Process to Obtain Signatures from the SSIS Dean's Office

The SSIS Dean's Office receives a large volume of requests asking for approval signatures from the Dean, Associate Dean, and/or one of our office's staff. To be able to effectively track and manage all of these requests, we ask everyone to follow the steps below:

For forms submitted through OnBase:

- Examples: Electronic Personnel Transaction Forms (ePTFs), Faculty Release Time Requests, Add/Drop Petitions
- Instructions:
    - Follow the instructions provided for each individual form. They should automatically route to the Dean for signatures as appropriate.

For forms submitted through required pre-built Adobe Sign workflows:

- Examples: ProCard Statements (for old ProCards), Invoice Approval forms (for old POs entered in CFS), etc.
- Instructions:
    - Include any required department-level personnel in the workflow in the appropriate fields.
    - Include the Dean's Office's personnel in the workflow as follows:
        - Preapproval by designated staff: Aaron Eichenberger (aeichenb@csus.edu)
        - Additional Approver or Authorized Signer: David Lang (lang@csus.edu)
        - CC: ssis@csus.edu
    - For situations where the instructions above may not work, please contact Aaron Eichenberger (aeichenb@csus.edu) to consult on a solution.

For forms submitted through Concur:

- Examples: ProCard Statements (for new ProCards), Reimbursements, Concur Hospitality Justifications
- Instructions to come—we're still learning how these workflows will function and what our options will be.

For P2P Ad-Hoc Requisition workflow:

- This process is used for getting one-up DOA approval from the Dean in P2P.
- Instructions:
    - Follow the user guide from the Chancellor's Office in the additional page below.
    - Include the Dean's Office's personnel in the workflow as follows:
        - Before the DOA approval step add Aaron Eichenberger (aeichenb@csus.edu) as an "ad-hoc approver."
        - Note: When you're assigning an ad hoc approver, the menu asks you to select which step you'd like the approver to be added after. i.e., Don't choose the DOA approval step for this field, choose something before it.

For ALL other forms:

- Examples: Hospitality Justifications (for expenses on an old ProCard), UEI Faculty/Chair Agreements for Additional Employment, CCE Faculty Assignment Sheets, etc.
- Instructions:
    - Collect any necessary department-level signatures before submitting to our office.
    - Save the form as a PDF file.
    - Email the form as an attachment to ssis@csus.edu.
    - In the body of the email, please include instructions for where you would like the form to be sent after it's signed.

We strive to review and sign all forms within two business days. Please allow enough time for our review when planning to meet submission deadlines.

QUICK REFERENCE GUIDE

CSU The California State University

CSUBUY

A COLLABORATIVE PROCURE TO PAY MARKETPLACE

Ad-Hoc Approver

Add an additional approver for a specific step in the requisition workflow after your approval.

Ad-hoc approvers should be used when you need to add an approver in addition to your own. Note: An ad-hoc approver needs to have approval authority.

Ad-hoc approvers should be the exception. If you notice you are using them frequently, contact your Campus Core Project Team.

SET YOUR REQUISITION TO HAVE AN AD-HOC APPROVER IN REQUISTION WORKFLOW.

Follow the steps below to set an ad-hoc approver:

1. After assigning the requisition to yourself, navigate to the **Other Participant Information** section and click **select** next to the **Ad-Hoc Approver** field.
2. The Ad-Hoc Approver screen will appear. Select **Submission** for the **After** field.
3. You can name your **Ad-Hoc Approver** step, i.e., Ad-hoc 1 person's name. This is how the name will appear in the workflow. See workflow screenshot for visual.
4. Select the individual who will be the **Ad-Hoc Approver.** You can search for the individual using the magnifying glass.
5. Add **Comments** for the ad-hoc approver and click **Save**.
6. You will be taken back to the requisition where you can **Approve/Complete** the requisition.