

Reducing Paper Through Financial Processing

Streamlining Mailman's financial process to eliminate its reliance on paper can save time, money, and improve the overall efficiency in the filing of documents.

This presentation will focus on:

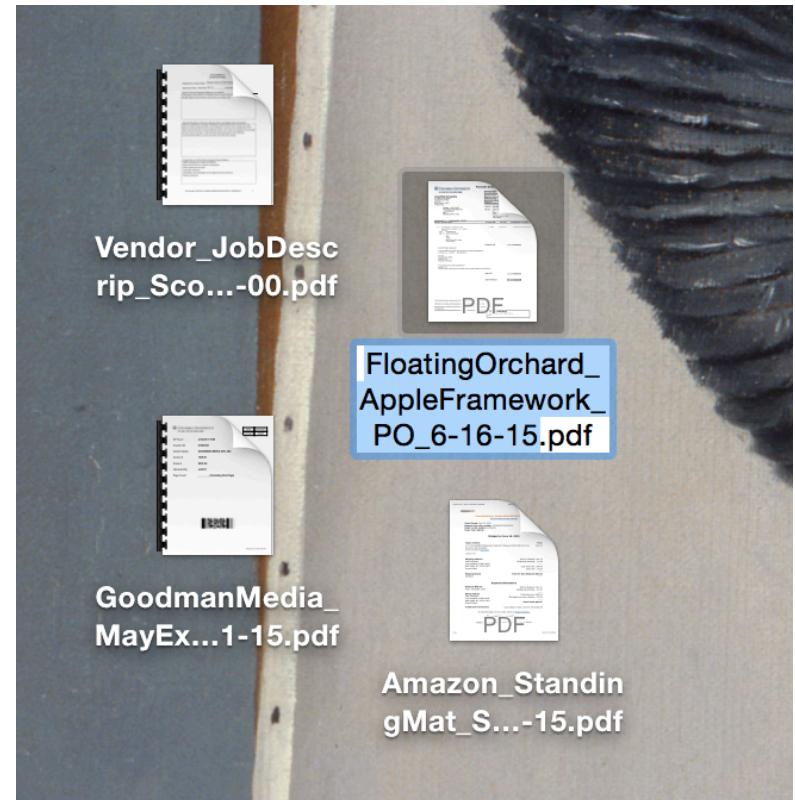
- File file naming for e-filing and e-submissions
 - Getting e-signatures from designated approvers
 - Submitting electronic documents to finance for approval
-

File Naming

Name your e-files in this format:

VendorName_JobDescrp_DocType_Date.

- Leading with the name will help when file sorting alphabetically
- 2-3 word job/purchase description gives an at-a-glance idea of what the file contains
- DocType_Date will help when looking back for reference or when documentation is requested



File Naming

This is the naming convention in action.

Previous 7 Days



AlanJoel_EthernetPortsIT_INV_6-9-15.pdf



Perkaroma_Comm_6-3-15.PDF



Perkaroma_Comm_6-10-15-2.PDF



Perkaroma_Comm_6-10-15.PDF



FloatingOrchard_AppleFramework_INV_6-16-15.pdf



SeckMartin_PromoPhotoShoot2_INV_6-10-15.pdf



Hamied_ZangaroPort_SeanPCard_6-12-15



B&H_CommBatteries_SeanPCard_6-10-15



MyEmma_MayPayment_SeanPCard6-1-15_.pdf



Amazon_USB3-Connectors_SeanPCard_6-14-15.pdf



Blackmesh_ProStudHosting_DwaynePCard_6-8-15.pdf



DanWinckler_GaryTaubes_PO_6-11-15.pdf



Zehentner_PromoVidRetainer_PO_6-11-15.pdf



GovConn_WD-BackupHDs_PO_6-2-15.pdf



AV-Services_AudSysRepair_PO_5-29-15.pdf



Apple_Monitors&F-cut_PO_6-6-15.pdf



Zehentner_PromoVidRetainer_INV_6-18-15.pdf



Apple_MonitorsSeanCindy_INV_6-18-15.pdf

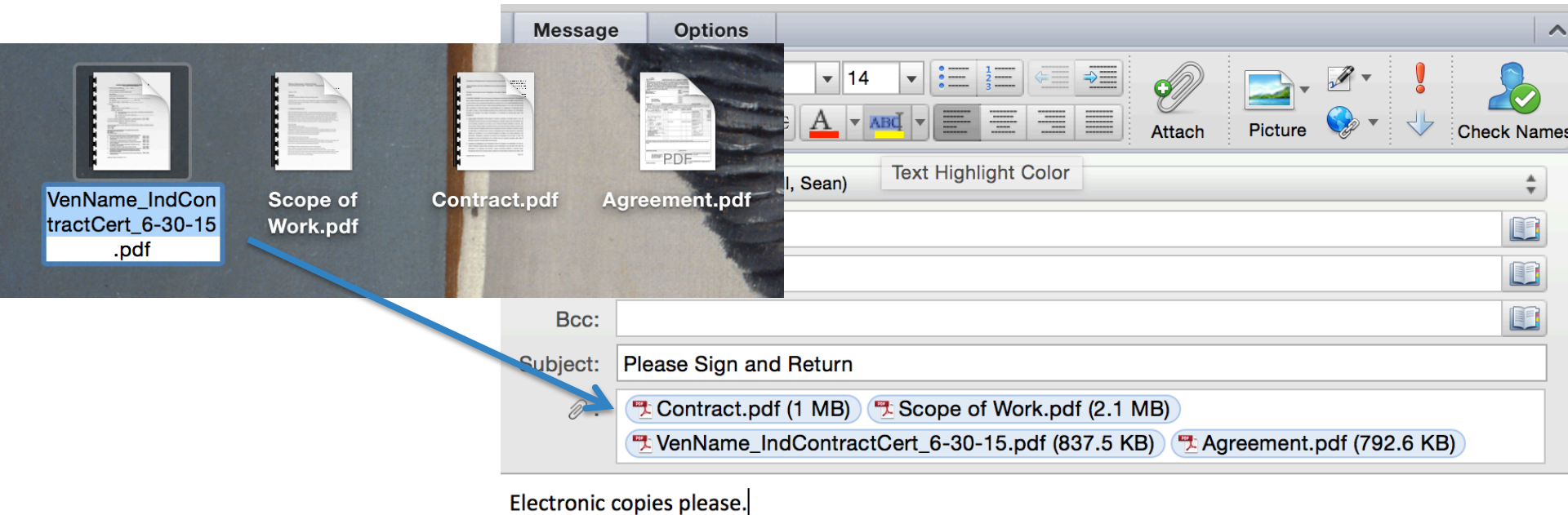


Apple_F-cut_INV_6-18-15.pdf

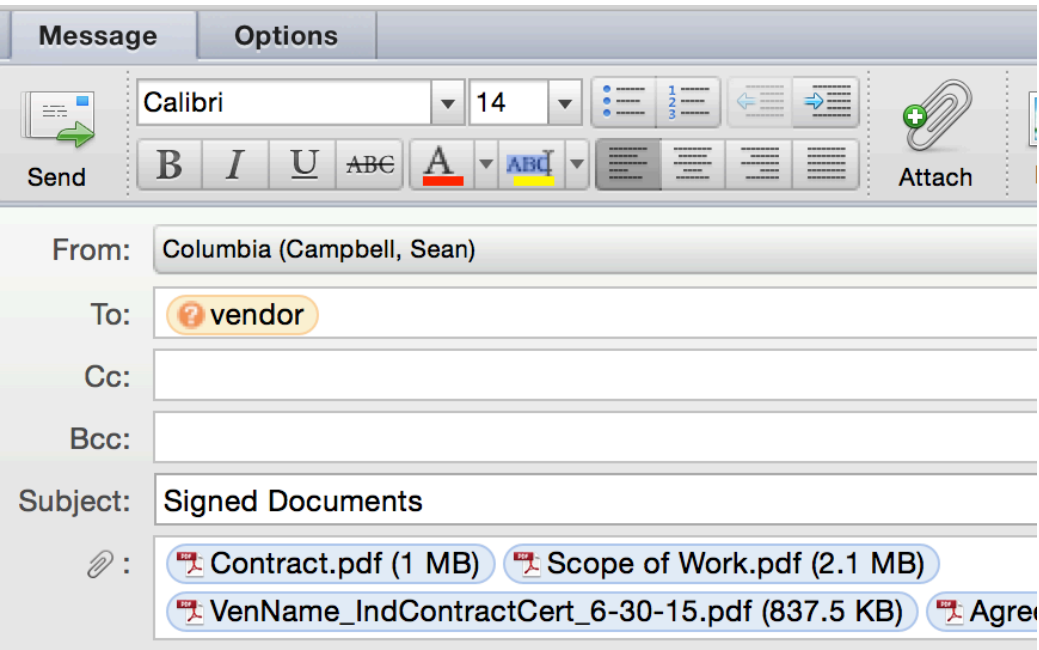
Preparing E-Docs

Once you have your individual documents ready email them to the vendor and ask for scanned copies emailed back

- Use proper file naming for each document



Preparing E-Docs



Here you go. |

Once you have the signed e-docs, drag them onto your desktop

If you have Adobe Acrobat Pro, combine them into a single requisition document.

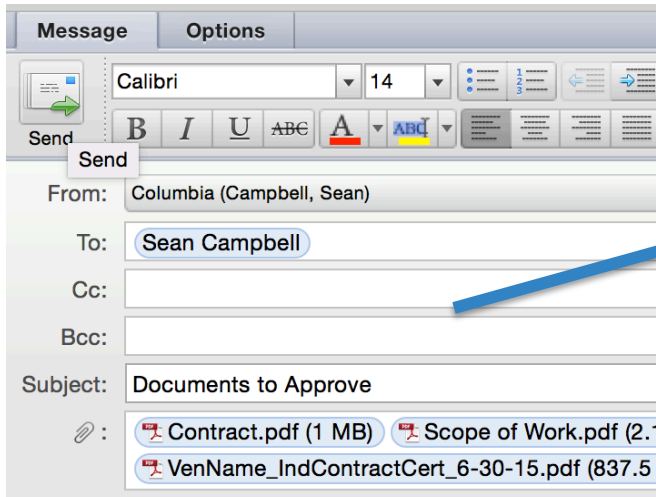
- Multiple requisition documents can be sent in a single email for e-signature

If you do not have Acrobat Pro, keep them separate.

- Send one email per requisition in this case

E-Signatures

Send an email to approver with documents needing signature. The approver can then open these documents on their smartphone or tablet.



Please sign.

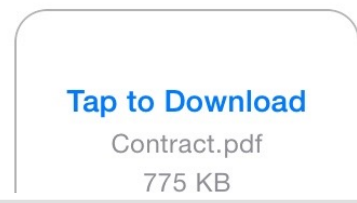


From: Sean Campbell > Hide

To: Sean Campbell >

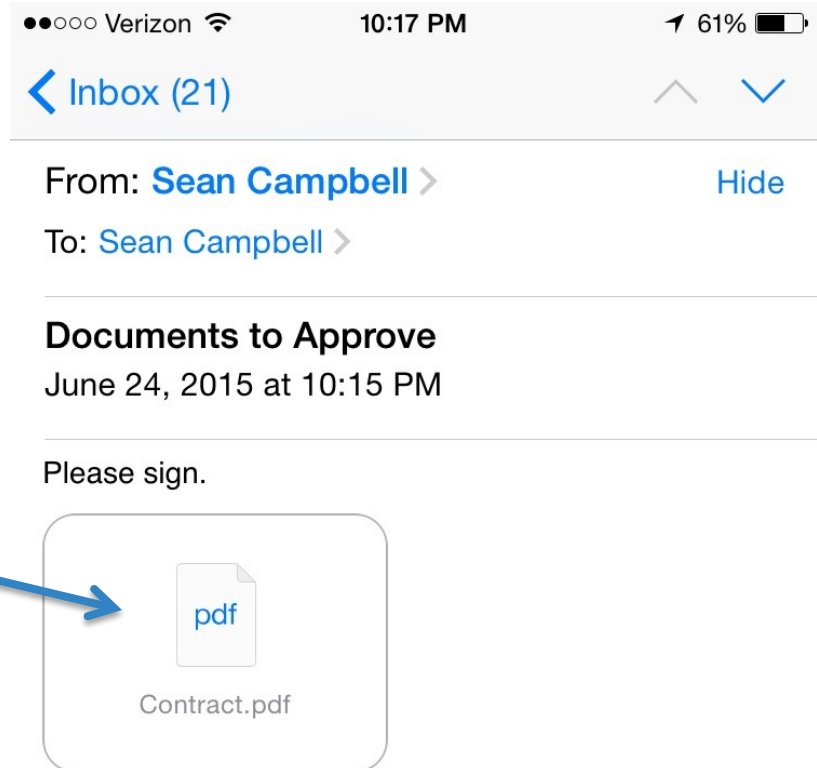
Documents to Approve
June 24, 2015 at 10:15 PM

Please sign.



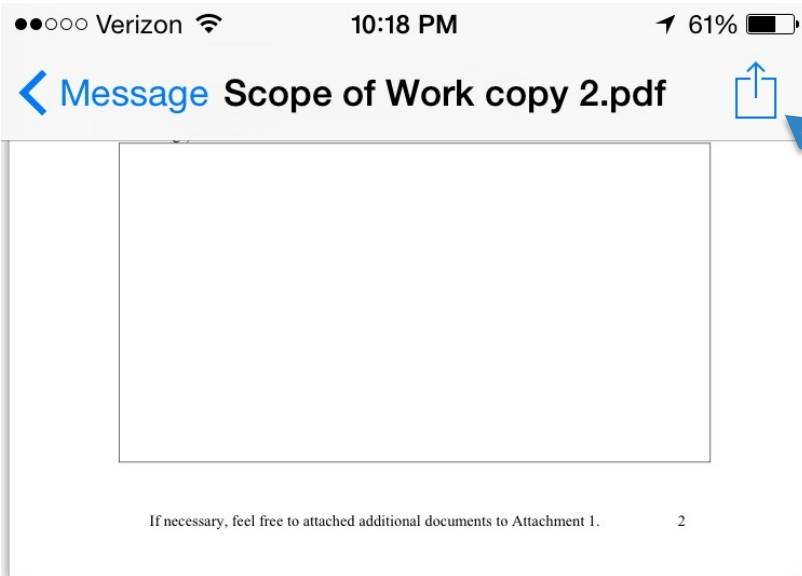
E-Signing

The approver can then e-sign the documents in Adobe by following the images in the next series of slides.

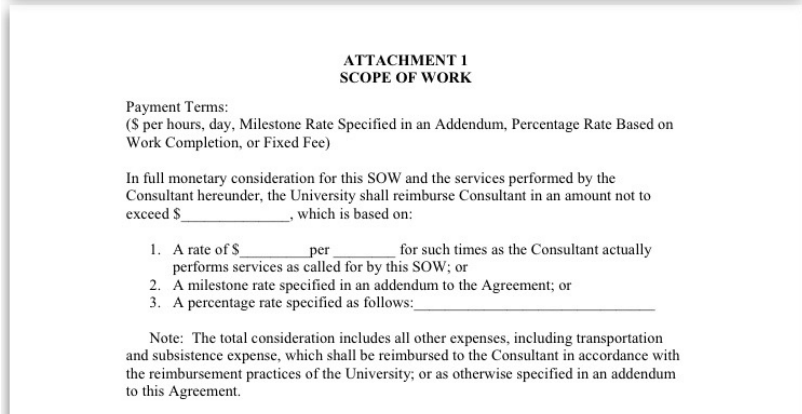


Tap here to start

E-Signing

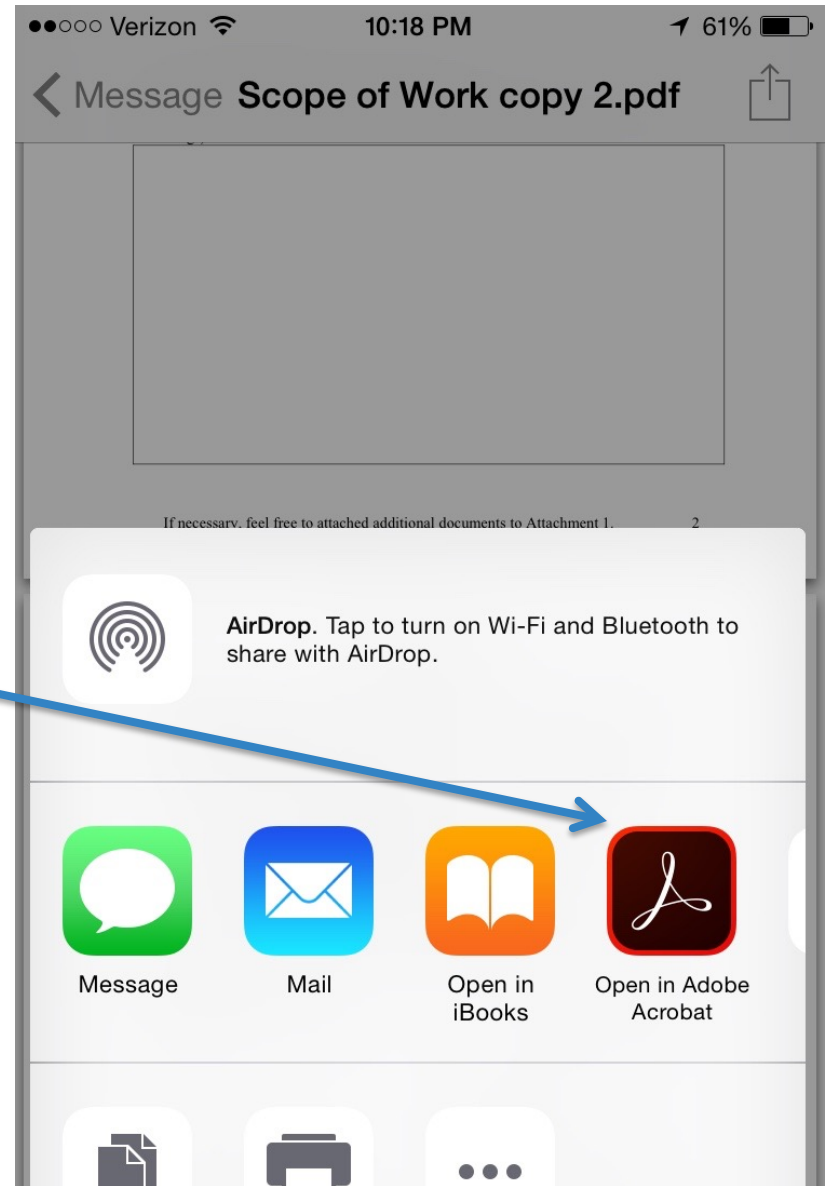


Tap here to bring up option of opening in Adobe app.



E-Signing

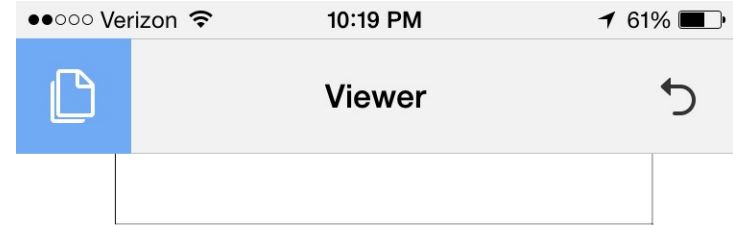
Open in Adobe app.



E-Signing

Now you are in the Adobe Viewer.

Tap this to open up the tool options. One of these will be for signing.



If necessary, feel free to attached additional documents to Attachment 1. 2

ATTACHMENT 1 SCOPE OF WORK

Payment Terms:
(\$ per hours, day, Milestone Rate Specified in an Addendum, Percentage Rate Based on Work Completion, or Fixed Fee)

In full monetary consideration for this SOW and the services performed by the Consultant hereunder, the University shall reimburse Consultant in an amount not to exceed \$ 771.70 _____, which is based on:

1. A rate of \$ _____ per _____ for such times as the Consultant actually performs services as called for by this SOW; or
2. A milestone rate specified in an addendum to the Agreement; or
3. A percentage rate specified as follows: _____

Note: The total consideration includes all other expenses, including transportation and subsistence expense, which shall be reimbursed to the Consultant in accordance with the reimbursement practices of the University; or as otherwise specified in an addendum to this Agreement.

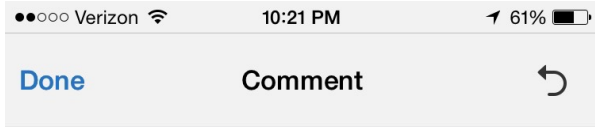
SOW Approved by (Print Name) _____ for Contract Executed on _____.

"Service Provider"	Department/School
By: _____	By: _____
Name: _____	Name: Dwayne Dixon
Title: _____	Title: Desktop Manger
Date: _____	Date: 3/31/15

NOTE: This would articulate the Incorporation of the standard University terms & conditions (PO boilerplate).



E-Signing



If necessary, feel free to attached additional documents to Attachment 1. 2

ATTACHMENT 1 SCOPE OF WORK

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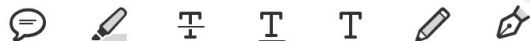
SOW Approved by (Print Name) _____ for Contract Executed on _____

"Service Provider"	Department/School
By: _____	By: _____
Name: _____	Name: Dwayne Dixon
Title: _____	Title: Desktop Manger
Date: _____	Date: 3/31/15

NOTE: This would articulate the incorporation of the standard University terms & conditions (PO boilerplate).

If necessary, feel free to attached additional documents to Attachment 1. 3

This is for signing.



E-Signing

Tap the location where you would like to place your signature and tap “Add Signature.” If you do not have a signature saved, you will be prompted to sign on the smart device.



“Edit Saved Signature” let’s you replace the signature that you have saved.

Done Comment ↶

If necessary, feel free to attached additional documents to Attachment 1. 2

**ATTACHMENT 1
SCOPE OF WORK**

Payment Terms:
($\$$ per hours, day, Milestone Rate Specified in an Addendum, Percentage Rate Based on Work Completion, or Fixed Fee)

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SOW _____

Service Provider _____ Department _____

By: _____

Name: _____

Title: _____

Date: _____

By: _____

Name: Dwayne Dixon

Title: Desktop Manger

Date: 3/31/15

NOTE: This would articulate the incorporation of the standard University terms & conditions (PO boilerplate).

If necessary, feel free to attached additional documents to Attachment 1. 3

☰ ✎ T T T ✎ ✎

E-Signing

ATTACHMENT 1 SCOPE OF WORK

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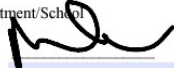
1. A rate of \$ _____ per _____ for such times as the Consultant actually performs services as called for by this SOW; or
2. A milestone rate specified in an addendum to the Agreement; or
3. A percentage rate specified as follows: _____

Note: The total consideration includes all other expenses, including transportation and subsistence expense, which shall be reimbursed to the Consultant in accordance with the reimbursement practices of the University; or as otherwise specified in an addendum to this Agreement.

SOW Approved by (Print Name) _____ for Contract Executed on _____

“Service Provider”

By: _____
Name: _____
Title: _____
Date: _____

Department/School
By: 
Name: Dwayne Dixon
Title: Desktop Manger
Date: 3/31/15

NOTE: This would articulate the incorporation of the standard University terms & conditions (PO boilerplate).

Signed document.

E-Signing

- performs services as called for by this SOW; or
- 2. A milestone rate specified in an addendum to the Agreement; or
- 3. A percentage rate specified as follows: _____

Note: The total consideration includes all other expenses, including transportation and subsistence expense, which shall be reimbursed to the Consultant in accordance with the reimbursement practices of the University; or as otherwise specified in an addendum to this Agreement.

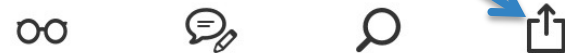
SOW Approved by (Print Name) _____ for Contract Executed on _____

<p>“Service Provider”</p> <p>By: _____</p> <p>Name: _____</p> <p>Title: _____</p> <p>Date: _____</p>	<p>Department/School _____</p> <p>By: </p> <p>Name: Dwayne Dixon</p> <p>Title: Desktop Manger</p> <p>Date: 3/31/15</p>
--	---

NOTE₁: This would articulate the incorporation of the standard University terms & conditions (PO boilerplate).

Tap this

If necessary, feel free to attached additional documents to Attachment 1.



³To bring up this.

Payment Terms:
(\$ per hours, day, Milestone Rate Specified in an Addendum, Percentage Rate Based on Work Completion, or Fixed Fee)

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SOW Approved by (Print Name) _____ for Contract Executed on _____

“Service Provider” _____ Department/School _____

Share File

Share Public Link

Save to Adobe Document Cloud

Open In...

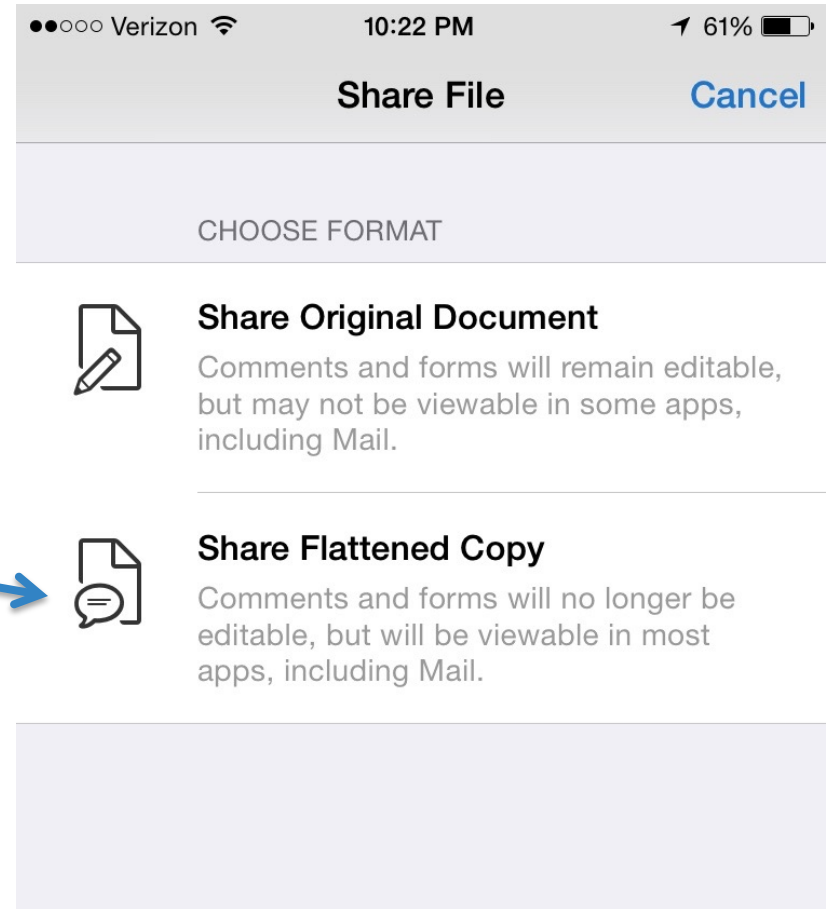
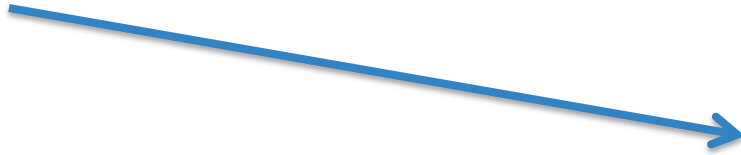
Print Document

Cancel

Tap “Share File.”

E-Signing

Tap “Share Flattened Copy.”



CHOOSE FORMAT



Share Original Document

Comments and forms will remain editable, but may not be viewable in some apps, including Mail.

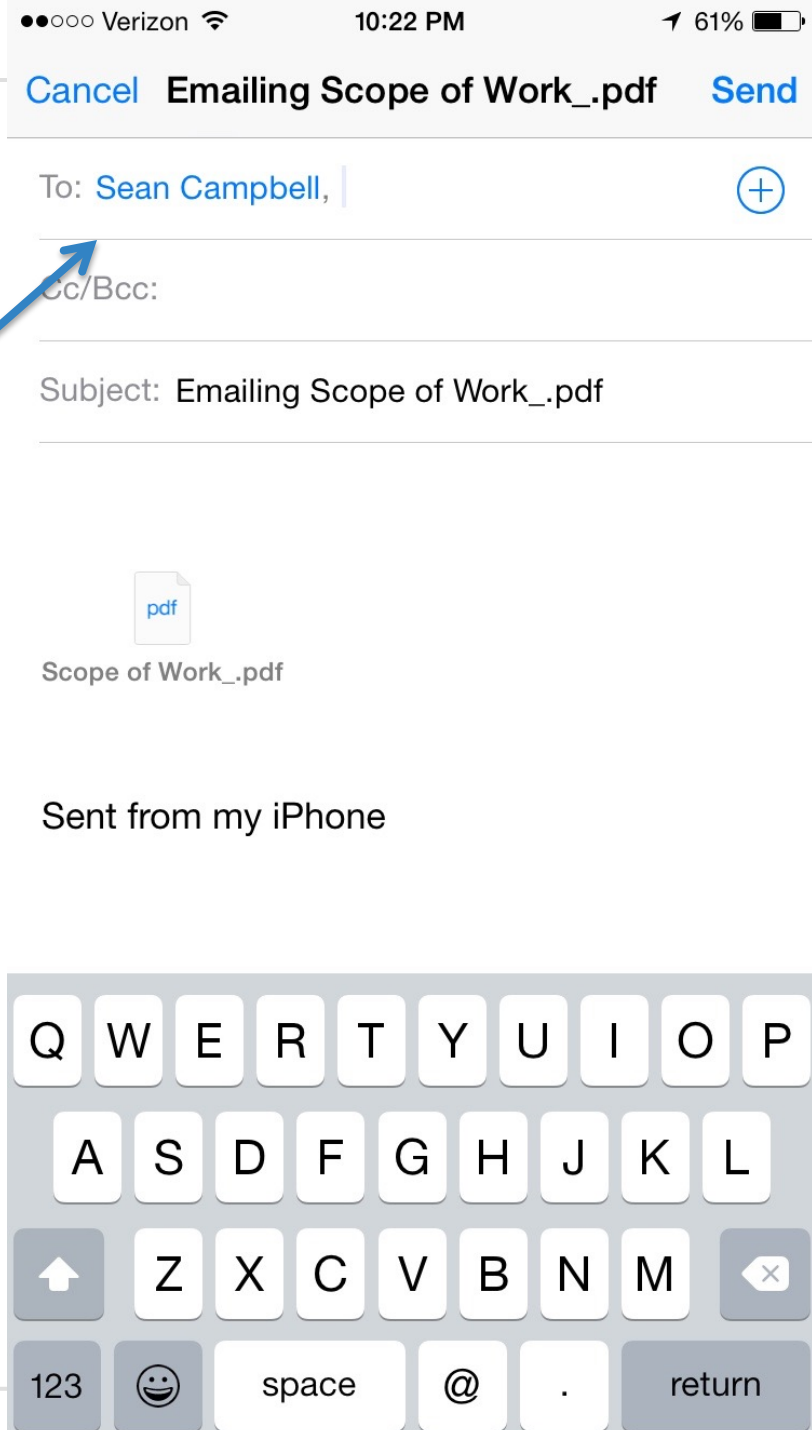
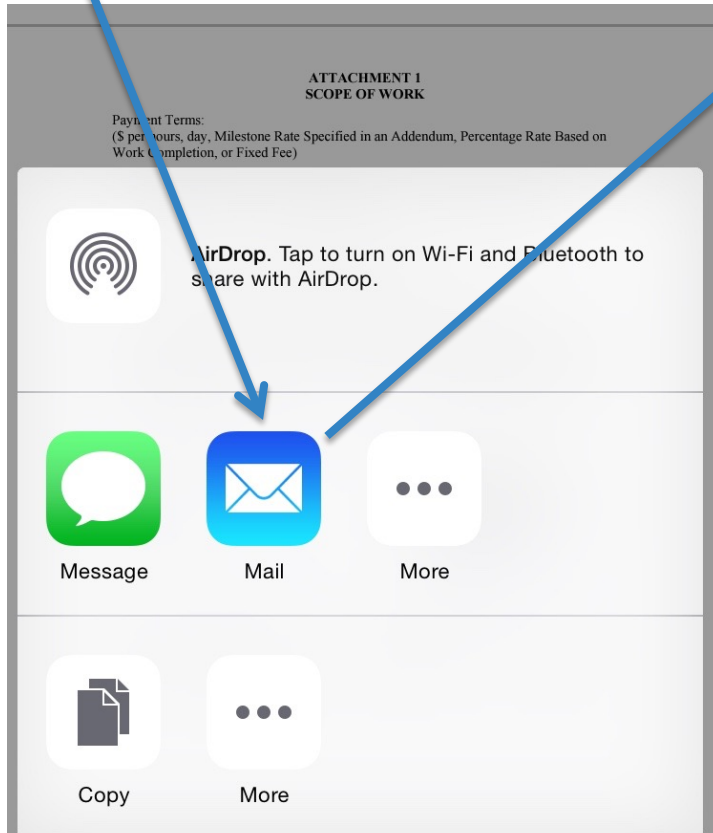


Share Flattened Copy

Comments and forms will no longer be editable, but will be viewable in most apps, including Mail.

E-Signing

Tap mail.



E-Signing

The approver's section is now complete.

E-Requisitions

Department Approval

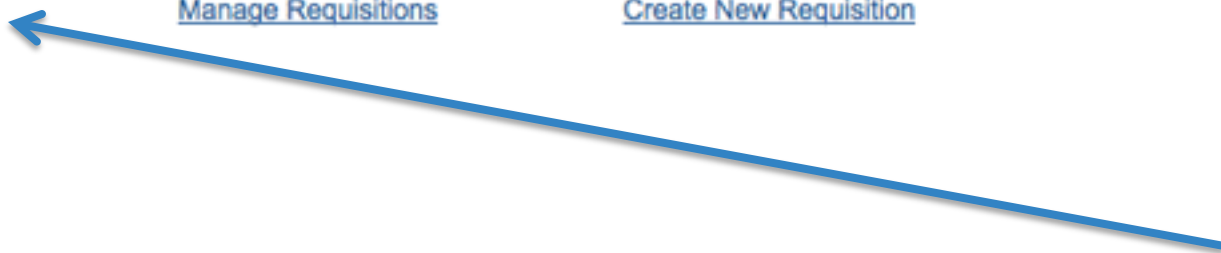
Line 1 Schedule 1 Distribution 1: Pending [Start New Path](#)
Item: hhhh

Department Approval

Pending [Multiple Approvers](#) [Department Approval](#)

Submit Edit Requisition Apply Approval Changes Check Budget

[View printable version](#) [Manage Requisitions](#) [Create New Requisition](#)



Create your requisitions as you normally do, then click on “view printable version” after saving and submitting for approval.

E-Requisitions

Requisition

Ship To: See detail below

Bill To: 722 W 168th Street
44
44
44
New York City NY 10032

Business Unit: COLUM		
Req ID:	Date	Page
000055799	06/26/2015	1
Requisition Name: sff		
Requester	Currency	
Campbell, Sean	USD	
Requester Signature		

Line-Schd	Item	Description	Mfg ID	Quantity	UOM	Price	Extended Amt Due Date
1-1		Nhh		1.0000	EA	456.00	456.00

Save the resulting page by clicking on the download icon.

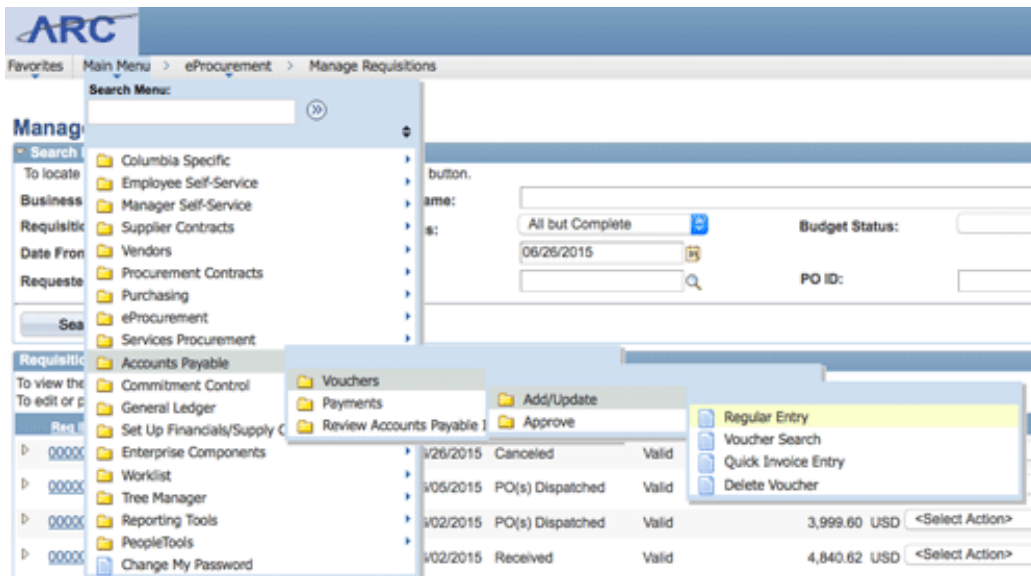
This will be put with your other files for the requisition.

- Merged into a single PDF doc if you have Adobe Pro

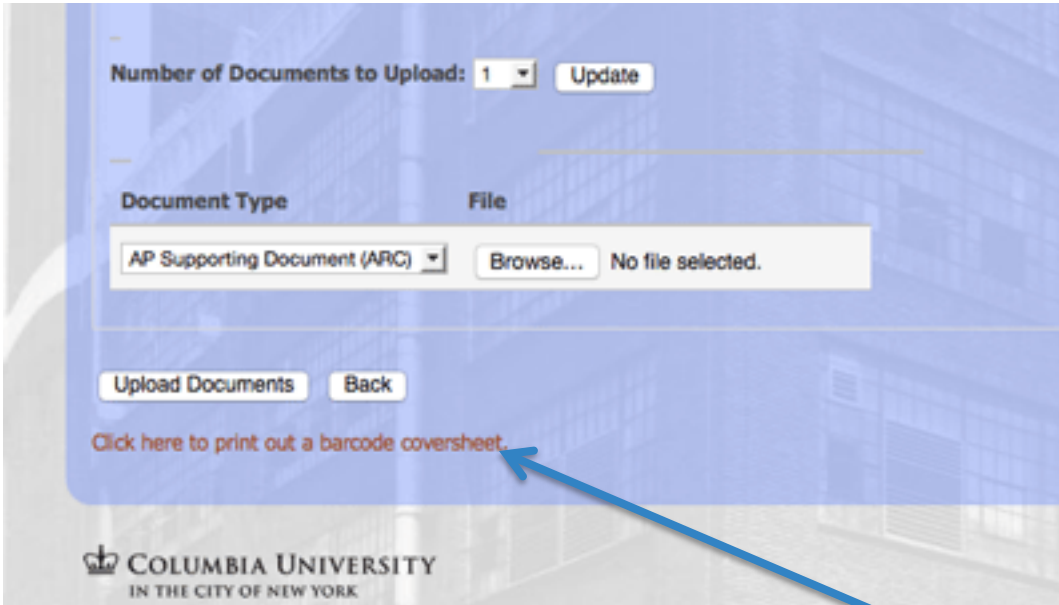
E-Invoices

To work with electronic invoices, follow the same process as you do with paper invoices.

The scanning of the paper documents for upload to the EDM is no longer necessary.



Adding E-Doc Barcode




Number of Documents to Upload: 1

Document Type File

AP Supporting Document (ARC) No file selected.

[Click here to print out a barcode coversheet.](#)

 COLUMBIA UNIVERSITY
IN THE CITY OF NEW YORK

Once you have entered your document into ARC and submitted it for approval, go to the Procurement website to upload your document.

After your doc is uploaded to the system, click on the “print out a barcode link.”

Adding E-Doc Barcode



Download this page.

Just as with the requisition cover page, this will be put with your other files related to the e-doc.

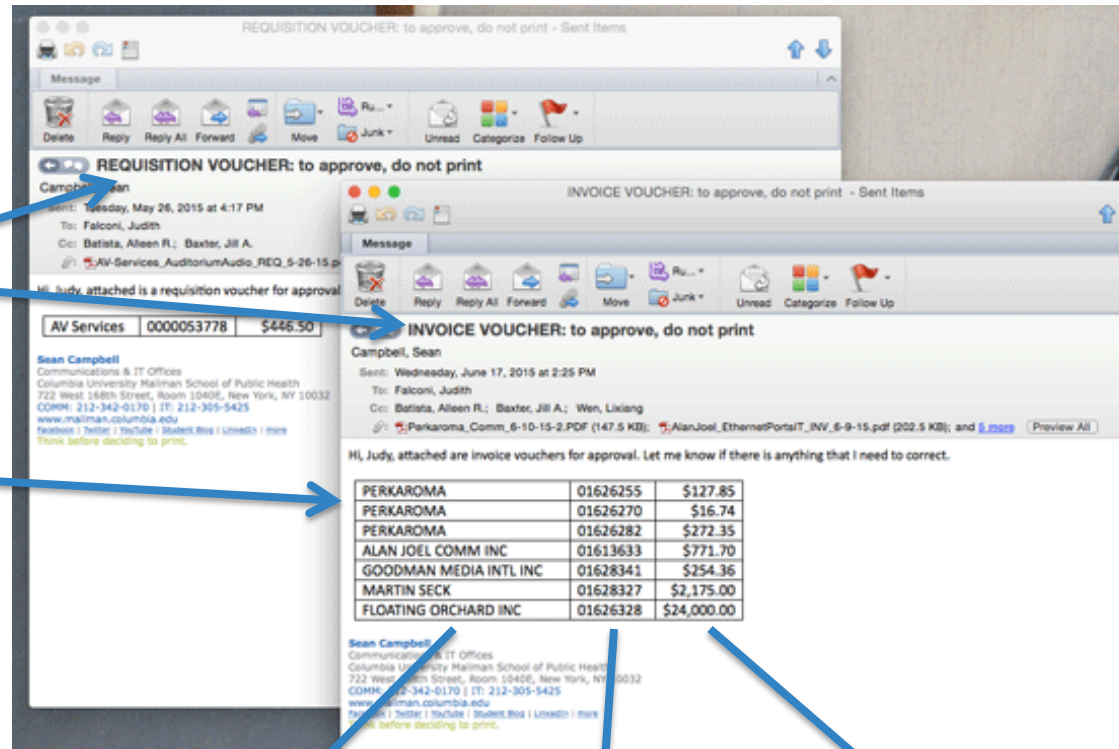
- This will be a single PDF doc if you have Adobe Pro

Submitting to Finance

Email attachments of your documents to the finance office for review and approval with the following, set parameters:

DOCTYPE: to approve...

Table with the vendor names, voucher number used in ARC, and amount of the voucher



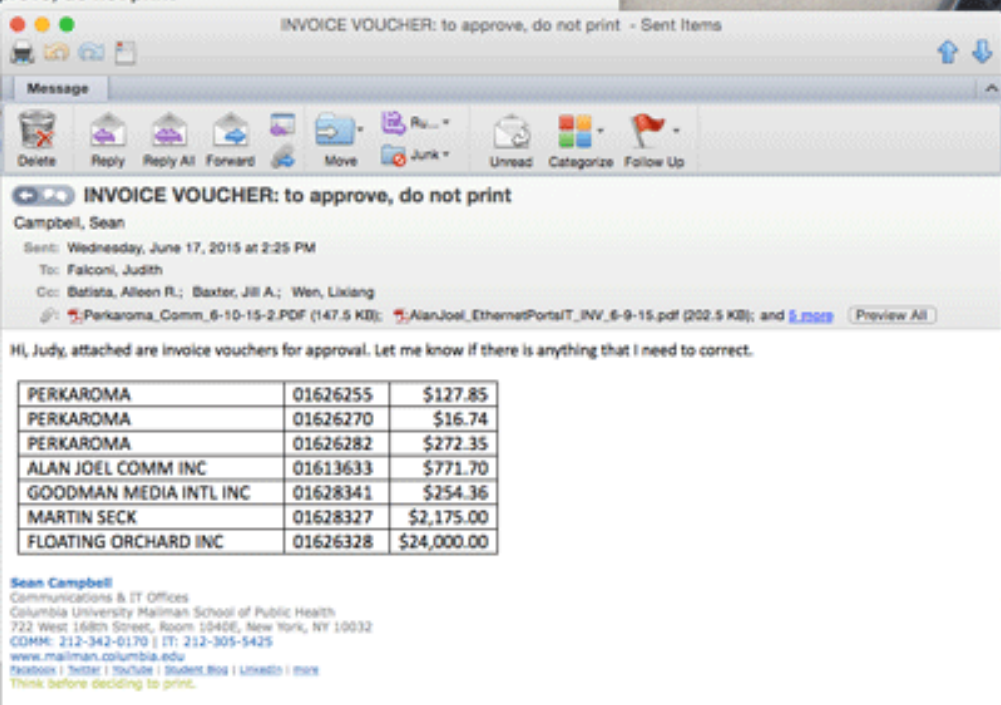
Vendor Name

Voucher ID

Amount

Submitting to Finance

Remember to **CC** the appropriate approvers and use the **EXACT** text shown below and in the previous slide as the subject of the email.



INVOICE VOUCHER: to approve, do not print - Sent Items

Message

Delete Reply Reply All Forward Move Junk Unread Categorize Follow Up

INVOICE VOUCHER: to approve, do not print

Campbell, Sean

Sent: Wednesday, June 17, 2015 at 2:25 PM
To: Falconi, Judith
Cc: Batista, Aileen R.; Baxter, Jill A.; Wen, Lixiang
Attachments: Perkaroma_Comm_6-10-15-2.PDF (147.5 KB); AlanJoel_EthernetPortsIT_INV_6-9-15.pdf (202.5 KB); and 5 more [Preview All](#)

Hi, Judy, attached are invoice vouchers for approval. Let me know if there is anything that I need to correct.

PERKAROMA	01626255	\$127.85
PERKAROMA	01626270	\$16.74
PERKAROMA	01626282	\$272.35
ALAN JOEL COMM INC	01613633	\$771.70
GOODMAN MEDIA INTL INC	01628341	\$254.36
MARTIN SECK	01628327	\$2,175.00
FLOATING ORCHARD INC	01626328	\$24,000.00

Sean Campbell
Communications & IT Offices
Columbia University Mailman School of Public Health
722 West 168th Street, Room 1040E, New York, NY 10032
COMM: 212-342-0170 | IT: 212-305-5425
www.mailman.columbia.edu
[Facebook](#) | [Twitter](#) | [YouTube](#) | [Student Blog](#) | [LinkedIn](#) | [more](#)
[Think before deciding to print.](#)

Approvals and Corrections

Once your documents are reviewed, you will receive approval or correction email from the appropriate person in the finance office.

Arrange By: Date Received ↕ Newest on Top ▼

▼ WEDNESDAY

✉ Batista, Alleen R. 6/24/15
Correction

▼ TUESDAY

Batista, Alleen R. 6/23/15
approved

▼ MONDAY

✉ Batista, Alleen R. 6/22/15
correction



✉ Batista, Alleen R. 6/22/15
correction

**Batista, Alleen R. 6/22/15
approved**

▼ LAST WEEK

✉ Batista, Alleen R. 6/19/15
RE: INVOICE VOUCHER: to approve, do not print

✉ Batista, Alleen R. 6/19/15
RE: INVOICE VOUCHER: to approve, do not print

  **approved**

Batista, Alleen R.

Sent: Monday, June 22, 2015 at 10:45 AM

To: Campbell, Sean

Dell Marketing LP	01633321	\$ 4,840.62
Steve Zehentner	01631575	\$ 17,375.00
Floating Orchard	01626328	\$ 24,000.00

best
Alleen Batista
 Accountant
 Columbia University
 Mailman School of Public Health
 Finance & Administration
 600 West 168th Street-Room 702, New York, NY 10032
Phone: 212-342-4101 | **Fax:** 212-342-1276

That's it.
