

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

## Contracts

Your role in the CPA process will consist of 2 parts: reviewing and making changes to the form itself and then using the workflow task buttons to send the form on for approval. When a Project Manager submits a form, whether it be new or revised, it will be routed to your workflow queue for review before it goes on to obtain approvals. You will also receive forms into your workflow queue that have been returned by an approver requesting changes.

### FORM CHANGES:

Here are the items to review:

- For forms sent to you by the Project Manager, you will verify that the form is completed accurately and make adjustments as necessary:
  - This includes verifying fields for accuracy and grammatical issues.
  - You will also verify that approvers have been entered accurately and completely
- For forms that have been returned to you by an approver, you will review changes that have been requested by the approver and update the form as necessary.
  - You will want to clear out any approvals that occur after the approver that you are returning the form to. This will alleviate confusion as to why it is in their queue but their approval line already shows their approval. The notification email to the approver will include information indicating that the form may be one that they already reviewed but there were changes and so their approval is needed again.

**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):

- **Send for Approvals** – Click this workflow task button if the form is ready to send to the first approver, the Director of PDC. Generally, this is only used for forms that have yet to be approved by anyone.
- **Return to Project Manager** – If the form requires significant changes or changes that only the Project Manager can make, you can click this workflow task button to return it to the Project Manager so they can make the changes and then send it back to you.

- **Return to Approver** – If the form was returned to you by an approver for changes to be made, you can use this workflow task button to send it back to them. When you click this button, a form will pop up with a drop-down list that will allow you to select which queue (approver) to send it back to.

## **EMAIL NOTIFICATIONS**

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

- **Newly Submitted Form to Review**
  - You will receive this email when a form (New or Revised) is submitted by the Project Manager and it has moved into your workflow queue for you to review.
- **Returned Form by Approver to Review**
  - You will receive this email when a form is returned to you by an Approver and it has moved into your workflow queue for you to review.
- **Returned Form by Director PDC to Review**
  - You will receive this email when a form is returned to by the Director PDC and it has moved into your workflow queue for you to review.
- **Returned Form by Project Manager to Review**
  - When a form has been sent back to the Project Manager for changes (whether by you or by the Director PDC) and they have completed their changes, you will receive this notification when they have returned it to you and it has moved into your workflow queue for you to review.
- **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.