

USING ADOBE Sign for routing Check Requests

Updated: 8/24/21 (alambert)

If you have Adobe Pro DC, once you fill in the info on the updated check request form (AP_Check_Req_Fillable_pdf-BPCC rev082421), do the following in Adobe PRO DC:

1-Save As and name your file with date of request and vendor name (ex: 5.12 Staples)

2-Scan and save your backup as a pdf

3-Open the saved check request file and backup file in Adobe Pro and use the 'Combine' tool to put the two files together as one and re-save adding the amount for reference later in the title '5.12 Staples \$100'.

4-use the 'Adobe Sign' or 'Request Signatures' tool to route the approvals, starting with the 'requesting agent', who may or may not be the preparer, appropriate VC as department approver, Veloria Nanze as Executive Director of Business Operations vnanze@bpcc.edu, Gayle Doucet for Purchasing and the appropriate Finance personnel (Lynn Lyle llyle@bpcc.edu for general fund and student fee funds, Debra Elliott deelliott@bpcc.edu for the 131xxx funds and Anita Drozd adrozd@bpcc.edu for grant funds). **(NEW STEP)** Include Tammy Kennedy tkennedy@bpcc.edu for AP. (This will take the place of forwarding to AP@bpcc.edu after the routing is complete.) Adobe will ask you to Add Signers by entering the e-mail addresses of the approvers (enter them in the order that they should approve –Requesting Agent, Approving Agent for Department, Executive Director of Business Operations, Purchasing, Finance and last AP). **Do NOT use the AP@bpcc.edu address or it will not route correctly.**

BOSSIER PARISH COMMUNITY COLLEGE
FINANCE DEPARTMENT
ACCOUNTS PAYABLE CHECK REQUEST

DATE: 08/12/21

Please see

Finance

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11000

Submit

Submit

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Get documents signed fast with Adobe Sign

Add signers, specify where to sign, send and track progress. [Learn more](#)

Add signers

Add CC

alambert@bpcc.edu X

rabraham@bpcc.edu X

vnanze@bpcc.edu X

gdoucet@bpcc.edu X

llyle@bpcc.edu X

tkennedy@bpcc.edu X

AP_Check_Req_Fillable_pdf-BPCC rev082421-TEST

Please review and sign this document.

[More Options](#)

Cancel

[Specify Where to Sign](#)

date

Original receipts/invoices must be attached to check request with the exception of agency accounts.
Sales tax is not reimbursable.
Checks will be written Tuesday night and Thursday night.
If grant funds, submit to Grants and Restricted Funds Accountant for compliance with grant contract.
For checks marked "Hold for pick-up" - Business Office personnel will contact the designated employee when the check is ready to be picked up.

Finance Department Use Only

entered by		date entered	
AP Document #			

Original copy - Finance Department
Duplicate copy - Requesting Agent

NOTE: When routing a check request for grants, Gayle prefers that Nita sign before she does, so the e-mail addresses would be ordered slightly differently, but the assignment of the signature boxes would be the same.

Next, click the 'Specify Where to Sign' button where you will assign the signature lines to each approver on the document. ***To 'assign' you will double click in each signature box and use the drop down to select and 'ok' for each one. **NEW STEP:** Assign the three spaces at the bottom under the ***Finance Department Use Only*** heading to Tammy Kennedy.

The screenshot displays the 'Request Signatures' interface. At the top, there are tabs for 'Add signers', 'Specify where to fill and sign', and 'Send and track progress'. Below the tabs, there's a toolbar with various icons and a 'Relative to Page' dropdown set to 'Signature6'. The main area shows several signature boxes with names: 'Requesting Agent', 'Approving Agent', 'Ex Dir of Business Operations', and 'Finance Approval'. A modal window for 'Signature6' is open, showing 'Assigned To' as 'Raymond Abraham (rabraham@...)' and 'Field Type' as 'Signature'. A callout box points to the modal, stating: 'Use drop down to choose and assign approver Tammy Kennedy for each of the three boxes in this section.'

Notice that the tiny triangle in the top right corner of the signature boxes changes colors to match the assignments. Once you 'save and send' for routing, you will be notified as each approver signs.

5-If you see that it is not moving through approvals quickly, you can open the file in Adobe Pro to see the 'activity', which will show you where it got hung up. Someone may have 'reviewed', but not completed the signing process.

6-You can send them a reminder within Adobe Pro, which will prompt them to sign and you can write them a note of explanation as to how to accomplish the task. They need to double click in the signature box to 'apply' their signature and then will scroll down and 'click to sign' to complete the process and forward to the next approver automatically.

7-Once all have signed you will receive a notification. Finance suggests that you save this completed document to your U: drive by date for future reference. You will no longer need to forward the completed document to AP@bpcc.edu for processing payment, since AP is part of the process.

Note: there is a document size limit of 100 pages in Adobe Pro DC, so you will need to send large backup files in a separate e-mail; otherwise, you will get an error message if you try to combine and send a file over 100 pages.