

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: Lienes,Carol J

To view the CEA, click the following link:

https://finch.uit.tufts.edu:11016/psp/FMDEV9/EMPLOYEE/ERP/c/TFTF_CEA.TFTF_CEA.GBL?Page=TFTF_CEA_APPROVAL&Action=U&BUSINESS_UNIT=TUFTS&TFTF_CEA_NUM=C0000083&TFTF_CEA_SUPPLEMENT=N

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: Lienes,Carol J

To view the CEA, click the following link:

https://finch.uit.tufts.edu:11016/psp/FMDEV9/EMPLOYEE/ERP/c/TFTF_CEA.TFTF_CEA.GBL?Page=TFTF_CEA_APPROVAL&Action=U&BUSINESS_UNIT=TUFTS&TFTF_CEA_NUM=C0000083&TFTF_CEA_SUPPLEMENT=N

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: Lienes,Carol J

Resubmitted By: Terranova, Frank

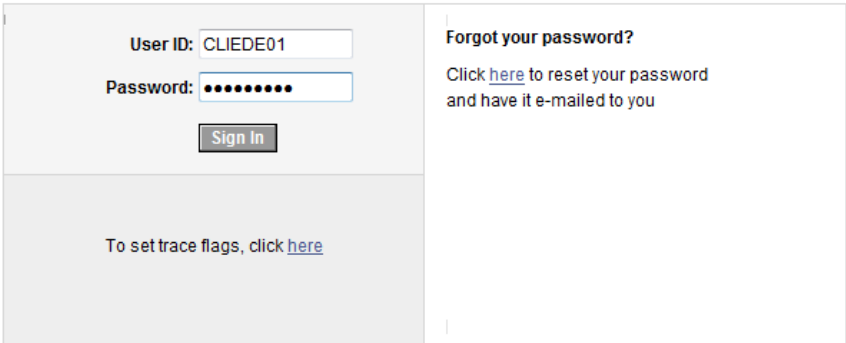
This is an informational message only. To view the CEA, click the following link:

https://finch.uit.tufts.edu:11016/psp/FMDEV9/EMPLOYEE/ERP/c/TFTF_CEA.TFTF_CEA.GBL?Page=TFTF_CEA_APPROVAL&Action=U&BUSINESS_UNIT=TUFTS&TFTF_CEA_NUM=C0000083&TFTF_CEA_SUPPLEMENT=N

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.

ORACLE
PEOPLESOFT ENTERPRISE



The image shows a login form for Oracle PeopleSoft Enterprise. On the left, there are two input fields: 'User ID:' containing 'CLIEDE01' and 'Password:' containing a series of dots. Below these is a 'Sign In' button. On the right, there is a 'Forgot your password?' section with a link 'here' and the text 'Click here to reset your password and have it e-mailed to you'. At the bottom left, there is a link 'here' with the text 'To set trace flags, click here'.

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.

Pending CEA List

The following CEA's are awaiting approval from Hunt,Ann M:

Pending CEA List									
Apprver/Proxy Name	CEA Num	Suppl?	Project ID	CEA Title	CEA Amount	CEA Type	Entered By Name	Entered Date	
1 Terranova, Frank	C0000009	No		New SIS	30,400,000.00	Computer Equipment/Software	Lagasse, Bryan D.	10/08/2010	
2 Hunt, Ann M	C0000028	No		test adhoc button	50,000.00	Equipment	Bratton, Linda	10/27/2010	
3 Hunt, Ann M	C0000029	No		test2 adhoc button	100,000.00	Equipment	Boyajian, Peter G	10/27/2010	
4 Rottler, Rock A	C0000053	No		Bio Reactor for Med School	80,000.00	Equipment	Ambrosia, Patrice L	11/09/2010	

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

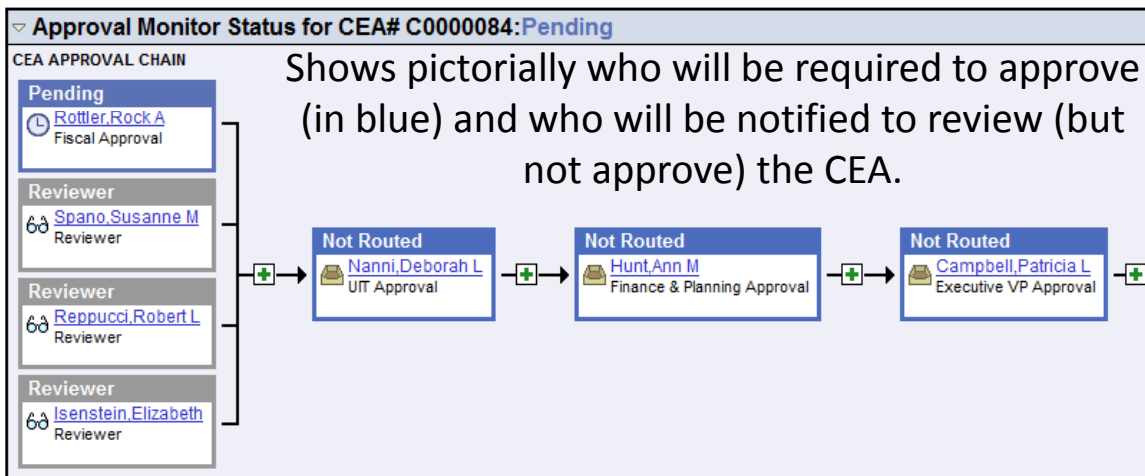
You are directed to the CEA Routing/Approval Info screen. To review specifics, click on other tabs such as Funding Source Info or CEA File Attachment Info.

CEA Request Info |
 CEA Funding Source Info |
 CEA File Attachment Info |
 CEA Routing/Approval Info

CEA Number: C0000009 **Supplemental:** No **Project ID:** **CEA Status:** Pending Approvals

Entered Date/Time: 10/08/10 11:06AM **Entered By:** Lagasse, Bryan D.
CEA Title: New SIS **Requester Name:** Lagasse, Bryan D.
CEA Type: Computer Equipment/Software **Responsible Person:** Milonas, Evangelia
CEA Amount: 30,400,000.00 **Project Manager:** Snell, Linda E.
CEA Description: OMG! What a lot of cash!

COMPUTER SOFTWARE/EQUIPMENT



Approver/Reviewer Comments:

COMPUTER SOFTWARE/EQUIPMENT

Approval Monitor Status for CEA# C0000084: Pending

CEA APPROVAL CHAIN

Pending
Rottler, Rock A
Fiscal Approval

Reviewer
Spano, Susanne M
Reviewer

Reviewer
Reppucci, Robert L
Reviewer

Reviewer
Isenstein, Elizabeth
Reviewer

Not Routed
Nanni, Deborah L
UIT Approval

Not Routed
Hunt, Ann M
Finance & Planning Approval

Not Routed
Campbell, Patricia L
Executive VP Approval

Approver/Reviewer Comments:
Type comments here if needed

Approve CEA Deny CEA
Print CEA
[Go To Pending Approval List](#)

Click on Approve CEA or Deny CEA. There is also a button if you want to print the CEA.

CEA APPROVAL CHAIN

Approved
Rottler, Rock A
Fiscal Approval
1/20/2011 - 4:00 PM

Pending
Terranova, Frank for Caputo, Marybeth
Fiscal Approval

Pending
No Approvers Found
Fiscal Approval

Reviewer
Spano, Susanne M
Reviewer

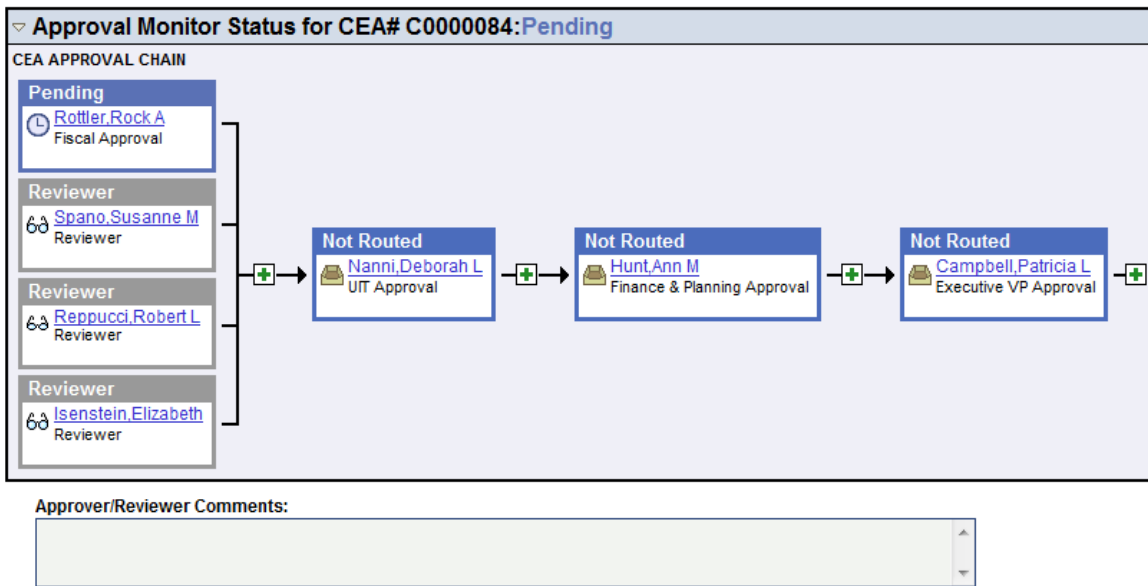
Reviewer
Reppucci, Robert L
Reviewer

Reviewer
Isenstein, Elizabeth
Reviewer

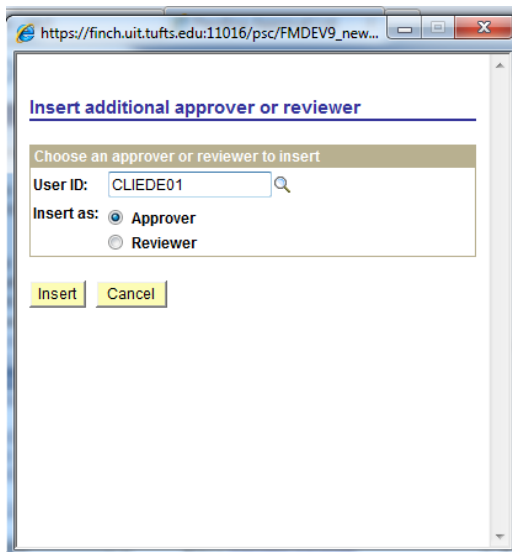
After Approve has been clicked, the diagram changes so your name is now in a green box as approved. A 'successful' message will also appear in text.

Save Additional Changes
Print CEA
[Go To Pending Approval List](#)
The CEA was successfully approved for the current step

COMPUTER SOFTWARE/EQUIPMENT



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.



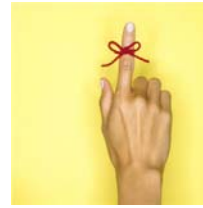
1. Click on Green (+).
2. Insert the UTLN of the ad hoc reviewer or approver
3. Select Approve or Review
4. Click Insert
5. You MUST click on Save & Submit Adhoc

Save & Submit Adhoc Approver Updates

Save Changes

Print CEA

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.

The screenshot shows the Tufts Self-Service portal with the following sections:

- Tufts Self-Service:** Includes links for PO Payment Inquiry, My System Profile (circled in red), and Cap Expenditure Authorizations.
- Tufts Administration:** Includes Portal Utilities, Sub-System Journals, Tufts Admin Home Pages, PCard / Company Property, Tree Maintenance, Process Setup, Tufts Security, and XML Publisher Tools.
- Tufts Finance:** Includes Purchasing Reports/Inquiry, Journal Entry, and Journal Utilities.

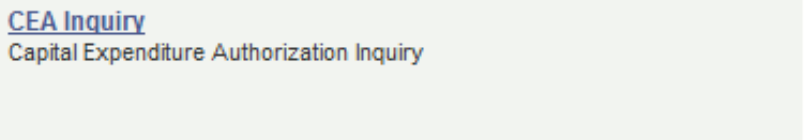
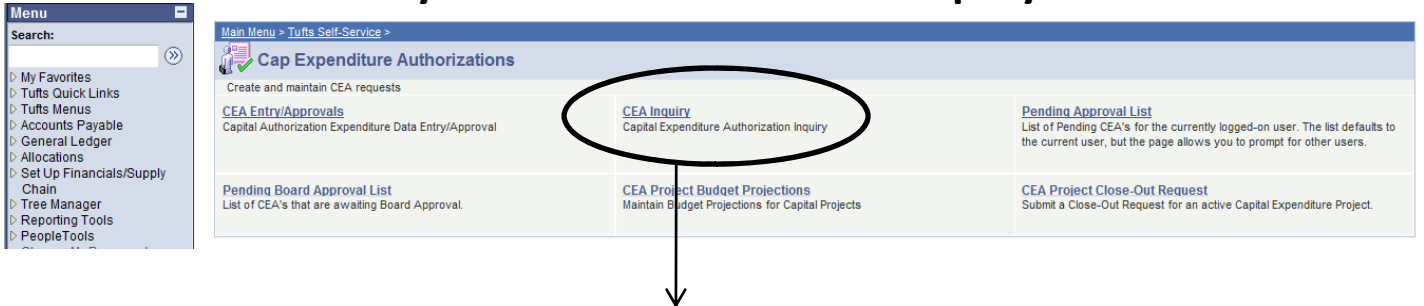
The 'Alternate User' section is expanded, showing the following fields:

- My preferred language for PIA web pages is: English
- My preferred language for reports and email is: English
- Currency Code: []
- Default Mobile Page: []
- Alternate User ID: []
- If you will be temporarily unavailable, you can select an alternate user to receive your routings.
- From Date: [] (example: 12/31/2000)
- To Date: [] (example: 12/31/2000)
- Workflow Attributes: Email User Worklist User
- Miscellaneous User Links
- Email Account table with columns: Primary Email Account, Email Type, Email Address

Fill in the dates that another will approve on your behalf, and select the user by using the magnifying glass to search.

APPENDIX

If you want to find a CEA: Inquiry



The screenshot shows the 'CEA Inquiry Criteria' form. The search criteria section is highlighted with a red box, including 'Project Location Criteria', 'Personnel Criteria', and 'Date/Amount Criteria'. The 'View Details' button is circled in black.

CEA Inquiry Criteria

CEA Number: Project ID: CEA Title:
Supplemental: CEA Status: CEA Type:
Funding Source Criteria
Fund Code: DeptID: Grant:
Project Location Criteria
Personnel Criteria
Date/Amount Criteria

CEA Inquiry Instructions:

- 1) Enter Criteria as needed and press View Details button
- 2) Criteria is not Case Sensitive
- 3) All Free Form Criteria fields default to a "Begins With" Operator
- 4) Placing a % in front of your Criteria values will be interpreted as a "Contains" Operator

[View Details](#)
[Clear All Criteria](#)

[CEA Inquiry Criteria](#) | [CEA Inquiry Results](#)

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.

APPENDIX

CEA Inquiry Results											
Print CEA	CEA Num	Suppl?	Project ID	CEA Amount	Funding Source: Fund	Funding Source: Deptid	Funding Source: Grant	Funding Source: Amount	CEA Title	CEA Type	CEA Status
1	Print CEA 00-0028C	No	PG0432	58,500.00				2,008.00	Computer Lab Renovations	Renovation/Rehab.	Closed
2	Print CEA 00-0028C	No	PG0432	58,500.00				56,492.00	Computer Lab Renovations	Renovation/Rehab.	Closed
3	Print CEA 00-0034P	No	EM0710	134,000.00				134,000.00	Computer Lab	Equipment	Closed
4	Print CEA 00-0058P	Yes	EM0536	25,000.00				25,000.00	Computer Upgrades	Equipment	Closed
5	Print CEA 00-0080P	No	EM0732	53,000.00				53,000.00	Computers & software	Equipment	Closed
6	Print CEA 00-0217P	Yes	EM0553	360,000.00	00000	A810210	000000	360,000.00	Computers for A&S	Equipment	Completed
7	Print CEA 00-0254P	No	EG0458	13,000.00	11707	U000001	000000	13,000.00	Computer Equip for Dean's Office	Equipment	Closed
8	Print CEA 00-0255P	No	EG0459	59,000.00	11707	U000001	000000	59,000.00	Computer & Furniture	Equipment	Closed
9	Print CEA 00-0266P	No	EM0793	35,642.00	00000	P110400	000000	35,642.00	Computer Equip/Dining	Equipment	Closed
10	Print CEA 01-0212P	Yes	EM0553		11703	U000001	000000	262,000.00	Computers for A&S	Equipment	Completed
11	Print CEA 01-0246P	No	EM0893		00000	A250001	USAF16	33,201.00	Computer Cluster	Equipment	Closed
12	Print CEA 01-0246P	No	EM0893		11703	U000001	000000	14,604.00	Computer Cluster	Equipment	Closed
13	Print CEA 02-0087P	No	EM0940	49,100.00	00000	P110100	000000	49,100.00	Computer/Software	Equipment	Closed

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



Pending Approval List

List of Pending CEAs for the currently logged-on user. The list defaults to the current user, but the page allows you to prompt for other users.

Pending CEA List

The following CEA's are awaiting approval from Hunt,Ann M:

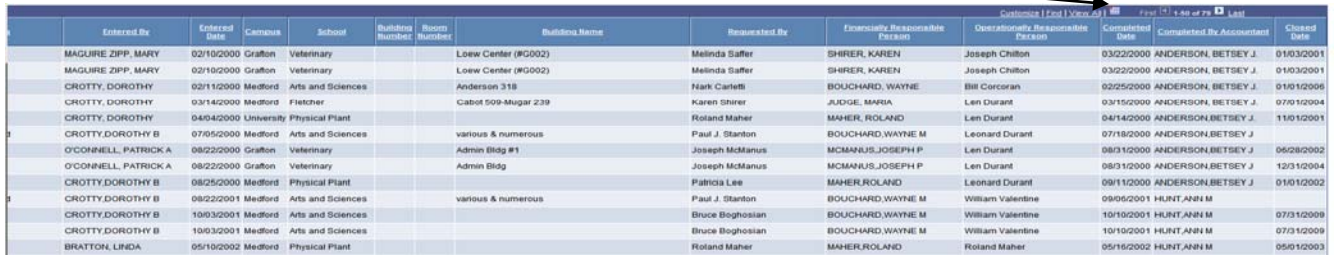
Pending CEA List									
Approver/Proxy Name	CEA Num	Suppl?	Project ID	CEA Title	CEA Amount	CEA Type	Entered By Name	Entered Date	
1 Terranova, Frank	C0000009	No		New SIS	30,400,000.00	Computer Equipment/Software	Lagasse, Bryan D.	10/08/2010	
2 Hunt, Ann M	C0000028	No		test adhoc button	50,000.00	Equipment	Bratton, Linda	10/27/2010	
3 Hunt, Ann M	C0000029	No		test2 adhoc button	100,000.00	Equipment	Boyajian, Peter G	10/27/2010	
4 Rottler, Rock A	C0000053	No		Bio Reactor for Med School	80,000.00	Equipment	Ambrosia, Patrice L	11/09/2010	

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

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

APPENDIX

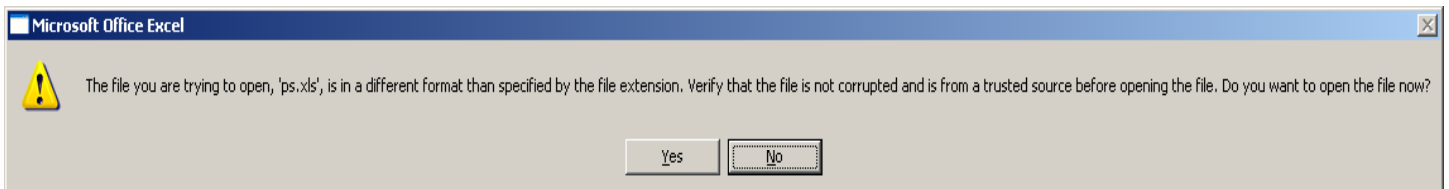
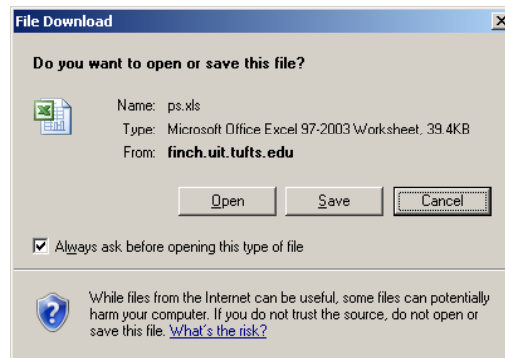
On the screen showing CEA Inquiry search results, scroll over to the far right and find this button:



Entered By	Entered Date	Campus	School	Building Number	Room Number	Building Name	Requested By	Essentially Responsible Person	Operationally Responsible Person	Completed Date	Completed By Accountant	Closed Date
MAGUIRE_ZIPP, MARY	02/10/2000	Grafton	Veterinary			Loew Center (#G002)	Melinda Saffer	SHIRER, KAREN	Joseph Chilton	03/22/2000	ANDERSON, BETSEY J.	01/03/2001
MAGUIRE_ZIPP, MARY	02/10/2000	Grafton	Veterinary			Loew Center (#G002)	Melinda Saffer	SHIRER, KAREN	Joseph Chilton	03/22/2000	ANDERSON, BETSEY J.	01/03/2001
CROTTY, DOROTHY	02/11/2000	Medford	Arts and Sciences			Anderson 318	Nark Carlett	BOUCHARD, WAYNE	Bill Corcoran	02/25/2000	ANDERSON, BETSEY J.	01/01/2006
CROTTY, DOROTHY	03/14/2000	Medford	Fletcher			Cabot 509-Mugar 239	Karen Shorer	JUDGE, MARIA	Len Durant	03/15/2000	ANDERSON, BETSEY J.	07/01/2004
CROTTY, DOROTHY	04/04/2000	University	Physical Plant				Roland Maher	MAHER, ROLAND	Len Durant	04/14/2000	ANDERSON, BETSEY J.	11/01/2001
CROTTY, DOROTHY B	07/05/2000	Medford	Arts and Sciences			various & numerous	Paul J. Stanton	BOUCHARD, WAYNE M	Leonard Durant	07/18/2000	ANDERSON, BETSEY J.	
O'CONNELL, PATRICK A	08/22/2000	Grafton	Veterinary			Admin Bldg #1	Joseph McManus	MCMANUS, JOSEPH P	Len Durant	08/31/2000	ANDERSON, BETSEY J.	06/28/2002
O'CONNELL, PATRICK A	08/22/2000	Grafton	Veterinary			Admin Bldg	Joseph McManus	MCMANUS, JOSEPH P	Len Durant	08/31/2000	ANDERSON, BETSEY J.	12/31/2004
CROTTY, DOROTHY B	08/25/2000	Medford	Physical Plant				Patricia Lee	MAHER, ROLAND	Leonard Durant	08/11/2000	ANDERSON, BETSEY J.	01/01/2002
CROTTY, DOROTHY B	08/22/2001	Medford	Arts and Sciences			various & numerous	Paul J. Stanton	BOUCHARD, WAYNE M	William Valentine	09/06/2001	HUNT, ANH M	
CROTTY, DOROTHY B	10/03/2001	Medford	Arts and Sciences				Bruce Boghosian	BOUCHARD, WAYNE M	William Valentine	10/10/2001	HUNT, ANH M	07/31/2009
CROTTY, DOROTHY B	10/03/2001	Medford	Arts and Sciences				Bruce Boghosian	BOUCHARD, WAYNE M	William Valentine	10/10/2001	HUNT, ANH M	07/31/2009
BRATTON, LINDA	05/10/2002	Medford	Physical Plant				Roland Maher	MAHER, ROLAND	Roland Maher	05/16/2002	HUNT, ANH M	05/01/2003

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).

APPENDIX

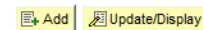
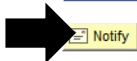
	A	B	C	D	E	F	G	H	I	J	K	L	M
	Print CEA	CEA Num	Suppl?	Project ID	CEA Amount	Funding Source: Fund	Funding Source: Deptid	Funding Source: Grant	Funding Source: Amount	CEA Title	CEA Type	CEA Status	Employee
4	Print CEA	00-0028C	No	PG0432	58,500.00				2,008.00	Computer Lab Renovations	Renovation/Rehab.	Closed	MAGUI
5	Print CEA	00-0028C	No	PG0432	58,500.00				56,492.00	Computer Lab Renovations	Renovation/Rehab.	Closed	MAGUI
6	Print CEA	00-0034P	No	EM0710	134,000.00				134,000.00	Computer Lab	Equipment	Closed	CROTTY
7	Print CEA	00-0058P	Yes	EM0536	25,000.00				25,000.00	Computer Upgrades	Equipment	Closed	CROTTY
8	Print CEA	00-0080P	No	EM0732	53,000.00				53,000.00	Computers & software	Equipment	Closed	CROTTY
9	Print CEA	00-0217P	Yes	EM0553	360,000.00	00000	A810210	000000	360,000.00	Computers for A&S	Equipment	Completed	CROTTY
10	Print CEA	00-0254P	No	EG0458	13,000.00	11707	U000001	000000	13,000.00	Computer Equip for Dean's Office	Equipment	Closed	O'CONN
11	Print CEA	00-0255P	No	EG0459	59,000.00	11707	U000001	000000	59,000.00	Computer & Furniture	Equipment	Closed	O'CONN
12	Print CEA	00-0266P	No	EM0793	35,642.00	00000	P110400	000000	35,642.00	Computer Equip/Dining	Equipment	Closed	CROTTY
13	Print CEA	01-0212P	Yes	EM0553		11703	U000001	000000	262,000.00	Computers for A&S	Equipment	Completed	CROTTY
14	Print CEA	01-0246P	No	EM0893		00000	A250001	USAF16	33,201.00	Computer Cluster	Equipment	Closed	CROTTY
15	Print CEA	01-0246P	No	EM0893		11703	U000001	000000	14,604.00	Computer Cluster	Equipment	Closed	CROTTY
16	Print CEA	02-0087P	No	EM0940	49,100.00	00000	P110100	000000	49,100.00	Computer/Software	Equipment	Closed	BRATTO
17	Print CEA	02-0135P	No	EM0960	57,365.00	00000	F200156	000000	57,365.00	Computer replacement	Equipment	Closed	O'CONN
18	Print CEA	02-0168P	Yes	EM0553	410,000.00	00000	A810210	000000	410,000.00	Computers for A&S	Equipment	Completed	O'CONN
19	Print CEA	02-0196P	No	EB0792	30,686.00	22501	0000000	000000	30,686.00	Computer replacement/upgrade	Equipment	Closed	O'CONN
20	Print CEA	02-0217P	No	EB0801	30,036.00	11355	U000001	000000	30,036.00	computer replacement	Equipment	Closed	O'CONN
21	Print CEA	03-0032P	No	EB0807	17,836.00	11355	U000001	000000	17,836.00	computer/monitor replacement	Equipment	Closed	O'CONN
22	Print CEA	03-0053P	No	EB0819	15,600.00	11355	U000001	000000	15,600.00	computers for Radiology	Equipment	Closed	O'CONN
23	Print CEA	03-0069P	No	EM1033	69,000.00	00000	P110100	000000	69,000.00	Computers for Operations Div	Equipment	Closed	O'CONN
24	Print CEA	03-0147P	Yes	EM0553	345,000.00	00000	A810210	000000	345,000.00	Computers for A&S	Equipment	Completed	O'CONN
25	Print CEA	04-0077P	Yes	EM1033	20,000.00	00000	P110100	000000	20,000.00	Computers for Operations Div	Equipment	Closed	O'CONN
26	Print CEA	04-0108P	No	EM1155	25,245.00	00000	A140000	000000	15,721.00	computers for Comp Sci and ECE	Equipment	Closed	O'CONN

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.

The screenshot shows the 'CEA Request Info' tab selected. The header contains the following information: CEA Number: NEXT, Entered By: Liedes, Carol J, Entered Date/Time: 01/27/11 2:30PM, Supplemental: No, CEA Status: New, Project ID: [blank]. Below this is the 'CEA Request Information' section with fields for CEA Title, CEA Type, Requester Name (Liedes, Carol J), CEA Amount, Responsible Person, and Project Manager. The 'Project Location' section includes Campus, Building, School Code, and Room Number. A large text area for 'CEA Description' is also present. At the bottom of the form are two buttons: 'Save & Preview Approvals' and 'Save & Submit for Approval'.



The 'Send Notification' dialog box has a title bar and instructions: 'Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator. Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.' It features a 'Notification Details' section with fields for To, CC, BCC, Priority, Subject, Template Text, and Message. There are two links: 'Lookup Recipient' and 'Delivery Options'. At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

Click the Lookup
Receipt link

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Send Notification

Lookup Address Type in a last name,
then click Search.

Recipient Search

Name:

Search Results Customize | Find | View All | 1 of 1

To	cc	bcc	Recipient	Email Address	User ID
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			

Recipient List

To:

CC:

BCC:


Send Notification

Lookup Address

Recipient Search

Name:

Search Results Customize | Find | View All | 1 of 1

To	cc	bcc	Recipient	Email Address	User ID
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 Liedes, Carol J	psfn_testing@tufts.edu	CLIEDE01

Recipient List

To:

CC:

BCC:

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.

APPENDIX

Send Notification

Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator.
Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.

Notification Details [Lookup Recipient](#) [Delivery Options](#)

To: Liedes,Carol J/CLIEDE01

CC:

BCC:

Priority: [v]

Subject: <Enter Subject here>

Template Text: Workflow Notification
Priority: %NotificationPriority
Date Sent: 2011-01-27

Message:

Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification.
Click Apply to send this notification and remain on this page.

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.