



# FINANCIAL SYSTEMS OPERATIONS

[FSO@csusm.edu](mailto:FSO@csusm.edu)



**NEW**

DOA

Delegation of Fiscal Authority  
...Coming Soon

# What's New ?

- Records are maintained by Empl-ID
- Name is no longer a text field
- Authority by Chartfield String
  - SMCMP: Dept-Fund
  - SMFND & SMURS: Project-Dept-Fund

# Why the new DOA ?

- Integration to Concur Travel System
  - Cost Object Approver (COA)
- Integration to CSU Buy P2P (future)
- Integration from HR
- Improved Inquiry

# Requesting DOA Updates

Additions – Need Empl-ID

No Change to Submission Method

- SMCMP Department use the Adobe Sign request
- SMCMP Trust Funds use the Trust agreement amendment form
- Contact the Travel Office for Travel functions
- SMFND & SMURS Projects and Funds use the Project agreement

Inactivations

- Same process for existing employees
- HR terminations and CFS Account Locks occur in batch

# Other Considerations

## Campus Employees

- Integrated from HR
- Uses Empl-ID
- Must be Active in HR
- Uses HR Name not Preferred Name

## Approvers that are not Campus Employees

- Require CFS ID

## Timing

- Not Live yet
- PCBO Notice will announce change

The background is a blue gradient with white circuit-like lines in the corners. The lines consist of straight segments and small circles, resembling a network or data flow diagram.

# How to Search?

# DOA Query for Campus Department Users

## SM\_CSU\_DOA\_APPROVAL\_NEW

**CSU** The California State University  
COMMON FINANCIAL SYSTEM

Query Viewer New Window

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

\*Search By  begins with

[Advanced Search](#)

**Search Results**

\*Folder View

**Query**

1-1 of 1

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
SM_CSU_DOA_APPROVAL_NEW	New DOA Detail Inquiry	Public	SM_DOA	HTML	Excel	XML	Schedule	Lookup References	Favorite



# DOA Inquiry for Campus Department Users

Run to HTML

## SM\_CSU\_DOA\_APPROVAL\_NEW - New DOA Detail Inquiry

\*SetID  

Dept.  

Fund  

Project  

Name (wildcards:%)

Status  

[View Results](#)

# DOA Inquiry for Campus Department Users

Run to HTML

## SM\_CSU\_DOA\_APPROVAL\_NEW - New DOA Detail Inquiry

\*SetID  

Dept.  

Fund  

Project  

Name (wildcards:%)

Status  

[View Results](#)

# DOA Inquiry for Campus Department Users

## Results

View Results

Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File](#) (10 kb)

View All

Row	DOA Bus Unit	Employees Status	DOA Status	ID	Name	Dept	Fund	Program	Project	Class	Account	FS Function ID
1	SMCMP	A	A		Amy Armstrong	1013	48500	ALL	ALL	ALL	ALL	BT
2	SMCMP	A	A		Amy Armstrong	1013	48500	ALL	ALL	ALL	ALL	DP
3	SMCMP	A	A		Amy Armstrong	1013	48500	ALL	ALL	ALL	ALL	ET
4	SMCMP	A	A		Amy Armstrong	1013	48500	ALL	ALL	ALL	ALL	RA
5	SMCMP	A	A		Carl Kennitz	1013	48500	ALL	ALL	ALL	ALL	BT
6	SMCMP	A	A		Carl Kennitz	1013	48500	ALL	ALL	ALL	ALL	DP
7	SMCMP	A	A		Carl Kennitz	1013	48500	ALL	ALL	ALL	ALL	ET
8	SMCMP	A	A		Carl Kennitz	1013	48500	ALL	ALL	ALL	ALL	RA
9	SMCMP	A	A		Jacqueline Trischman	1013	48500	ALL	ALL	ALL	ALL	BT
10	SMCMP	A	A		Jacqueline Trischman	1013	48500	ALL	ALL	ALL	ALL	DP
11	SMCMP	A	A		Jacqueline Trischman	1013	48500	ALL	ALL	ALL	ALL	ET
12	SMCMP	A	A		Jacqueline Trischman	1013	48500	ALL	ALL	ALL	ALL	RA
13	SMCMP	A	A		Lori Asaro	1013	48500	ALL	ALL	ALL	ALL	BT
14	SMCMP	A	A		Lori Asaro	1013	48500	ALL	ALL	ALL	ALL	ET
15	SMCMP	A	A		Lori Asaro	1013	48500	ALL	ALL	ALL	ALL	RA
16	SMCMP	A	A		Maria Rasimas	1013	48500	ALL	ALL	ALL	ALL	BT
17	SMCMP	A	A		Maria Rasimas	1013	48500	ALL	ALL	ALL	ALL	DP
18	SMCMP	A	A		Maria Rasimas	1013	48500	ALL	ALL	ALL	ALL	ET
19	SMCMP	A	A		Maria Rasimas	1013	48500	ALL	ALL	ALL	ALL	RA
20	SMCMP	A	A		Matthew Escobar	1013	48500	ALL	ALL	ALL	ALL	TE
21	SMCMP	A	A		Matthew Escobar	1013	48500	ALL	ALL	ALL	ALL	TR
22	SMCMP	A	A		Ricardo Fierro	1013	48500	ALL	ALL	ALL	ALL	BT
23	SMCMP	A	A		Ricardo Fierro	1013	48500	ALL	ALL	ALL	ALL	DP
24	SMCMP	A	A		Ricardo Fierro	1013	48500	ALL	ALL	ALL	ALL	ET
25	SMCMP	A	A		Ricardo Fierro	1013	48500	ALL	ALL	ALL	ALL	RA

# DOA Inquiry for Campus Department Users

Run to HTML

## SM\_CSU\_DOA\_APPROVAL\_NEW - New DOA Detail Inquiry

\*SetID  

Dept.  

Fund  

Project  

Name (wildcards:%)

Status  

[View Results](#)

# DOA Inquiry for Campus Department Users

## Results

[View Results](#)

Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File](#) (5 kb)

View All

Row	DOA Bus Unit	Employees Status	DOA Status	ID	Name	Dept	Fund	Program	Project	Class	Account	FS Function ID
1	SMCMP	A	A		Jacqueline Trischman	1013	48500	ALL	ALL	ALL	ALL	BT
2	SMCMP	A	A		Jacqueline Trischman	1013	48500	ALL	ALL	ALL	ALL	DP
3	SMCMP	A	A		Jacqueline Trischman	1013	48500	ALL	ALL	ALL	ALL	ET
4	SMCMP	A	A		Jacqueline Trischman	1013	48500	ALL	ALL	ALL	ALL	RA
5	SMCMP	A	A		Jacqueline Trischman	1013	48514	ALL	ALL	ALL	ALL	BT
6	SMCMP	A	A		Jacqueline Trischman	1013	48514	ALL	ALL	ALL	ALL	DP
7	SMCMP	A	A		Jacqueline Trischman	1013	48514	ALL	ALL	ALL	ALL	ET
8	SMCMP	A	A		Jacqueline Trischman	1013	48514	ALL	ALL	ALL	ALL	RA
9	SMCMP	A	A		Jacqueline Trischman	1013	48517	ALL	ALL	ALL	ALL	BT
10	SMCMP	A	A		Jacqueline Trischman	1013	48517	ALL	ALL	ALL	ALL	DP
11	SMCMP	A	A		Jacqueline Trischman	1013	48517	ALL	ALL	ALL	ALL	ET
12	SMCMP	A	A		Jacqueline Trischman	1013	48517	ALL	ALL	ALL	ALL	RA

# Function ID

BT	Budget Transfer
DP	Direct Pay
ET	Expenditure Transfer
RA	Requisition Approval
OTH	Other
TE	Travel Expense
TR	Travel Request

**NEW**

DOA

# Delegation of Fiscal Authority





# FINANCIAL SYSTEMS OPERATIONS

X4465 KAREN

X4452 KARLEEN

X8468 RAY

[FSO@csusm.edu](mailto:FSO@csusm.edu)



# DOA Inquiry

## Functional Users

- Accounts Payable
- Budget
- Cashiers
- Fiscal Services
- Procurement

