

APPROVER REQUEST

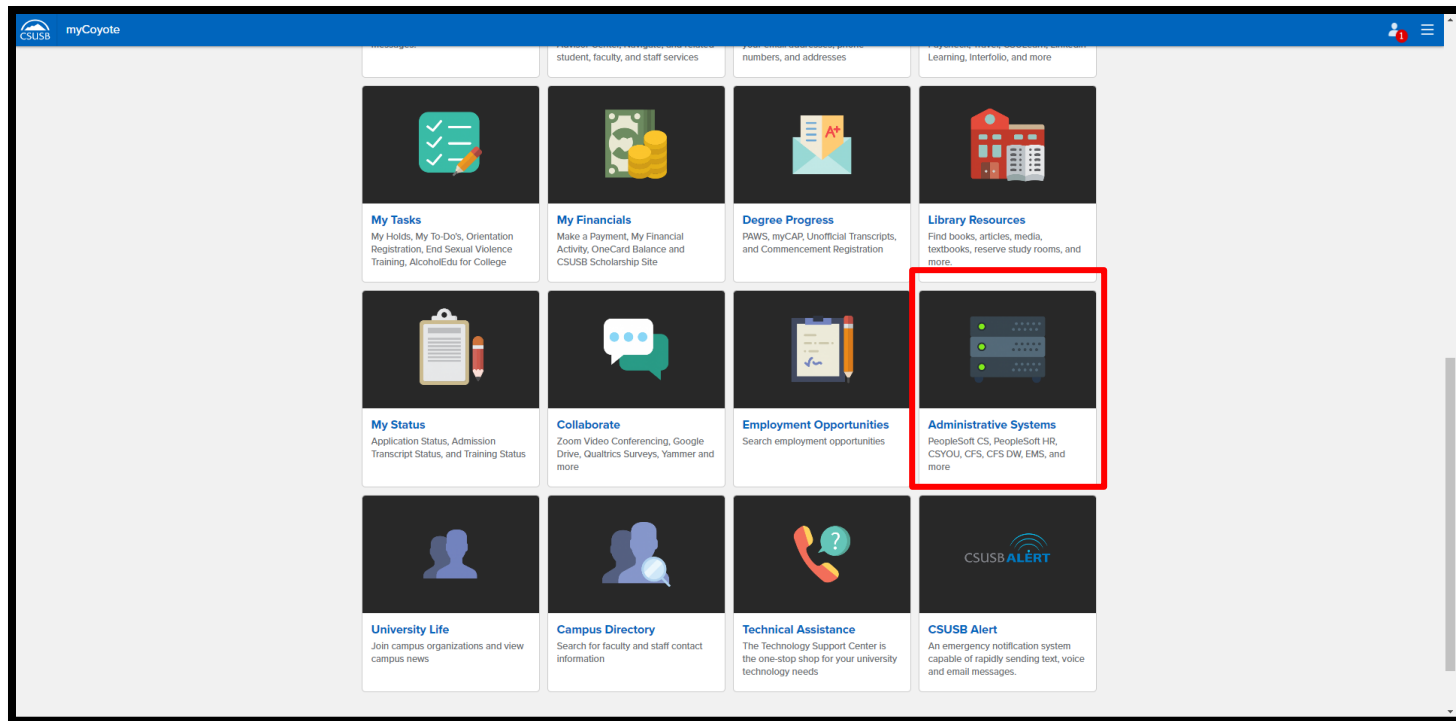
HOW TO SUBMIT A REQUEST



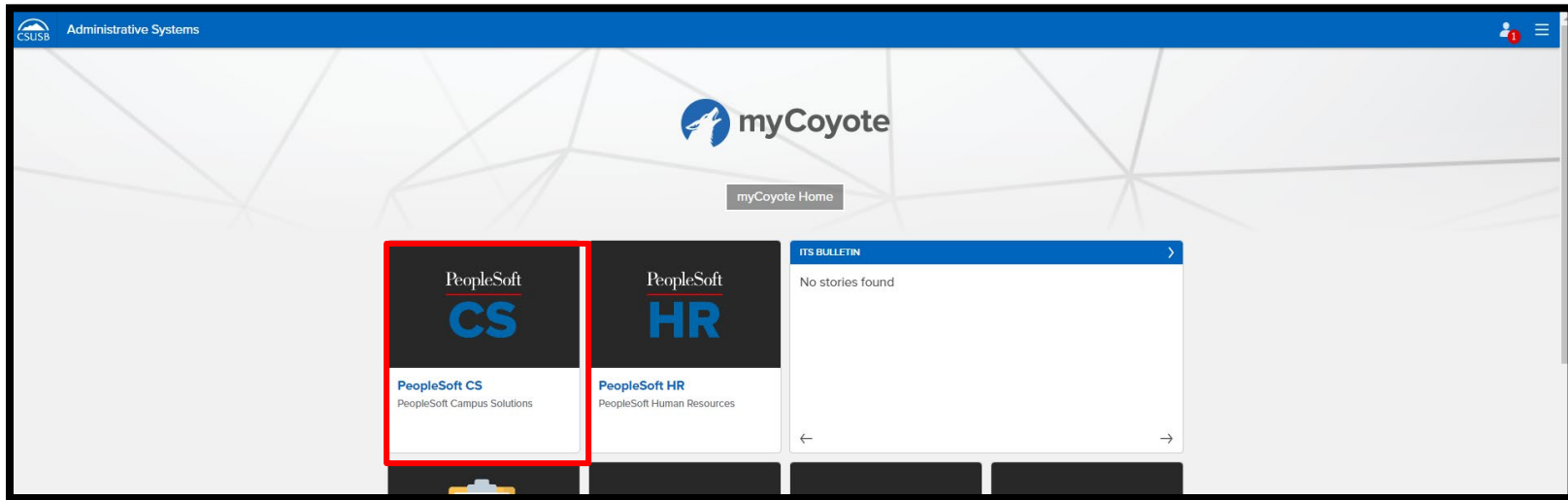
From the csusb.edu top menu bar select MyCoyote:
Log into MyCoyote using your credentials.



Scroll down and click on Administrative Systems:

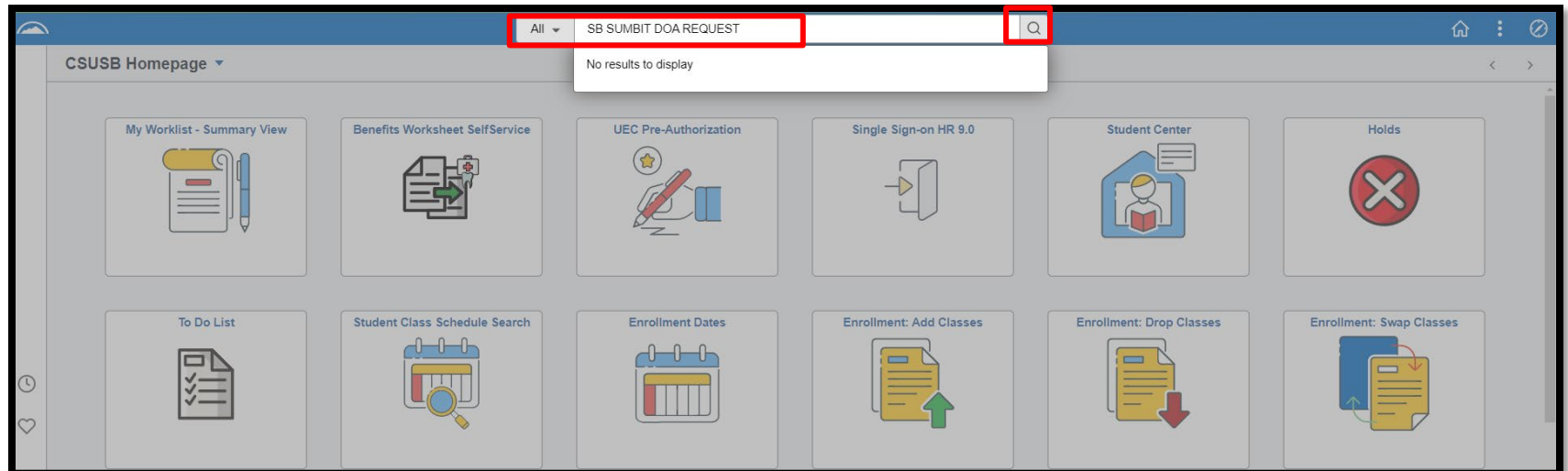


Click on PeopleSoft CS:

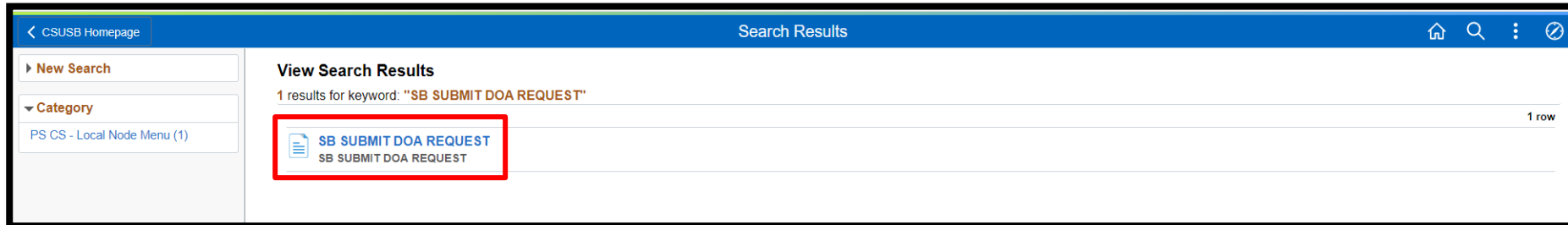


In the search bar enter: SB SUBMIT DOA REQUEST

Click the hourglass to search:



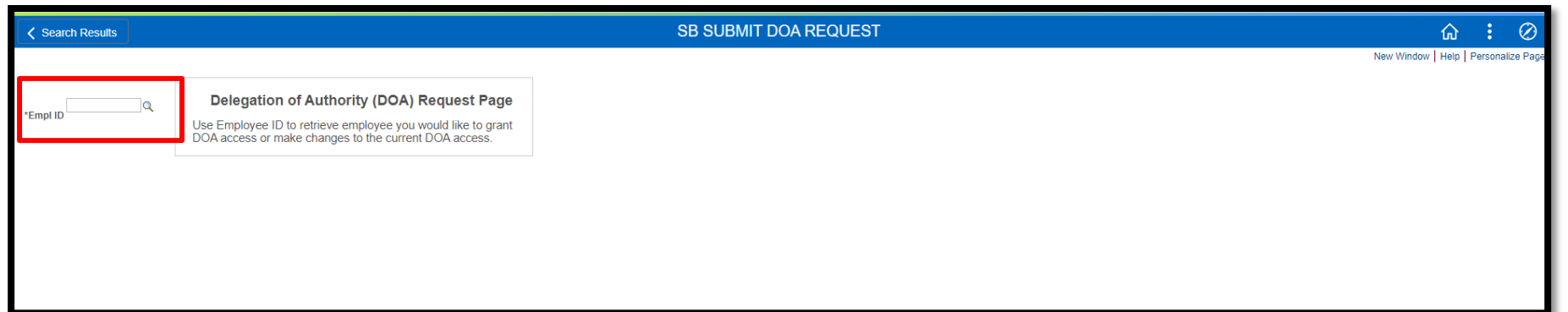
Click on the link:



The screenshot shows the CSUSB Search Results page. The header includes a navigation bar with 'CSUSB Homepage' and 'Search Results'. A sidebar on the left contains 'New Search' and 'Category' (PS CS - Local Node Menu (1)). The main content area displays 'View Search Results' for the keyword 'SB SUBMIT DOA REQUEST', showing 1 result. A red box highlights the link 'SB SUBMIT DOA REQUEST' in the results table.

| View Search Results |
|--|
| 1 results for keyword: "SB SUBMIT DOA REQUEST" |
| SB SUBMIT DOA REQUEST |

Enter the employee ID:



The screenshot shows the 'Delegation of Authority (DOA) Request Page'. The header includes a navigation bar with 'Search Results' and 'SB SUBMIT DOA REQUEST'. The main content area contains a form with a red box highlighting the 'Empl ID' input field. Below the input field, there is a description: 'Use Employee ID to retrieve employee you would like to grant DOA access or make changes to the current DOA access.'

Empl ID

Delegation of Authority (DOA) Request Page

Use Employee ID to retrieve employee you would like to grant DOA access or make changes to the current DOA access.

Click on the hourglass:

[CSUSB Homepage](#)

SB SUBMIT DOA REQUEST

*Empl ID

00

Delegation of Authority (DOA) Request Page

Use Employee ID to retrieve employee you would like to grant DOA access or make changes to the current DOA access.

Make sure the person who appears is the one you want to give DOA to. Click on the Empl ID link:

[CSUSB Homepage](#)

SB SUBMIT DOA REQUEST

*Empl ID

Delegation of Authority (DOA) Request Page

Use Employee ID to retrieve employee you would like to grant DOA access or make changes to the current DOA access.

Look Up Empl ID

Search by: ID begins with

Look Up

Cancel

Advanced Lookup

Search Results

View 100

First

1 of 1

Last

| ID | Name | Gender | Date of Birth | Campus ID | Local Campus ID | National ID | National ID Country | MID Short Description | Last Name | First Name |
|----|------|--------|---------------|-----------|-----------------|-------------|---------------------|-----------------------|-----------|------------|
| | | | **/**/**** | (blank) | (blank) | ***** | USA | SSN | | |



In the following window you will be able to view their current authorizations. You can delete or update in the drop-down menu.

If a new request needs to be made, click on create new and click next:

[CSUSB Homepage](#)
SB SUBMIT DOA REQUEST

To Update:

Select '**Request Action**' from existing authorization(s) below, then click '**Next**' to review

To Create a New authorization:

Check '**Create New**' then '**Next**'

'Create New' and 'Update' have to be submitted in separate requests

Names

Job Info

| Last Name | First Name | Middle Name |
|-----------|------------|-------------|
| 1 | | |

Current Authorization(s)

Request Action

Delete

Update

Business Unit

SBCMP

Department

D0270

Project

ALL

Division

DVD00

Fund Code

ALL

Account

ALL

| FS Function ID | Approver Level | Limit | Effective Date | End Date |
|------------------------------|----------------|-------|----------------|----------|
| Budget Management | Level1Aprv | | 04/01/2022 | |
| Hospitality Expense Designee | Level1Aprv | | 04/01/2022 | |
| Property Management | Level1Aprv | | 04/01/2022 | |
| Printing Services Approval | Level1Aprv | | 04/01/2022 | |
| Travel Approval | Level1Aprv | | 04/01/2022 | |

☐ Create New

Back

Next

Submit



Creating a new Request, you will see the page below. Select the business unit, division and Dept ID.

Fund Code, Project, and Class field is needed if the person needs only a specific range to approve.

Please note: *Staff members* have authorization for Printing Services and Travel Approval only.

MPP/Department Chair have options for authorization for Budget Management, Property Management, Printing Services, Travel Approval, and Hospitality Expense Designee.

Level 1 is designated for Department Chairs, Directors, and AVP's.

Level 2 is designated for VP's only.

Click on the functions needed and click next:

[← CSUSB Homepage](#)SB SUBMIT DOA REQUEST

Empl ID

Input the chartfield string and desired options then click on Next

Names

Job Info

| Last Name | First Name | Middle Name |
|-----------|------------|-------------|
| 1 | | |

Details

Find First 1 of 1 Last

*Business Unit

*Division

*DeptID

*Fund Code

*Project

*Class Field

| Authorized | SB FS Function ID | *SB FS Approver Level | Maximum Limit | Effective Date | End Date |
|--------------------------|------------------------------|-----------------------|---------------|----------------|----------|
| <input type="checkbox"/> | Travel Approval | Level1Aprv | | | |
| <input type="checkbox"/> | Printing Services Approval | Level1Aprv | | | |
| <input type="checkbox"/> | Budget Management | Level1Aprv | | | |
| <input type="checkbox"/> | Property Management | Level1Aprv | | | |
| <input type="checkbox"/> | Hospitality Expense Designee | Level1Aprv | | | |

Back

Next

Submit

Next you will select the approver that should approve the DOA request.

Note: If you do not see the approver that needs to be selected, please check if they have delegation of authority for the Business unit, Division, Dept ID, Fund Code, and Class field. If they do not they will not be an option as an approver.

If this is the case, you will then need to submit a DOA request for the person who needs to be the approver first.

CSUSB Homepage

SB SUBMIT DOA REQUEST

Empl ID

Please review and select an approver for each request then click on Submit.

Names

Job Info

Last Name

First Name

Middle Name

Request Details

Find

First

1 of 1

Last

Change Authorization

Business Unit

SBCMP

Division

DVD00

DeptID

D0270

Fund Code

ALL

Project

ALL

Class Field

ALL

| | Authorized | SB FS Function ID | SB FS Approver Level | Maximum Limit | Effective Date | End Date |
|---|-------------------------------------|------------------------------|----------------------|---------------|----------------|----------|
| 1 | <input checked="" type="checkbox"/> | Travel Approval | Level1Aprv | | 11/15/2022 | |
| 2 | <input type="checkbox"/> | Printing Services Approval | Level1Aprv | | 11/15/2022 | |
| 3 | <input type="checkbox"/> | Budget Management | Level1Aprv | | 11/15/2022 | |
| 4 | <input type="checkbox"/> | Property Management | Level1Aprv | | 11/15/2022 | |
| 5 | <input type="checkbox"/> | Hospitality Expense Designee | Level1Aprv | | 11/15/2022 | |

*Approver

Bryan Haddock | BHaddock@csusb.edu

Kristine Barraza | KBarraza@csusb.edu

Maria Badulis | MBadulis@csusb.edu

Samuel Sudhakar | SSudhakar@csusb.edu

Yuk Leung Au-Yeung | Michael Au-Yeung@csusb.edu



Once approver is selected you will click submit.

CSUSB Homepage
SB SUBMIT DOA REQUEST

Empl ID

Please review and select an approver for each request then click on **Submit**.

Names
Job Info

| | Last Name | First Name | Middle Name |
|---|-----------|------------|-------------|
| 1 | | | |

Request Details
Find
First
1 of 1
Last

Change Authorization

Business Unit
SBCMP
Division
DVD00
DeptID
D0270
Fund Code
ALL
Project
ALL
Class Field
ALL

| | Authorized | SB FS Function ID | SB FS Approver Level | Maximum Limit | Effective Date | End Date |
|---|-------------------------------------|------------------------------|----------------------|---------------|----------------|----------|
| 1 | <input checked="" type="checkbox"/> | Travel Approval | Level1Aprv | | 11/15/2022 | |
| 2 | <input type="checkbox"/> | Printing Services Approval | Level1Aprv | | 11/15/2022 | |
| 3 | <input type="checkbox"/> | Budget Management | Level1Aprv | | 11/15/2022 | |
| 4 | <input type="checkbox"/> | Property Management | Level1Aprv | | 11/15/2022 | |
| 5 | <input type="checkbox"/> | Hospitality Expense Designee | Level1Aprv | | 11/15/2022 | |

*Approver

a@csusb.edu

Back
Next
Submit

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



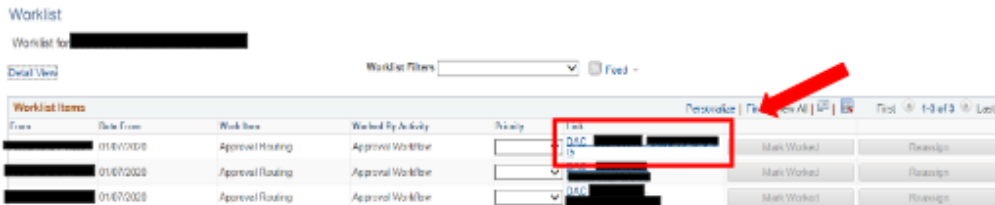
How to Guide for Approvers

PeopleSoft Breadcrumbs for Approvers to approve or deny a request

- From the main page once logged in, click on Worklists



- Here you will see a list of pending items that you will need to take action on by clicking on a link



- 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: SBUSP Division: D0000 Department: D0000

Pund Code: ALL Project: ALL Class Field: ALL

| FS Function ID | Approver Level | Limit | Eff Date | End Date |
|----------------------------|------------------|-------|------------|----------|
| Direct Expenditure | Level 1 Approver | | 09/05/2018 | |
| Printing Services Approval | Level 1 Approver | | 09/05/2018 | |
| Travel Approval | Level 1 Approver | | 09/05/2018 | |

Change Authorization

Business Unit: SBUSP Division: D0000 DeptID: D0000

Pund Code: ALL Project: ALL Class Field: ALL

☒ ALL ☒ Travel (TA) ☒ Printing Services (PS) ☒ Direct Expenditure (DE)

Limit Amt: 100 Eff Date: 09/05/2018 End Date: 09/05/2018

Comments

| Comment Date/Time | User | Comment |
|-------------------|------|---------|
| 1 | | |

Approve Deny Add Comments

Delegation Approver

Delegation of Authority (set in getThreadDescr): Pending

Pending Multiple Approvers Approves



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

Names Job Info **WIP**

| | Last Name | First Name | Middle Name |
|---|-----------|------------|-------------|
| 1 | | | |

Change Authorization

*Business Unit **SOCVCP** *Division **DV000** *DeptID **D0001**

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

☒ ALL ☒ Travel (TA) ☒ Printing Services (PS) ☒ Direct Expenditure (DE)

Limit Amt: Eff. Date: End Date:

Comments

| | Comment Date/Time | User | Comment |
|---|-------------------|------|---------|
| 1 | | | |

Add Comments

Delegation Approver

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

Names Job Info **WIP**

| | Last Name | First Name | Middle Name |
|---|-----------|------------|-------------|
| 1 | | | |

Current Authorization

Business Unit **SOCVCP** Division **DV000** Department **D0000**

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

| PS Function ID | Approver Level | Limit | Eff Date | End Date |
|----------------------------|------------------|-------|------------|----------|
| Direct Expenditure | Level 1 Approver | | 08/05/2019 | |
| Printing Services Approval | Level 1 Approver | | 08/05/2019 | |
| Travel Approval | Level 1 Approver | | 08/05/2019 | |

Change Authorization

*Business Unit **SOCVCP** *Division **DV000** *DeptID **D0000**

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

☒ ALL ☒ Travel (TA) ☒ Printing Services (PS) ☒ Direct Expenditure (DE)

Limit Amt: Eff. Date: End Date:

Comments

| | Comment Date/Time | User | Comment |
|---|---------------------|------|---------|
| 1 | 01/10/20 10:00:00AM | Trot | |

Add Comments

Delegation Approver

Delegation of Authority (set in getThreadDescr) **Denied**

