

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



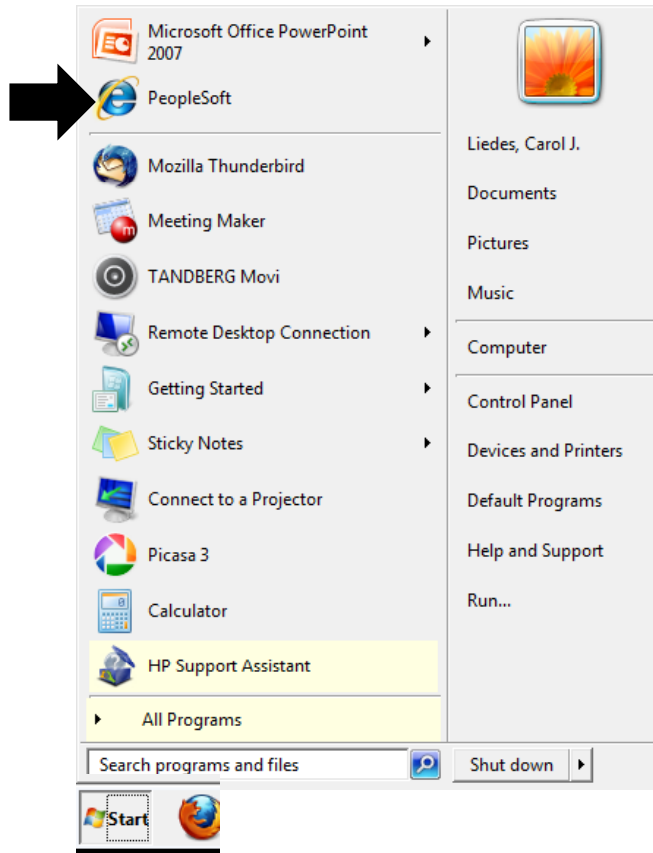
February 2011

CEA Manual

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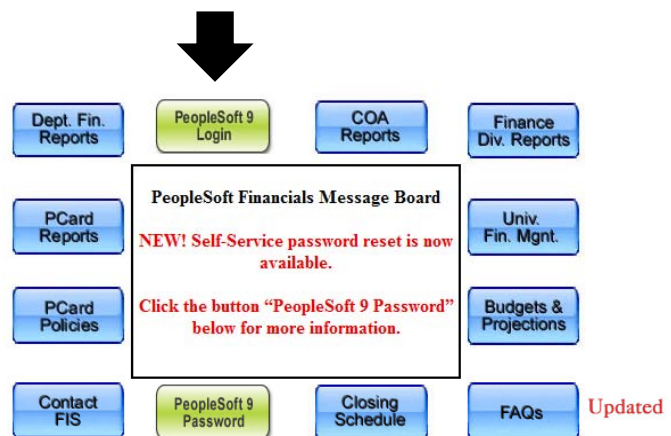
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Logging into PeopleSoft



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.



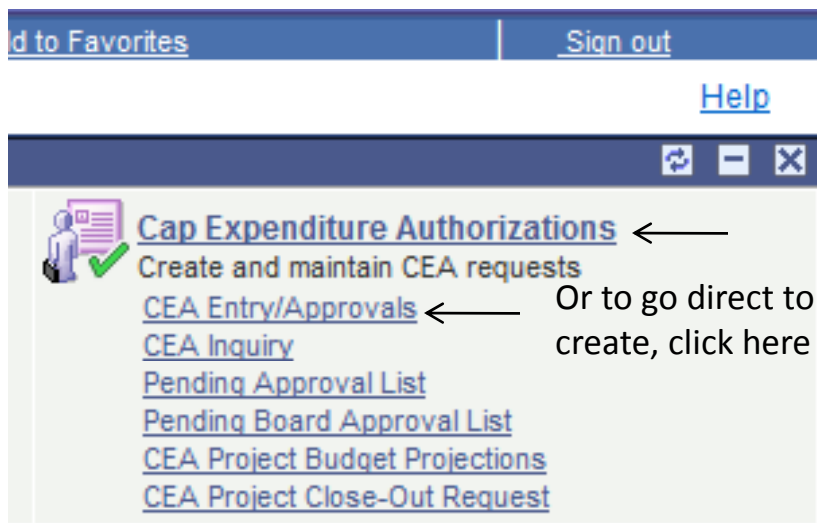
You may also go to the PS sign-in directly, located at:
<https://fargo.uit.tufts.edu:11000/psp/FMPROD9/?cmd=login>

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

ORACLE
PEOPLESFT ENTERPRISE

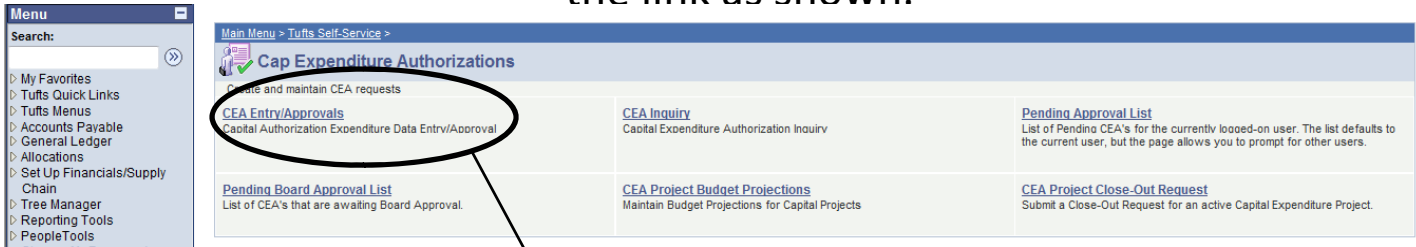
<p>User ID: <input type="text" value="CLIEDE01"/></p> <p>Password: <input type="password" value="••••••••"/></p> <p><input type="button" value="Sign In"/></p> <p>To set trace flags, click here</p>	<p>Forgot your password?</p> <p>Click here to reset your password and have it e-mailed to you</p>
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Locate the CEA system link on the PeopleSoft home page, and click on it.



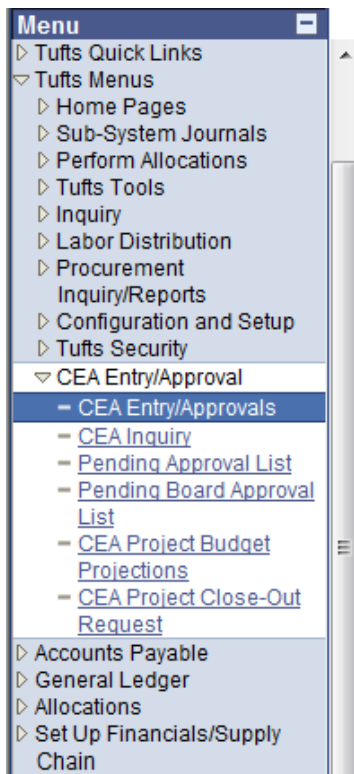
CEA Options Menu

To begin creating or approving a CEA, click the link as shown.



The screenshot shows the 'CEA Request' form. The 'Add a New Value' tab is selected, and the 'Find an Existing Value' tab is also visible. The form contains various input fields for CEA details, including CEA Number, Supplemental Request, Project ID, Funding Source, CEA Type, CEA Status, CEA Project Title, School, CEA Entered By, and CEA Entered Date. The 'Add a New Value' tab is circled, and an arrow points to the next screenshot.

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:

Supplemental Request?:

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).

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: *CEA Type:
 *Requester Name: Liedes, Carol J *CEA Amount:
 *Responsible Person: (Financial Respon
 Project Manager: (Operational Respo
 Project Location
 *Campus: *School Code:
 *Building: 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

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

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

Type the first few letters of an individual's last name, then click the magnifying glass 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:			
<input checked="" type="radio"/> Existing Building? <input type="radio"/> Multi Building Project? <input type="radio"/> New Construction? <input type="radio"/> 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: Lienes, 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: Lienes, 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: Lienes, Carol J
CEA Title: The New Thing Requester Name: Lienes, 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)

Save & Submit for Approval

Add Update/Display

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

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: Lienes,Carol J		
CEA Title: The New Thing		Requester Name: Lienes,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)?: <input type="button" value="No"/> <input type="button" value="Yes"/>				
Funding Sources				
*Funding Type: <input type="button" value="+"/> <input type="button" value="-"/>				
*Funding Amount: 100,000.00 Source of Funds:				
Routing Area:				
<input type="button" value="Save & Preview Approvals"/> <input type="button" value="Save & Submit for Approval"/>				

Funding Sources	
*Funding Type:	<input type="button" value="+"/> <input type="button" value="-"/>
*Funding Amount:	100,000.00
Routing Area:	

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 <input type="button" value="+"/> <input type="button" value="-"/>
*Funding Amount:	100,000.00
Routing Area:	



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: Lienes,Carol J		
CEA Title: The New Thing		Requester Name: Lienes,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: <input type="text"/> + -
Attached File Name:	
Entered By:	
Entered Date/Time:	
Save & Preview Approvals Save & Submit for Approval	

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.

 Add  Update/Display



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

<input type="text"/>	Browse...
Upload	Cancel

After uploading, your document name will appear, as will

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: Lienes,Carol J Entered Date/Time: 12/29/10 9:57AM	
Save & Preview Approvals Save & Submit for Approval	

a new button to View Attachments.

 Add  Update/Display

The CEA Approval Tab

CEA Routing/Approval Info

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

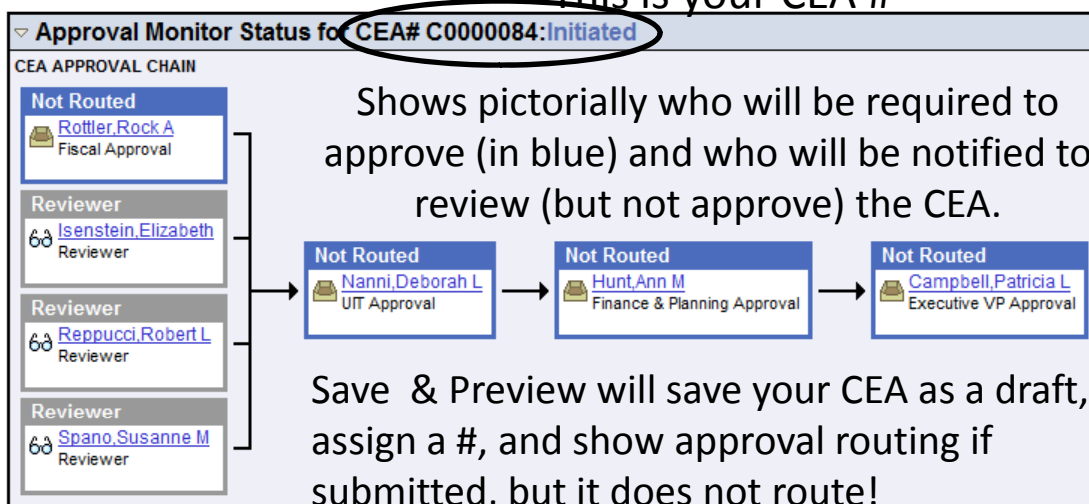
Update/Display

[CEA Request Info](#) | [CEA Cost/Budget Breakout Info](#) | [CEA Funding Source Info](#) | [CEA File Attachment Info](#) | [CEA Routing/Approval Info](#)

Save & Preview Approvals

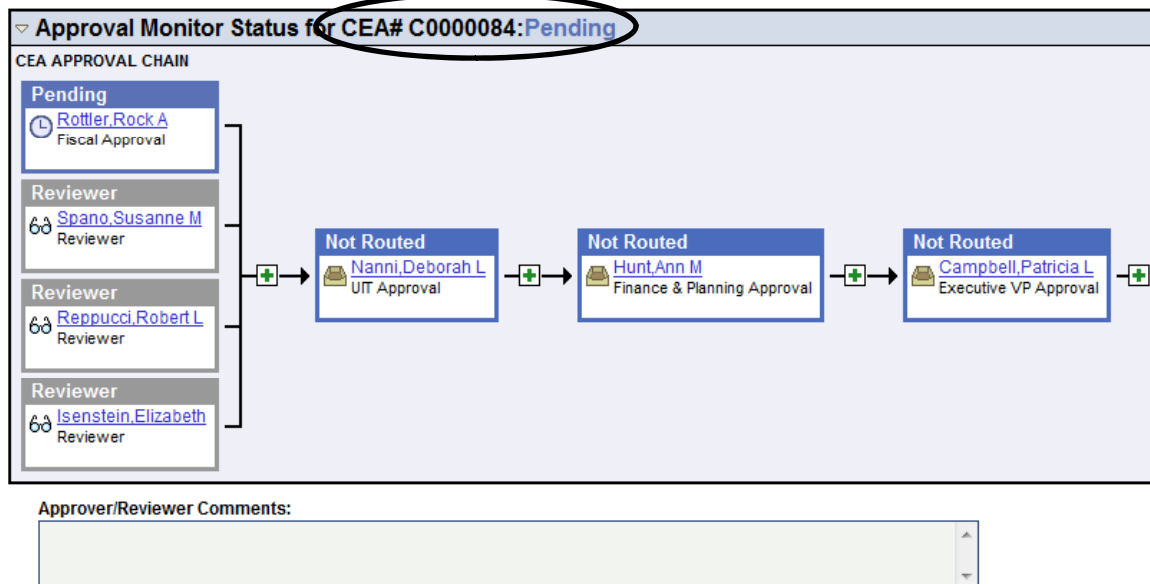
COMPUTER SOFTWARE/EQUIPMENT

This is your CEA #



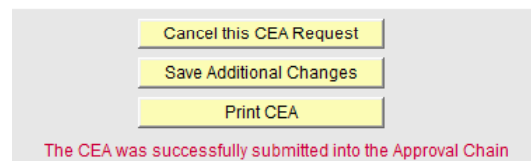
Once you click on [Save & Submit for Approval](#) your screen will change to this.

COMPUTER SOFTWARE/EQUIPMENT

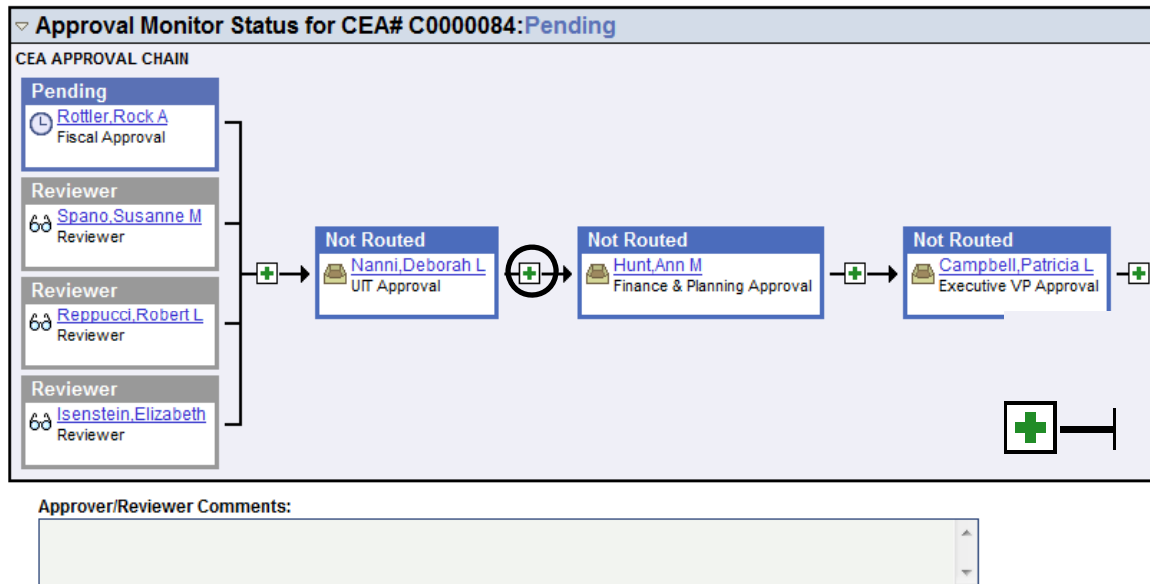


Those individuals in gray boxes are Reviewers only. They can make comments but are not part of the approval chain. You'll notice that the first individual in the blue box says Pending, as the system has notified them via e-mail of their required approval. Once that person does approve, the first person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



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.

The dialog box titled 'Insert additional approver or reviewer' contains the following fields and options:

- Choose an approver or reviewer to insert:** A search bar with 'User ID: CLIEDE01' and a magnifying glass icon.
- Insert as:** Two radio buttons: ☒ Approver and ☐ Reviewer.
- Buttons:** 'Insert' and '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

Finding a CEA: Inquiry

Menu

Search:

- My Favorites
- Tufts Quick Links
- Tufts Menus
- Accounts Payable
- General Ledger
- Allocations
- Set Up Financials/Supply Chain
- Tree Manager
- Reporting Tools
- PeopleTools

Cap Expenditure Authorizations

Create and maintain CEA requests

CEA Entry/Approvals Capital Authorization Expenditure Data Entry/Approval	CEA Inquiry Capital Expenditure Authorization Inquiry	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 Board Approval List List of CEA's that are awaiting Board Approval.	CEA Project Budget Projections Maintain Budget Projections for Capital Projects	CEA Project Close-Out Request Submit a Close-Out Request for an active Capital Expenditure Project.

CEA Inquiry
Capital Expenditure Authorization Inquiry

CEA Inquiry Criteria | **CEA Inquiry Results**

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.

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:

Pending CEA List										Customize	Find	First	1-4 of 4	Last
	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.

Reviewing the Board Approval List



Pending CEA List

The following CEA's are awaiting Board Approval:

Pending CEA List									
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 missing 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

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

Find an Existing Value

Project ID:

Status:

Description:

Manager Name:

☐ Case Sensitive

[Basic Search](#)

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

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.”

Project ID:	EB0989	Description:	Dental Chairs
Close-Out Status:	New Close-Out Request	View all CEA's for this Project	
Entered By:	Liedes, Carol J	Entered Date:	01/20/2011
Closed By:		Closed Date:	

Original Funding:	201,000.00
Total Expenditures:	141,256.84
Unexpended Balance:	59,743.16

Final Close-Out Action Necessary

Please transfer the unexpended fund and budget balance as follows, then inactivate the project:

Project Close-Out Funding Sources							Customize	Find	First	1 of 1	Last
*Fund	*Deptid	Grant	Source of Funds	Project F S Budgeted Amt	Unexpended F S Balance	Project F S Final Amt					
10000	D700877		Unrestricted Deptid	201,000.00	59,743.16	141,256.84	+	-			

Requester Comments:

General Accounting Comments:

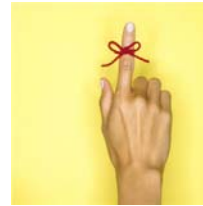
Save & Submit Request to General Accounting

Refresh Expenditures & Funding Sources for Close-Out

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.

Tufts Self-Service

PO/Payment Inquiry
Inquiry on Purchase Orders, Vouchers, and Payments

My System Profile
Change password, set up forgotten-password hint, etc.

Cap Expenditure Authorizations
Create and maintain CEA requests
CEA Entry/Approvals
CEA Inquiry
Pending Approval List
Pending Board Approval List
CEA Project Budget Projections
CEA Project Close-Out Request

Tufts Administration

Portal Utilities
Manage Portal Menu Structure and Security

Sub-System Journals
Load Sub-System Journals to GL
Load Sub-System Journals
Journal Generator

Tufts Admin Home Pages
Custom "Home" Pages for Tufts Administrators

PCard / Company Property
P-Card and Company Property Administration

Tree Maintenance
Maintain and Audit Trees
Tree Manager

Process Setup
Maintain Process and Job Configuration

Tufts Security
Tufts Security Processes and Setup
Restrict Labor Module Access

XML Publisher Tools
XML Publisher Report Creation and Viewing
Report Manager

Tufts Finance

Purchasing Reports/Inquiry
Purchasing Reports and Inquiry Screens
Tufts PO/Payment Inquiry

Journal Entry
Functions to Create/Modify Journal Entries
Journal/Budgets Entry
Spreadsheet Upload (v7.5)
Spreadsheet Upload (v8.4/9.0)

Journal Utilities
Misc Utilities for Processing Journals
Copy Journals
Suspense Correction
Suspense Cross-Reference

Personalizations

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

If you will be temporarily unavailable, you can select an alternate user to receive your routings.

Alternate User ID:

From Date: (example: 12/31/2000)

To Date: (example: 12/31/2000)

Workflow Attributes

☐ Email User ☐ Worklist User

[Miscellaneous User Links](#)

Email Customize | Find | First | 1 of 1 | Last

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

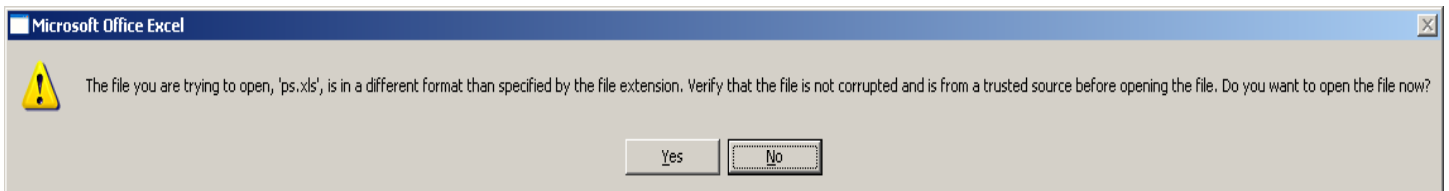
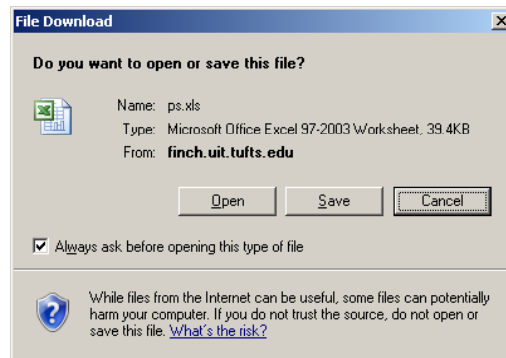
On the screen showing CEA Inquiry search results, scroll over to the far right and find this button:



Entered By	Entered Date	Campus	School	Building Number	Room Number	Building Name	Requested By	Emergency 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 Carletti	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	MOHANUS, 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	MOHANUS, JOSEPH P.	Len Durant	08/31/2000	ANDERSON, BETSEY J.	12/31/2004
CROTTY, DOROTHY B	08/25/2000	Medford	Physical Plant				Palma Lee	MAHER, ROLAND	Leonard Durant	09/11/2000	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, ANN M	
CROTTY, DOROTHY B	10/03/2001	Medford	Arts and Sciences				Bruce Boghosian	BOUCHARD, WAYNE M	William Valentine	10/10/2001	HUNT, ANN 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, ANN M	07/31/2009
BRATTON, LINDA	05/10/2002	Medford	Physical Plant				Roland Maher	MAHER, ROLAND	Roland Maher	05/16/2002	HUNT, ANN 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	
	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
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	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.

The screenshot shows the 'CEA Request Information' tab of a web application. At the top, there are four tabs: 'CEA Request Info', 'CEA Funding Source Info', 'CEA File Attachment Info', and 'CEA Routing/Approval Info'. Below the tabs, a header section displays 'CEA Number: NEXT', 'Entered By: Liedes, Carol J', 'Entered Date/Time: 01/27/11 2:30PM', 'Supplemental: No', 'CEA Status: New', and 'Project ID:'. The main form area is titled 'CEA Request Information' and contains several fields: '*CEA Title:', '*CEA Type:', '*Requester Name: Liedes, Carol J', '*CEA Amount:', '*Responsible Person:', 'Project Manager:', '*Campus:', '*School Code:', 'Building:', and 'Room Number:'. A 'CEA Description' field is also present. At the bottom of the form are two buttons: 'Save & Preview Approvals' and 'Save & Submit for Approval'. A black arrow points to a 'Notify' button located at the bottom left of the screen, below the main form area.

The screenshot shows the 'Send Notification' screen. At the top, there is a title 'Send Notification' and a subtitle '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.' Below this, there are two links: 'Lookup Recipient' and 'Delivery Options'. The main form area is titled 'Notification Details' and contains several fields: 'To:', 'CC:', 'BCC:', 'Priority:', 'Subject: <Enter Subject here>', 'Template Text: Workflow Notification', 'Priority: %NotificationPriority', 'Date Sent: 2011.01.27', and 'Message:'. At the bottom of the form are three buttons: 'OK', 'Cancel', and 'Apply'. An arrow points to the 'Lookup Recipient' link with the text 'Click the Lookup Receipt link'.

APPENDIX

Send Notification

Lookup Address

Type in a last name,
then click Search.

Recipient Search

Name:

Search Results [Customize](#) | [Find](#) | [View All](#) | [First](#) [Last](#)

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](#) | [First](#) [Last](#)

To	cc	bcc	Recipient	Email Address	User ID
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 Liedes, Carol J	psfin_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:	
Subject:	<Enter Subject here>
Template	Workflow Notification
Text:	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.