Requesting CSUBUY P2P Roles and Delegation of Fiscal Authority (DOA)

Note: DOA Approvers must have both the role and the DOA module assignment. Both are completed with this CFS request ticket.

1. Creating a JIRA ticket for the CSUBUY P2P Roles or DOA

Either navigate to your Cal Poly Portal and select ‘Tech Support’ under My apps. Then select type ‘Other’ and then Financial Administrative Access.

OR

Select ‘Request CSUBUY P2P and DOA Access’ tiles from the CSUBUY P2P Resources webpage under ‘Other Resources’.

2. Enter Username or Email requiring security in the ‘This Request is For’ section

If you need to request access to Student Administration or Title IX Administration, enter Requestor’s Email.
3. Enter the Name or Email of the Manager (Approver) for whom the request is for: (The manager will receive an email asking for their approval of the request. Processing of the request cannot begin until it has been approved).

   Enter name or email...

   Enter your manager's name or email address. They will receive an email asking for their approval of the request. Processing of request cannot begin until approved.

4. Either select ‘Grant Access’ or ‘Remove Access for “Requested Action”’:

   Requested Action *
   - Grant Access
   - Remove Access

5. Select “No” for the Similar Access question. Note: DOA Approvers cannot inherit similar access and must be individually approved by their department director.

   Similar Access *
   Will the recipient’s roles match an incumbent’s (person with similar roles)?
   - Yes
   - No (Select NO for CSUBUY or DOA Role Requests)

6. View CMS Recommended Access Roles by Position available for CSUBUY:

   See PeopleSoft (CMS) Recommended Access Roles by Position for help selecting the roles below.

   Access Roles *
   Select one or more roles below. Please note: adding a new DOA Approver will not replace the previous DOA Approver. A new Jira ticket will be needed to remove a user’s DOA Approval Access.
   Select...
## Permissions granted to each Access Role

<table>
<thead>
<tr>
<th>Access Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Inquiry (CFSSL EU_FINANCIAL_INQUIRY)</td>
<td>View-only access to Accounts Payable, Purchasing, Asset Mgmt, Receiving, General Ledger, and Chart of Accounts information.</td>
</tr>
<tr>
<td>Finance Dashboard (CFSSL ZR_DB_FINANCE_USERS)</td>
<td>Finance Dashboard access to review financial transactions.</td>
</tr>
<tr>
<td>Payroll Labor Cost Dashboard (CFSSL ZR_DB_PAYROLL_ALL)</td>
<td>Allows access to employee salaries and benefits. Should only be granted to those managing budgets.</td>
</tr>
<tr>
<td>Property Dashboard (CFSSL ZR_DB_PROPERTY)</td>
<td>Property Dashboard access to review Asset Management and Physical Inventory data. Should only be granted to those maintaining departmental property.</td>
</tr>
<tr>
<td>Pro Card (CFCSU_AP_ProCard_02)</td>
<td>Required for anyone with a ProCard. Allows the reconciliation of ProCard transactions and printing account statements.</td>
</tr>
<tr>
<td>CSUBUY Shopper (CFCSU_PO_JG_Shopper)</td>
<td>Allows user to build a cart in CSUBUY and assign to a Requester</td>
</tr>
<tr>
<td>CSUBUY Requester (CFCSU_PO_JG_Requester)</td>
<td>Allows user to build and submit a cart</td>
</tr>
<tr>
<td>CSUBUY DOA Approver (CFCSU_PO_JG_DOA_Approver)</td>
<td>Grants delegated fiscal authority to approve transactions in CSUBUY up to the designated level threshold by dollar amount</td>
</tr>
</tbody>
</table>

### 7. Select the role(s) for the user:

Select one or more roles below. Please note adding a new DOA Approver will not replace the previous DOA Approver. A new Jira ticket will be needed to remove a user's DOA Approval Access.

- CSUBUY DOA Approver (CFCSU PO_JG_DOA_Approver)
- CSUBUY Requisition Requester (CFCSU PO_JG_Requester)
- CSUBUY Shopper (CFCSU PO_JG_Shopper)
- Financial Inquiry (CFSSL EU_FINANCIAL_INQUIRY)
- Finance Dashboard (CFSSL_ZR_DB_FINANCE_USERS)
- Payroll Labor Cost Dashboard (CFSSL_ZR_DB_PAYROLL_ALL)
- Property Dashboard (CFSSL_ZR_DB_PROPERTY)
- Pro Card (CFCSU_AP_ProCard_02)
*Note: Adding a New DOA Approver will NOT replace the previous DOA Approver. A new JIRA ticket is required to remove a user’s DOA Approver Access or Remove them from a DeptID or FUND.

8. Select the appropriate Fiscal Authority Threshold Level.

See policy for more details on roles and their associated levels: [https://policy.calpoly.edu/delegation-of-fiscal-authority](https://policy.calpoly.edu/delegation-of-fiscal-authority)

9. Enter the Division, Dept ID(s) and/or Fund ID(s) the Approver is Delegated.

Select ‘Yes’ if the Dept ID has sub departments requiring it to be authorized in the department tree and include the ‘Sub departments’ ID numbers.

Enter Fund IDs authorized for fiscal approval (university Campus Programs or Facilities Chapter 15 Project Funds only). This authorizes ALL Dept IDs used with the Fund ID.
NOTE:

FUND first + ALL DeptID when fund is a Chapter 15 Capital Project fund or a University Campus Programs gift fund

DEPARTMENT first + ALL Funds when for regular fiscal approval within a department.

- Select “Yes” if the department ID has sub departments also authorized below in the department tree.

- Select “No” if you only want authorization at the top dept level

10. Enter additional notes or questions in the ‘Additional Information/Details’ text box (optional).

*Then Click ‘Send’*

11. Authorization is complete once the ticket is processed and closed.

Once security is added for the role and the DOA module designations, the DOA Approver will receive workflow transactions to approve in the CSUBUY system. This occurs after the request has been submitted and before procurement occurs.

* Please be aware that DOA Approvers are uploaded into the CSUBUY system once a week, on Friday mornings.