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:

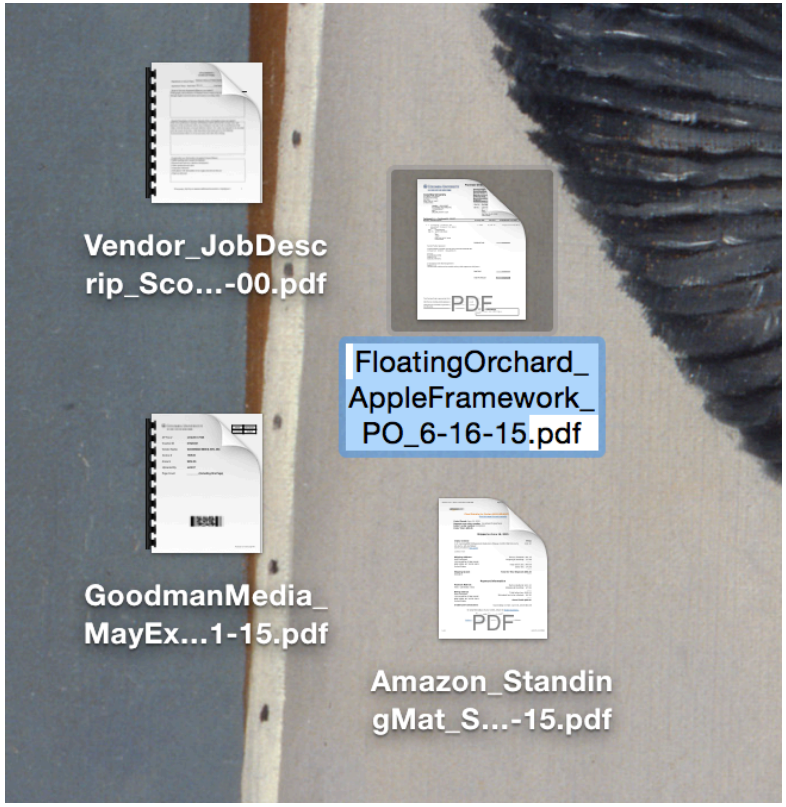
- File file naming for e-filing and e-submissions
- Getting e-signatures from designated approvers
- Submitting electronic documents to finance for approval

File Naming

Name your e-files in this format:

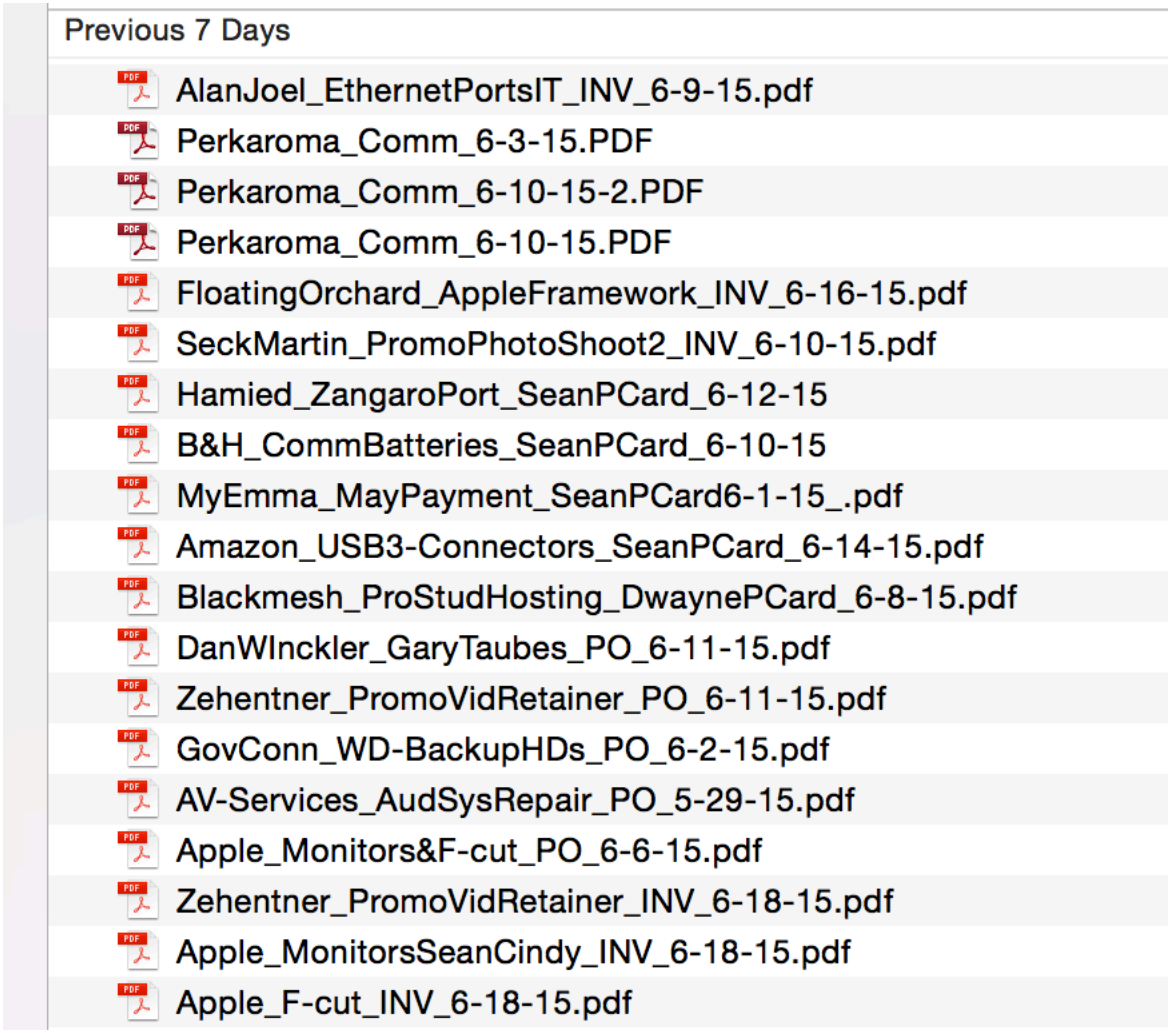
VendorName_JobDescrp_DocType_Date.

- 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

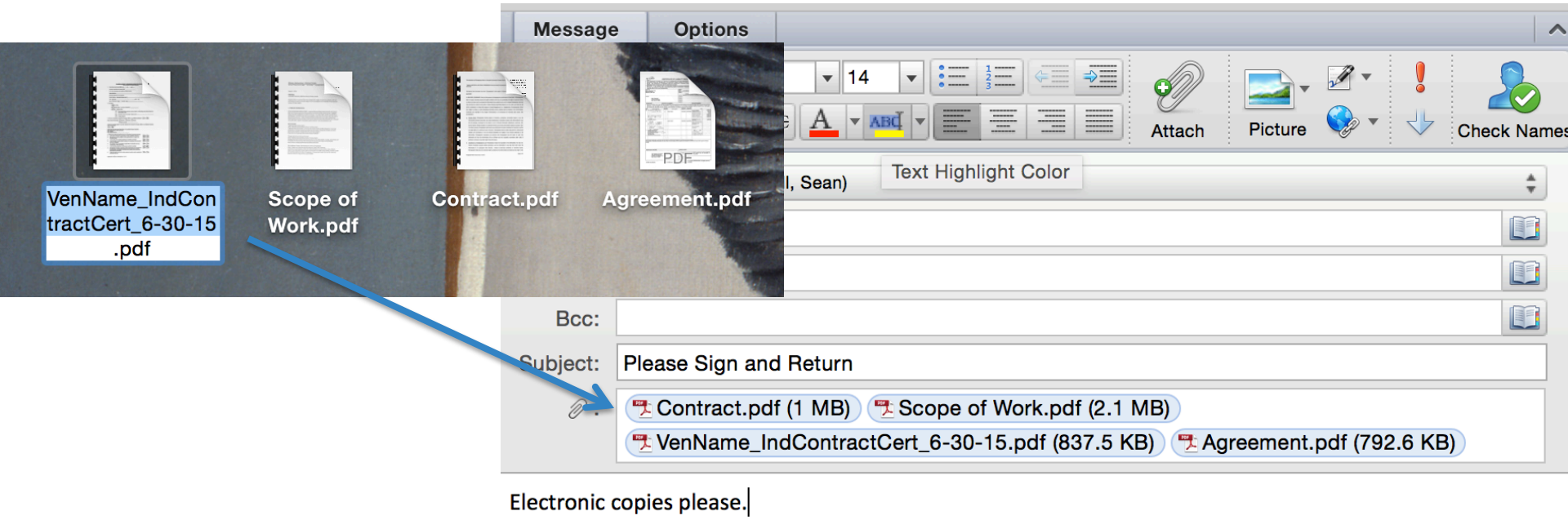
This is the naming convention in action.



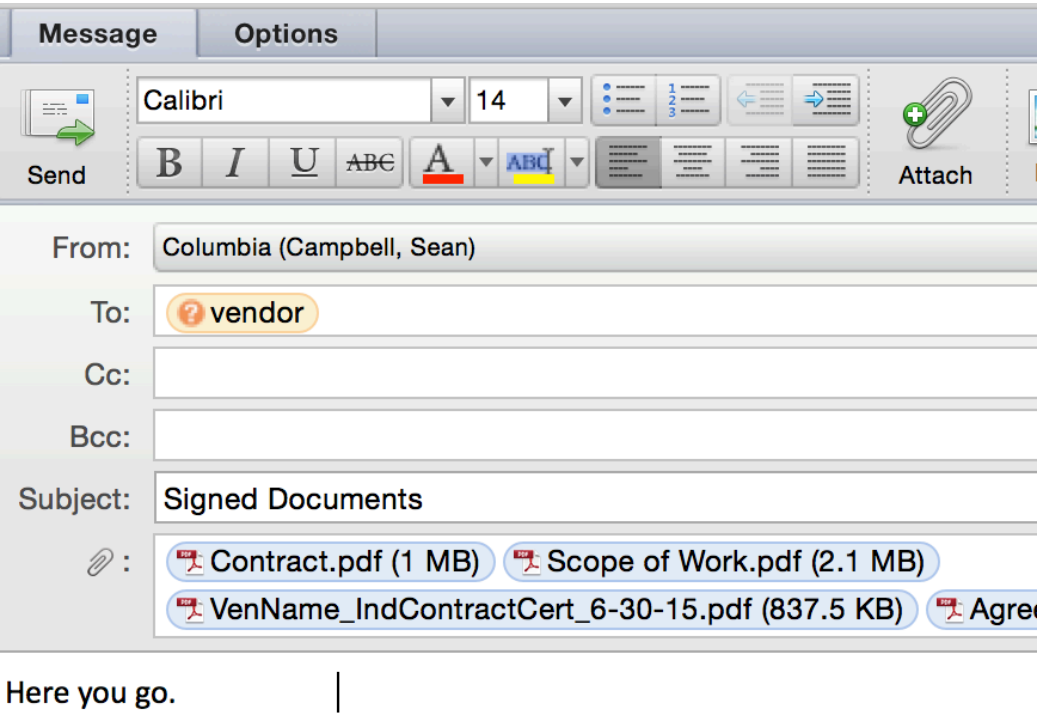
Preparing E-Docs

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



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.

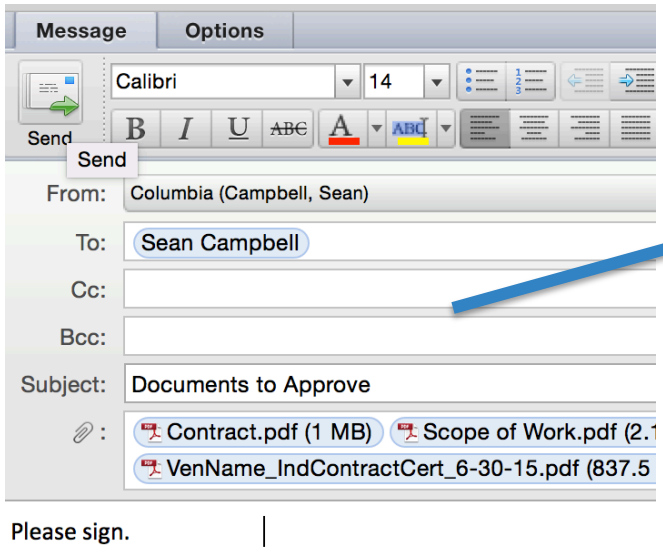
- Multiple requisition documents can be sent in a single email for e-signature

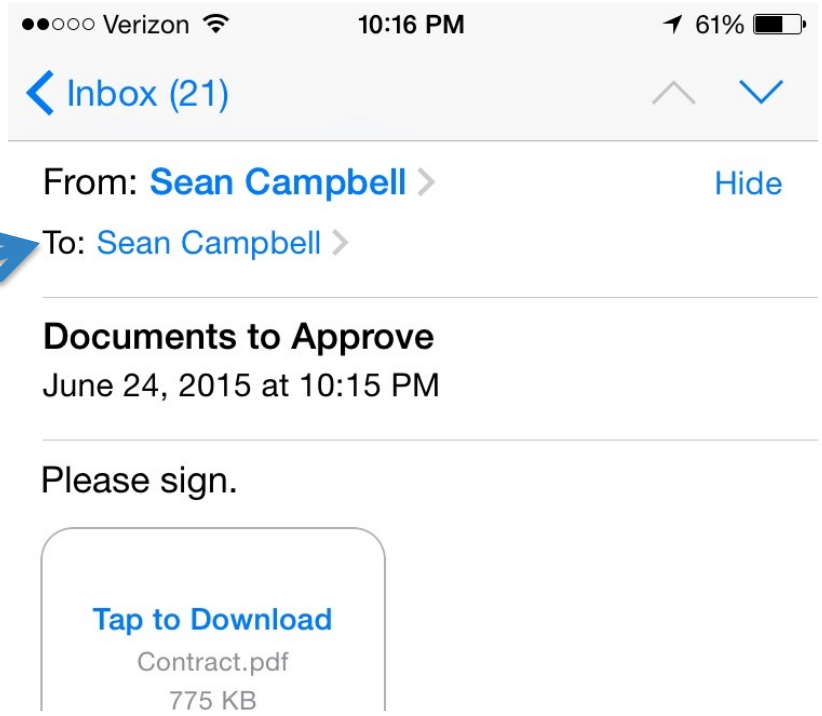
If you do not have Acrobat Pro, keep them separate.

- 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.

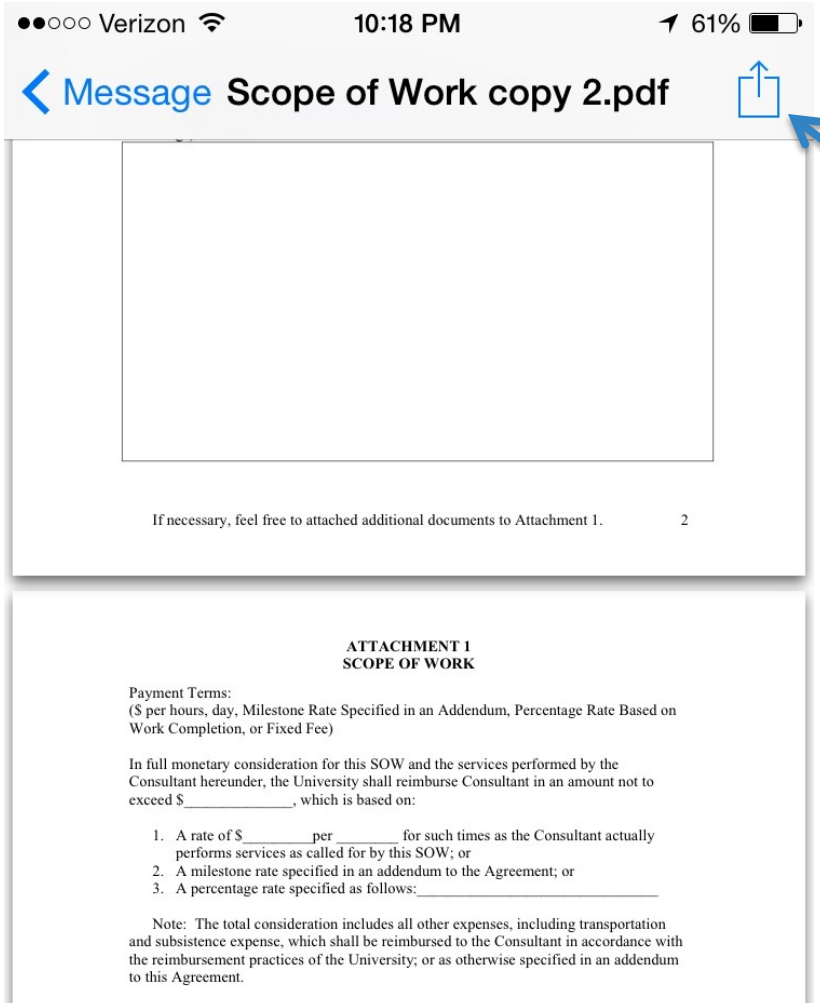




E-Signing

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

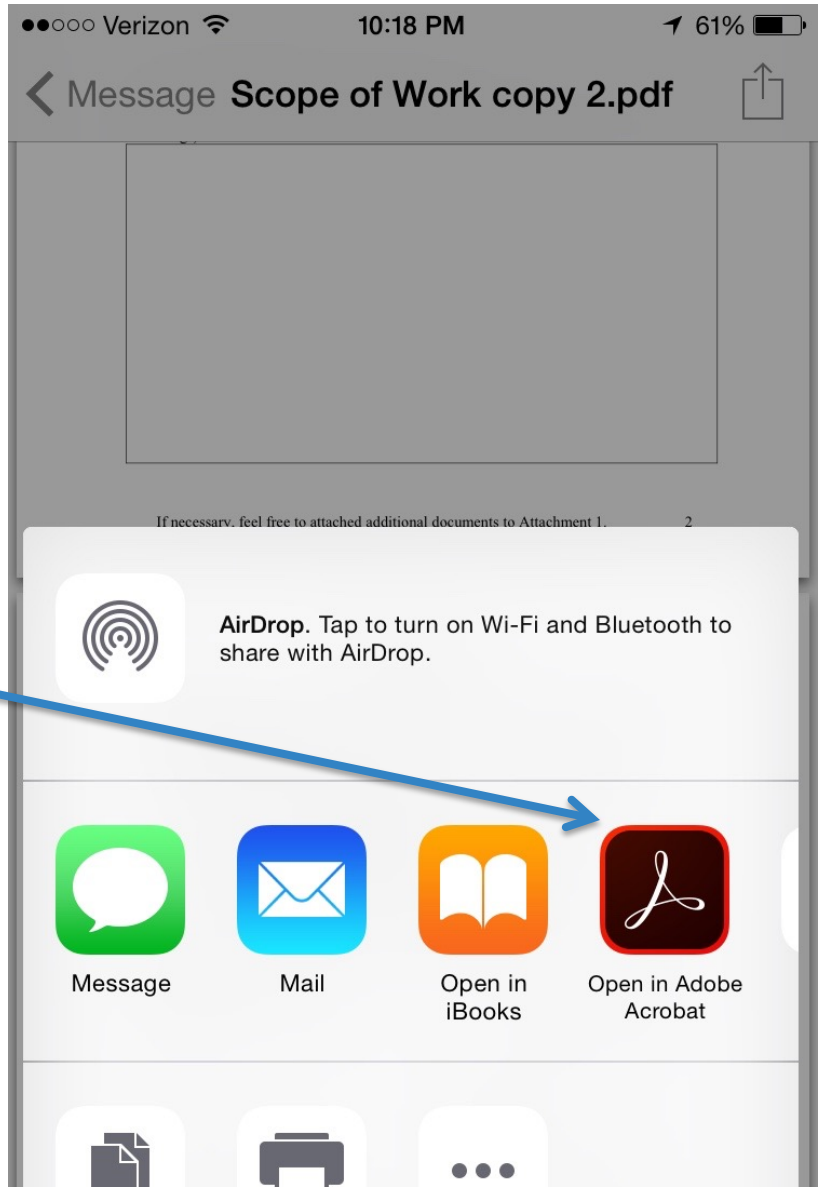
E-Signing



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

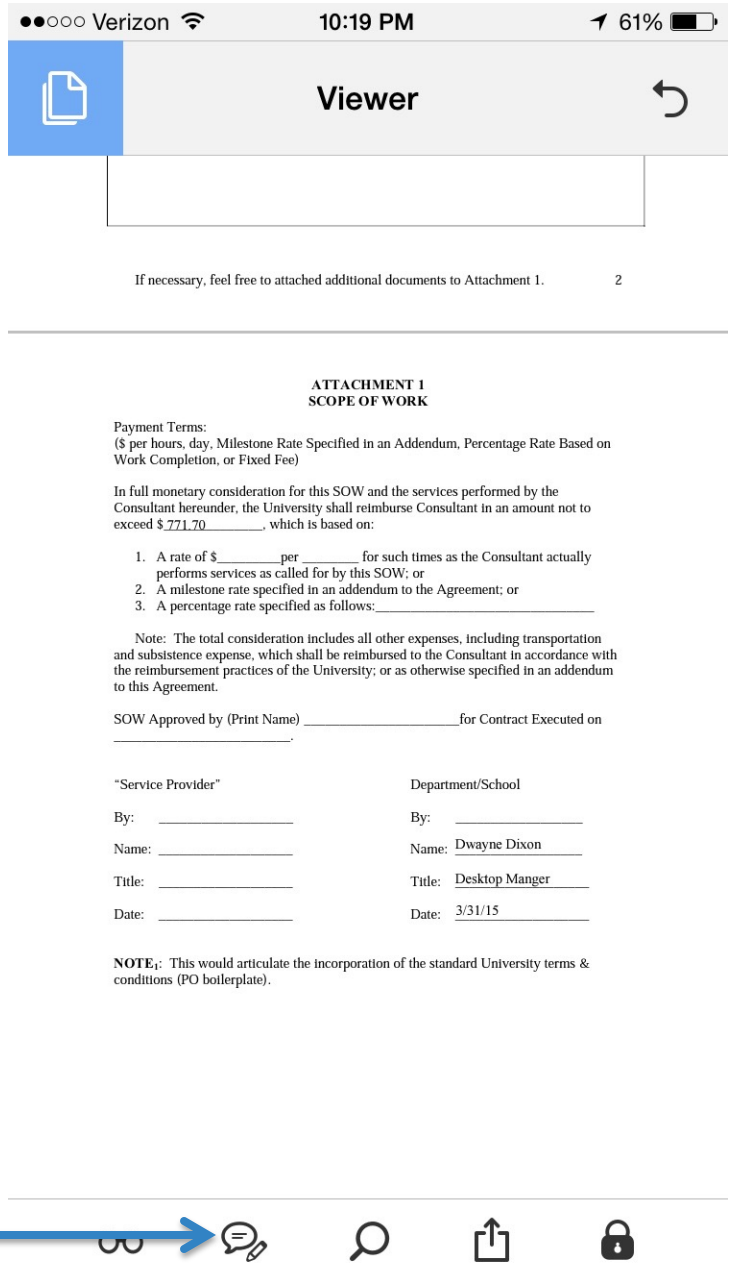
E-Signing

Open in Adobe app.



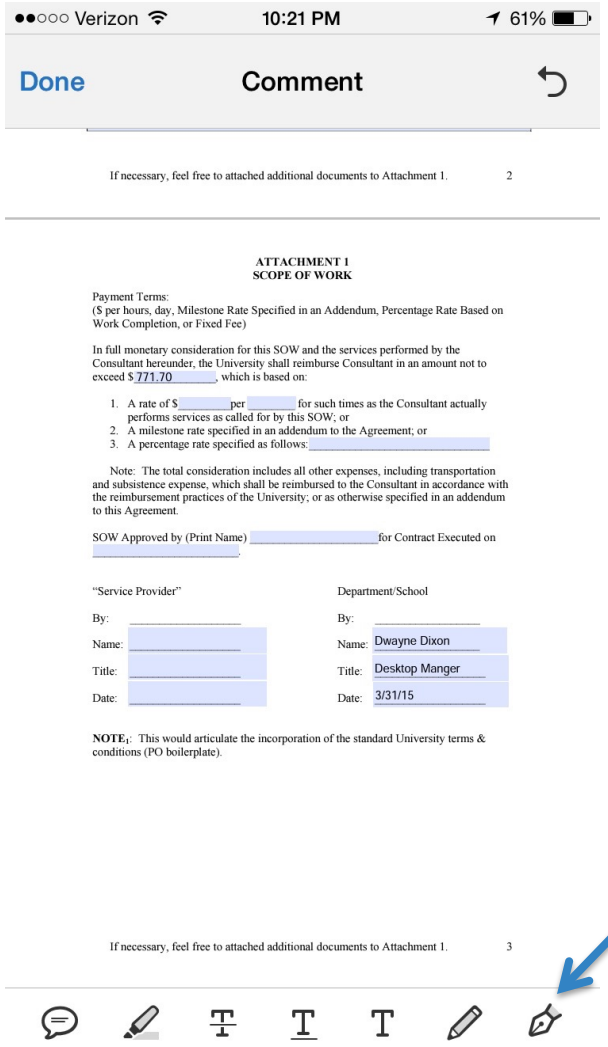
E-Signing

Now you are in the Adobe Viewer.



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

E-Signing

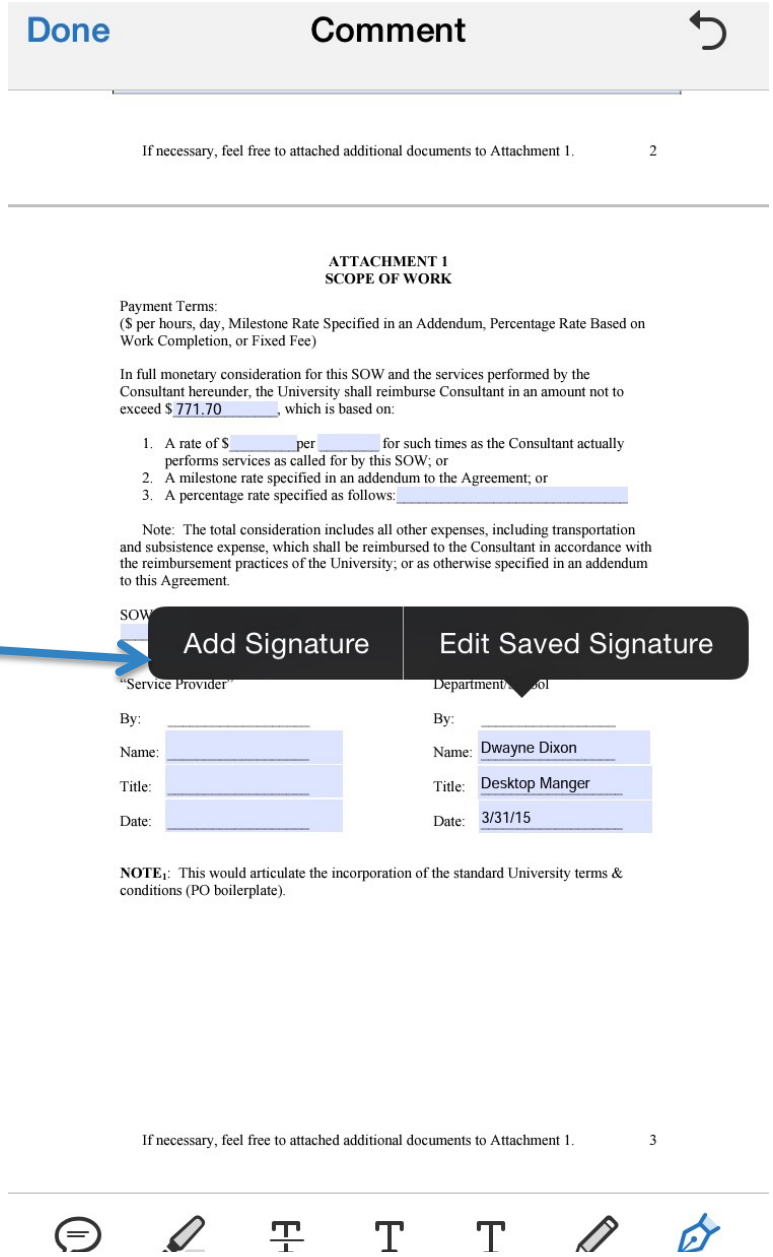


This is for signing.

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.



E-Signing

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$_1$: 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.

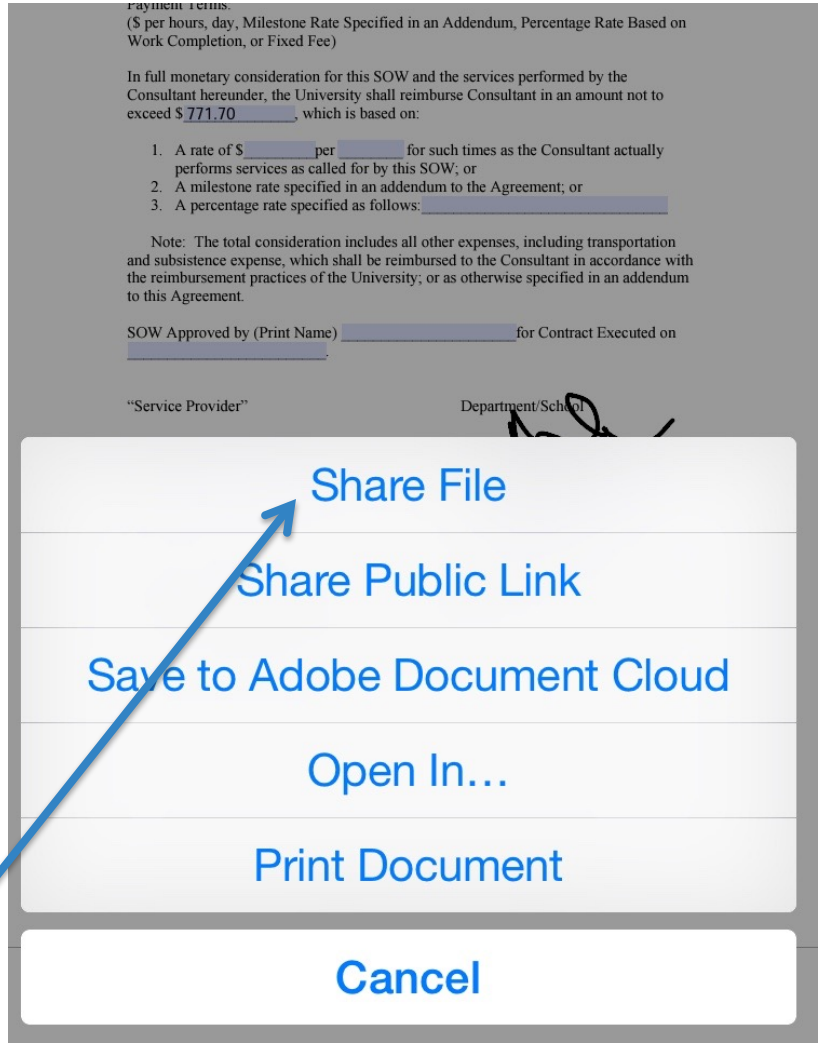
SOW Approved by (Print Name) _____ for Contract Executed on _____.

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

NOTE1: 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

Tap this

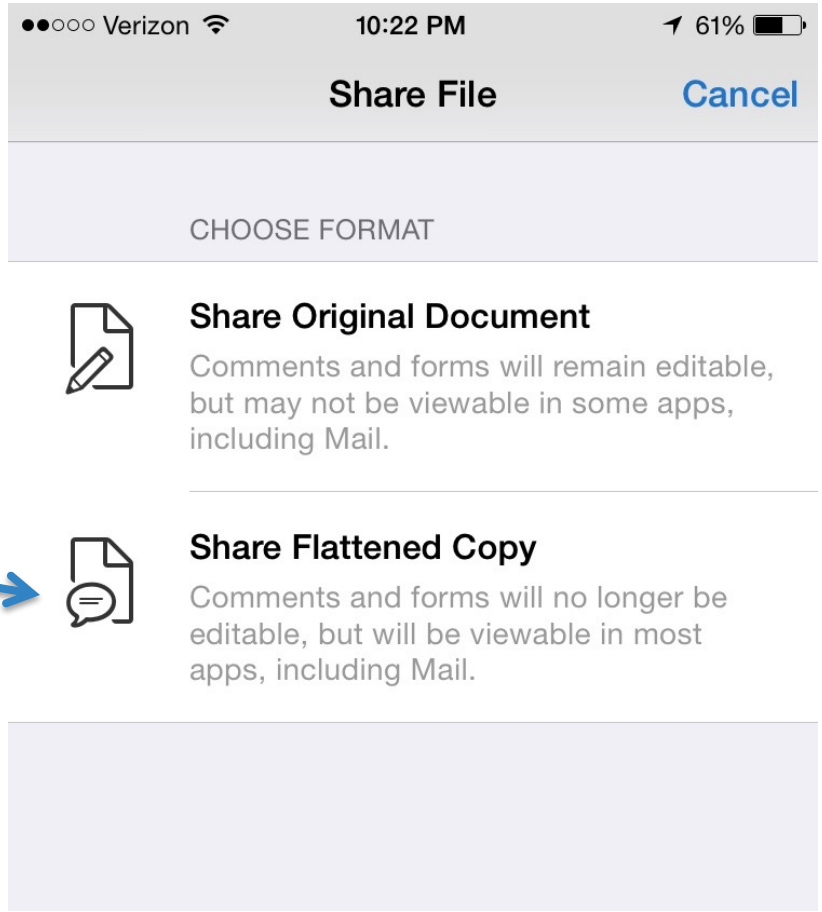


To bring up this.

Tap "Share File."

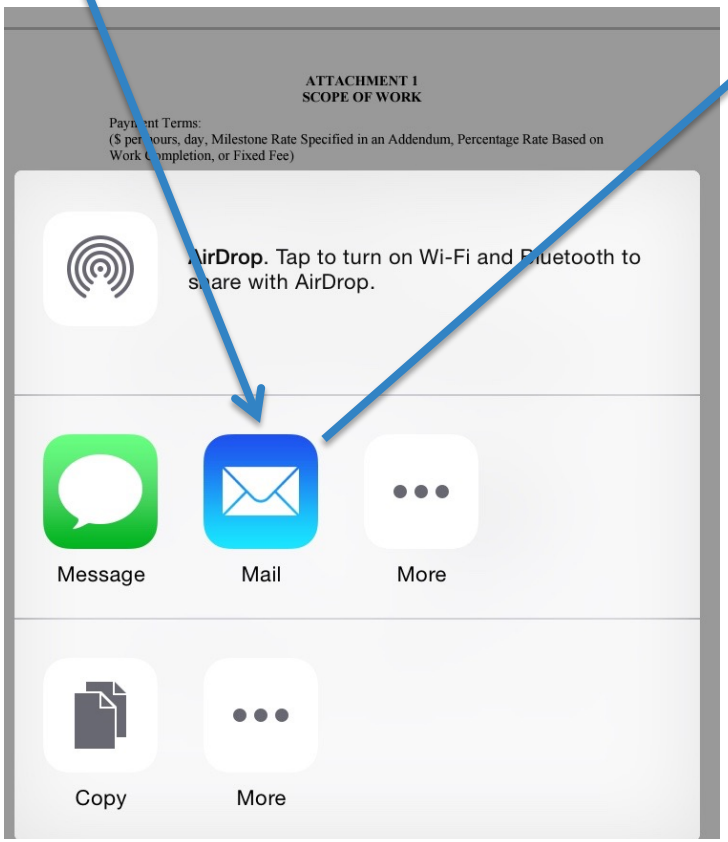
E-Signing

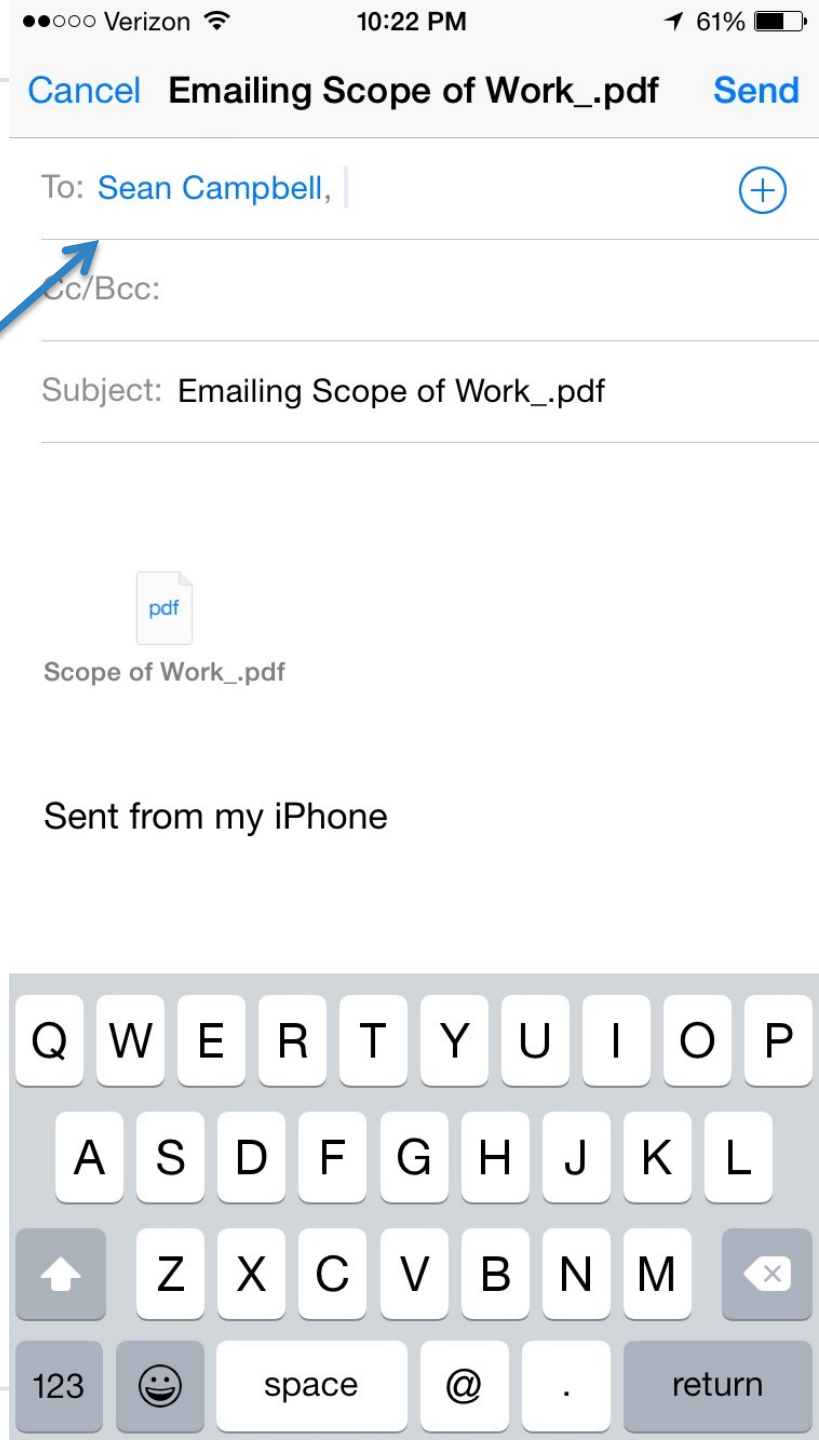
Tap "Share Flattened Copy."



E-Signing

Tap mail.

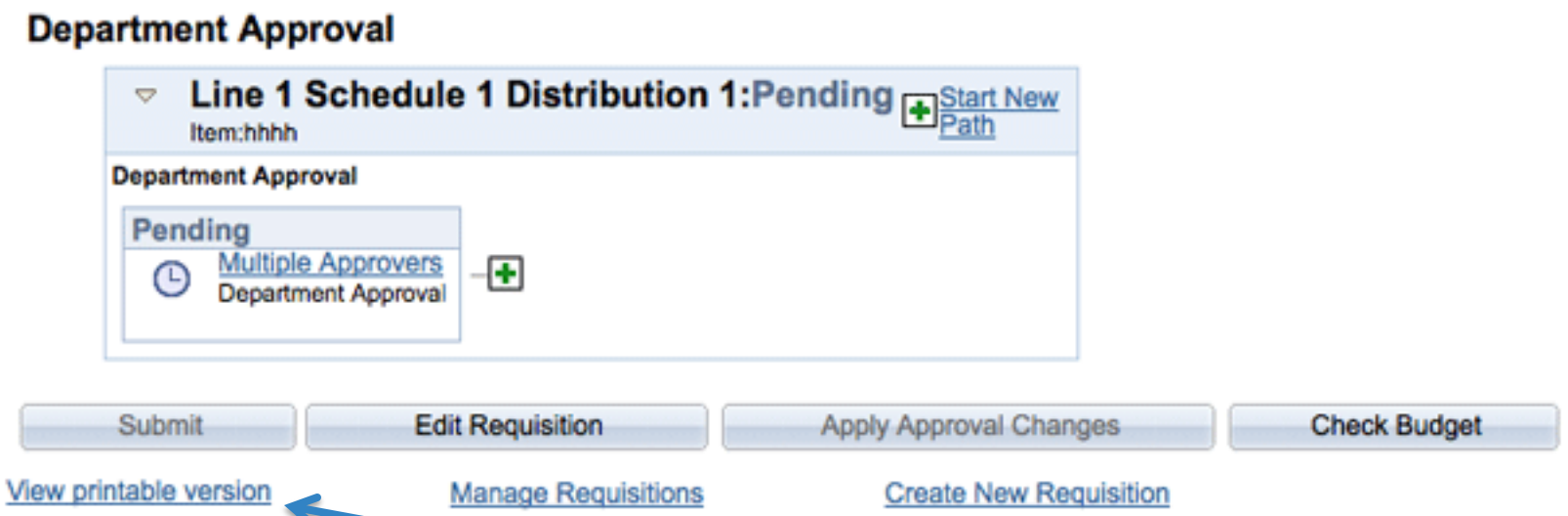




E-Signing

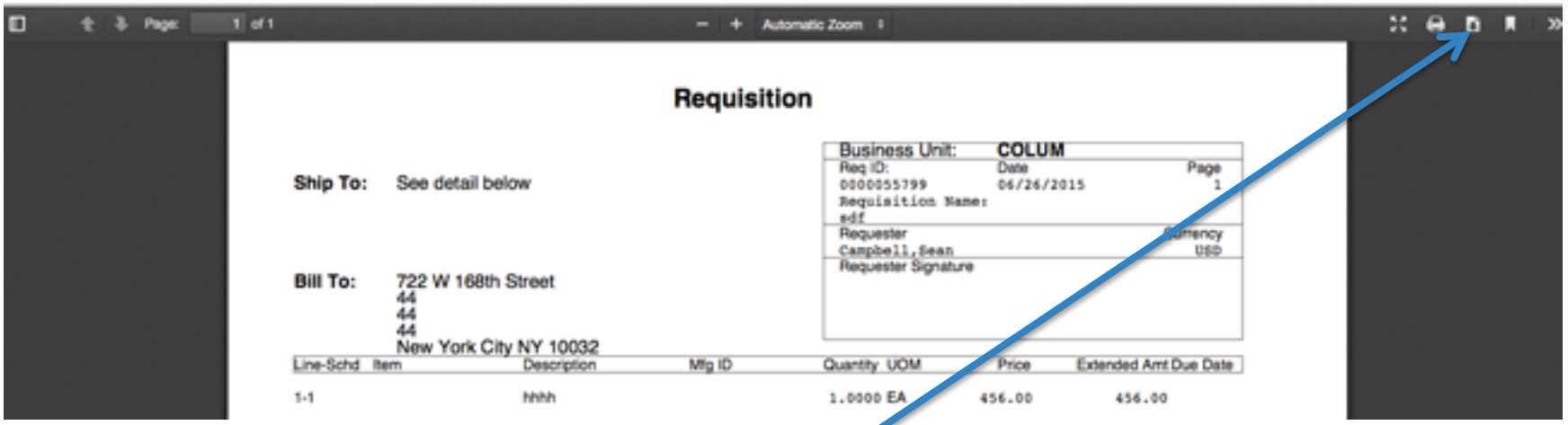
The approver's section is now complete.

E-Requisitions



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

E-Requisitions



Save the resulting page by clicking on the download icon.

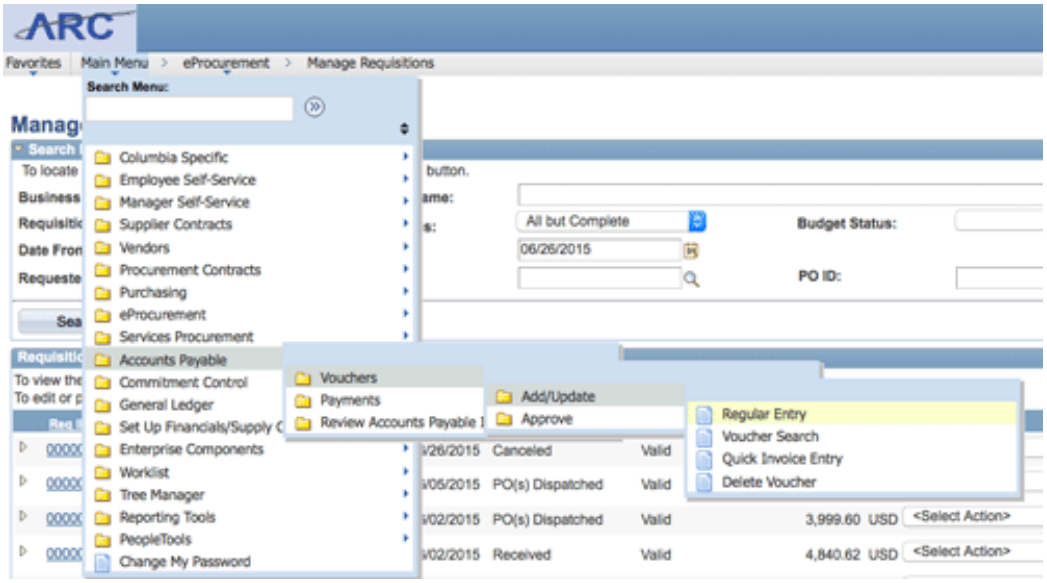
This will be put with your other files for the requisition.

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

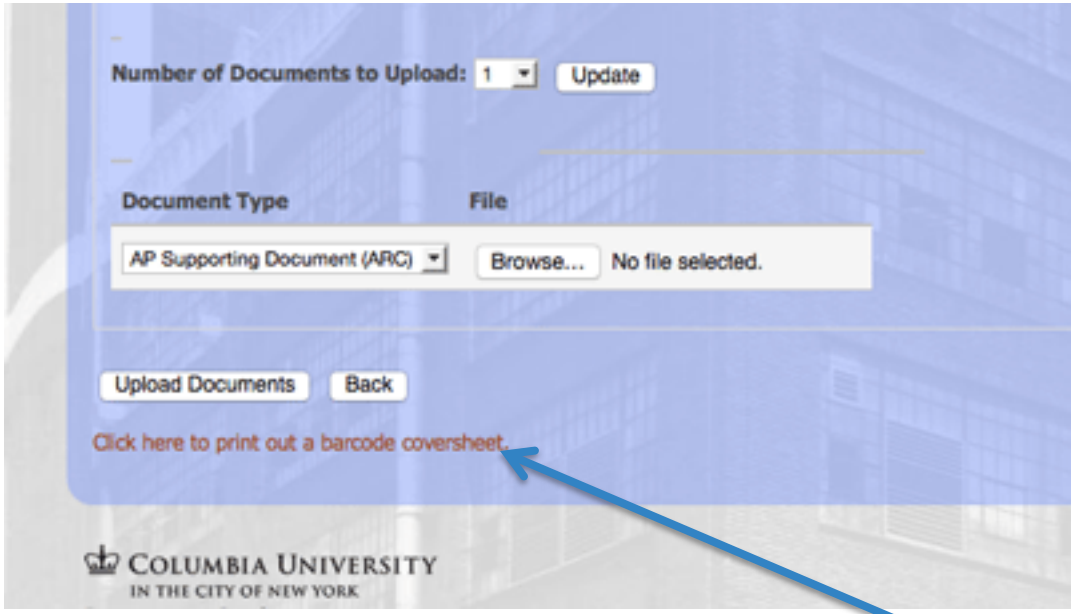
E-Invoices

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



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

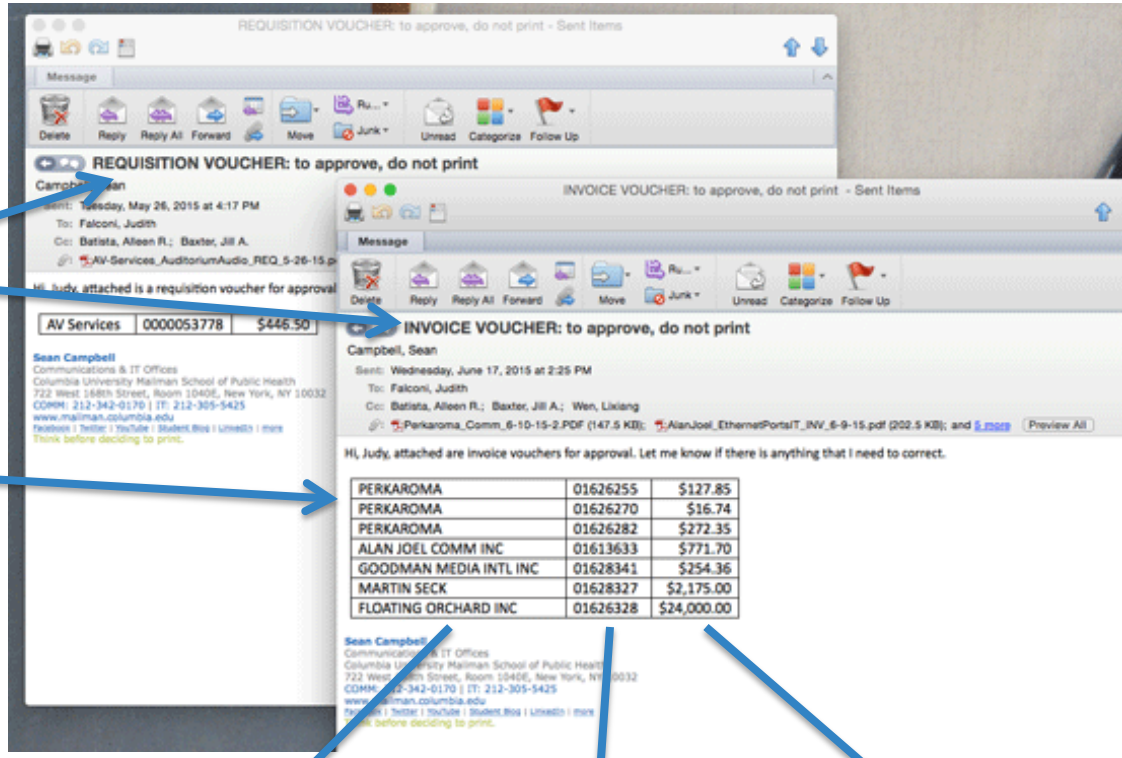
- This will be a single PDF doc if you have Abobe Pro

Submitting to Finance

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

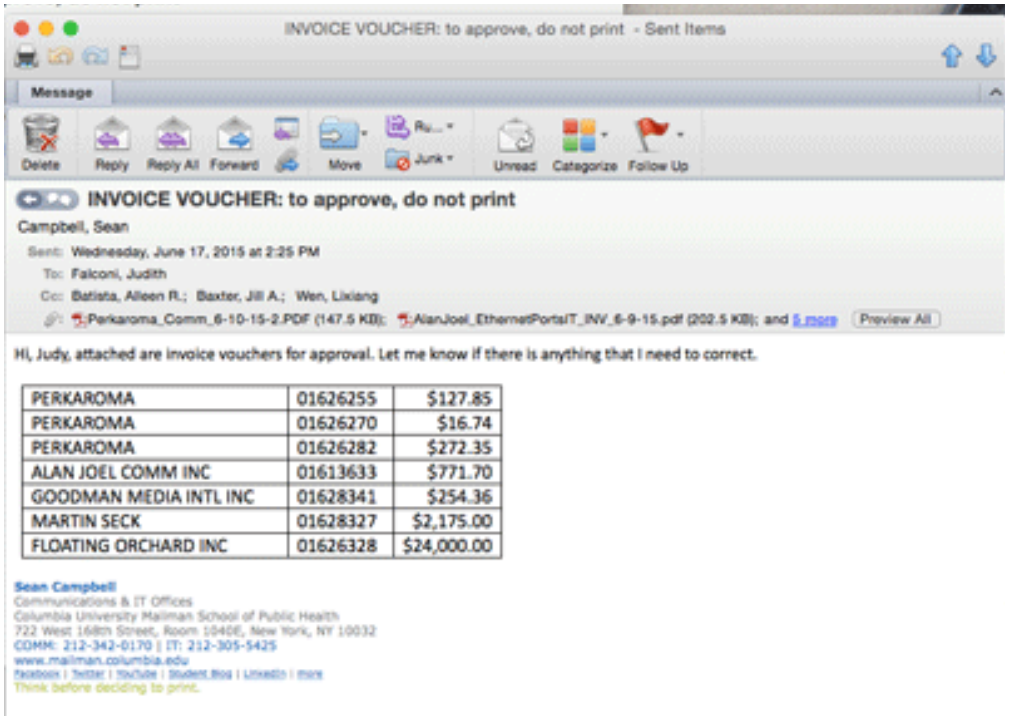
DOCTYPE: to approve…

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



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

Perkaroma_Comm_6-10-15-2.PDF (147.5 KB); AlanJoel_EthernetPorts/T_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
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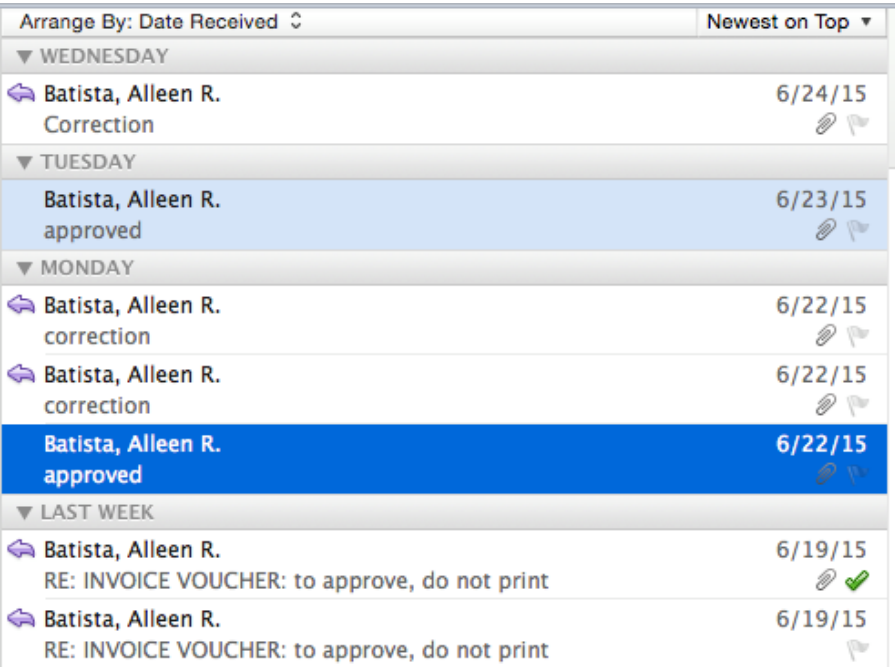
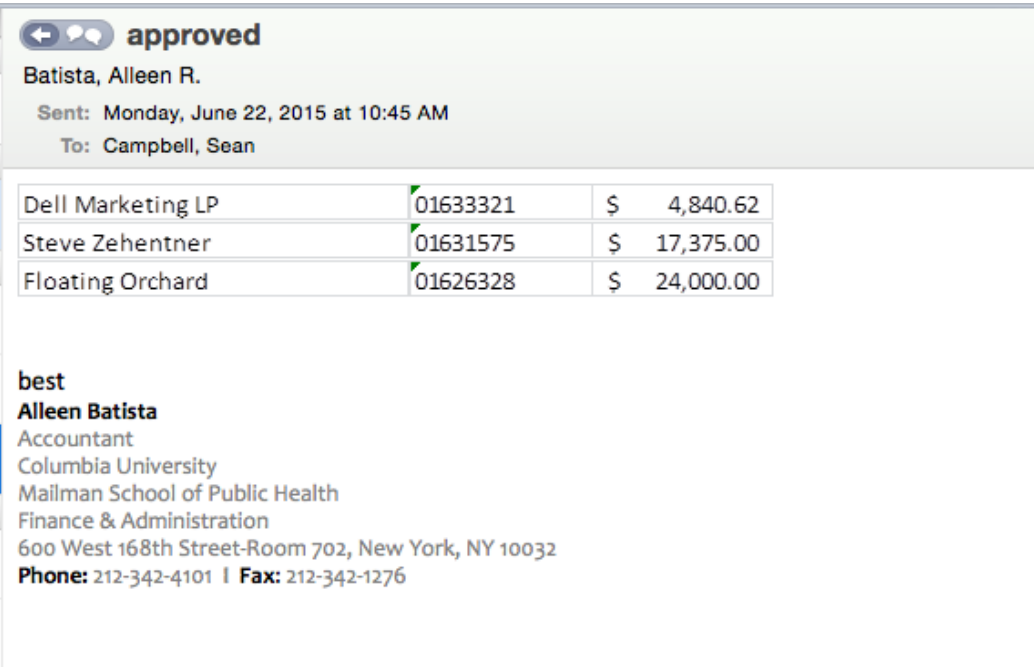
722 West 168th Street, Room 1040E, New York, NY 10032
COMM: 212-342-0170 | IT: 212-305-5425
www.mailman.columbia.edu
Facebook | Twitter | YouTube | Student Blog | LinkedIn | more
Think before deciding to print.

Approvals and Corrections

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





That's it.