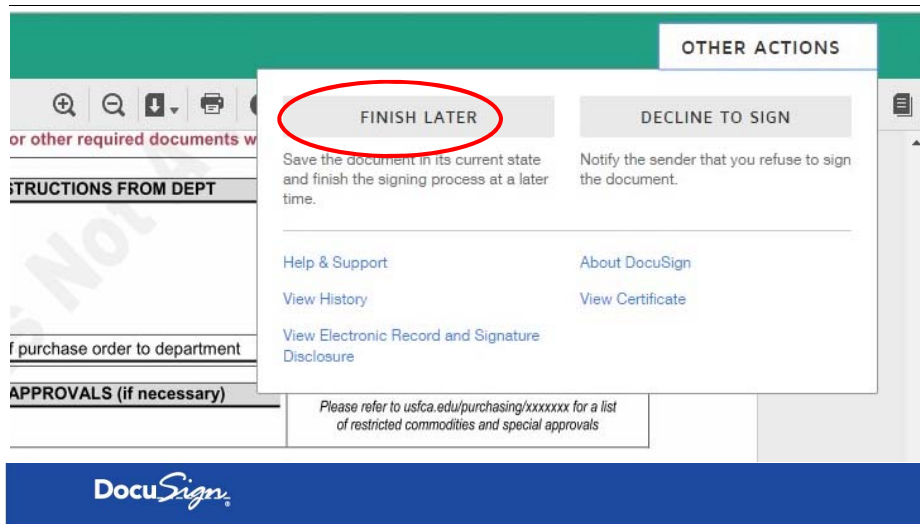
characters remaining 500/500

**DECLINE TO SIGN** CANCEL

A *Decline to Sign* response box enables a message to be sent to PAAS. Other signers will not see this message.

Click 'DECLINE TO SIGN' button one more time. The p-REQ has been declined.

## How to Save to Approve/Reject Later:



Click the 'Finish Later' button if the approver is not ready to post approval.

To access the document again, return to the e-mail notification and click on the *View Documents* button

Your document has been saved to be signed later

To access your document, return to your email notification and click "Review Documents".



SEE DOCUSIGN IN ACTION

See how easy it is to prepare, send, sign and manage documents digitally using DocuSign.

# Approve or Reject from a Smart Phone or Tablet

**Approvals**

- ODOnline** Aug 21  
Approval Required: Order Confirmatio...  
Business Solutions Division LOGO 888-... ☆
- Purchasing & Ancillary Service...** Aug 21  
Please DocuSign: RZ0000002\_test.pdf  
Please review and sign your do... Inbox ☆
- Purchasing & Ancillary Service...** Aug 21  
**Please DocuSign: RZ0000001\_test.pdf**  
Please review and sign your do... Inbox ☆
- ODOnline** Aug 21  
Approval Required: Order Confirmatio...  
Business Solutions Division LOGO 888-... ☆
- ODOnline** Aug 21  
Approval Required: Order Confirmatio...  
Business Solutions Division LOGO 888-... ☆
- ODOnline** Aug 21  
Approval Required: Order Confirmatio...  
Business Solutions Division LOGO 888-... ☆
- ODOnline** Aug 21  
Approval Required: Order Confirmatio...  
Business Solutions Division LOGO 888-... ☆
- ODOnline** Aug 21

Please DocuSign:  
**RZ0000001\_test.pdf** Approvals ☆  
Inbox

**Purchasing & Ancillary Ser...** to me  
3 days ago [View details](#)

Please review and sign your document

**DocuSign**

**Purchasing & Ancillary Services**  
From: (preq@usfca.edu)  
University of San Francisco

Hello Luis Diaz,

Purchasing & Ancillary Services has sent you a new DocuSign document to view and sign. Please click on the 'View Documents' link below to begin signing.

Please review pREQ RZ0000001

[View Documents](#)

**DocuSign**

## REQUEST FOR SIGNATURE

Purchasing & Ancillary Services of University of San Francisco requested your signature

[Read Electronic Record and Signature Disclosure](#)

I consent to use Electronic Records and Signatures

[Review Document](#)

[How It Works](#)

[Decline](#)

**DocuSign**

Tap Start to begin [START](#)

**P-REQ # RZ000017**

Please e-mail completed form to [PREQ@USFCA.EDU](mailto:PREQ@USFCA.EDU)

P-REQ DATE: 08/25/2015 / DATE NEEDED: 09/15/2015

REQUESTING DEPT	REQUESTOR	SUGGESTED VENDOR
Purchasing	Contact: Jillian Roreal E-mail: jatermblog@usfca.edu	C.R.E.A.M. 2000 Van Ness San Francisco, CA 94103 (415) 400-4551
CAMPUS DELIVERY LOCATION	Phone:	VENDOR CONTACT
HH LL		FOAP 110000-xxxxxxx-xxxxxxx-1600
		Barbara Smith bsmith@creamonline.com

QTY	UOM	CATALOG	DESCRIPTION	UNIT PRICE	AMOUNT
30	EA	412	Chocolate Chip Cookies	\$ 5.00	\$ 150.00
900	EA	789	Oatmeal Raisin Cookies	\$ 5.00	\$ 4,500.00
190	EA	541	Red Velvet Cookies	\$ 5.00	\$ 950.00
2000	GAL	936	Vanilla Ice Cream	\$ 4.00	\$ 8,000.00
1	TAX		Tax	\$ 1,190.01	\$ 1,190.01
				TOTAL	\$ 14,790.01

ATTACHMENTS ENCLOSED

SPECIAL INSTRUCTIONS FROM DEPT

PURCHASE ORDER DELIVERY

Mail to Vendor  
 E-mail to :  
 Fax to :  
 Phone order - 415.400.4551

Paper  PDF copy of purchase order to department

WILL CALL:  Return to department  Hold for pick-up

SPECIAL APPROVALS (if necessary)

Please refer to [usfca.edu/purchasing/faq](http://usfca.edu/purchasing/faq) for a list of standard commodities and special approvals

SIGNATURES	Name	E-mail	Signature
Budget Approval	Luis Diaz	ldiaz6@usfca.edu	
VP / Process Approval			
Additional Approval			

For form instructions visit [usfca.edu/purchasing/faq](http://usfca.edu/purchasing/faq) rev. 10/2011

[SAVE AS](#) [PRINT](#) [RESET FORM](#)