Invoice Approval Process for End Users: Adobe Sign Workflow
Department Initiated

Due to COVID-19, shelter in place, a method to route invoices for approval has been developed using Adobe Sign. Most invoices are sent out by the Accounts Payable office requesting delegation of authority approval. However, some exceptions exist wherein the campus department may initiate this process (e.g., Facilities).

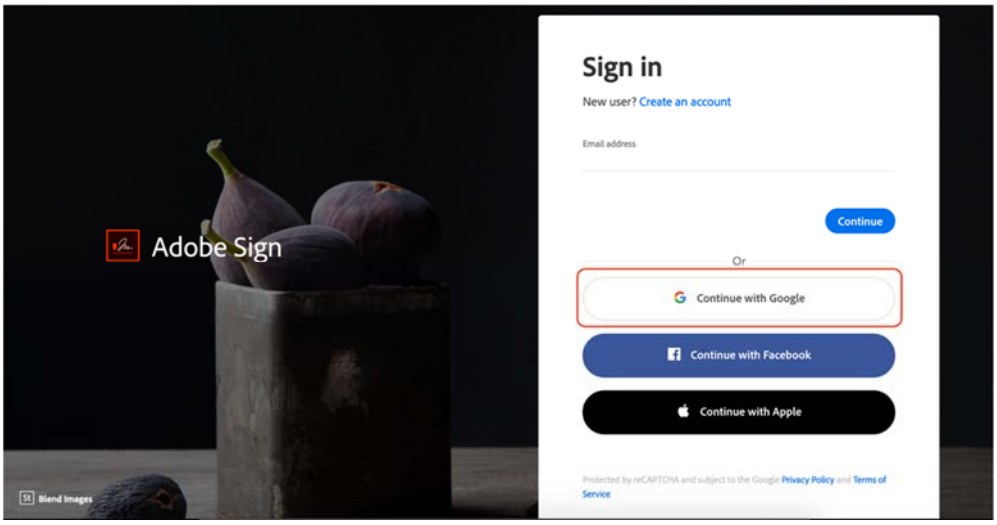
1) Sign into Adobe Sign by going to sign.csueastbay.edu

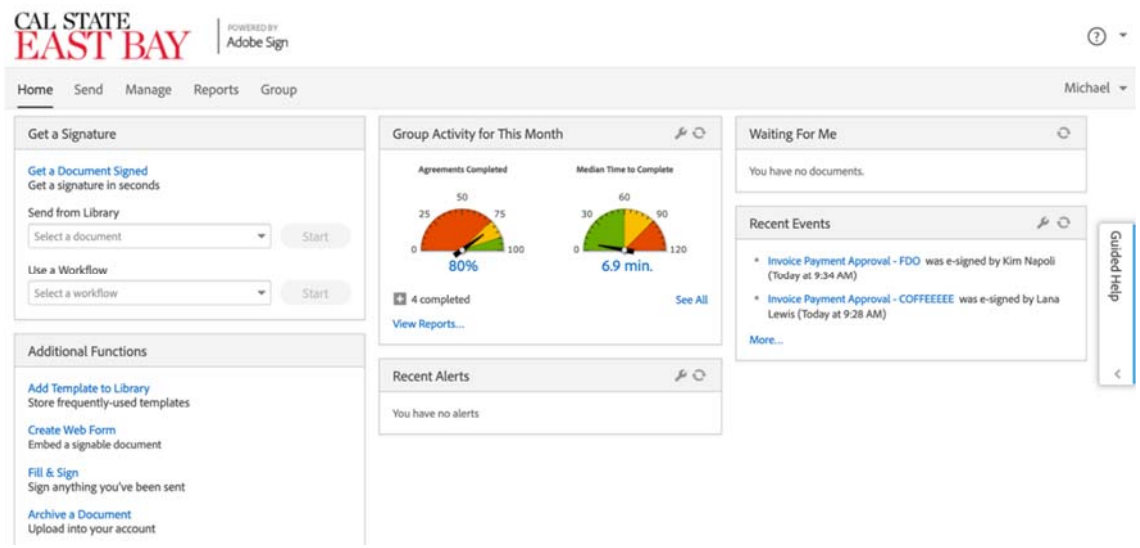
- Sign in through using the **Continue with Google** option.

- Once signed in, select Adobe Sign Home page

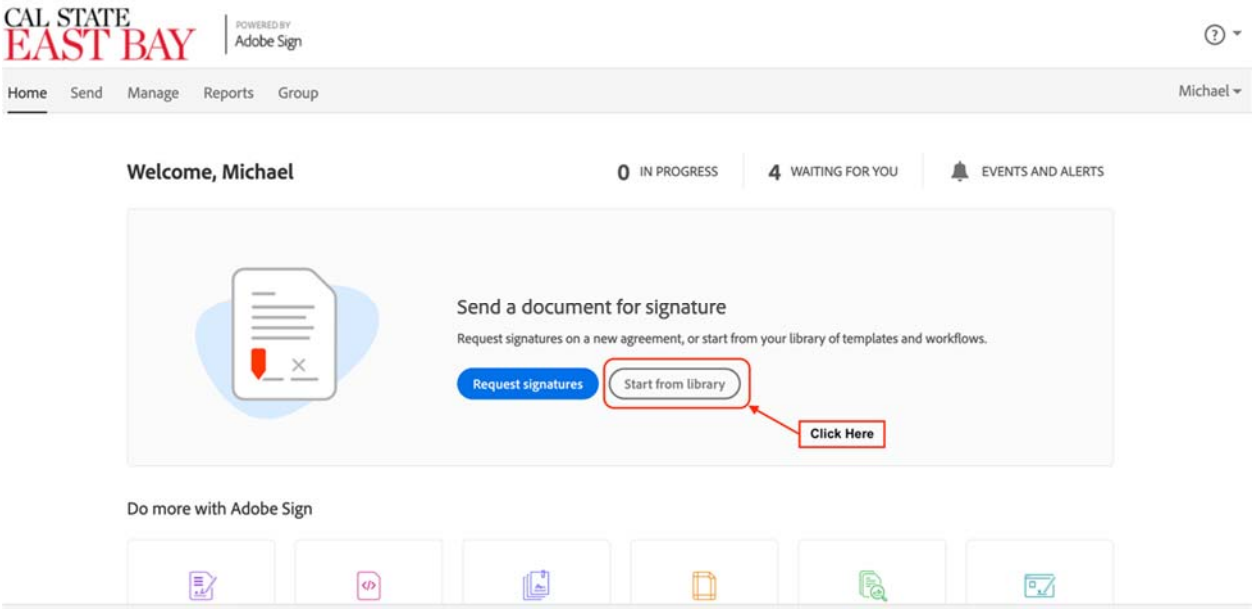
  Note: It is possible that you will be prompted with an alternate view, please click on the "Start from Library" button

- Go to **Workflows**, and choose the **"AP – Invoice Approval form"**

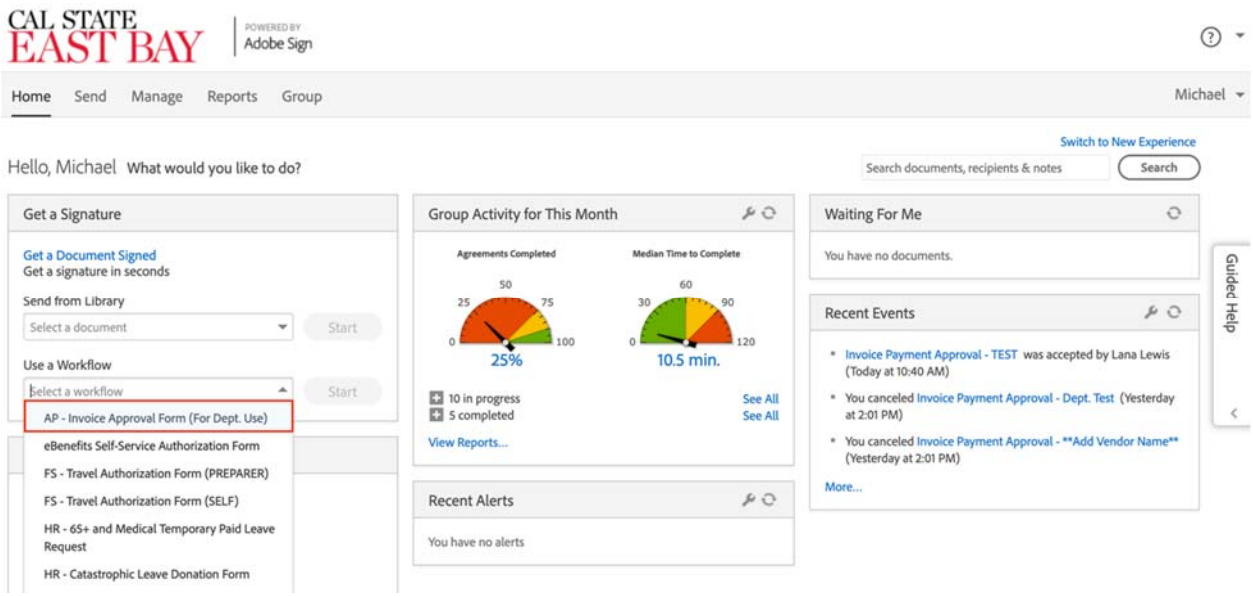




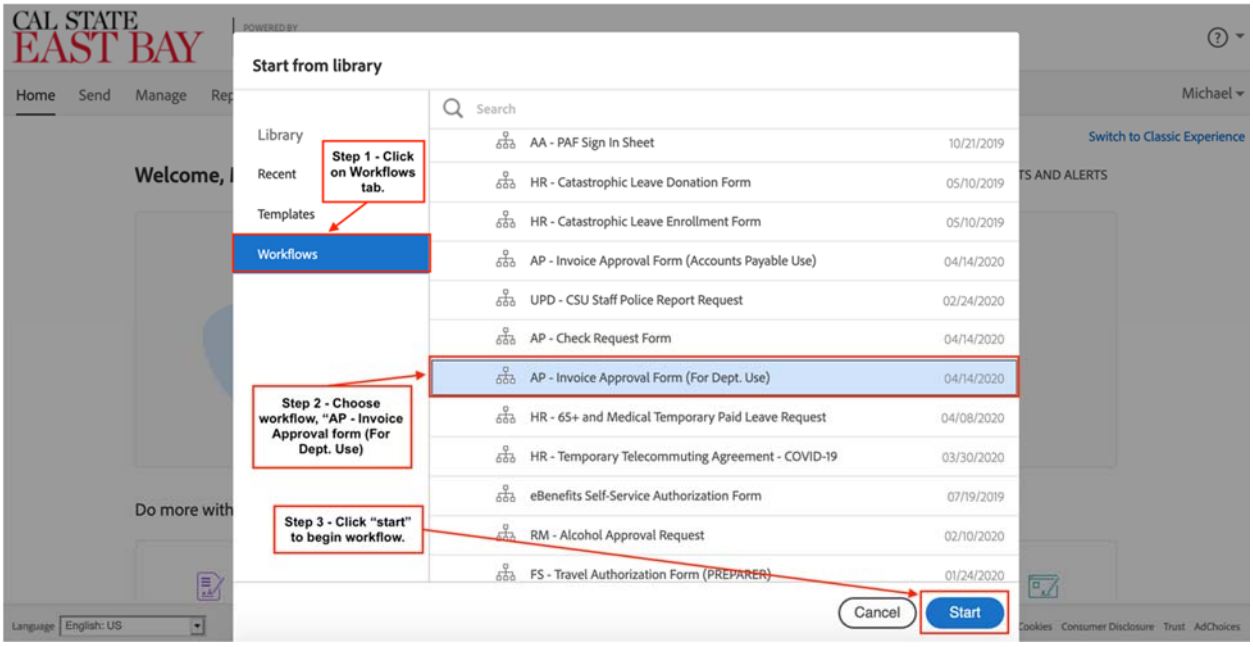
Alternate View: If you are auto-prompted to this page, follow these photos.



2) Select "**AP – Invoice Approval Form (For Dept. Use)"** from the *Workflow* drop down menu on your homepage.



Alternate view – Begin with clicking on **"Start from Library"**



- Initiator (campus department) – Type “myself”
- Delegation of Authority*
    - Group Name – Type **“AP”**
    - DOA Approver – Type in the email of the person with delegation of authority who can approve invoice.
- 2nd / 3rd Level DOA approver - Optional, use this field as needed to obtain proper approvals prior to making a payment on any invoice.
- AP Technician* – Key the AP technician email address, based on the vendor name (Disregard words such as “The or A”; For example, a vendor with the name, ***The Best Supply Company Ever***, would go to Tammy Heard due to the word ***Best***. Note how the word, ***the,*** is ignored.)

  For invoice processing:

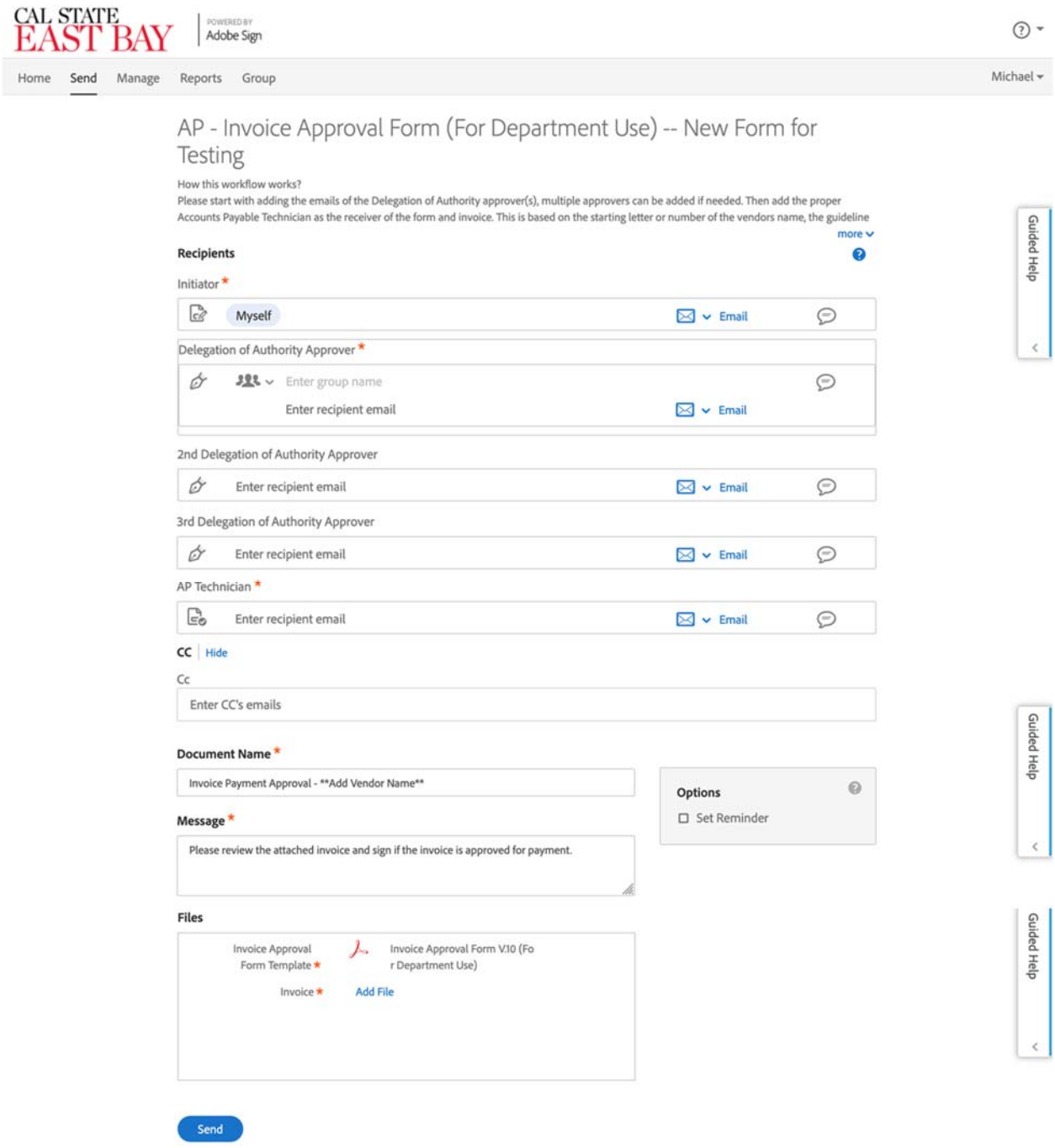
tammy.heard@csueastbay.edu	A – H
christina crosby@csueastbay.edu	I – N
angie trujillo@csueastbay.edu	O – U
anna bento@csueastbay.edu	V – Z

  Or, if unsure, route to accounts.payable@csueastbay.edu.

- Document Name* - Delete ****Add Vendor Name**** and replace it with the vendor whose invoice needs to processed.
- Message* - The message is mandatory, but a generic message has been automated and should not be changed unless further information needs to be added. In which case, please add the additional information below the automated message.
- Attachments* (2 Section Field)
    - Invoice Approval Form – Automatically uploaded, no action is needed.
    - Invoice – Upload the invoice needing approval. This file should be in PDF format.

*mandatory fields

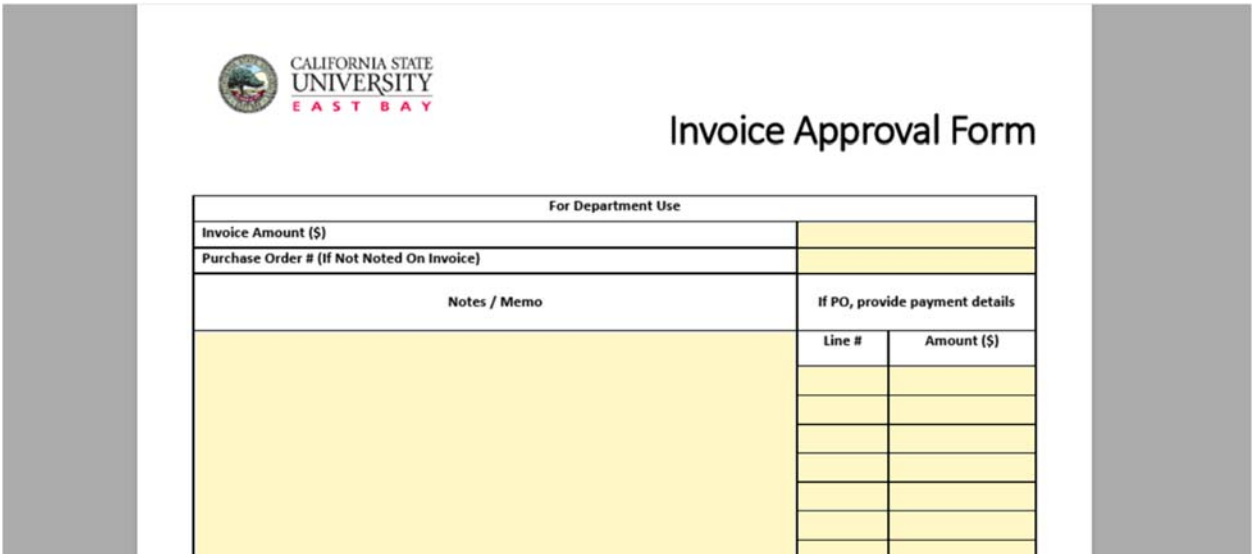
3) Once all fields have been filled out, please continue by pressing **“Send”** located at the bottom of the page. This will enable the attached documents to be combined and ready for processing.



4) Complete the section, "**FOR DEPARTMENT USE**"

- Make sure that the dollar amount ties to the invoice total to include shipping/handling and tax costs.
- If the purchase order # is known or listed on the invoice, please add the purchase order # to this portion.
- The notes/memo section can be used to add extra information that needs to be relayed to the Delegation of Authority approver and Accounts Payable Technician.

- For multiple line purchase orders, the line # and amount section can be used to state which lines on the purchase order to use and the amount you want paid out of that line.

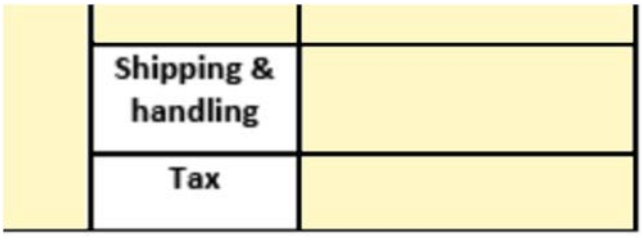


CALIFORNIA STATE UNIVERSITY EAST BAY

Invoice Approval Form

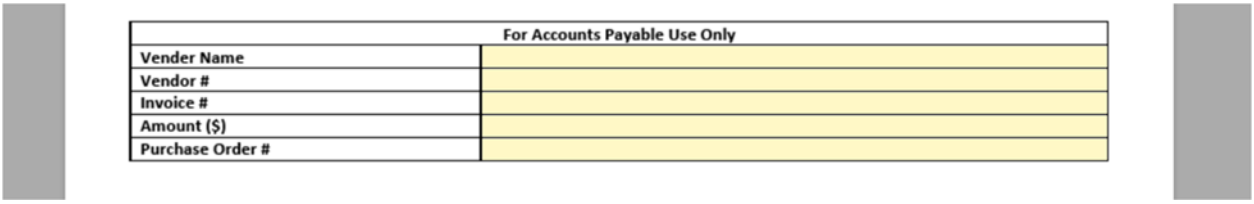
For Department Use		
Invoice Amount ($)		
Purchase Order # (If Not Noted On Invoice)		
Notes / Memo	If PO, provide payment details	
	Line #	Amount ($)

- Please note that the bottom two lines on the Line #'s column is for shipping/handling and tax. Please complete as indicted on the invoice.



Shipping & handling	
Tax	

- The "FOR ACCOUNTS PAYABLE USE ONLY" section is for your Accounts Payable Technician to fill out. No action is needed for you on this section, please leave blank.



For Accounts Payable Use Only	
Vender Name	
Vendor #	
Invoice #	
Amount ($)	
Purchase Order #	

5) The approver will receive an email for AP invoice approval.

- Open document
- Review invoice following Delegation of Authority protocol (i.e., ensuring the expense is accurate, a valid business expense, reasonable necessary, etc.)
- Approve and digitally sign document using the Adobe Sign.

  Note: If additional delegation of authority signatures are required, the document will continue to route to the next approver.

6) Once approved by the delegation of authority, the Invoice Approval form will route to the AP technician indicated. The AP technician will

- Review the invoice and supporting documents, following campus protocols to ensure adequate supporting documentation is evident.
- Ensure appropriate delegation of authority.
- Approve via adobe sign only when documentation is complete/Delegation of Authority is correct.
- Process the invoice in the Peoplesoft system, as normal.
- Download/save completed document in Accounts Payable Share drive, following a naming convention.

7) Note that all parties in the process will receive a "completed agreement" email once the invoice has been fully routed and approved.

8) Campus department should maintain original invoice.