

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

## Facility Services Accounting

Your role in the CPA process comes once all approvals have been obtained. Your role in the CPA process consists of the Project Setup as well as Project Funding. A brief description of the process is included below as well as what changes you can make to the form and workflow actions you will perform.

Once all approvals have been obtained, you will receive an email notifying you that you have a new CPA to review and the document will be moved to your OnBase workflow queue: **FS – CPA – Accounting – Project Setup**. There, you will be able to review the form and enter the PeopleSoft Speedchart for this project. Then you will use your workflow task button to move the form to the Comptroller's Office for their review and project setup in PeopleSoft Financials.

Once the Comptroller's Office and the Budget Office have completed their portion of the project setup, you will receive an email notifying you that the Project has been setup and is ready for funding. The document will be moved to your workflow queue: **FS – CPA – Accounting – Funding**. You will then complete the project funding in PeopleSoft Financials and then use your workflow task button to indicate that funding is complete.

### FORM CHANGES (required fields in red):

- **PeopleSoft Speedchart** – Enter the Speedchart number in this field so that the Comptroller's Office knows what project number to setup.
- **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):

- **FS – CPA – Accounting – Project Setup queue**
  - **Send to Comptroller – Project Setup** – Click this workflow task button to send the form to the Comptroller's Office so that they can setup the project in PeopleSoft Financials.

- **FS – CPA – Accounting – Funding queue**
  - **Funding Complete** – Click this workflow task button once you have completed the project funding to notify the Project Manager, Contracts, and the Director PDC that the project has been funded. This will also remove the document from workflow.

## **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 is ready for Project Setup. The form will be moved to your **FS – CPA – Accounting – Project Setup** queue for your review.
- **Form to Review – Project Funding**
  - You will receive this email when a form has been through the Comptroller’s Office review and Budget Office review and they have finalized the Project setup and the form/project is ready for Funding. The form will be moved to your **FS – CPA – Accounting – Funding** queue for your review.