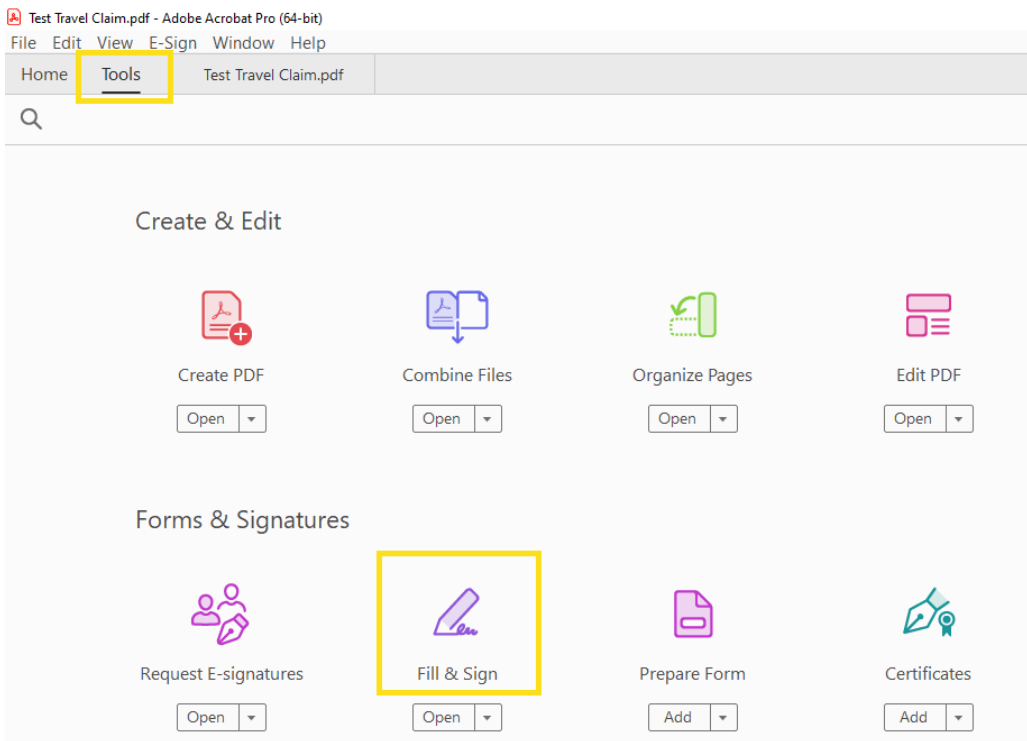


## Quick Reference Guide

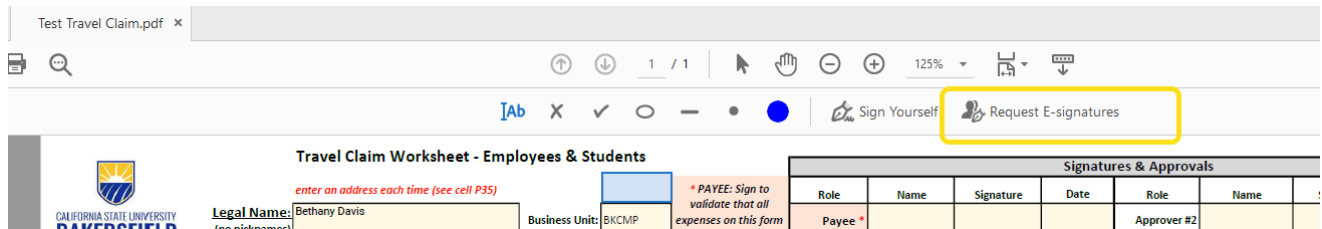
### Route Travel Claim Worksheet in Adobe Sign

#### Route Travel Claim Worksheet in Adobe Sign

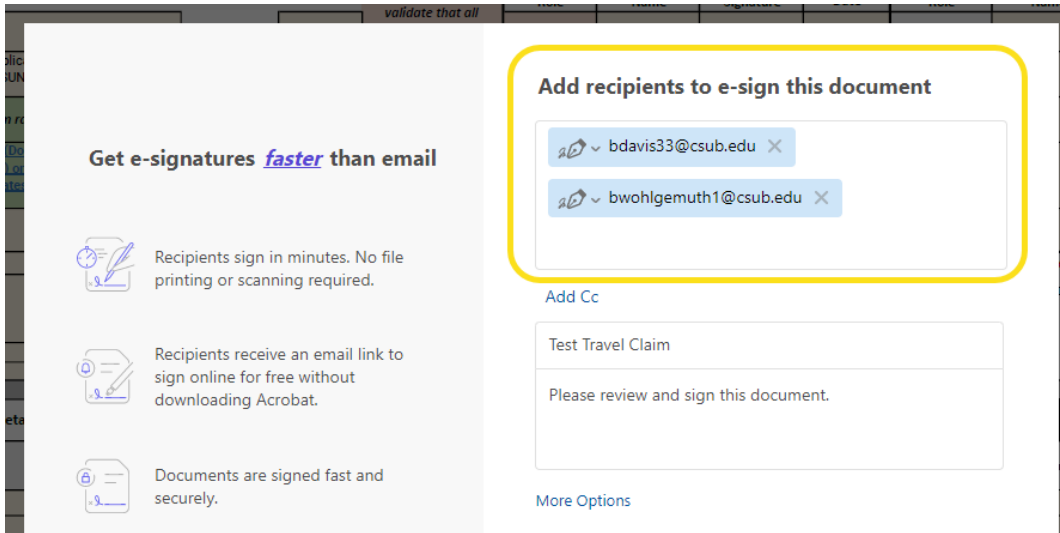
1. Convert the Excel worksheet to a PDF.
2. Open the PDF file in Adobe Acrobat.
3. Go to **Tools > Fill & Sign**.



4. Select **Request E-signatures** from the ribbon.

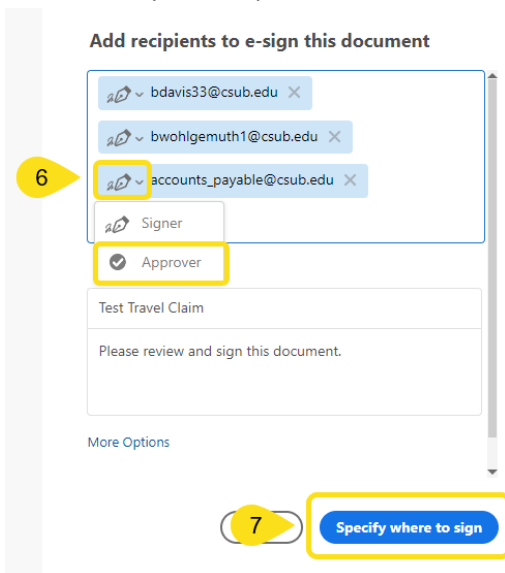


5. Enter the names or email addresses of your recipients in the order that you want them to sign the form. The order should be **Payee & Preparer > Reviewers > Approvers > Grant Analyst & Dr. Sumaya > Payment Services**. Recipients will be added as a **Signer** by default.



**Note on required and optional signers:** only the Payee and the Approver (DOA approver) are required for all business units. Grant Analyst and Dr. Sumaya are only required for grant funding. Preparer, Reviewer # 1, Reviewer # 2, Approver # 2, and Approver # 3 are optional. Use the Preparer field for your own signature if you are not the Payee. Use the reviewer fields if a department analyst or other staff member wants to review the form before the DOA approver signs it. Use the additional approver fields if the chartfields you are using require multiple DOA signers.

6. For the final recipient, add [accounts\\_payable@csub.edu](mailto:accounts_payable@csub.edu) as an **Approver**. To change a recipient from a Signer to an Approver, click the pen icon to the left of their email address and select Approver from the dropdown menu.
7. When all of your recipients have been added, click **Specify Where to Sign**.



- Select a recipient from the dropdown menu at the right-hand side of the screen to add form fields for them. Once you start adding fields, you can identify which fields belong to which signer by the color displayed next to their name.

Signatures & Approvals				
Date	Role	Name	Signature	Date
	Approver #2			
	Approver #3			
	Grant Analyst			
	Dr. Sumaya (grants > \$3k)			
	<a href="#">AP/Pmt Svcs *</a>			

*(add AP/Payment Services as an approver & enter a date field)*

he drop-down options. Enter all values in USD. For more details, refer to the Instructions tab.

Advanced editing on

[Switch to new authoring](#)

**RECIPIENTS**

- Bethany Davis (me) (Signer) ▾
- Bethany Davis (me) (Signer)
- Bianca Wohlgemuth (b... (Signer)
- Payment Services (acco... (Approver)

- Add a **Name**, **Date**, and **Signature** field for each signer, except Payment Services. For Payment Services, only add **Signature** and **Date**.

To add a field, drag and drop the field type onto the form from the dropdown menus at the right side of the screen. Once a field has been added, it can be resized and moved using the cursor, and can be deleted using the Delete key.

**RECIPIENTS**

- Bethany Davis (me) (Signer) ▾

**Signature Fields** ▴

- Signature
- Initials
- Signature Block
- Stamp

**Signer Info Fields** ▾

**RECIPIENTS**

- Bethany Davis (me) (Signer) ▾

**Signature Fields** ▾

**Signer Info Fields** ▴

- Title
- Company
- Name
- Email
- Date

The finished product should look like this, with optional signers added as needed:

Signatures & Approvals							
Role	Name	Signature	Date	Role	Name	Signature	Date
Payee *	Full N...	Signature	Date	Approver #2			
Preparer				Approver #3			
Reviewer #1				Grant Analyst			
Reviewer #2				Dr. Sumaya (grants > \$3k)			
Approver *	Full N...	Signature	Date	<a href="#">AP/Pmt Svcs *</a>		Signature	Date

10. When you are finished adding signers, click **Sign, then Send** in the bottom right corner of the screen.

0.00	0.00	64.66	0.00	0.00	10.00	\$74.66
Lodging*	Miles*	Ground Transport*	Car Rental*	Business Expense*	Total Trip Expenses	
	96.5			10.00	\$74.66	
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	

Transaction Fields v

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[Reset Fields](#)

Save as template

**Sign, then Send**