

USING ADOBE SIGN for routing Check Requests
UPDATED: 10/21/20

If you have Adobe Pro DC, once you fill in the info on your check request, 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' tool to route the approvals, starting with the 'requesting agent', which may or may not be the preparer, appropriate AVC or VC as department approver, Raymond Abraham for AVC Finance Review, Gayle Doucet for Purchasing and the appropriate Finance personnel (Lynn Lyle llyle@bpcc.edu for general fund and student fee funds, Rene Tate rtate@bpcc.edu for the 131xxx funds and Anita Drozd adrozd@bpcc.edu for grant funds). Adobe will ask you to enter the e-mail addresses of the approvers (enter them in the order that they should approve –Requesting Agent, Approving Agent for Department, Raymond Abraham (rabraham@bpcc.edu), Gayle Doucet (gdoucet@bpcc.edu), and last Finance) and then to 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. 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 and **you will need to forward the completed document to AP@bpcc.edu for processing payment.**

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.