

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

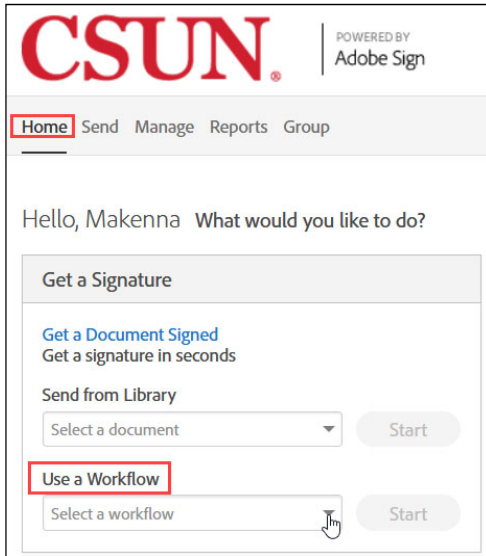
With your CSUN email address and password, click [here](#) to log in to Adobe Sign.

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.

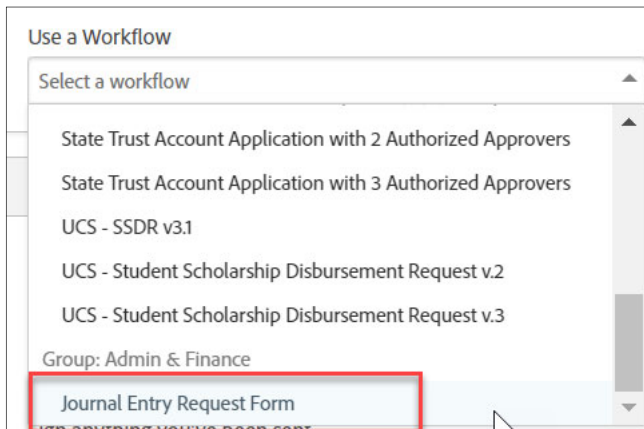
ACCESSING THE WORKFLOW

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




The screenshot shows the CSUN Home dashboard. At the top left is the CSUN logo and 'POWERED BY Adobe Sign'. Below the logo is a navigation bar with 'Home', 'Send', 'Manage', 'Reports', and 'Group'. The 'Home' link is highlighted with a red box. Below the navigation bar is a greeting: 'Hello, Makenna What would you like to do?'. There are two main sections: 'Get a Signature' and 'Use a Workflow'. The 'Use a Workflow' section has a dropdown menu labeled 'Select a workflow' and a 'Start' button. The 'Use a Workflow' text and the dropdown menu are highlighted with a red box.

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



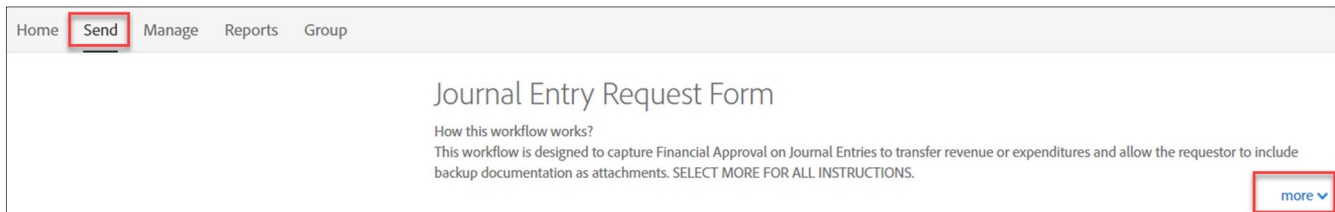
The screenshot shows the 'Use a Workflow' dropdown menu. The dropdown is open, showing a list of workflows. The 'Journal Entry Request Form' is highlighted with a red box. The list includes: 'State Trust Account Application with 2 Authorized Approvers', 'State Trust Account Application with 3 Authorized Approvers', 'UCS - SDR v3.1', 'UCS - Student Scholarship Disbursement Request v.2', and 'UCS - Student Scholarship Disbursement Request v.3'. Below the list is the text 'Group: Admin & Finance'.

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



The screenshot shows the CSUN Home dashboard. The 'Use a Workflow' section is selected, and the dropdown menu is open, showing 'Journal Entry Request Form'. The 'Start' button to the right of the dropdown is highlighted with a red box. A mouse cursor is pointing at the 'Start' button.

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.

A screenshot of the 'Recipients' section in a web application. The section is titled 'Recipients' and has a help icon (question mark) in the top right corner. Below the title, there are four recipient rows. Each row has a document icon on the left, a text input field, an email icon with a dropdown arrow and the word 'Email', and a chat icon. The first row is for the 'Preparer' and has 'Myself' in the input field. The second row is for the 'Department Reviewer (Optional)' and has 'Enter recipient email' in the input field. The third row is for the 'Financial Approver' and has 'Enter recipient email' in the input field. The fourth row is for 'Financial Accounting & Reporting' and has 'Cynthia.H.Roseman@csun.edu' in the input field.

*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.

A screenshot of two form fields. The first field is labeled 'Document Name *' and has a red box around the label. The input field contains the text 'Journal Entry Request'. The second field is labeled 'Message *' and has a red box around the label. The input field contains the text 'Please review and approve.' There is a small icon in the bottom right corner of the message field.

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

Document Name *

Journal Entry Request

Message *

Please review and approve.

Files

Journal Entry Request Form * fs-je-form

Backup Documentation * [Add File](#)

[Send](#)

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