

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.



[Tech Support](#)

Other

ID Badge Request, New IP, Network Port Activation or Change, Financial Administration Access, New or Updated CMS Configuration, Duo Hardware Token Request



Financial Administration Access

Request to Grant/Remove access to Common Financial System (CFS) for financial transactions or reporting including CSUBUY and Delegation of Fiscal Authority (DOA).

OR

Select 'Request CSUBUY P2P and DOA Access' tiles from the [CSUBUY P2P Resources webpage](#) under 'Other Resources'.

Other Resources

Other Resources		
Commodity Code to Account Code Mapping	xlsx	>
Instructions - Request CSUBUY P2P and DOA Access	pdf	>
Request CSUBUY P2P and DOA Access	jira	>

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

If you need to request access to Student Administration or Financial Administration, then click on the link below.

This Request Is For

Enter name or 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).

Approver *

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

Access Role	Description
Financial Inquiry (CFSSL_EU_FINANCIAL_INQUIRY)	View-only access to Accounts Payable, Purchasing, Asset Mgmt, Receiving, General Ledger, and Chart of Accounts information.
Finance Dashboard (CFSSL_ZR_DB_FINANCE_USERS)	Finance Dashboard access to review financial transactions.
Payroll Labor Cost Dashboard (CFSSL_ZR_DB_PAYROLL_ALL)	Allows access to employee salaries and benefits. Should only be granted to those managing budgets.
Property Dashboard (CFSSL_ZR_DB_PROPERTY)	Property Dashboard access to review Asset Management and Physical Inventory data. Should only be granted to those maintaining departmental property.
Pro Card (CFSCSU_AP_ProCard_02)	Required for anyone with a ProCard. Allows the reconciliation of ProCard transactions and printing account statements.
CSUBUY Shopper (CFSCSU_PO_JG_Shopper)	Allows user to build a cart in CSUBUY and assign to a Requester
CSUBUY Requester (CFSCSU_PO_JG_Requester)	Allows user to build and submit a cart
CSUBUY DOA Approver (CFSCSU_PO_JG_DOA_Approver)	Grants delegated fiscal authority to approve transactions in CSUBUY up to the designated level threshold by dollar amount

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

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.

CSUBUY DOA Approver (CFSCSU_PO_JG_DOA_Approver)

CSUBUY Requisition Requester (CFSCSU_PO_JG_Requester)

CSUBUY Shopper (CFSCSU_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 (CFSCSU_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>

See DOA Policy Page for more details: <https://policy.calpoly.edu/delegation-of-fiscal-authority>

Select Fiscal Authority Threshold Level *

Select...

Level 4 - Up to \$250K

Level 3 - Up to \$500K

Level 2 - Up to \$1 Million

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.

Division *		
Administration and Finance		
Dept ID *	Include all sub departments	Sub departments
125000	<input checked="" type="checkbox"/> Yes	List them here if you checked "Yes"

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.

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.

Fund ID

N7004

Fund ID

Fund ID

Fund ID

NOTE:

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

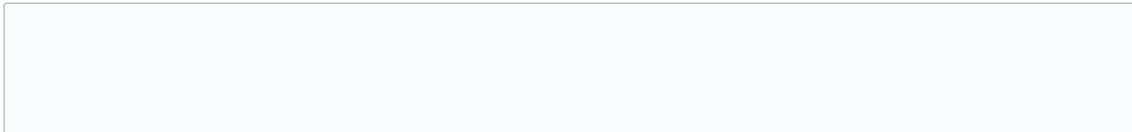
DEPARTMENT first + ALL Funds when for regular fiscal approval within a department.

- 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’**

Additional Information/Details



Send

Cancel

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.**