Tufts University
Manual to Approve a
Capital Expenditure
Authorization (CEA)

February 2011
# CEA Manual

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Approving a CEA – Emails that you may receive

As an approver of the CEA system, you will receive an email to approve a CEA, to review a CEA, or an email about a resubmission that is “FYI”. Samples are as follows:

The following Capital Expenditure Authorization requires your approval:
CEA #: C0000083
CEA Title: TAB IT Learning Lab
CEA Type: Design
CEA Amount: 250,000.00
CEA Entered By: Liedes, Carol J
To view the CEA, click the following link:

The following Capital Expenditure Authorization awaits your review:
CEA #: C0000083
CEA Title: TAB IT Learning Lab
CEA Type: Design
CEA Amount: 250,000.00
CEA Entered By: Liedes, Carol J
To view the CEA, click the following link:

The following Capital Expenditure Authorization has been Resubmitted:
CEA #: C0000083
CEA Title: TAB IT Learning Lab
CEA Type: Design
CEA Amount: 250,000.00
CEA Entered By: Liedes, Carol J
Resubmitted By: Terranova, Frank
This is an informational message only. To view the CEA, click the following link:

Click on the link provided in your email to access the login screen.
To access the CEA system, log into PeopleSoft with your UTLN and PeopleSoft password.

Note: if you clicked on a link from an email, after logging in you will be sent directly to that particular CEA. If not, then follow as shown below.

Locate the CEA system link on the PeopleSoft home page, and click on Pending Approval List.
At this point, your CEA’s to approve are listed chronologically by entered date. To approve, click on the CEA Number hyperlink.

NOTE: To view the transaction, click on the CEA Number hyperlink.

You are directed to the CEA Routing/Approval Info screen. To review specifics, click on other tabs such as Funding Source Info or CEA File Attachment Info.

COMPUTER SOFTWARE/EQUIPMENT

Shows pictorially who will be required to approve (in blue) and who will be notified to review (but not approve) the CEA.
Click on Approve CEA or Deny CEA. There is also a button if you want to print the CEA.

After Approve has been clicked, the diagram changes so your name is now in a green box as approved. A ‘successful’ message will also appear in text.
To add an Adhoc Approver in the chain, click on the green [+] located in between the Not Routed approvers. They’ll be inserted at the location where the green [+] was located.

1. Click on Green (+).
2. Insert the UTLN of the ad hoc reviewer or approver
3. Select Approve or Review
4. Click Insert
5. You MUST click on Save & Submit Adhoc
Some Points to Remember!

1. If an approver changes the funding source on a CEA, the approval cycle starts over from the beginning and everyone in the chain must approve again.

2. Under My System Profile – an alternative user (proxy) can be added if a regular reviewer or approver will be away on business or vacation. After signing into PeopleSoft, instead of clicking on CEA, click on My System Profile.

Fill in the dates that another will approve on your behalf, and select the user by using the magnifying glass to search.
If you want to find a CEA: Inquiry

Search for a CEA by completing any of the search fields available on the screen, including the expandable search criteria (as highlighted above in red), then click View Details.
Your inquiry will result in data, at which point you can Print a CEA or click on the CEA number to be taken into the system, directly to that specific CEA. You can also sort your list by clicking on any column header or download the entire result set to Excel by following instructions in the appendix.

### Reviewing your Pending Approval List

Click on Pending Approval List from the home page, and you’ll be taken to a list of CEAs waiting for your approval.
APPENDIX

On the screen showing CEA Inquiry search results, scroll over to the far right and find this button:

Click this icon and a window will pop up prompting you to save an Excel file “ps.xls”.

Click Open. Office 2007 users will get an additional error message (below). Office 2010 users may not be able to use this feature. Office 2003 users should not receive this message.

Click Yes at this dialog (if presented).
Microsoft Excel should open, containing the results from the Inquiry Search Results screen.
APPENDIX

There is a Notify button on the CEA screens in the bottom left. When clicked it will allow a user to email a message about the CEA to anyone in the system.

Click the Lookup Receipt link
Type in a last name, then click Search.

The person’s information will populate. Indicate whether you wish to have this person be a “TO” or “CC”. Click Add to Recipient List. Then, Click OK.
Type in your subject line, and your message. Then click OK. An email will automatically be sent to the individual(s) with you listed as the sender. NOTE: If you wish to receive a copy of the email you can add yourself to the CC list.