The following **attestation** (or a variation of it) is useful to include when requesting PI approval / signature:
I have reviewed the attached invoice. Both the work being performed and the expenses reflected on this invoice are consistent with the scope of work.

ELECTRONIC, PDF: **instructions to create a stamp for the attestation and place for PI signature on a PDF**
These instructions have been generated on Adobe Acrobat Pro DC, if you are using a different version, steps may vary.

To Create the Stamp:
1. Create a PDF of the **attestation** (suggest starting in word and converting to a PDF)
2. Open Adobe, select the *Comment* function (tool bar on the right side of the window)
   a. Find the stamp icon in the toolbar
   b. Scroll down to custom stamps
   c. Select *Create*
   d. Upload the PDF you created in 1
   e. Name the stamp and select the category *Sign Here*
   f. Click OK
3. Now the stamp will appear in your custom stamp options

To Place the Stamp:
1. Open the invoice or other PDF you wish to have signed
2. Select the *Comment* function (tool bar on the right side of the window)
   a. Click on the stamp icon in the toolbar
   b. Select *Sign Here* to access all the stamps under the *Sign Here* header
   c. Scroll down to the custom PI Attestation stamp, highlight it and click OK
3. Place the stamp on the PDF and save

To Add a Signature Block (including an electronic option):
1. Go to *Tools Tab*, next to the *Home Tab* (top left side of the window)
   a. Select *Fill and sign*
   b. A menu will pop up on the right, select *Send for Signature*
   c. A window will pop up, select *Prepare Form*
   d. Find the signature block icon in the toolbar
   e. Select, place and size the signature block
2. Save and send

Please note: some institutions "lock" their invoices for security purposes and you may not be able to add a stamp.

ELECTRONIC, EMAIL (OUTLOOK): **instructions to create a quick part for attestation**
To Create the Quick Part:
1. Go to the *Insert* tab at the top of the email window
2. Go to the *Text* section and look for the *Quick Parts* button
3. Select the *Quick Parts* button and add the **attestation**
4. Name and save

To add the Quick Part:
1. Go to the *insert* tab at the top of the email window
2. Select the *Quick Parts* button and you will see a preview of the text to insert into your email

Please note: this creates an email approval process rather than a signature process. Recommend you add a prompt to the quick part like: *respond yes or no to this email* to take the place of a signature.

ELECTRONIC, EMAIL (MICROSOFT ONLINE): **instructions to create a template for attestation**
> _To Create the Template:_
1. Open a new email
2. Select the piece of paper with a little lightning bolt on it, _My Templates,_ which is located at the bottom right of the email text box
    a. A side bar will appear on the right hand side of the window
    b. Select + _Template_
    c. Copy and paste the **attestation**
3. Name and save the template
> _To add the Template:_
1. Select the _My Templates_ button and click on the attestation to insert it into your email

Please note: this creates an email approval process rather than a signature process. Recommend you add a prompt to the template like: _respond yes or no to this email_ to take the place of a signature.

ELECTRONIC, SHAREPOINT:

Microsoft Online (MSO), mso.harvard.edu, contains many powerful tools and resources, including file sharing and work flows through SharePoint sites. Use of a department SharePoint is not required. A SharePoint may be built in many ways, so it is difficult to recommend one way to structure an approval workflow.

If your department uses MSO and SharePoint, it is worth considering working with IT to develop a training for your department to learn more about this tool and how it may be used by the department.

Main Pro: MSO and SharePoint are backed up continuously, so data is not lost. It also links with your Harvard email address so you can send files easily from Outlook and SharePoint from anywhere in the world without having to download files.

Main Con: SharePoint is not the most intuitive interface and it may be a little difficult to figure out setting up a particular feature on your own without training or IT help.

PAPER: **instructions to create a sticker template for the attestation**
1. Open a new document
2. Go to the _Mailings_ tab (top center of the window)
3. Click the Labels button (top left side of the window)
    a. Copy and paste the **attestation** into the address box
    b. The radio button on the left automatically defaults to printing a whole sheet of labels
    c. To find the right size / shape to fit the label sheet you have, select _Options_
        i. Select the label maker and number (this is often printed on the top / bottom of the sheet, i.e. _Avery 5466_)
        ii. Once you have the right details, click OK
    d. Select _New Document_ and a whole sheet of the labels will be generated
    e. Format to your preferences (for font, etc.) and check the text orientation
    f. Save and/or print