STLS Process for End Users: Adobe Sign Workflow

Short Term Limited Scope

Due to COVID-19, shelter in place, a method to route different forms for approval has been developed using Adobe Sign.

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: There are two different types of views, the old version and the new experience. 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 – Short Term Limited Scope”
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”

- Prepared By – Automatically populated as yourself
- Payee – The person who needs to get paid for the services provided
- Delegation of Authority – Person to approve payment, multiple approvals might be needed
- Purchasing Director – Automatically populated with Jon Medwin’s email, as he is the current purchasing director who needs to approve the submission of this form
- CC – Enables to copy anyone who needs to be informed, Christina Crosby is automatically informed as she is the Accounts Payable technician who processes the STLS form
- Document Name – Automatically populated to say, “AP – Short Term Limited Scope”, you can add onto the document name to help specify who this is being processed for
- Message – Additional information can be added to the message prior to sending, this will inform everyone within the workflow to be informed of further information needed
- Files – Allows you to attach additional documentation as needed to help support the approval of the form

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 required filed fields listed on the form, all required fields are labeled with a red asterisks (*)
6) Once form is properly filled, the “Submit” button will automatically show up at the bottom. Please verify that information is correct and all supporting documentation has been attached prior to clicking on submit to route for approval.