CSUN | CALIFORNIA STATE UNIVERSITY NORTHRIDGE Finance & Trust Accounting

ADOBE SIGN GUIDE
JOURNAL ENTRY REQUEST FORM

Valera Hall 360
Phone: (818) 677-2696
Fax: (818) 677-2840

INTRODUCTION

The Journal Entry Form is available as a Workflow in AdobeSign. This guide is designed to provide instructions on how to access and complete the workflow in AdobeSign. To access the workflow, a user must have **Sender** access in Adobe Sign. If you do not have Sender access, please contact the IT Help Center.

All signatures on the application must be the true facsimile (exact image) of the approver's actual signature. This can be done on a smartphone or tablet. The application cannot be approved if a predefined signature font is used. For help setting up a permanent electronic signature that is stored in AdobeSign for later use (not Adobe DC or Adobe Pro), please contact the IT Help Center.

LOGGING IN TO ADOBE SIGN

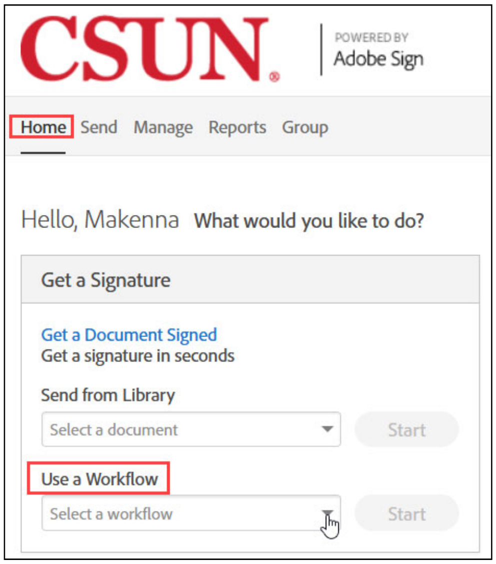
With your CSUN email address and password, click here to log in to Adobe Sign.

WHO DO I CONTACT FOR HELP?

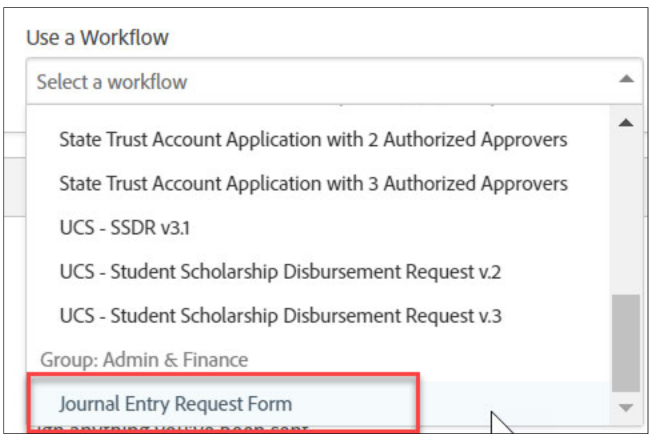
Create a TOPdesk request under Solar Financials or email solarfin@csun.edu. For immediate assistance contact SOLAR Financials by phone (818) 677-6685.

ACCESSING THE WORKFLOW

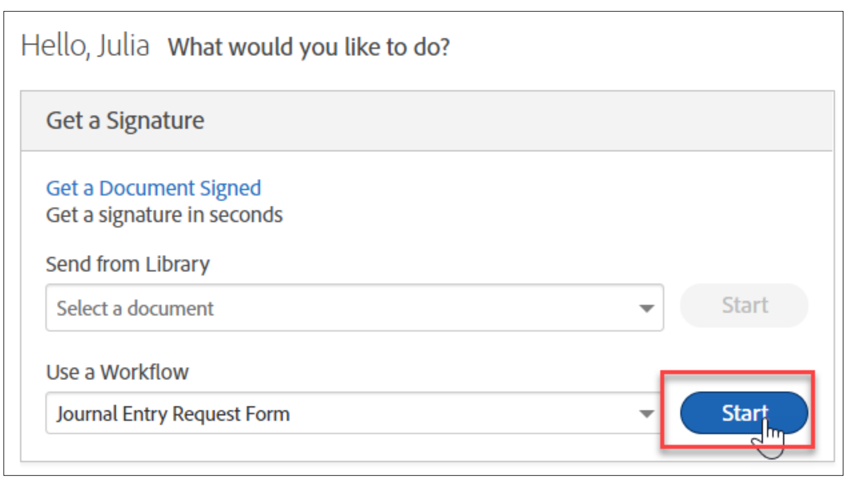
1. From **Home** dashboard, select the **Use a Workflow** dropdown menu.



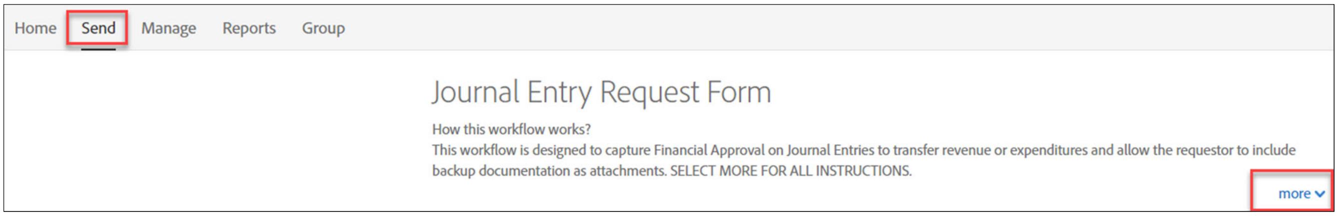
2. Select the **Journal Entry Request Form** from the dopdown menu.



3. Select the Start button to the right of the dropdown menu.



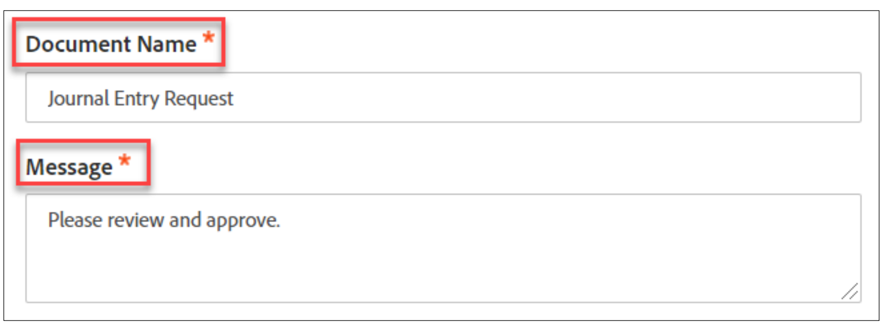
4. Under the **Send** dashboard, read all the instructions for the workflow, select more to view all.



5. Complete the **Recipients** section.
   - *Preparer:* Defaulted to the person who starts this workflow
   - *Department Reviewer (Optional):* For example, the Financial Analyst. This section will not have a signature field if department reviewer is left blank.
   - *Financial Approver:* For example, the Director of Finance of the college/department.

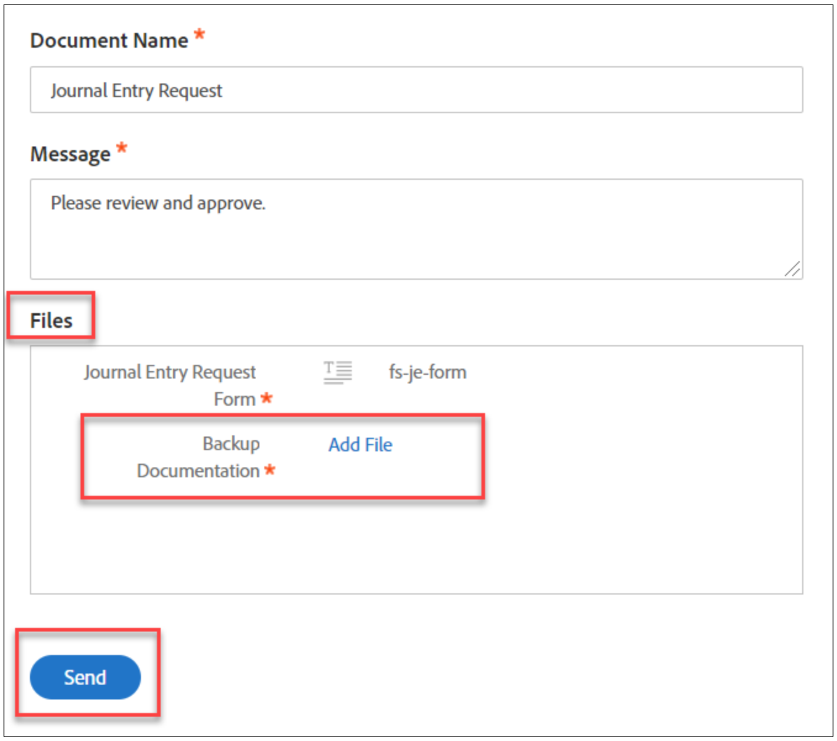
*Financial Accounting & Reporting is not editable.

6. The Document Name and Message can be edited. This is what will appear in the email to each of the recipients.



7. The **Files** cannot be edited. The Journal Entry Request Form is attached and backup documentation is required. Select the **Send** button to begin filling out the application.

   Note: Selecting Send will not initiate the approval workflow, it will launch the fillable application



8. **Complete the Journal Entry Request Form and submit, all fields have been assigned to the appropriate recipient.**