The California State University

CSUBUY

A COLLABORATIVE PROCURE TO PAY MARKETPLACE



CSUBUY P2P
DELEGATION OF AUTHORITY
October 2024

CSU The California State University

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A COLLABORATIVE PROCURE TO PAY MARKETPLACE

Agenda

- What's Different regarding DOA?
- P2P verses Other transactions
- Q&A

DOA: What is Different?

DOA Single structure:

- SMURS and SMFND – Project
- SMCMP* and SMASI – Department

*SMCMP, if the fund begins with 496xx, then DOA is by Fund

DOA Combination structure:

Travel Request and Travel Expense continue to have the combination Fund/Department

DOA: What is Different?

Function code consolidation:

OT – Other Approval consolidates BT (budget transfer), ET (expenditure transfer), DP (direct pay) and PR (Principal Investigators/Project Directors)

JGS – Purchase of Goods and Services Approval replaces RA (requisition)

TR – Travel Request Approval
TE – Travel Expense Approval

DOA Approver Levels – P2P

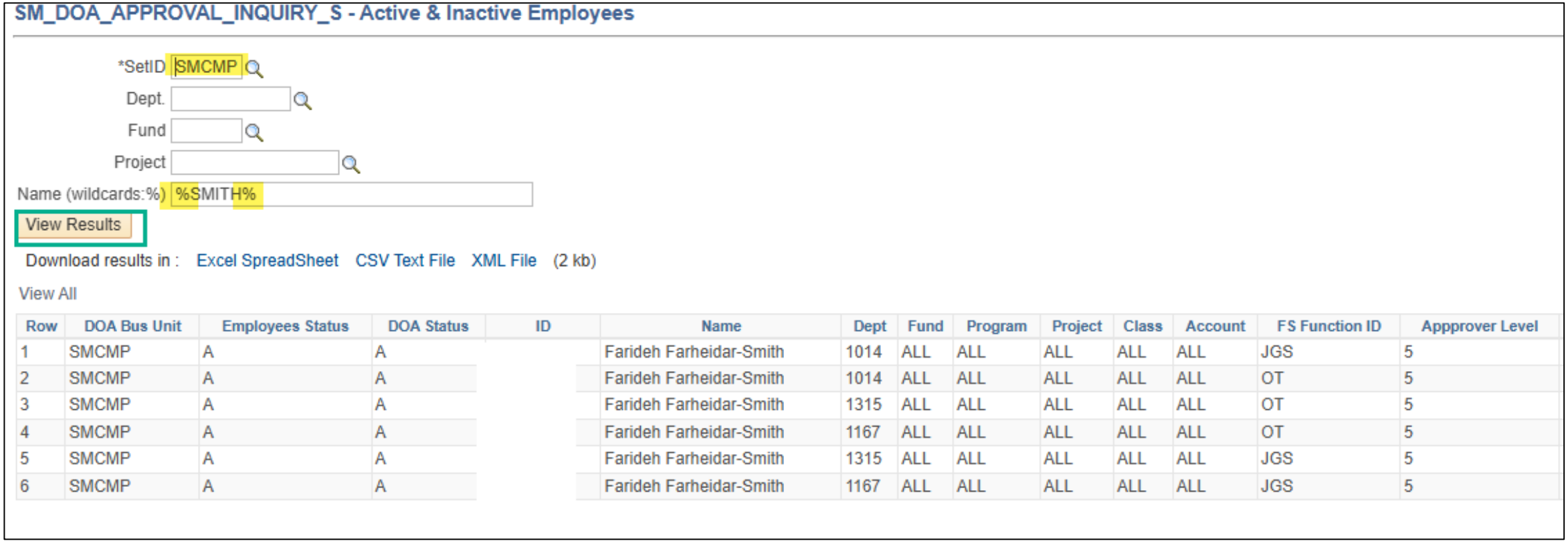
Role	Role/Titles	CSUBUY Approval Limits
5	Non-MPP, Fiscal Analysts, or Administrative Support personnel (Classifications: AAS, ASA, ASC, SSP, Budget Analyst, IST, Conf Admin, Accounting Tech, Library Services Spec, ITC, Extended Ed Spec)	$0-$5k
4	Manager/Director/Senior Director, Exec Director, some Assistant VPs or Academic Equivalent, Department Chairs, Faculty Directors, Associate Deans, (Classification: Admin I & II, ADMIN III if they are an associate Dean, Deputy CIO, Info Sec Officer), Aux Managers	$5,000.01k-$50k
3	Deans, Associate/Assistant Vice President (AVP), Vice Provost, Athletic Director, Aux Associate Executive Director	$50,000.01k-$100k
2	PAT, Aux. Executive Directors	$100,000.01k-$50m
1	President/CFO	$50m+/unlimited

P2P Go-Live-Date is November 18

- To add additional DOA for individuals for the most part the process remains the same
  - Individuals must the DOA Approver role; FSO will send an email with a link to the Security Access Form
- Updating or removing DOA once P2P is live

Other Transactions(OT) - DOA lookup by Name

Query Name: SM_DOA_APPROVAL_INQUIRY_S



SM_DOA_APPROVAL_INQUIRY_S - Active & Inactive Employees

*SetID SMCMP

Dept.

Fund

Project

Name (wildcards:%) %SMITH%

View Results

Download results in : Excel SpreadSheet CSV Text File XML File (2 kb)

View All

Row	DOA Bus Unit	Employees Status	DOA Status	ID	Name	Dept	Fund	Program	Project	Class	Account	FS Function ID	Appprover Level
1	SMCMP	A	A		Farideh Farheidar-Smith	1014	ALL	ALL	ALL	ALL	ALL	JGS	5
2	SMCMP	A	A		Farideh Farheidar-Smith	1014	ALL	ALL	ALL	ALL	ALL	OT	5
3	SMCMP	A	A		Farideh Farheidar-Smith	1315	ALL	ALL	ALL	ALL	ALL	OT	5
4	SMCMP	A	A		Farideh Farheidar-Smith	1167	ALL	ALL	ALL	ALL	ALL	OT	5
5	SMCMP	A	A		Farideh Farheidar-Smith	1315	ALL	ALL	ALL	ALL	ALL	JGS	5
6	SMCMP	A	A		Farideh Farheidar-Smith	1167	ALL	ALL	ALL	ALL	ALL	JGS	5

Other Transactions(OT)- DOA lookup by Chartfield

Query Name: **SM_DOA_APPROVAL_INQUIRY_S**

SM_DOA_APPROVAL_INQUIRY_S - Active & Inactive Employees

*SetID SMCMP

Dept. 1035

Fund

Project

Name (wildcards:%)

View Results

Download results in : Excel SpreadSheet CSV Text File XML File (4 kb)

View All

Row	DOA Bus Unit	Employees Status	DOA Status	ID	Name	Dept	Fund	Program	Project	Class	Account	FS Function ID	Appprover Level	SB Limit Amount
1	SMCMP	A	A		Giselle Luevanos	1035	ALL	ALL	ALL	ALL	ALL	JGS	4	50000
2	SMCMP	A	A		Giselle Luevanos	1035	ALL	ALL	ALL	ALL	ALL	OT	4	50000
3	SMCMP	A	A		Leon Wyden Jr	1035	ALL	ALL	ALL	ALL	ALL	JGS	1	999999999
4	SMCMP	A	A		Alicia Mondragon	1035	ALL	ALL	ALL	ALL	ALL	OT	5	5000
5	SMCMP	A	A		Alicia Mondragon	1035	48500	ALL	ALL	ALL	ALL	TR	1	999999999
6	SMCMP	A	A		Alicia Mondragon	1035	48500	ALL	ALL	ALL	ALL	TE	1	999999999
7	SMCMP	A	A		Alicia Mondragon	1035	ALL	ALL	ALL	ALL	ALL	JGS	5	5000
8	SMCMP	A	A		Sarah Villarreal	1035	ALL	ALL	ALL	ALL	ALL	JGS	2	50000000
9	SMCMP	A	A		Sarah Villarreal	1035	ALL	ALL	ALL	ALL	ALL	OT	2	50000000

- Review DOA and send a message to FSO if you have any questions. fso@csusm.edu

