

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

Director PDC

As an approver in the CPA process, you will be asked to review the submitted form and complete two tasks. First you will be able to make some changes to the form itself. Second, you will then be able to make your decision on whether to Approve, Deny, etc and click the appropriate workflow task button to finalize your decision.

FORM CHANGES (required fields in red):

- **ABOR Project Type** – Select the appropriate ABOR Project Type from the list.
- **Scope of Work** – Make adjustments to the Scope of Work, if necessary.
- **Supporting Documentation** – Click this button to add Supporting Documentation as an attachment to the form.
- **Funding Source Description and Speedchart** – If your user id is listed on a row of the funding section, please review and complete/update these two fields. **If your user id is on a funding row, you will not be able to save the form or complete a workflow task until these fields are populated.**
- **Comments** – If you need to add comments, please type them in the comments field on the approval line that corresponds to you and click “Submit” on the form to save your changes. Comments are required if you are Denying or Requesting Changes to a 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):

- **Approve** – Click this workflow task button if you approve of the details in the CPA form.

- **Deny** – Click this workflow task button if you do not approve of the details in the CPA form. If you click this task, the form will be removed from the approval process and a new CPA form would have to be created in order to continue with the project.
- **Send Back to Project Manager for Changes** – Click this workflow task button to return the form to the Project Manager for them to make changes. You must save comments to the form describing your changes in order to click this task button.
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EMAIL NOTIFICATIONS

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

- **Form to Review**
 - You will receive this email when a form is approved by the previous approver and the form is moved into your workflow queue for you to review and approve. This includes forms that you may have previously approved but changes were made that require you to apply your approval again.
- **Approvals Complete**
 - You will receive this email once the final approver has applied their approval and the form has moved to FS Accounting for project setup.