

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

## President

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):

- **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.

- **Request Changes** – Click this workflow task if you need to request that Facilities Contracts make changes to the form that you do not have access to. The form will be routed to Facilities Contracts. Once they make the changes, they will return it to you for your approval.

## **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.