
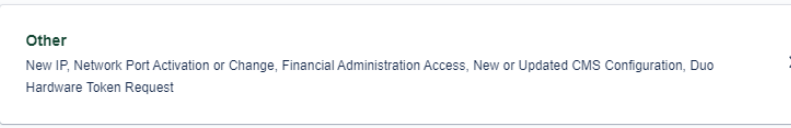
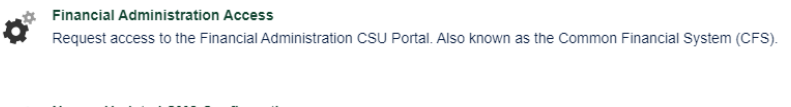




Requesting CSUBUY P2P Roles and Delegation of Fiscal Authority (DOA)

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

From the My Cal Poly Portal, click Tech Support under My Apps	 Tech Support
Select type “Other” and then Financial Administration Access	 <p>Other New IP, Network Port Activation or Change, Financial Administration Access, New or Updated CMS Configuration, Duo Hardware Token Request</p>  <p>Financial Administration Access Request access to the Financial Administration CSU Portal. Also known as the Common Financial System (CFS).</p>
Enter username needing security in “On behalf of”	
Enter the name or email address of the approver of the user, typically their reports to manager	
Select “No” on the Similar Access question to access CSUBUY and DOA selections. Note: DOA Approvers cannot inherit similar access and must be individually approved by their department head	<p>Similar Access *</p> <p>Will the recipient's roles match an incumbent's (person with similar roles)?</p> <p><input type="radio"/> Yes</p> <p><input checked="" type="radio"/> No (Select NO for CSUBuy or DOA Role Requests)</p>
Select the role(s) for the user. DOA Approver – authorized to approve transactions in CSUBUY Requester – can submit requests and carts ready for approval Shopper – can only create carts and assign them to a Requester. ALL roles inherit the receiving function to create a receipt for goods.	<p>Access Roles *</p> <p>Select one or more roles below.</p> <p>Select...</p> <ul style="list-style-type: none">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)

Select the appropriate level threshold for approval.

See policy for more details on roles and their associated levels: <https://policy.calpoly.edu/delegation-of-fiscal-authority>

Access Roles *
 Select one or more roles below.

CSUBUY DOA Approver (CFSCSU_PO_JG_DOA_Approver) ✕

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

Enter the DeptID(s) and/or FundID(s) the approver is delegated.

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.

CSUBUY DOA Approver (CFSCSU_PO_JG_DOA_Approver) ✕

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

Select Fiscal Authority Threshold Level *

Level 4 - Up to \$250K

Enter DeptID(s) authorized for fiscal approval. (This authorizes ALL funds used with the DeptID, ex SL001, SL002, etc)

DeptID * 125000 Include all sub departments Yes

DeptID 126000 Include all sub departments Yes

DeptID 129000 Include all sub departments Yes

Enter Fund IDs authorized for fiscal approval (University Campus Programs or Facilities Chapter 15 Project funds only). This authorizes ALL DeptIDs used with the Fund ID.

Fund ID N7004 Fund ID 62588

Fund ID N7005 Fund ID S8345

Description
 These are our new Facilities Chapter 15 Project Funds and University Campus Program Fund

- 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

Enter additional notes or questions in the Description box (optional)

Click Send

Send Cancel

Authorization is complete once 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.