

CSUBUY P2P – DOA Conversion

Frequently Asked Questions

1. My form doesn't have any information on it, why is that?

If you fill in the information on the Gateway form, that information will appear in the Adobe power form when it is delegated to all of the recipients.

(This is the Gateway form portal that needs to be filled out properly before it being sent off for signatures.)

Recipients

Contact *

Search by Name or Email

Previewer

Search by Name or Email

Level 4 Approver (Leave blank if removing or not used)

Search by Name or Email

Level 3 Approver (Leave blank if removing or not used)

Search by Name or Email

Additional Level 3 or 4 Approver #1 (Leave blank if removing or not used)

Search by Name or Email

Additional Level 3 or 4 Approver #2 (Leave blank if removing or not used)

Search by Name or Email

Additional Level 3 or 4 Approver #3 (Leave blank if removing or not used)

Search by Name or Email

Level 2 Approver (Leave blank if removing or not used)

Search by Name or Email

Approving Authority (Section 3 of the DOA form) *

Search by Name or Email

GRASP (Required for Grants)

Search by Name or Email

Accounting (Based on Business Unit; see instructions above) *

Search by Name or Email

You will receive a link to the form above where you can begin filling in all yellow sections that are available and applicable to your request. Once all fields are properly entered and filled, each signer's name will auto fill once the form is delegated to the signers.

Example:

Acctg - DOA Chartfield Request (update) from BK001 for BKCMP

 **CALIFORNIA STATE UNIVERSITY BAKERSFIELD**
Delegation of Authority & Chartfield Request Form
Financial Services - Accounting & Reporting

Please select: (More than one option may be selected)

Request New Chartfields (Read instruction for sections) Explain: _____

Modify/Inactivate Existing Chartfields Sections 1 & 3 Explain: _____

Add/Remove Delegation of Authority Sections 2 & 3 Explain: _____

Dept Contact: _____ [Click here to sign](#) Extension: * _____ Reviewer: _____

Section 1 Chartfield Maintenance

Add	Delete	Bus. Unit	Fund	Dept ID	Account	Program	Project	Class
<input type="radio"/>	<input type="radio"/>	Select...						
		Effective Date:	Title:					Payroll Costs? <input type="checkbox"/>
		Projects Only:	Start Date:	End Date:	GRASP:			

2. What if the approver has separated and I cannot get a hold of them and I require their signature?

In the case of a signer being separated and there is no possible way to get a hold of them, please select the 'delete' radial button on section 2 and the text box should unlock to populate the signer's name. No official signature will be needed from them as long as the section 3 approving authority that signs off on the form oversees the department that the signer is in.

Section 2 Delegation of Fiscal Authority & Responsibility

The undersigned persons confirm that any expenditure activity authorized under this delegation will conform to CSU Policy and University fiscal and budgetary practices. The designees listed below are authorized to submit transactions for the following chartfield:

Bus. Unit Fund Dept

Add	Delete	Name	Signature	CSUBuy	Concur
<input type="radio"/>	<input checked="" type="radio"/>	CSUB President; Chief Financial Officer	Not Necessary	Level 1 (President/CFO)	
<input type="radio"/>	<input type="radio"/>			Level 2 (Vice-President)	Select...
<input type="radio"/>	<input type="radio"/>			Level 3 (Dean; AVP)	Select...

This only applies to situations where you are deleting signers, if you are adding on you need to wait until the person is back to sign the form

3. Why can I not type in the Dept box on the Chartfield request form?

In order to unlock the Dept text box for the DOA form you will need to type in 'ALL' in the 'Fund' text box. This will unlock the Dept text box and allow you to type in the Department ID that is needed.

Section 2 Delegation of Authority & Responsibility

The undersigned persons confirm that any expenditures made by the designees listed below are authorized and will conform to CSU Policy and University fiscal and budgetary practices. The designees listed below are authorized to request chartfield:

Bus. Unit Fund Dept

If using funds BK001, BK002, BKCP0, BKCST, or BKGRD, enter "ALL" and specify the Department.

4. I am filling out the form, and it won't let me uncheck boxes, what do I do?

Make sure to click on the box that says, 'Clear all data', and it will clear all the prior information, and you can fill in the form the way that you need it to be.

Options ▾

- Read agreement
- Delegate signing to another
- Decline to sign
- Clear document data**
- View history
- Download PDF
- Legal Notices

Acctg - DOA Chartfield Request (update) from BK001 for BKCMP

FINANCIAL SERVICES
CSU BAKERSFIELD

CALIFORNIA STATE UNIVERSITY BAKERSFIELD
Delegation of Authority & Chartfield Request Form
Financial Services - Accounting & Reporting

Please select: (More than one option may be selected)

- Request New Chartfields (Read instruction for sections) Explain:
- Modify/Inactivate Existing Chartfields Sections 1 & 3 Explain:
- Add/Remove Delegation of Authority Sections 2 & 3 Explain:

Clear Document Data

Are you sure you want to clear all the data you filled out in this document?

5. What is Approving Authority?

Approving Authority is the final approver in Section 3 of DOA form (Vice Presidents, Deans, AVPs, or Administrators). This is not related to the signers' approval levels (1 through 4) for P2P. This signer will approve the entire form and all signers in section 2.

Example

Approving Authority (Section 3 of the DOA form)*

Correlates to this section (example of Approving Authority)

Section 3 Approving Authority

The persons named above are designated to act on behalf of the campus for the fiscal expenditures and associated payment authorizations.

Approving Name & Title: Bob Frakes Dean, Arts and Humanities

Approving Authority Signature:  Date: 11/30/23
Bob Frakes (Nov 30, 2023 14:01 PST)

6. Can I use the same signer on different levels? For example, list the same approver on level 3 & 4?

Yes, you can switch signers as long as it follows the signing hierarchy (going down) you can add the same approver under multiple levels. For example, a level 2 signer can also be added to DOA as a level 3 or 4 signer, but a level 4 signer cannot be added as a level 2.

- **Missing gaps can be filled by repeating existing approvers in the following order:**
 - Use level 2 approver for missing levels 3 or 4.
 - Use level 3 approver for missing level 4 only.
 - Do not use level 4 approve to fill missing gaps in levels 2 or 3. This is not permitted.

7. What if I have Gaps in my signers?

With the new implementation of DOA 360, Gaps in DOA are no longer permitted. Missing gaps must be filled even in Funds/departments that already have DOA enabled. Accounting will not process forms that remove signers from DOA if the changes cause gaps in DOA. Accounting encourages everyone to review the campus DOA spreadsheet in Box before submitting DOA forms to prevent any gaps from happening.

8. I messed up on an Adobe power DOA Chartfield form, and it has been sent out. What should I do?

If you fill out a form incorrectly and it is in circulation, reach out to the next signer and have them reject the form and it will delete the form. If you are not sure where the form is at contact

accounting@csub.edu with the following information:

- Name of the power form.
- State that you would like to delete the form.
- Include your extension number.

(Note: It might be faster to contact the next signer and have them reject the form but, in the case, where you cannot get ahold of them or you're not sure where the form is at, then contact Accounting. Expect a call from Accounting confirming which form you would like to delete, and they will confirm specifics of the form to make sure the correct form is deleted. During this call, have a copy of the Power form available to ensure that the information matches the form that they are deleting for you.

9. Why can't I use my fund or department in P2P?

Due to the new DOA 360 implementation, all Funds or departments with missing DOA will not be available for use in CSUBUY. Please check to see if the chartfields have DOA set up and if DOA is not set up, please submit a new Chartfield Request/DOA form. Make sure to fill out section 2 of DOA form and include approvers for all levels 2-4. No missing gaps will be permitted, and the form will be rejected.

10. What if I don't have access to that Box file?

If you do not have access to that Box file, contact accounting@csub.edu and state:

- Your name
- Your position title
- The purpose for requesting access to this Box file

We will then either approve or deny request to this file.

11. What if I need to add someone to DOA that's never been on DOA before?

In order to add someone that is new to the DOA process, they will first need to complete the Jagger role approval form. Once this form has been completed and we verify that the approver role has been added, Accounting can then add them to DOA. Accounting **cannot add the signer prior** to them having the role since DOA 360 now requires all DOA signers to have the role in order to be put into the system. The form can be found in the campus gateway forms portal under '**CFS/P2P Access Request Form**'. Depending on the departments, you can choose between both of these forms.

Campus Forms

Forms	Form Descriptions	Instructions	Department Forms
CFS/P2P Access Request Form (BAS)	BAS Departments Only: Use this form to request access to the Common Finance Systems (CFS), Procure-to-Pay (P2P), Finance Data Warehouse, ProCard, or the CMS File Share.	N/A	ITS CMS
CFS/P2P Access Request Form (Campus)	Campus Use: Use this form to request access to the Common Finance Systems (CFS), Procure-to-Pay (P2P), Finance Data Warehouse, ProCard, or the CMS File Share.	N/A	ITS CMS

Please make sure to have this box checked off to make sure the proper jagger role is assigned for DOA.

[orders, vouchers, sourcing events, and contracts.](#)

CSUBUY Procure-to-Pay (P2P) Delegation of Authority Approver

This security role allows authorized users to review, edit, and approve requisitions related to financial oversight within their delegated authority. Users can also view and query all aspects of the procurement process in CSUBUY P2P, including requisitions, purchase orders, vouchers, sourcing events, and contracts.

12. What do the levels mean in the signature authority (Levels 1-4)?

The signature authority levels go based on the dollar amount and as well as the title of the signers. Please reach out to your respective department heads to see who should be added to DOA.

CSUB Financial Delegation Levels

Level	Level Definition	Titles	Delegation Amt (\$)
1	Individual with oversight of campus and auxiliaries	President; Chief Financial Officer	Unlimited
2	Individuals with oversight of divisions and/or auxiliaries	Provost, Vice President, Executive Director of University Auxiliary Organization	\$750,001 to \$999,999
3	Individuals with oversight of sub-divisions or schools	Deans, AVPs, Athletic Director, Controller	\$500,001 to \$750,000
4	Individuals with delegated authority to spend from and manage approved budgets	Management Personnel Plan (MPP), AVPs, Associate Deans, Directors, Associate Directors, Managers, Department Chairs, and Grant Principal Investigators.	\$1.00 to \$500,000