Tufts University
Manual to Create and Approve a Capital Expenditure Authorization (CEA)
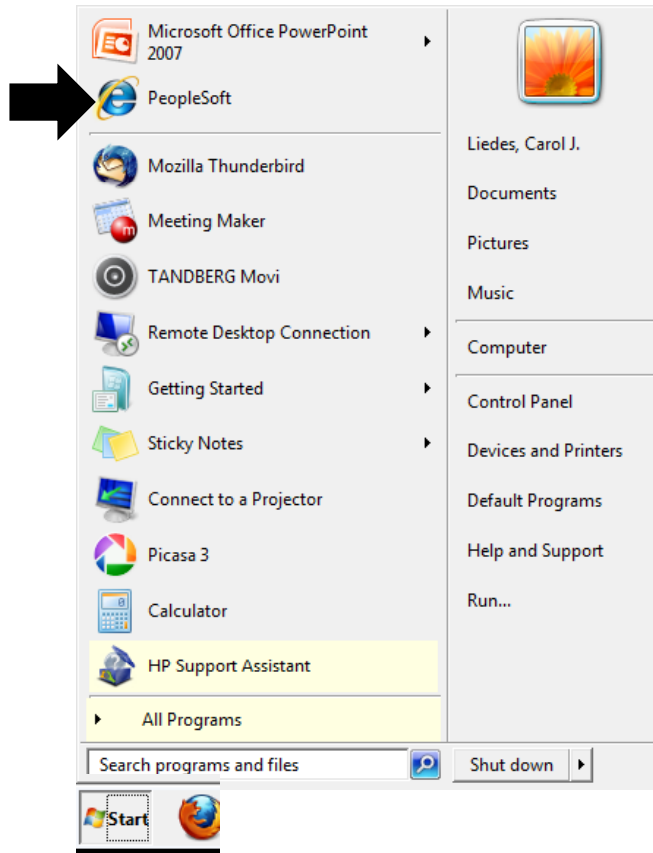
CEA Manual
Table of Contents

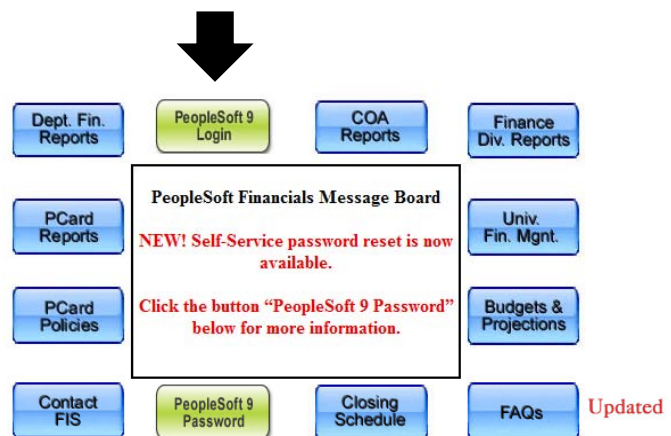# Logging into PeopleSoft

Click on your Start button, then find the PeopleSoft icon. It may be that you'll need to click All Programs, then Tufts Services, then PeopleSoft.

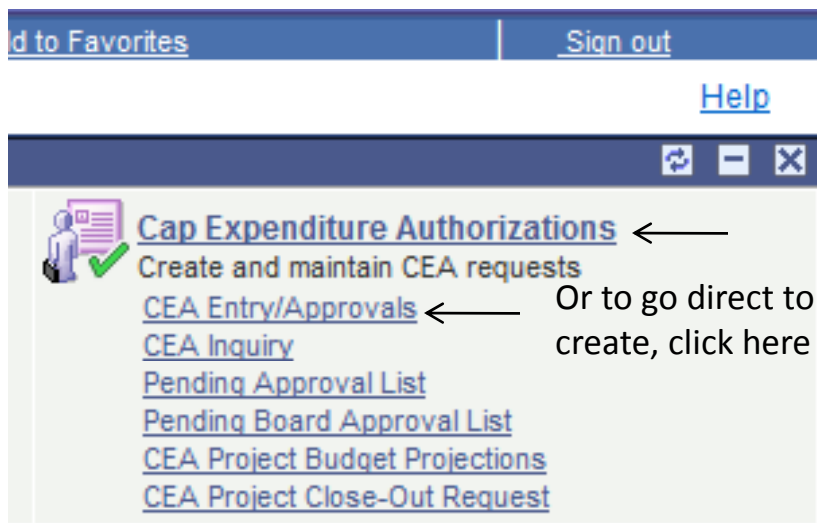You are taken to the PeopleSoft Message Board. Click on the PeopleSoft 9 Login button.

You may also go to the PS sign-in directly, located at:
https://fargo.uit.tufts.edu:11000/psp/FMPROD9/?cmd=login

To access the CEA system, log into PeopleSoft with your UTLN and PeopleSoft password.

ORACLE®
PEOPLESOFT ENTERPRISE

User ID: CLIEDE01
Password: ●●●●●●●●

Sign In

Forgot your password?
Click here to reset your password
and have it e-mailed to you

To set trace flags, click here

Locate the CEA system link on the PeopleSoft home page, and click on it.

d to Favorites | Sign out

Help

Cap Expenditure Authorizations ←
Create and maintain CEA requests
CEA Entry/Approvals ←   Or to go direct to
CEA Inquiry   create, click here
Pending Approval List
Pending Board Approval List
CEA Project Budget Projections
CEA Project Close-Out Request

CEA Options Menu

To begin creating or approving a CEA, click
the link as shown.
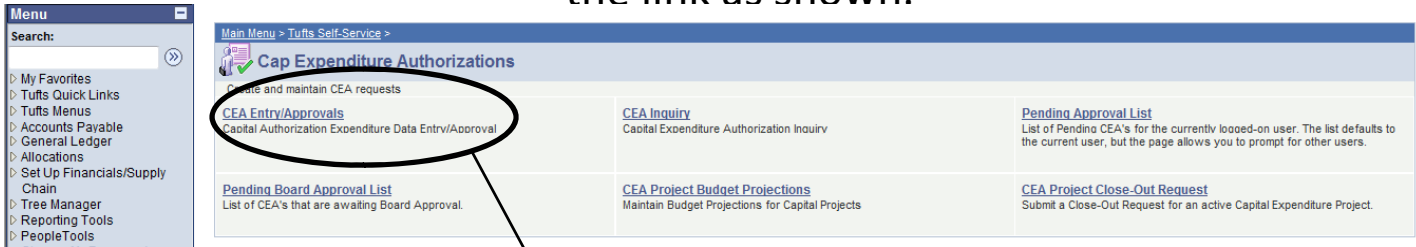
You'll be taken to the CEA Request panel, defaulting at Find an Existing CEA. Either insert criteria to find a saved CEA, or click on the tab named Add a New Value to create a new CEA.
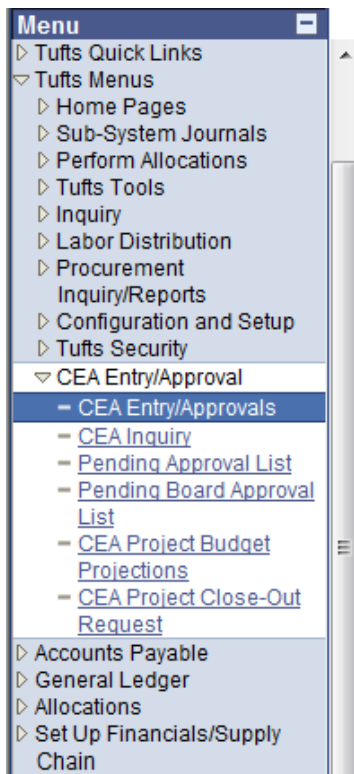
Answer via the drop-down window if this is a supplemental CEA request, or not.

CEA Request

| Find an Existing Value | Add a New Value |

CEA Number: NEXT

Supplemental Request?: No

- No
- Yes

Add

Find an Existing Value | Add a New Value

Once you click the Add button, the system will automatically begin the setup process for you to complete. No actual CEA # is assigned at this point (field is grayed out).

Menu

- ▷ Tufts Quick Links
- ▽ Tufts Menus
  - ▷ Home Pages
  - ▷ Sub-System Journals
  - ▷ Perform Allocations
  - ▷ Tufts Tools
  - ▷ Inquiry
  - ▷ Labor Distribution
  - ▷ Procurement
    - Inquiry/Reports
  - ▷ Configuration and Setup
  - ▷ Tufts Security
  - ▽ CEA Entry/Approval
    - − CEA Entry/Approvals
    - − CEA Inquiry
    - − Pending Approval List
    - − Pending Board Approval List
    - − CEA Project Budget Projections
    - − CEA Project Close-Out Request
- ▷ Accounts Payable
- ▷ General Ledger
- ▷ Allocations
- ▷ Set Up Financials/Supply Chain

Initially, four tabs will appear, each with a panel of information to be completed. The first panel is: **CEA Request Info**

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

| CEA Number: | NEXT | Entered By: | Liedes,Carol J | Entered Date/Time: | 12/21/10 4:15PM |
| Supplemental: | No | CEA Status: | New | Project ID: | |

CEA Request Information

*CEA Title: ____

*Requester Name: Liedes,Carol J

*Responsible Person: ____ (Financial Respon

Project Manager: ____ (Operational Respo

*CEA Type: ____

Computer Equipment/Software
Design
Equipment
New Construction
Renovation/Rehab.
Vehicles

*CEA Amount: ____

lget Projections

Project Location

*Campus: ____

Building: ____

*School Code: ____

Room Number: ____

CEA Description:
(up to 254 characters)

Note: if you are not the person who requested the CEA, select the correct person to override yourself as the default.

Save & Preview Approvals   Save & Submit for Approval

Notify

Use notify to ask a question. See appendix for details!

Complete fields by using drop down windows or typing in the information.

Add   Update/Display

Type the first few letters of an individual's last name, then click the magnifying class to select.

Please note that any field with a (*) is a required field. Notice that depending on which CEA type is chosen in the drop-down, the bottom portion of the panel will change.

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

CEA Number: NEXT   Entered By: Liedes,Carol J   Entered Date/Time: 12/21/10 4:15PM
Supplemental: No   CEA Status: New   Project ID:

CEA Request Information

*CEA Title: testing123   *CEA Type: Renovation/Rehab.
*Requester Name: Liedes,Carol J   *CEA Amount: [Cost Breakout/Budget Projections]
*Responsible Person: (Financial Responsibility)
Project Manager: (Operational Responsibility)

Project Location
*Campus: *School Code:
○ Existing Building?   ○ Multi Building Project?   ○ New Construction?   ○ Land Improvements?
Building: Room Number:

CEA Description:
(up to 254 characters)

[Save & Preview Approvals]   [Save & Submit for Approval]

When selecting construction, renovation or design, the section above appears........

[Add]   [Update/Display]

CEA Request Information

*CEA Title: testing123   *CEA Type: Computer Equipment/Software
*Requester Name: Liedes,Carol J   *CEA Amount: [Cost Breakout/Budget Projections]
*Responsible Person: (Financial Responsibility)
Project Manager: (Operational Responsibility)

Project Location
*Campus: *School Code:
Building: Room Number:

CEA Description:
(up to 254 characters)

[Save & Preview Approvals]   [Save & Submit for Approval]

When selecting computer equipment, vehicle or equipment, the section above appears......

If required, click as shown for cost/budget entry for information. Before doing so, make sure all other fields with the (*) are completed.

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

| CEA Number: | NEXT | Entered By: | Liedes,Carol J | Entered Date/Time: | 02/17/11 11:43AM |
| Supplemental: | No | CEA Status: | New | Project ID: | |

CEA Request Information

*CEA Title:	The New Thing	*CEA Type:	Computer Equipment/Software
*Requester Name:	Liedes,Carol J	*CEA Amount:	100,000.00	Cost Breakout/Budget Projections
*Responsible Person:	McGurty,Thomas S	(Financial Responsibility)
Project Manager:		(Operational Responsibility)

Project Location

| *Campus: | Medford | *School Code: | C | Central |
| Building: | | Room Number: | |

CEA Description:
(up to 254 characters)

Save & Preview Approvals   Save & Submit for Approval

If you've clicked the Cost Breakout button, this screen will appear:

CEA Request Info	CEA Cost/Budget Breakout Info	CEA Funding Source Info	CEA File Attachment Info	CEA Routing/Approval Info

| CEA Number: | NEXT | Supplemental: | No | Project ID: | | CEA Status: | New |

Entered Date/Time:	12/29/10 9:23AM	Entered By:	Liedes,Carol J
CEA Title:	The New Thing	Requester Name:	Liedes,Carol J
CEA Type:	Computer Equipment/Software	Responsible Person:	McGurty,Thomas S
CEA Amount:	100,000.00	Project Manager:	Santangelo,Raymond N
CEA Description:			

NOTE: This is informational only: is not required!

CEA Cost Breakout   First 1 of 1 Last

Cost Category	Amount		
Software/Equipment	100,000.00	+	−

CEA Initial Budget Projections   First 1 of 1 Last

Fiscal Year	Quarter	Budget Amount		
2011	2nd Quarter (Oct to Dec)	100,000.00	+	−

1st Quarter (July to Sept)
2nd Quarter (Oct to Dec)
3rd Quarter (Jan to March)
4th Quarter (April to June)

ave & Submit for Approval

Add   Update/Display

Use the (+) to add rows; Use the dropdown to identify specific quarters and set budgeted amounts for projections.

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Click the CEA Funding Source Tab   **CEA Funding Source Info**

CEA Request Info	CEA Cost/Budget Breakout Info	**CEA Funding Source Info**	CEA File Attachment Info	CEA Routing/Approval Info

CEA Number: NEXT   **Supplemental:** No   **Project ID:**   **CEA Status:** New

Entered Date/Time: 12/29/10 9:23AM   **Entered By:** Liedes,Carol J
CEA Title: The New Thing   **Requester Name:** Liedes,Carol J
CEA Type: Computer Equipment/Software   **Responsible Person:** McGurty,Thomas S
CEA Amount: 100,000.00   **Project Manager:** Santangelo,Raymond N
CEA Description:

Again, use the (+) to add rows, in the event you need to have more than one funding type with a funding amount.

Budget Details

  *Has this request been approved in the Capital Budget (Y/N)?: ▼

No
Yes

Funding Sources

*Funding Type: ▼   + −
*Funding Amount: 100,000.00   Source of Funds: Note: you must enter the total fund
Routing Area: amount prior to using the [+]

   Save & Preview Approvals   Save & Submit for Approval

Funding Sources

*Funding Type: ▼
*Funding Amount:
Routing Area:

| Department |
| Fund |
| Grant |
| |

Answer the capital budget question, and indicate the funding type.   Once the type is selected, a new field will appear for you to complete: the deptid, grant or fund.

Funding Sources

*Funding Type: Department ▼   **Deptid:** 🔍
*Funding Amount: 100,000.00   **Source of Funds:**
Routing Area:

   Save & Preview Approvals   Save & Submit for Approval

Click the CEA Attachment Tab   **CEA File Attachment Info**
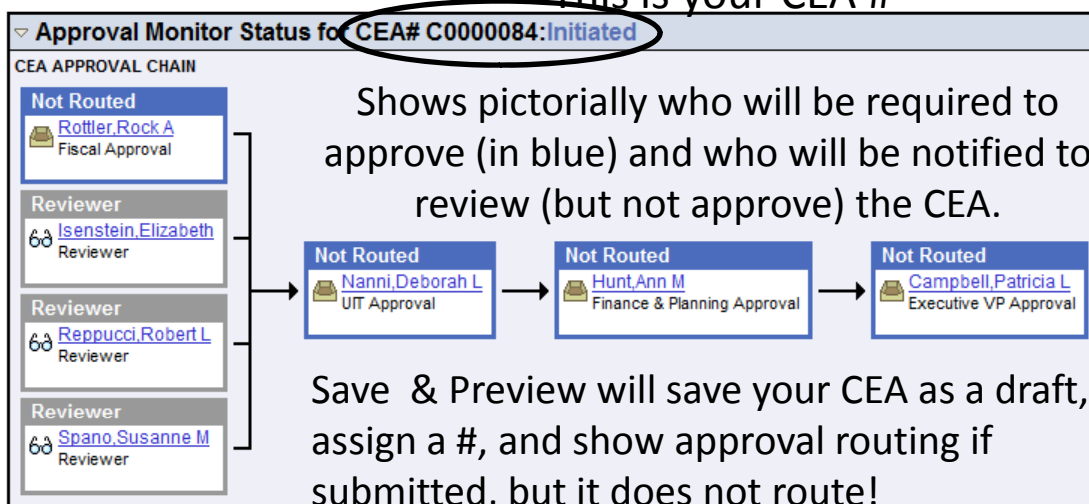
| CEA Request Info | CEA Cost/Budget Breakout Info | CEA Funding Source Info | **CEA File Attachment Info** | CEA Routing/Approval Info |

CEA Number: NEXT   **Supplemental:** No   **Project ID:**   **CEA Status:** New

Entered Date/Time: 12/29/10 9:23AM   **Entered By:** Liedes,Carol J
CEA Title: The New Thing   **Requester Name:** Liedes,Carol J
CEA Type: Computer Equipment/Software   **Responsible Person:** McGurty,Thomas S
CEA Amount: 100,000.00   **Project Manager:** Santangelo,Raymond N
CEA Description:

File Attachment Details

NOTE: Attachments are read-only.

File Attachments

Upload Attachment   **Document Description:**   + −

Attached File Name:

Entered By: **Entered Date/Time:**

Save & Preview Approvals   Save & Submit for Approval

Add   Update/Display

Upload your attachment to accompany the CEA request. Click on the Upload Attachment button in order to browse your local directories. Find the document then click Upload.

NOTE: An attachment detailing the justification for the CEA is required!

Browse...

Upload   Cancel

After uploading, your document name will appear, as will a new button to View Attachments.

File Attachment Details

NOTE: Attachments are read-only.

File Attachments

View Attachment   Document Description: Type your description here!   + −
Attached File Name: CEA_Project.docx
Entered By: Liedes,Carol J   **Entered Date/Time:** 12/29/10 9:57AM

Save & Preview Approvals   Save & Submit for Approval

Add   Update/Display

The CEA Approval Tab

This panel provides a brief summary and one of two choices:

Save & Preview Approvals   Save & Submit for Approval

| CEA Request Info | CEA Cost/Budget Breakout Info | CEA Funding Source Info | CEA File Attachment Info | **CEA Routing/Approval Info** |

CEA Number: NEXT   **Supplemental:** No   **Project ID:**   **CEA Status:** New

Entered Date/Time: 12/29/10 9:23AM   **Entered By:** Liedes,Carol J
CEA Title: The New Thing   **Requester Name:** Liedes,Carol J
CEA Type: Computer Equipment/Software   **Responsible Person:** McGurty,Thomas S
CEA Amount: 100,000.00   **Project Manager:** Santangelo,Raymond N
CEA Description:

Save & Preview Approvals   Save & Submit for Approval

Add   Update/Display

CEA Request Info | CEA Cost/Budget Breakout Info | CEA Funding Source Info | CEA File Attachment Info | CEA Routing/Approval Info

Save & Preview Approvals

COMPUTER SOFTWARE/EQUIPMENT   This is your CEA #

▽ **Approval Monitor Status for CEA# C0000084:Initiated**

CEA APPROVAL CHAIN

Not Routed
Rottler,Rock A
Fiscal Approval

Reviewer
Isenstein,Elizabeth
Reviewer

Reviewer
Reppucci,Robert L
Reviewer

Reviewer
Spano,Susanne M
Reviewer

Not Routed
Nanni,Deborah L
UIT Approval

Not Routed
Hunt,Ann M
Finance & Planning Approval

Not Routed
Campbell,Patricia L
Executive VP Approval

Shows pictorially who will be required to approve (in blue) and who will be notified to review (but not approve) the CEA.

Save & Preview will save your CEA as a draft, assign a #, and show approval routing if submitted, but it does not route!

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Once you click on **Save & Submit for Approval** your screen will change to this.

COMPUTER SOFTWARE/EQUIPMENT
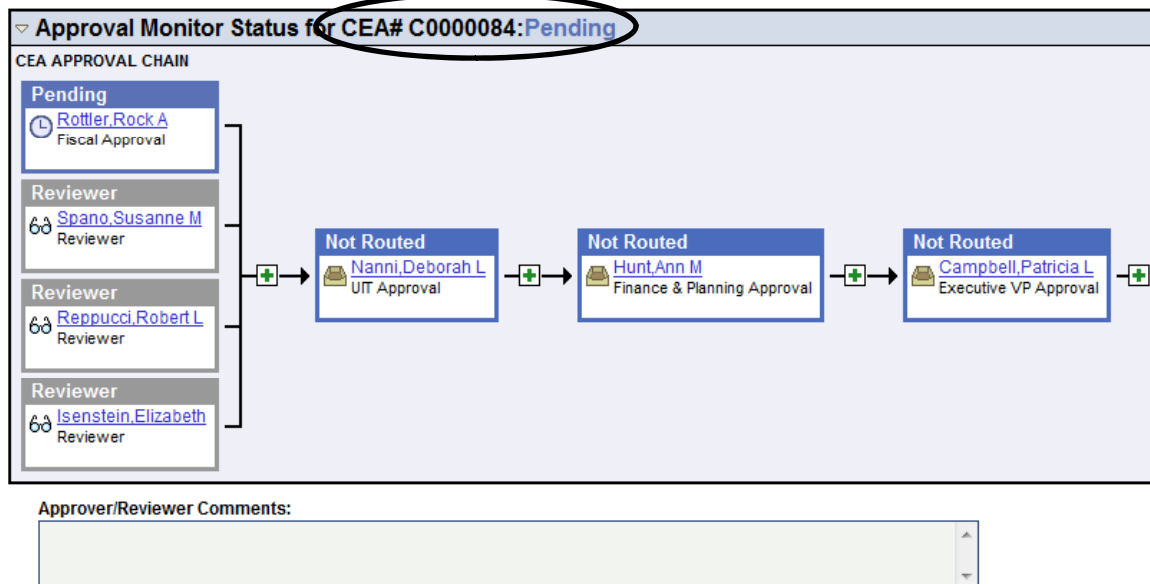
Those individuals in gray boxes are Reviewers only. They can make comments but are not part of the approval chain. You'll notice that the first individual in the blue box says Pending, as the system has notified them via e-mail of their required approval. Once that person does approve, the first person shown above as Not Routed becomes Pending.

There is also a yellow button at the bottom of this page that enables you to print the CEA.

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:

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.

https://finch.uit.tufts.edu:11016/psc/FMDEV9_new...

Insert additional approver or reviewer

Choose an approver or reviewer to insert

User ID: CLIEDE01 🔍
Insert as: ⦿ Approver
◯ Reviewer

Insert   Cancel

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

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Finding 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.

Finding a CEA: Inquiry Results

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 CEA's 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:

	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.

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Reviewing the Board Approval List

Pending Board Approval List
List of CEA's that are awaiting Board Approval.

Pending CEA List

The following CEA's are awaiting Board Approval:

	Approver/Proxy Name	CEA Num	Suppl?	Project ID	CEA Title	CEA Amount	CEA Type	Entered By Name	Entered Date
1	Bombino,Angela R.	C0000046	No		trace missinge reviewer email	81,000.00	Equipment	Ambrosia,Patrice L	11/01/2010

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

The Pending Board Approval list will provide a detailed list of CEAs that are currently waiting for approval by the Trustees Office.

Viewing Budget Projections

CEA Project Budget Projections
Maintain Budget Projections for Capital Projects

CEA Project Budget Projections

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Project ID: begins with

Status: =

Description: begins with

Manager Name: begins with

☐ Case Sensitive

Search   Clear   Basic Search   💾 Save Search Criteria

Insert a description or Project ID then click Search.

Viewing Budget Projections

RESULTS!

CEA Project Budget Projections

Project ID:	EB1043		Project Description:	Computer Upgrade Medical Schl
Project Status:	Active		Project Start Date:	11/20/2006
Project Dept:	School Of Medicine		Project Amount:	127,660.000

Project Budget Projections   Customize | Find | ▦   First ◄ 1 of 1 ► Last

	*Fiscal Year	*Quarter	*Budget Amount	Last Updated By	Last Update Date	
1	2007 🔍	2nd Quarter (Oct to Dec) ▼	127,660.00	CONVERSION	10/04/2010	➕ ➖

💾 Save   🔍 Return to Search   ↑▤ Previous in List   ↓▤ Next in List   ▤ Notify

Add lines if necessary

CEA Project Closeout Request

CEA Project Close-Out Request
Submit a Close-Out Request for an active Capital Expenditure Project.

CEA Project Close-Out Request
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Project ID: begins with ▼ EB1043
Description: begins with ▼
☐ Case Sensitive

Search   Clear   Basic Search   💾 Save Search Criteria

Type in value(s) and click search.

After clicking search, this request for close-out screen appears. Update the Project Close-out Funding Sources as needed and click the "Save & Submit Request to General Accounting."

Pressing this button will send an email to General Accounting, informing them to process the Close-out Request. You will receive a system generated email when the Close-out has been completed by General Accounting. If the Close-out has been submitted, and while it is still pending formal close-out by GA, a button will be displayed that allows you to cancel the Close-out request, if it has been entered in error or if corrections are required. If funding source changes are made to a pending close-out, a button will be displayed that will force you to resubmit the Close-out request. That way, General Accounting will be aware of the changes.

Refresh Expenditures & Funding Sources for Close-Out allows you to reset funding sources back to their original state, and update the total expenditures amount if any new expenses have been posted to the general ledger.

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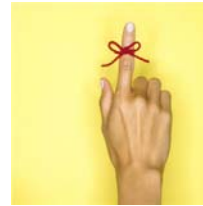
1. If an approver changes the funding source on a CEA, the approval cycle starts over from the beginning and everyone in the chain must approve again.

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.

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.
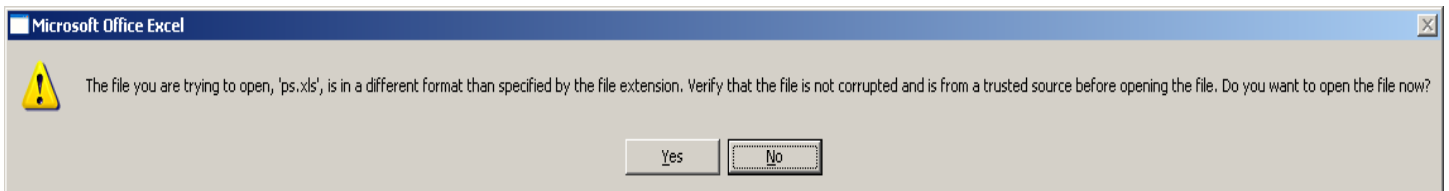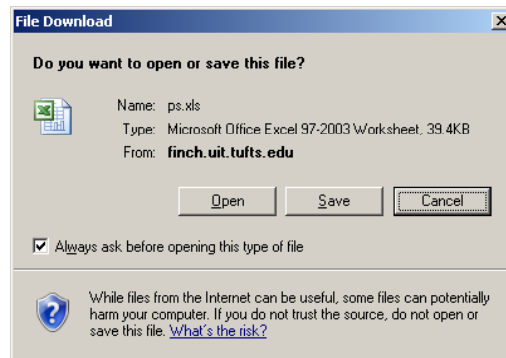
Click Yes at this dialog (if presented).

APPENDIX

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	E...
Print CEA	00-0028C	No	PG0432	58,500.00				2,008.00	Computer Lab Renovations	Renovation/Rehab.	Closed	MAGUI
Print CEA	00-0028C	No	PG0432	58,500.00				56,492.00	Computer Lab Renovations	Renovation/Rehab.	Closed	MAGUI
Print CEA	00-0034P	No	EM0710	134,000.00				134,000.00	Computer Lab	Equipment	Closed	CROTTY
Print CEA	00-0058P	Yes	EM0536	25,000.00				25,000.00	Computer Upgrades	Equipment	Closed	CROTTY
Print CEA	00-0080P	No	EM0732	53,000.00				53,000.00	Computers & software	Equipment	Closed	CROTTY
Print CEA	00-0217P	Yes	EM0553	360,000.00	00000	A810210	000000	360,000.00	Computers for A&S	Equipment	Completed	CROTTY
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
Print CEA	00-0255P	No	EG0459	59,000.00	11707	U000001	000000	59,000.00	Computer & Furniture	Equipment	Closed	O'CONN
Print CEA	00-0266P	No	EM0793	35,642.00	00000	P110400	000000	35,642.00	Computer Equip/Dining	Equipment	Closed	CROTTY
Print CEA	01-0212P	Yes	EM0553		11703	U000001	000000	262,000.00	Computers for A&S	Equipment	Completed	CROTTY
Print CEA	01-0246P	No	EM0893		00000	A250001	USAF16	33,201.00	Computer Cluster	Equipment	Closed	CROTTY
Print CEA	01-0246P	No	EM0893		11703	U000001	000000	14,604.00	Computer Cluster	Equipment	Closed	CROTTY
Print CEA	02-0087P	No	EM0940	49,100.00	00000	P110100	000000	49,100.00	Computer/Software	Equipment	Closed	BRATTO
Print CEA	02-0135P	No	EM0960	57,365.00	00000	F200156	000000	57,365.00	Computer replacement	Equipment	Closed	O'CONN
Print CEA	02-0168P	Yes	EM0553	410,000.00	00000	A810210	000000	410,000.00	Computers for A&S	Equipment	Completed	O'CONN
Print CEA	02-0196P	No	EB0792	30,686.00	22501	0000000	000000	30,686.00	Computer replacement/upgrade	Equipment	Closed	O'CONN
Print CEA	02-0217P	No	EB0801	30,036.00	11355	U000001	000000	30,036.00	computer replacement	Equipment	Closed	O'CONN
Print CEA	03-0032P	No	EB0807	17,836.00	11355	U000001	000000	17,836.00	computer/monitor replacement	Equipment	Closed	O'CONN
Print CEA	03-0053P	No	EB0819	15,600.00	11355	U000001	000000	15,600.00	computers for Radiology	Equipment	Closed	O'CONN
Print CEA	03-0069P	No	EM1033	69,000.00	00000	P110100	000000	69,000.00	Computers for Operations Div	Equipment	Closed	O'CONN
Print CEA	03-0147P	Yes	EM0553	345,000.00	00000	A810210	000000	345,000.00	Computers for A&S	Equipment	Completed	O'CONN
Print CEA	04-0077P	Yes	EM1033	20,000.00	00000	P110100	000000	20,000.00	Computers for Operations Div	Equipment	Closed	O'CONN
Print CEA	04-0108P	No	EM1155	35,346.00	00000	A440000	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.

Click the Lookup Receipt link

APPENDIX

Send Notification

Lookup Address

Type in a last name, then click Search.

Recipient Search

Name: Liedes

Search

Search Results   Customize | Find | View All | ⊞   First ◀ 1 of 1 ▶ Last

To	cc	bcc	Recipient	Email Address	User ID
☐	☐	☐			

Add to Recipient List

Recipient List

To:

CC:

BCC:

OK   Cancel

Send Notification

Lookup Address

Recipient Search

Name: Liedes

Search

Search Results   Customize | Find | View All | ⊞   First ◀ 1 of 1 ▶ Last

To	cc	bcc	Recipient	Email Address	User ID
☑	☐	☐	Liedes,Carol J	psfin_testing@tufts.edu	CLIEDE01

Add to Recipient List

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.

Recipient List

To:

CC:

BCC:

OK   Cancel

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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:

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.

OK	Cancel	Apply

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.