

NAU Capital Project Authorization (CPA) OnBase Form and Approval Workflow

Comptroller

Your role in the CPA process comes once all approvals have been obtained and Facility Services Accounting has provided the Speedchart number for the project. Your role in the CPA process consists of the Project Setup (which occurs in PeopleSoft Financials) as well as indicating on the CPA form that you have setup the project (which occurs in OnBase).

When a CPA form is ready for project setup, you will receive an email that will direct you to the OnBase workflow which is where the CPA form will be. You will not need to make any changes to the form itself. However, you can attach supporting documentation, if needed. Once you complete the project setup in PeopleSoft Financials, you will click your workflow task button in the OnBase workflow to indicate that the project has been setup. This will mark your work as complete on the form and will indicate the date completed. It will also route the form to the Budget Office so they can complete their work.

Form Changes (some of which may be required):

- **Supporting Documentation** – Click this button to add Supporting Documentation as an attachment to the form.

Important! Once you have made changes to the form, you must click “Submit” in order to save the changes. If you do not click submit, you will receive a message prompting you to save your changes if you try to leave the form or click on a workflow task.

WORKFLOW DECISION (Task Button):

- **PeopleSoft Project Setup Complete** – Click this workflow task button in the OnBase workflow once you have completed the project setup in PeopleSoft Financials. This will mark your work as complete on the form and will route it to the Budget Office so they can complete their work.

EMAIL NOTIFICATIONS

Here are the notifications you will receive as the form moves through the workflow:

- **Form to Review – Project Setup**
 - You will receive this email when a form has been approved by all users and Facility Services Accounting has provided the Speedchart number on the form. At this point, it is ready for Project Setup in PeopleSoft Financials. The form will be moved to your **FS – CPA – Comptroller – Project Setup** queue for your review.