



LANEY BUSINESS OFFICE TRAINING/REFRESHER

WEDNESDAY JUNE 17, 11-12PM: STAFF ASSISTANTS, MANAGERS TRAINING (OPTION 1)
THURSDAY JUNE 18, 1:30-2:30PM: STAFF ASSISTANTS, MANAGERS TRAINING (OPTION 2)

AGENDA

- ADOBE SIGN
- LAR LIVE DEMO
- DOCUMENT WORKFLOW
- Q & A
- ADOBE SIGN TRAINING RESOURCES
- CAMPUS CONTACTS & RESOURCES

ADOBE SIGN DOCUMENTS

MANDATED/NOT MANDATED AS OF 6/16/20

FINANCE:

MANDATED: Travel, ICC – Independent Contractor Consultant, Cash & Checks Receipt Form, Request to Advertise

PURCHASING/WAREHOUSE:

MANDATED: ICC – Independent Contractor Consultant
NOT MANDATED: Bulk Order Form

HR/PAYROLL:

MANDATED: LAR – Leave of Absence Report, Request to Advertise
NOT MANDATED: Timesheets – Student, Classified & Certificated, ILR – Individual Leave Request

CAMPUS:

MANDATED: Overtime Authorization Form, Petty Cash Form
NOT MANDATED: Stipend Approval Form

SEE DOCUMENT WORKFLOW FOR ADOBE SIGN INITIATOR

The background is a light gray gradient. In the top-left and bottom-right corners, there are several realistic water droplets of various sizes, rendered with soft shadows and highlights to give them a three-dimensional appearance. The text "LIVE DEMO" is centered in the middle of the page.

LIVE DEMO



LEAVE OF ABSENCE REQUEST (LAR)

STEP ONE: COMPLETE YOUR LAR

Fill out your LAR as you normally do every month, except for your signatures.

- Name
- ID
- Hours of leave taken.

If NO leave was taken for the month:

Please mark X on the box and enter your initials. You will not be able to complete this step later.



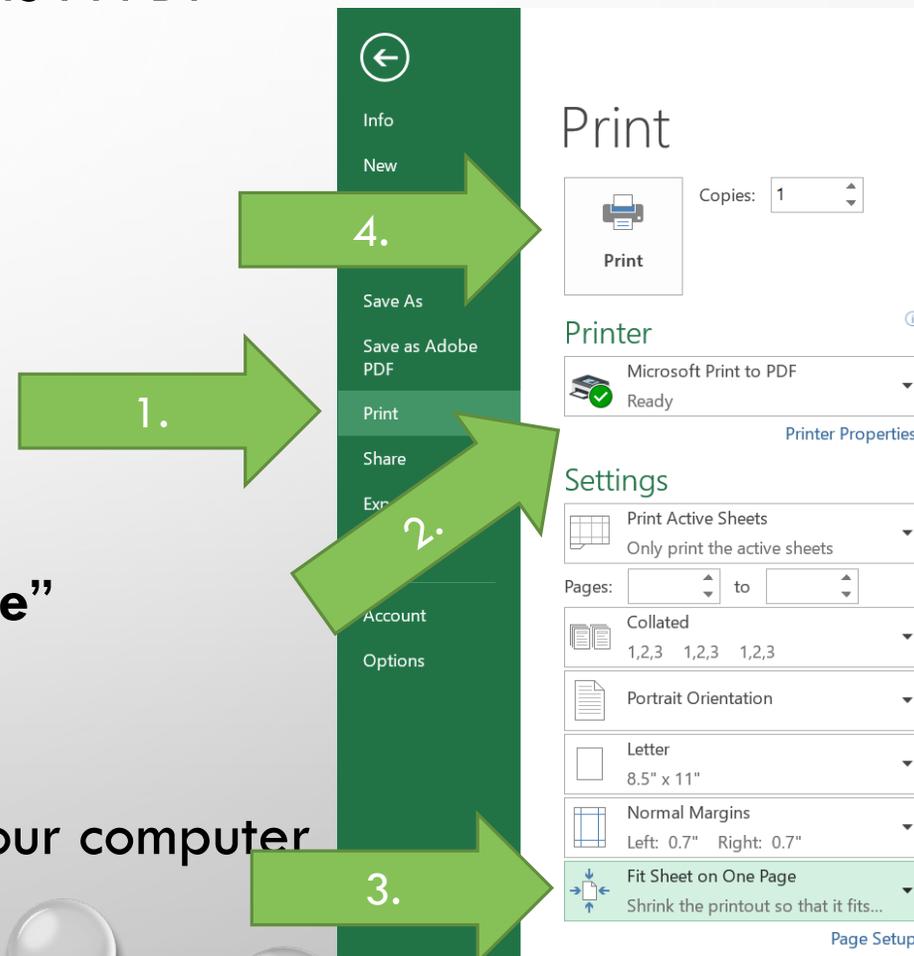
LEAVE OF ABSENCE REQUEST (LAR)

STEP TWO: SAVE YOUR LAR AS A PDF

Click on **“Print”**. For your printer selection choose **“Microsoft Print to PDF”**.

Before clicking Print, please make sure to look at the last selection. It should say **“Fit sheet on one page”**

This will prompt you to save your pdf document on your computer

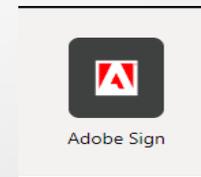


LEAVE OF ABSENCE REQUEST (LAR)

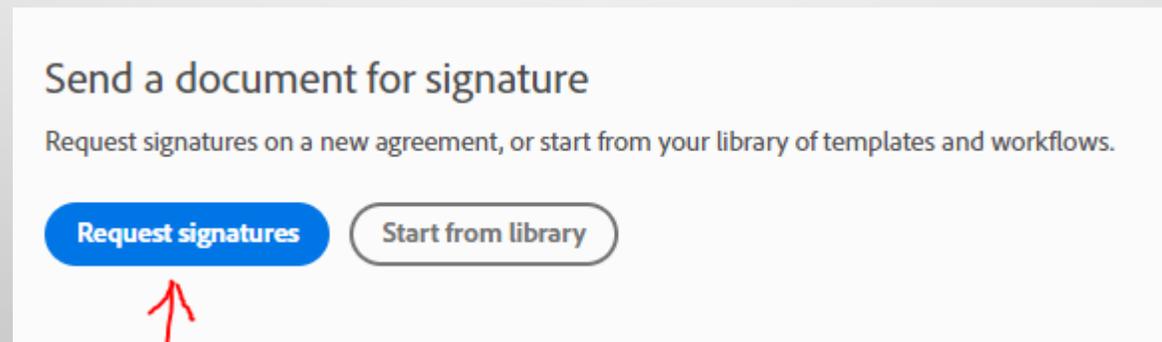
STEP THREE: INITIATING ADOBE SIGN

Login to your Peralta portal at <https://web.peralta.edu/portal/>

In your list of Apps, you will see an icon for Adobe Sign application:



Open the application and Click on Request Signatures:



LEAVE OF ABSENCE REQUEST (LAR)

STEP THREE: INITIATING ADOBE SIGN

1 Click on Add me link on the top right side, so that you can sign and then your supervisor's email on the second line. If you want to send a copy to your department's staff assistant, enter their email in the cc line.

Reports Group 3

Recipients

Complete in Order Complete in Any Order

1. Add Me | Add Recipient Group ?

1	✎	Myself	✉	Email	✕
2.	✎	Supervisor's_email_here	✉	Email	✕
3	✎	Enter recipient email			

CC | Hide

3. Staff_assistant's_email_here ✕

Message

LAR_June_2020

Please review and complete LAR_June_2020.

Options ?

- Password Protect
- Set Reminder

Files Add Files

LEAVE OF ABSENCE REQUEST (LAR)

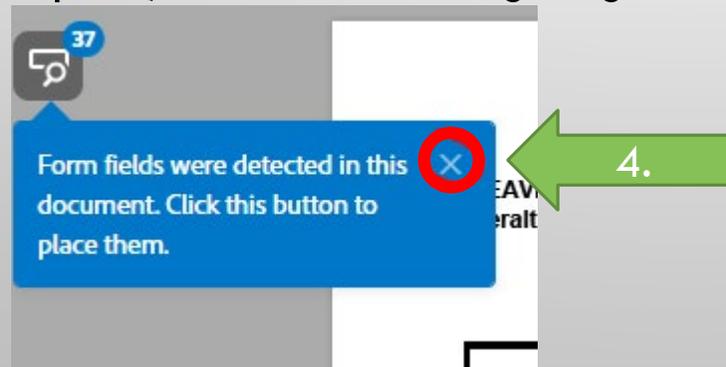
STEP THREE: INITIATING ADOBE SIGN

- 1 Type in the message for your supervisor to approve the LAR.
- 2 Then add your LAR file that needs signatures.
- 3 Next, click on Preview & Add Signature Field.
- 4 When the LAR pdf opens, close this message right away:

The screenshot shows an email interface with the following elements:

- CC:** Hide
- To:** Staff_assistant's_email_here x
- Message:** LAR_June_2020
Please review and complete LAR_June_2020.
- Files:** Add Files
- Options:** Preview & Add Signature Fields
- Next:** Next

Green arrows indicate the steps: 1. points to the message body, 2. points to the 'Add Files' button, and 3. points to the 'Preview & Add Signature Fields' checkbox.



LEAVE OF ABSENCE REQUEST (LAR)

STEP THREE: INITIATING ADOBE SIGN

- 1 Scroll to the bottom of your open LAR and locate the Employee signature line. Observe the panel on the right side and locate your name. Note that all recipient names will be color coded.
- 2 Under the Signature fields on the right panel, DRAG and DROP the Signature field on the Employee's signature line.
- 3 Now click on your supervisor's email on the right panel and then DRAG and DROP the Signature field on the Administrator's signature line.

I CERTIFY THAT THIS IS A TRUE STATEMENT OF LEAVE TAKEN

* Signature	
Employee's Signature	Date
* Signature	
Administrator's Signature	Date

1

- Signature
- Digital Signature
- Initials

LEAVE OF ABSENCE REQUEST (LAR)

STEP FOUR: COMPLETING ADOBE SIGN

On the bottom right, click on Sign, then Send.

Your LAR will now open with a place for you to sign. Sign it with your electronic signature (create one if you don't have one). Then click to sign.

The LAR will automatically be sent to your supervisor's email (the one that you put in Step Two (2)).

Once your supervisor signs, you will receive the signed LAR in your email for your records.

DOCUMENT WORKFLOW

DEPARTMENT INITIATED DOCUMENTS

GENERAL PROCESS: CONVERT TO PDF, SIGN THEMSELVES, SEND TO SUPERVISOR AS ADOBE SIGN

BID RECAP FORM

Initiator/SA → Initiate Adobe Sign: Include VP Admin. Services and Buyer Copy to: LBusinessOffice → Send to Business Office

ILR – INDIVIDUAL LEAVE REQUEST

Initiator/Employee Submit PDF → SA/Supervisor review, initiate Adobe Sign: Include Employee and Manager → Manager

LAR – LEAVE OF ABSENCE REPORT

Initiator/Employee Submit → SA/Supervisor review, initiate Adobe Sign: Include Employee and Manager → Manager
Department may vary on who sends to HR (Example: For Admin Services CC/send to LBusinessOffice)

STIPEND APPROVAL FORMS

Initiator/Employee Submit → SA/Supervisor initiate Adobe Sign: Include Employee and Manager Copy to: LBusinessOffice → Cost Center Manager

DOCUMENT WORKFLOW

BUSINESS OFFICE/PRESIDENT'S OFFICE

INITIATED DOCUMENTS

PLEASE FORWARD ORIGINALS TO BUSINESS OFFICE

GENERAL PROCESS: CONVERT TO PDF, SIGN THEMSELVES, SEND TO SUPERVISOR AS ADOBE SIGN

BULK ORDER FORMS (One signature only): Initiator → (FSS review, check, Adobe Sign) → VPAS – Send to District Warehouse (J. Kendrix)

CASH & CHECKS RECEIPT FORM (One signature only): Initiator → (FSS review, check, Adobe Sign) → VPAS – Send to District Finance (R. Ferreira)

ICC: Vendor → Dean → VPAS → President (President's SA reviews, check, Adobe Sign) → VC Finance, Chancellor

OVERTIME AUTHORIZATION: Supervisor → CC Manager → (FSS review, check, Adobe Sign) → VPAS

OVERTIME FORM – Initiator → Supervisor → (FSS review, check, Adobe Sign) → VPAS

PETTY CASH: CC Manager → (FSS review, check, Adobe Sign) → VPAS

RTA – REQUEST TO ADVERTISE: CC Manager → (FSS review, check, Adobe Sign) → VPAS → President

TIMESHEETS: ON HOLD Employee → CC Manager → (FSS review, check, Adobe Sign) → VPAS

TRAVEL: Employee → Supervisor → CC Manager → (FSS review, check, Adobe Sign) → VPAS → President → Chancellor/
BOT for \$3000+/Out-of-state

The background features a light gray gradient with several realistic water droplets of various sizes scattered in the corners. The droplets have highlights and shadows, giving them a three-dimensional appearance. The text 'Q & A' is centered in the middle of the page.

Q & A

ADOBE SIGN TRAINING RESOURCES

ADOBE SIGN TUTORIALS

[HTTPS://HELPX.ADOBE.COM/SIGN/TUTORIALS.HTML](https://helpx.adobe.com/sign/tutorials.html)

PCCD - ADMINISTRATION TRAINING AUDIO RECORDING

[HTTPS://BLUEJEANS.COM/S/OERKO](https://bluejeans.com/s/oerko)

CAMPUS CONTACTS & RESOURCES

Contacts

Pak Ho

Staff Services Specialist/Fiscal
Email: pho@peralta.edu
Telephone: (510) 464-3378

Travel Requests, Measure A Forms,
Budget Support all Funds

Diana Davaasuren

Staff Services Specialist/Fiscal
Email: ddavaasuren@peralta.edu
Telephone: (510) 464-3239

Student Timesheets, ePAFs, Budget Support
all Funds, General BO support

Derek Pinto, Ed.D.

Vice-President Admin. Services
Email: dpinto@peralta.edu
Telephone: (510) 464-3232

Janice Browne

Staff Assistant
Email: LBusinessOffice@peralta.edu
Email: jbrown@peralta.edu
Telephone: (510) 464-3228

General BO Support & Classified
Timesheets, Work Orders

Kevin Q. Tran

Principal Financial Analyst
Email: kqtran@peralta.edu
Telephone: (510) 464-3309

Laney Help Desk

Laneyhelpdesk@Peralta.edu
510-464-3233

Resources

Business Office General Website

https://laney.edu/business_office/business-office/

Business Office Forms

https://laney.edu/business_office/business-office-forms/

Business Office Presentations and Trainings

https://laney.edu/business_office/business-office-budget-training/

College Operating Procedures

https://laney.edu/business_office/adminsop/

PCCD ICC Guidelines Website

<https://web.peralta.edu/business/independant-contractor-guidelines/>

PCCD Payroll

<https://web.peralta.edu/payroll/>

EPAF Users Guide

<https://web.peralta.edu/hr/files/2012/08/ePAFS-Users-Guide-Initiators-Approvers-8-24-12.pdf>

Leave Forms

<https://web.peralta.edu/hr/leaves/>

The image features a light gray gradient background with several realistic water droplets of various sizes scattered in the corners. The droplets have highlights and shadows, giving them a three-dimensional appearance. The text 'THANK YOU' is centered in the middle of the page.

THANK YOU