

FOR APPROVERS

HOW TO APPROVE OR DENY A REQUEST



- The approver will receive an automatic email pictured below:
- They can click on the hyperlink highlighted in red below to be taken to the worklist in peoplesoft to approve or deny the request.

From: dacsadmin@csusb.edu <dacsadmin@csusb.edu>
Sent: Thursday, November 3, 2022 12:08 AM
To: [REDACTED]
Subject: DACS Approval Pending

You have pending **Delegation of Authority** (DOA) request(s) for review and approval. To review the pending DOA, please click [here](#) to login and click on CS Worklist icon to access your Worklist. You may also access the pending DOA in the PeopleSoft CS portal through MyCoyote.

For more help and step by step directions, please access the *Guide to Review Pending Delegation of Authority (DOA)* by clicking [here](#)

If you have questions or need assistance, please email dacsadmin@csusb.edu

Note: To avoid delays or confusion, communicate with the approver so they are aware these requests will be appearing on their worklists.

The approvers will receive reminder emails for 10 business days if the request has not been approved or denied.

Past the 10 business days the request will fall off their worklist and a new request will need to be submitted.

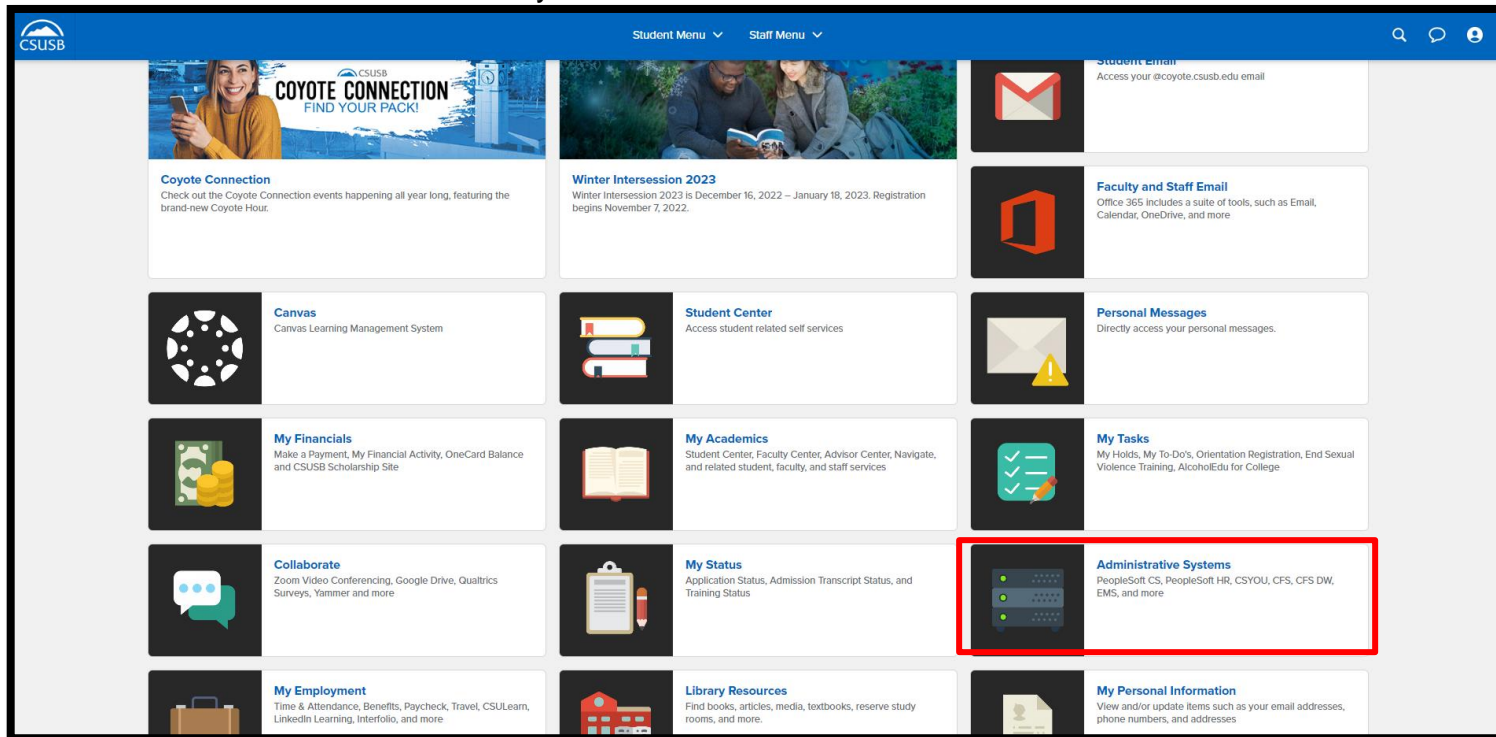
The request(s) can also be found on PeopleSoft Campus Solutions. Please see next slide.

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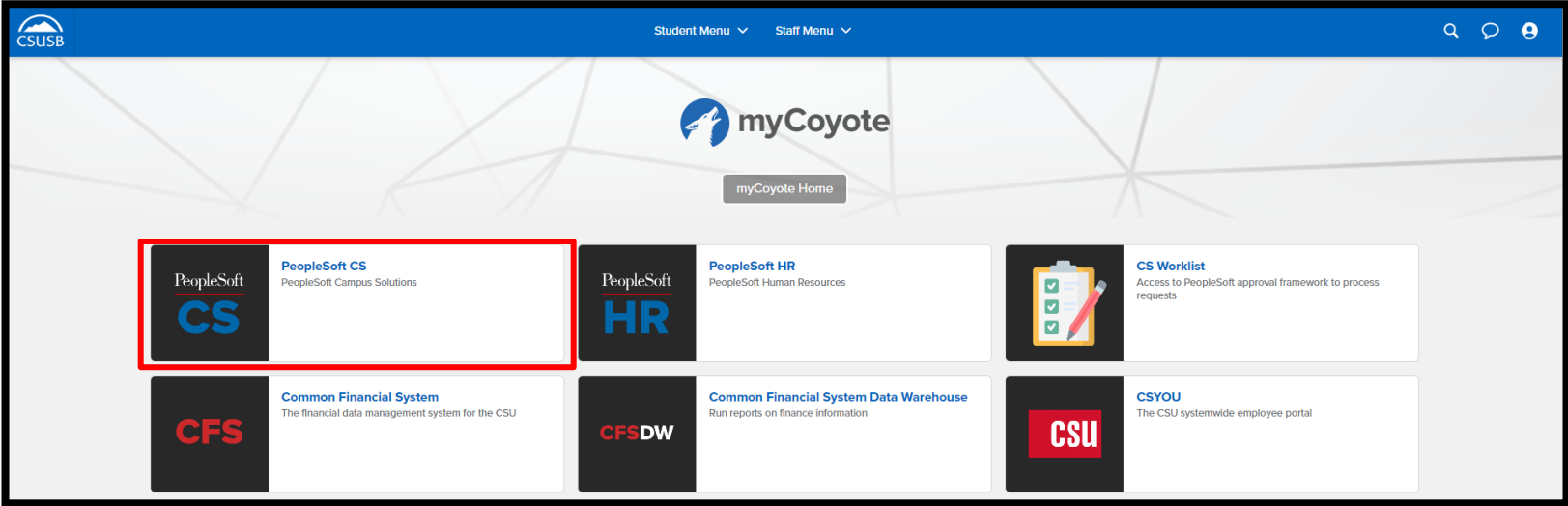
From the csusb.edu top menu bar select MyCoyote:
Log into MyCoyote using your credentials.



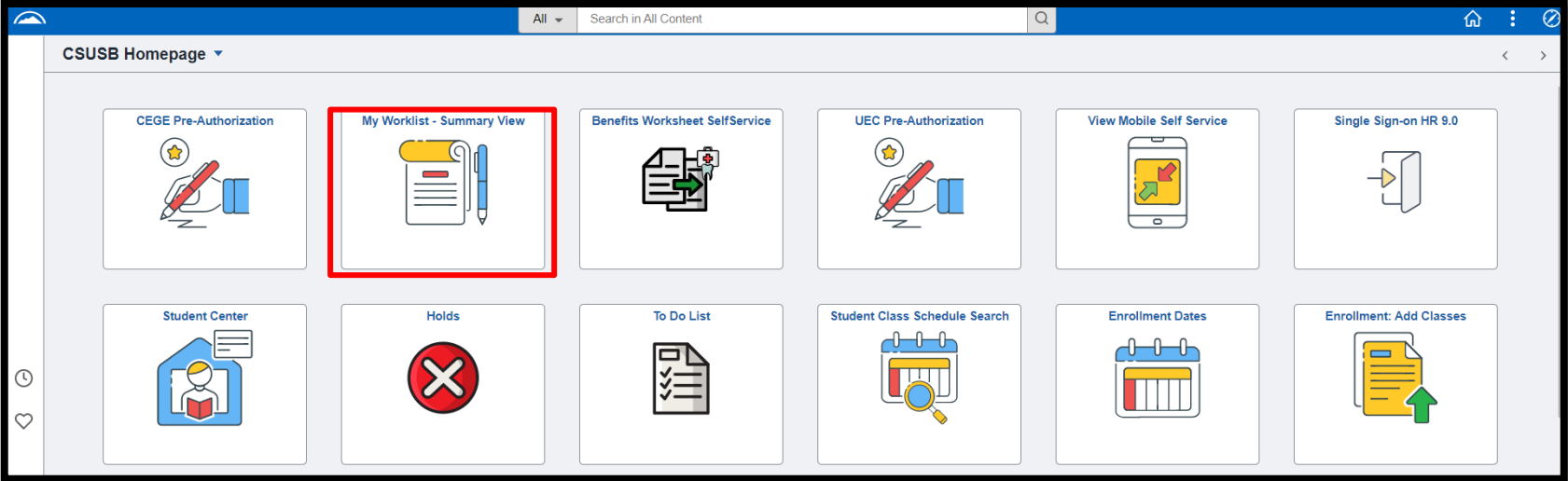
Scroll down and click on Administrative Systems:



Click on PeopleSoft CS:



Click on the icon for “My Worklist – Summary View”:



If you have any pending DOA Requests, you will see them listed under worklist items.

Click on the link highlighted in red below.

The screenshot shows the CSUSB Worklist interface. At the top left is a navigation link for 'CSUSB Homepage'. The page title is 'Worklist'. Below the title, it says 'Worklist for 00' followed by a redacted name. There are options for 'Detail View', 'Worklist Filters', and a 'Feed' icon. The main section is a table titled 'Worklist Items'. The table has columns for 'From', 'Date From', 'Work Item', 'Worked By Activity', 'Priority', 'Link', and actions. The 'Link' column contains a 'DACS' link for each row, which is highlighted with a red box. The actions column contains 'Mark Worked' and 'Reassign' buttons. A 'Refresh' button is located at the bottom left of the table area.

From	Date From	Work Item	Worked By Activity	Priority	Link	
[Redacted]	11/01/2022	Approval Routing	Approval Workflow	[Dropdown]	DACS	Mark Worked Reassign
[Redacted]	11/01/2022	Approval Routing	Approval Workflow	[Dropdown]	DACS	Mark Worked Reassign
[Redacted]	11/01/2022	Approval Routing	Approval Workflow	[Dropdown]	DACS	Mark Worked Reassign
[Redacted]	11/01/2022	Approval Routing	Approval Workflow	[Dropdown]	DACS	Mark Worked Reassign
[Redacted]	11/01/2022	Approval Routing	Approval Workflow	[Dropdown]	DACS	Mark Worked Reassign
[Redacted]	11/01/2022	Approval Routing	Approval Workflow	[Dropdown]	DACS	Mark Worked Reassign
[Redacted]	11/01/2022	Approval Routing	Approval Workflow	[Dropdown]	DACS	Mark Worked Reassign
[Redacted]	11/01/2022	Approval Routing	Approval Workflow	[Dropdown]	DACS	Mark Worked Reassign
[Redacted]	11/01/2022	Approval Routing	Approval Workflow	[Dropdown]	DACS	Mark Worked Reassign
[Redacted]	11/01/2022	Approval Routing	Approval Workflow	[Dropdown]	DACS	Mark Worked Reassign

Here you will see what the employee currently has authorization for and what is being requested.

Click on either the Approve or Deny buttons. Notice that there are multiple approvers (once one of the approvers takes an action on this request it will fall off from all approvers worklists)

Current Authorization

Business Unit: SBCMP Division: DVD00 Department: D0200

Fund Code: ALL Project: ALL Class Field: ALL

FS Function ID	Approver Level	Limit	Eff Date	End Date
Direct Expenditure	Level 1 Approver		09/05/2019	
Printing Services Approval	Level 1 Approver		09/05/2019	
Travel Approval	Level 1 Approver		09/05/2019	

Change Authorization

*Business Unit: SBCMP *Division: DVD00 *DeptID: D0200

*Fund Code: ALL *Project: ALL *Class Field: ALL

ALL Limit Amt Eff. Date End Date

Travel (TA) 09/05/2019

Printing Services (PS) 100 09/05/2019

Direct Expenditure (DE) 09/05/2019

Comments

Comment Date/Time	User	Comment
1		

Approve Deny Add Comments

Delegation Approver

Delegation of Authority (set in getThreadDescr): Pending

1

Pending
Multiple Approvers
Approvers

If you choose to **Approve** the request, you will see this confirmation on the next screen.

The screenshot shows the 'Change Authorization' interface. At the top, there are tabs for 'Names' and 'Job Info'. Below this is a table with columns for 'Last Name', 'First Name', and 'Middle Name', with a single row containing the number '1'. The main section is titled 'Change Authorization' and contains several input fields: '*Business Unit' (SBCMP), '*Division' (DVE00), '*DeptID' (E0401), '*Fund Code' (ALL), '*Project' (ALL), and '*Class Field' (ALL). There are four checked checkboxes: 'ALL', 'Travel (TA)', 'Printing Services (PS)', and 'Direct Expenditure (DE)'. Below these is a table with columns 'Limit Amt', 'Eff. Date', and 'End Date'. A 'Comments' section at the bottom has a table with columns 'Comment DateTime', 'User', and 'Comment', with one row containing '1'. An 'Add Comments' button is located below the comments table. At the bottom, under 'Delegation Approver', a dropdown menu shows 'Delegation of Authority (set in getThreadDescr): **Approved**'.

If you choose to **Deny** the request you will be required to input a comment as to why you are denying the request.

(Please make this meaningful, as the employee will see this comment). Your confirmation screen will look like the screen below:

The screenshot shows the 'Change Authorization' interface. At the top, there are tabs for 'Names' and 'Job Info'. Below this is a table with columns for 'Last Name', 'First Name', and 'Middle Name', with a single row containing the number '1'. The main section is titled 'Current Authorization' and contains several input fields: 'Business Unit' (SBCMP), 'Division' (DVD00), 'Department' (D0200), 'Fund Code' (ALL), 'Project' (ALL), and 'Class Field' (ALL). Below these is a table with columns 'FS Function ID', 'Approver Level', 'Limit', 'Eff Date', and 'End Date'. The table contains three rows: 'Direct Expenditure' (Level 1 Approver, Limit, 09/05/2019), 'Printing Services Approval' (Level 1 Approver, 09/05/2019), and 'Travel Approval' (Level 1 Approver, 09/05/2019). Below this is a 'Change Authorization' section with input fields: '*Business Unit' (SBCMP), '*Division' (DVD00), '*DeptID' (D0200), '*Fund Code' (ALL), '*Project' (ALL), and '*Class Field' (ALL). There are four checked checkboxes: 'ALL', 'Travel (TA)', 'Printing Services (PS)', and 'Direct Expenditure (DE)'. Below these is a table with columns 'Limit Amt', 'Eff. Date', and 'End Date'. The table contains one row: 'Direct Expenditure (DE)' with a limit of 500 and an effective date of 09/05/2019. A 'Comments' section at the bottom has a table with columns 'Comment DateTime', 'User', and 'Comment', with one row containing '1', '01/10/20 10:00:00AM', a redacted user name, and 'Test'. An 'Add Comments' button is located below the comments table. At the bottom, under 'Delegation Approver', a dropdown menu shows 'Delegation of Authority (set in getThreadDescr): **Denied**'.