



Peoplesoft (ERP) Finance Delegation of Authority Form User Guide

Last Revised: 10/21/13

REVISION CONTROL

Document Title: PeopleSoft ERP Finance Delegation of Authority Form User Guide
Author: IT Training & Support
File Reference: DOA_SecurityBPG.docx

Revision History

Revision Date	Revised By	Summary of Revisions	Section(s) Revised
10/21/13	Lori Arthur-Carmichael	Updated to add a notation about delegation of authority memo for travel request access	Click here to enter Revision Date

Review / Approval History

Review Date	Reviewed By	Action (Reviewed, Recommended or Approved)
10/1/13	Lydia Rodriguez, Joe Luzzi, Kerry Boyer, Naga Vadlakunta	Approved
10/21/13	Lydia Rodriguez, Joe Luzzi, Kerry Boyer, Naga Vadlakunta	Approved

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1.0 Finance Delegation of Authority (DOA) Form Overview

Authority for approval of financial transactions is delegated to individuals on campus using the Finance Delegation of Authority Form. The form is available online through the campus portal. **Prior to accessing the form all popup blockers must be disabled.**

What financial authority is covered by the Finance Delegation of Authority Form?

The following types of transactions are covered by the Finance Delegation of Authority Form:

- Budget Transfer approval
- A/P Check Request approval
- Travel Expense approval
- Travel Request approval



All DOA forms that request travel request approval access must include a Delegation of Authority memo from the President.

Who completes the Finance Delegation of Authority Form?

A Delegation of Authority Form can be initiated by anyone.

When is the authorization granted?

Once the form has been approved by the division Financial Manager, the Appropriate Administrator, the Employee, and a Financial Services Business Analyst, the Financial Services office will process the change in authority. The employee will receive an email notification when the authority request has been processed by Financial Services.






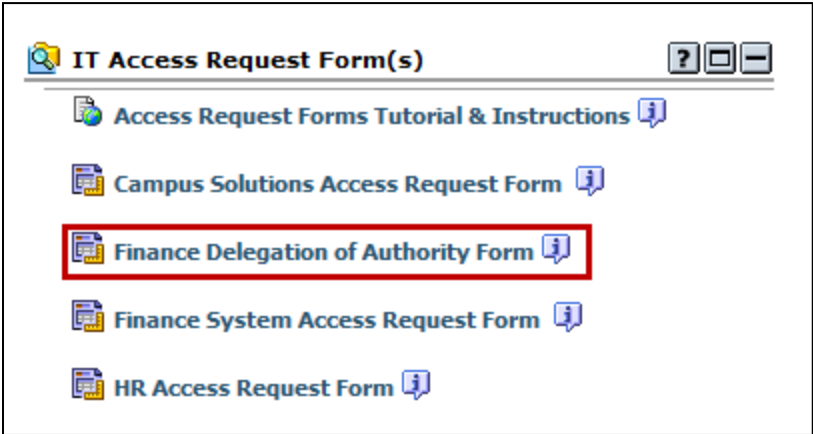



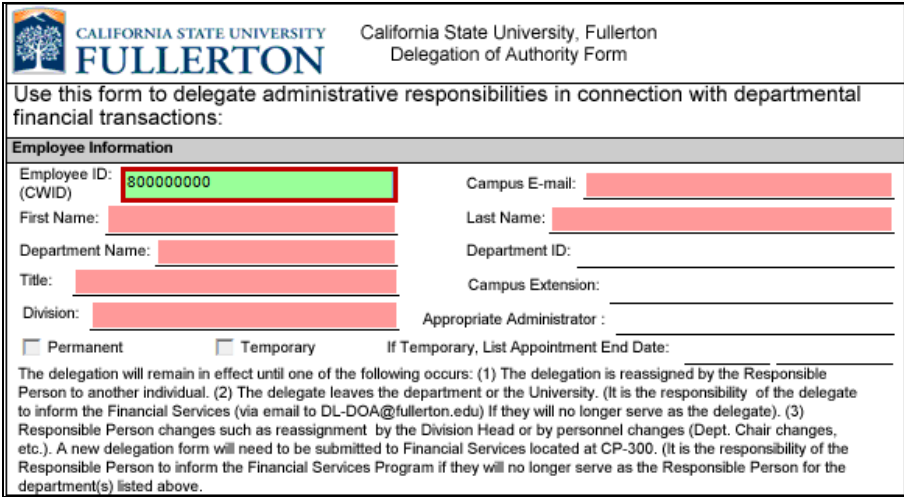
Please use the appropriate browser to successfully access the web based delegation of authority form:

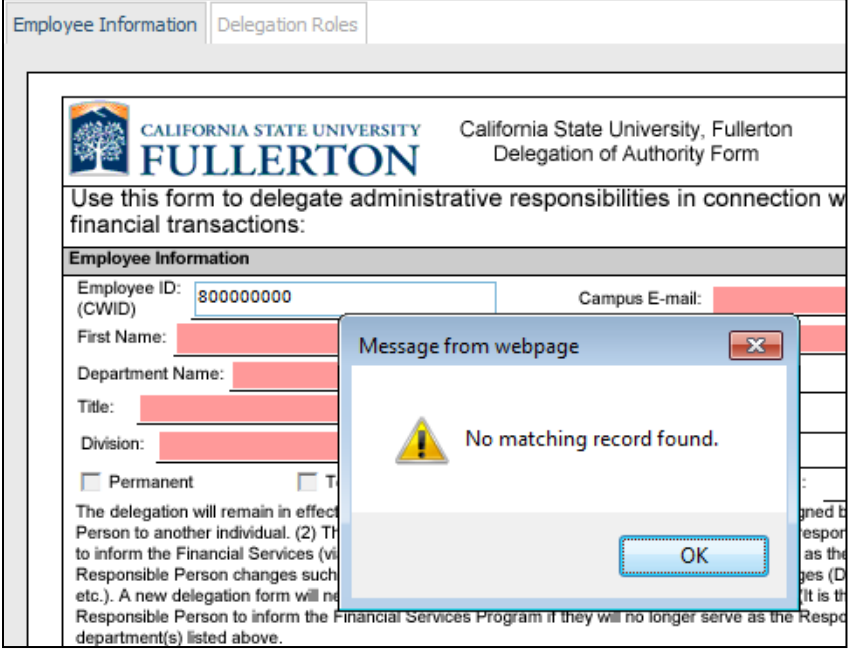
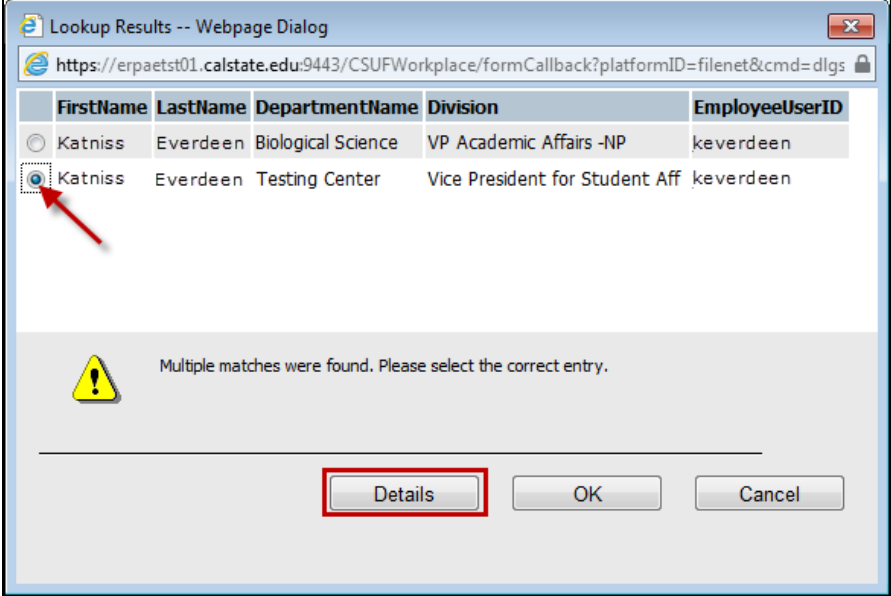
- PC – use Internet Explorer
- MAC – use Safari

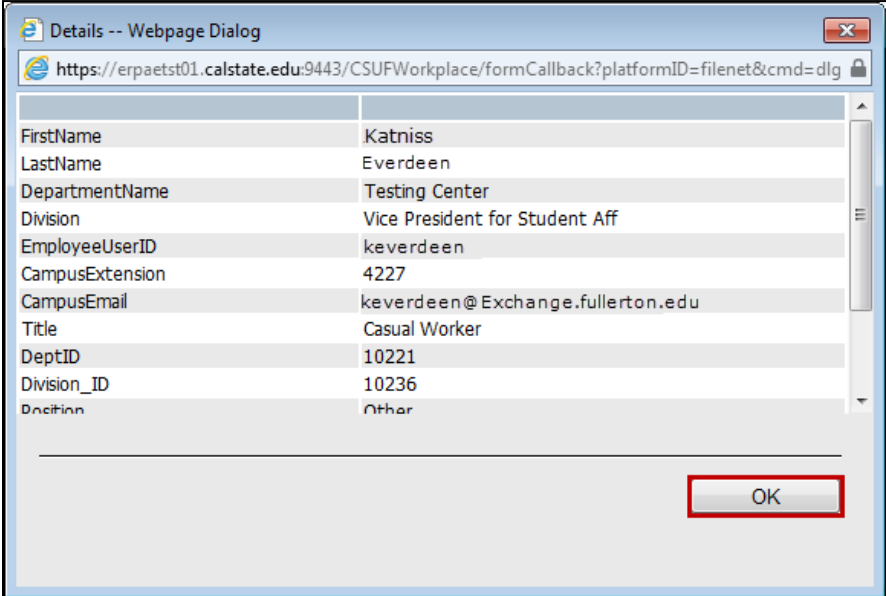
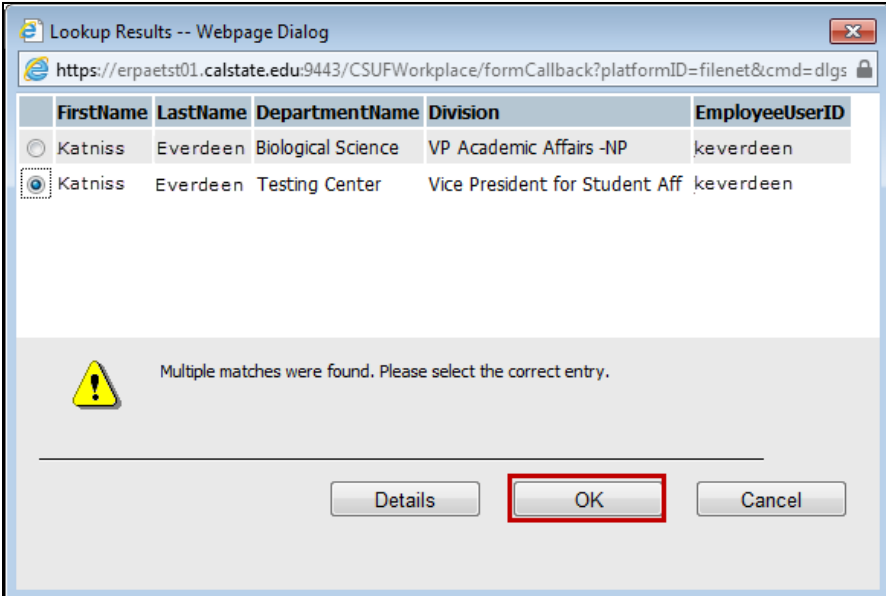
2.0 Finance Delegation of Authority Data Entry



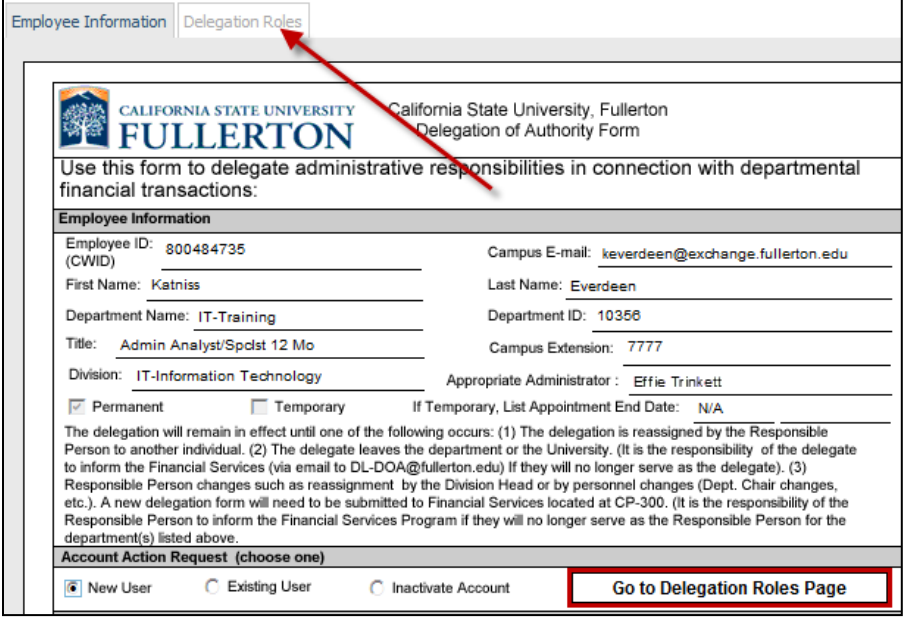
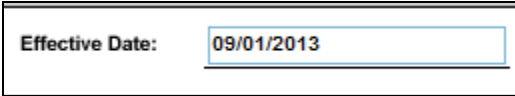
To begin the process, first create a new Finance Delegation of Authority Form.


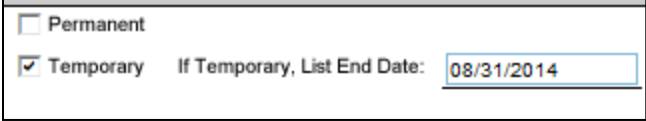

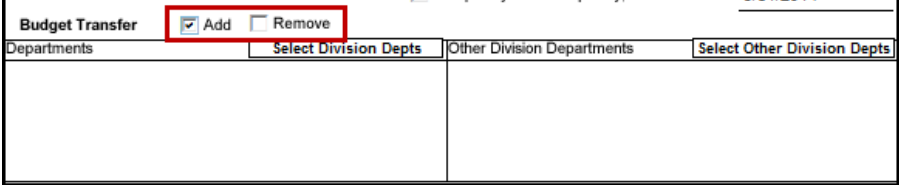
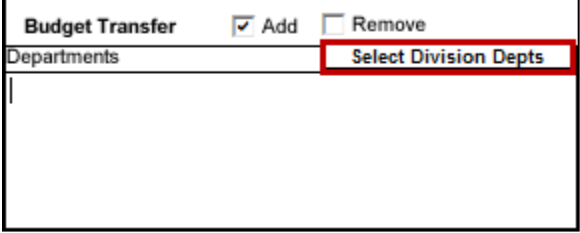
Processing Steps	Screen Shots
<p>Step 1: Log into the campus portal.</p> <p>Enter your campus username and password.</p> <p>Then, click Login.</p>	
<p>Step 2: Next, select the Titan Online tab.</p>	
<p>Step 3: Next, select My Workplace under the eContent section.</p>	
<p>Step 4: Depending upon your access you may see additional forms and reports.</p> <p>To access the Finance Delegation of Authority form, select the IT Access Request Form link.</p>	

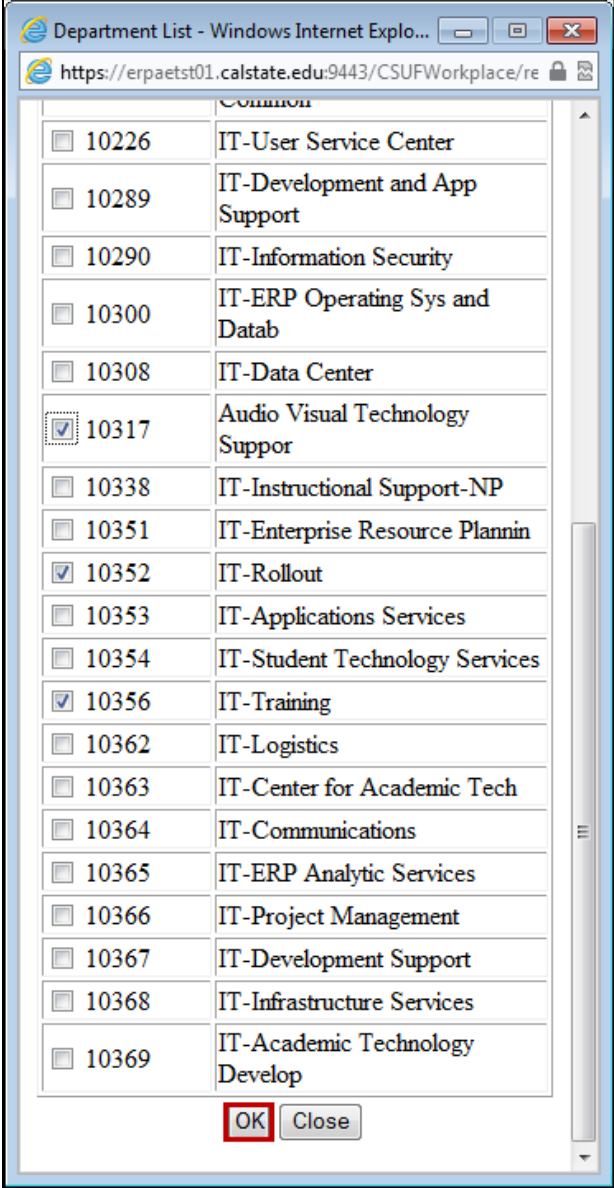
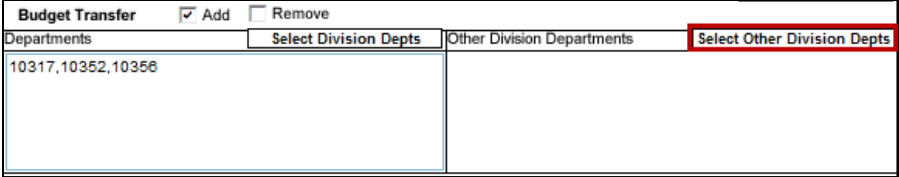
Processing Steps	Screen Shots
<p>Step 5: Next, select the appropriate form for the required access:</p> <ul style="list-style-type: none"> Finance Delegation of Authority Form <p> Prior to accessing the form all popup blockers must be disabled.</p>	
<p>Step 6: The form opens in a new window.</p> <p>First, enter the Employee ID (CWID).</p> <p>Then, tab to the next field. Additional fields on the page will auto populate.</p> <p> Fields in green should be completed first. This will auto populate other fields on the form with PeopleSoft data.</p> <p> Verify that the employee's Appropriate Administrator is correct since this form will automatically be routed to that person for approval.</p> <p> If the form populates with incorrect personal data, contact Human Resources and close the form without continuing. This form should not be used until that data has been corrected.</p>	


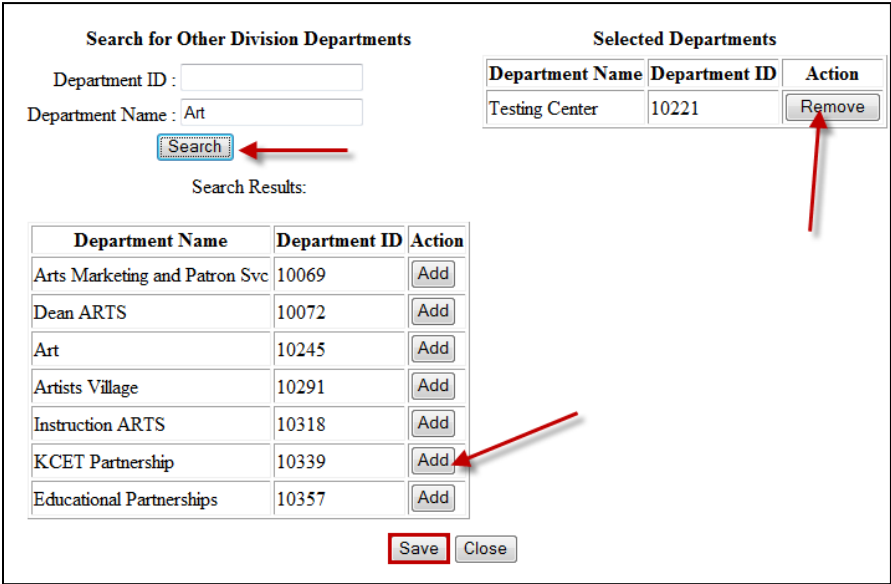
Processing Steps	Screen Shots															
<p>Step 6a: If the CWID is not listed in PeopleSoft an error message will pop up indicating “no matching record found.”</p> <p>Contact CMS Security at cmssecurity@fullerton.edu with the employee’s name and CWID if you get this error message. Security personnel will assist you in getting the user added to the system.</p>	 <p>The screenshot shows the 'Employee Information' tab of the Delegation of Authority Form. A modal dialog box titled 'Message from webpage' is displayed in the center, containing a yellow warning icon and the text 'No matching record found.' with an 'OK' button. The background form shows fields for Employee ID (800000000), First Name, Department Name, Title, and Division, all of which are redacted with pink boxes. Below the form, there are checkboxes for 'Permanent' and 'Temporary' and a paragraph of text explaining the delegation process.</p>															
<p>Step 6b: If the employee has multiple jobs on campus you will be prompted to choose the appropriate position for the form.</p> <p>To review the position information, select a position and click Details.</p>	 <p>The screenshot shows a 'Lookup Results -- Webpage Dialog' window. It contains a table with the following data:</p> <table border="1" data-bbox="586 1100 1414 1199"> <thead> <tr> <th>FirstName</th> <th>LastName</th> <th>DepartmentName</th> <th>Division</th> <th>EmployeeUserID</th> </tr> </thead> <tbody> <tr> <td>Katniss</td> <td>Everdeen</td> <td>Biological Science</td> <td>VP Academic Affairs -NP</td> <td>keverdeen</td> </tr> <tr> <td>Katniss</td> <td>Everdeen</td> <td>Testing Center</td> <td>Vice President for Student Aff</td> <td>keverdeen</td> </tr> </tbody> </table> <p>Below the table, a yellow warning icon is displayed with the text: 'Multiple matches were found. Please select the correct entry.' At the bottom of the dialog, there are three buttons: 'Details', 'OK', and 'Cancel'. The 'Details' button is highlighted with a red rectangle, and a red arrow points to the radio button next to the second entry in the table.</p>	FirstName	LastName	DepartmentName	Division	EmployeeUserID	Katniss	Everdeen	Biological Science	VP Academic Affairs -NP	keverdeen	Katniss	Everdeen	Testing Center	Vice President for Student Aff	keverdeen
FirstName	LastName	DepartmentName	Division	EmployeeUserID												
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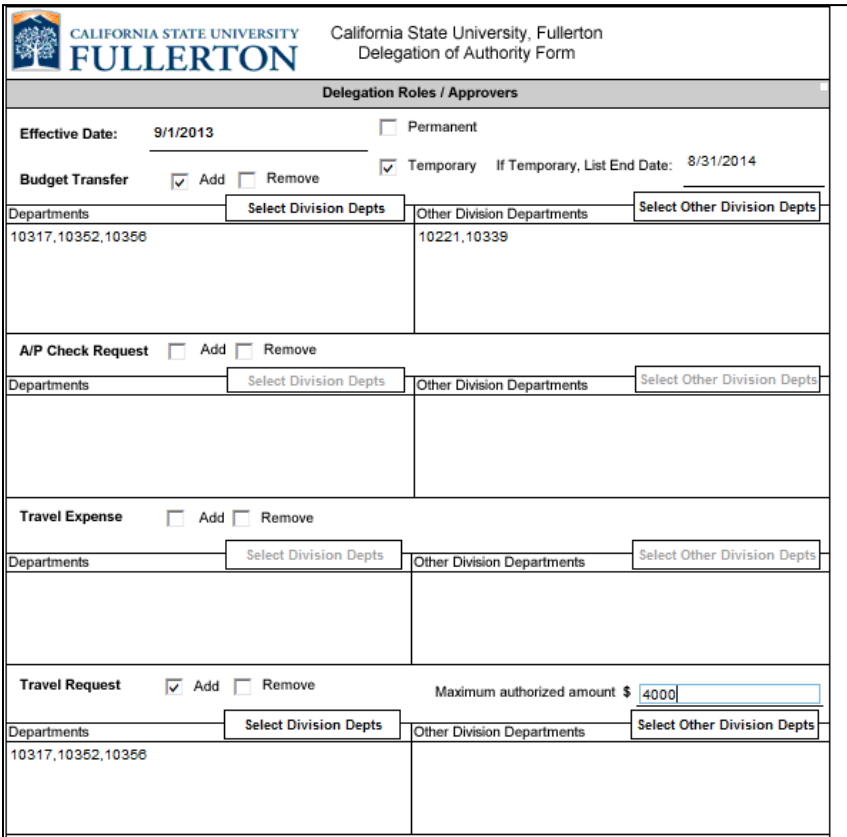
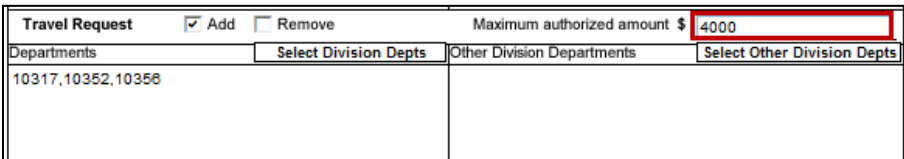
Processing Steps	Screen Shots																						
<p>Step 6c: The job details will be displayed. Select OK to return to the position selection screen.</p>	 <p>The screenshot shows a web browser window titled "Details -- Webpage Dialog" with the URL https://erpaetst01.calstate.edu:9443/CSUFWorkplace/formCallback?platformID=filenet&cmd=dlg. The window displays a list of employee details:</p> <table border="1"> <tr><td>FirstName</td><td>Katniss</td></tr> <tr><td>LastName</td><td>Everdeen</td></tr> <tr><td>DepartmentName</td><td>Testing Center</td></tr> <tr><td>Division</td><td>Vice President for Student Aff</td></tr> <tr><td>EmployeeUserID</td><td>keverdeen</td></tr> <tr><td>CampusExtension</td><td>4227</td></tr> <tr><td>CampusEmail</td><td>keverdeen@Exchange.fullerton.edu</td></tr> <tr><td>Title</td><td>Casual Worker</td></tr> <tr><td>DeptID</td><td>10221</td></tr> <tr><td>Division_ID</td><td>10236</td></tr> <tr><td>Division</td><td>Other</td></tr> </table> <p>An "OK" button is highlighted with a red box at the bottom right of the dialog.</p>	FirstName	Katniss	LastName	Everdeen	DepartmentName	Testing Center	Division	Vice President for Student Aff	EmployeeUserID	keverdeen	CampusExtension	4227	CampusEmail	keverdeen@Exchange.fullerton.edu	Title	Casual Worker	DeptID	10221	Division_ID	10236	Division	Other
FirstName	Katniss																						
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CampusExtension	4227																						
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DeptID	10221																						
Division_ID	10236																						
Division	Other																						
<p>Step 6d: When the correct position has been identified, select the position and click OK to continue.</p>	 <p>The screenshot shows a web browser window titled "Lookup Results -- Webpage Dialog" with the URL https://erpaetst01.calstate.edu:9443/CSUFWorkplace/formCallback?platformID=filenet&cmd=dlgs. The window displays a table of search results:</p> <table border="1"> <thead> <tr> <th>FirstName</th> <th>LastName</th> <th>DepartmentName</th> <th>Division</th> <th>EmployeeUserID</th> </tr> </thead> <tbody> <tr> <td><input type="radio"/></td> <td>Katniss</td> <td>Everdeen</td> <td>Biological Science</td> <td>VP Academic Affairs -NP</td> <td>keverdeen</td> </tr> <tr> <td><input checked="" type="radio"/></td> <td>Katniss</td> <td>Everdeen</td> <td>Testing Center</td> <td>Vice President for Student Aff</td> <td>keverdeen</td> </tr> </tbody> </table> <p>Below the table, a yellow warning triangle icon is displayed next to the text: "Multiple matches were found. Please select the correct entry." At the bottom, "Details", "OK", and "Cancel" buttons are visible, with the "OK" button highlighted by a red box.</p>	FirstName	LastName	DepartmentName	Division	EmployeeUserID	<input type="radio"/>	Katniss	Everdeen	Biological Science	VP Academic Affairs -NP	keverdeen	<input checked="" type="radio"/>	Katniss	Everdeen	Testing Center	Vice President for Student Aff	keverdeen					
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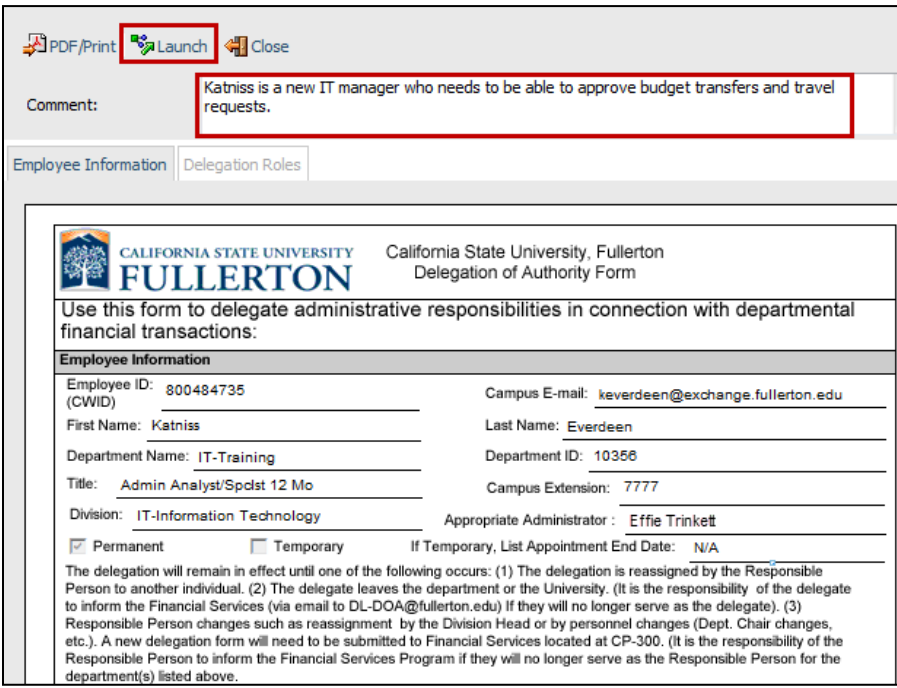
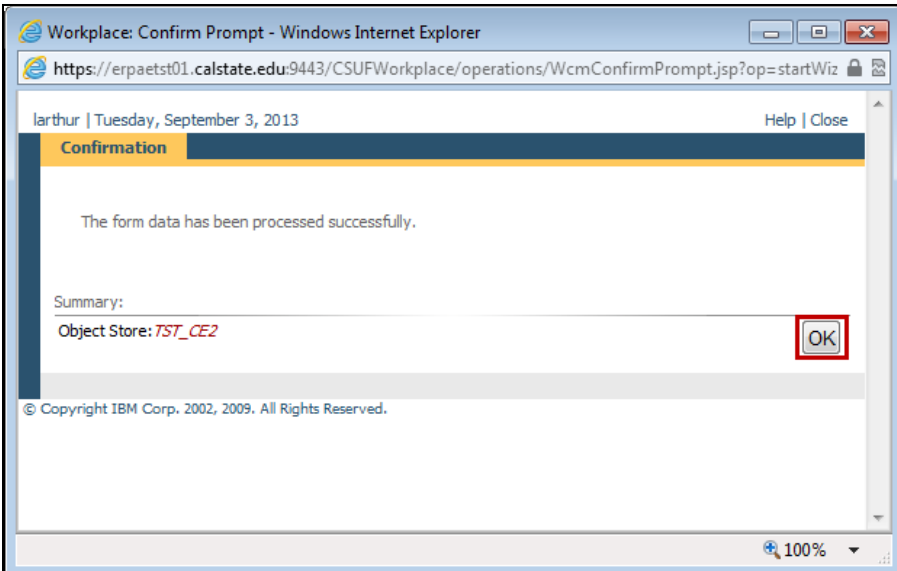
Processing Steps	Screen Shots
<p>Step 7: Next, identify the action request:</p> <ul style="list-style-type: none"> • New User: a user who does not currently have Finance Delegation of Authority. • Existing User: a user whose Finance Delegation of Authority needs to be modified. • Inactivate Account: a user whose Finance Delegation of Authority needs to be removed either because they are no longer on campus or they have changed positions on campus. <p> When you select Inactivate Account, you will not be able to use the Delegation Roles Page. All authority granted to the user will be automatically revoked.</p>	
<p>Step 8: Click on Go to Delegation Roles Page. Or click on the Delegation Roles tab.</p>	
<p>Step 9: Enter the Effective Date for this authority.</p>	

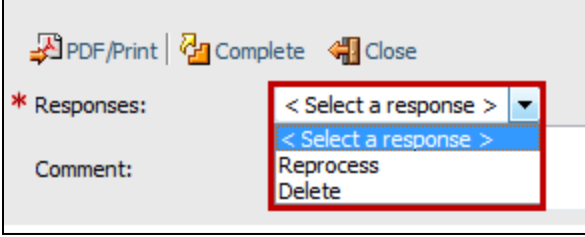
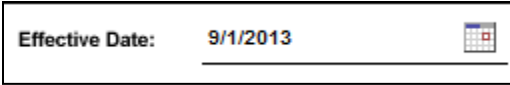


Processing Steps	Screen Shots
<p>Step 10: Indicate whether this authority is permanent or temporary.</p> <p>If it is temporary, enter the end date for the authority.</p> <p> If you specify an end date for the authority, the authority will automatically expire on that day. No additional forms will need to be filled out to remove the authority.</p>	
<p>Step 11: To add authority for a financial transaction, place a checkmark next to Add in that section.</p> <p>To remove authority for a financial transaction, place a checkmark next to Remove in that section.</p> <p> You cannot combine “Add” and “Remove” requests for a single section (i.e. Budget Transfer) on a single Finance Delegation of Authority Form. You must submit one form with your “Remove” requests and a separate form with your “Add” requests.</p>	
<p>Step 12: Click Select Division Depts to select the department(s) for which this user should have authority.</p>	

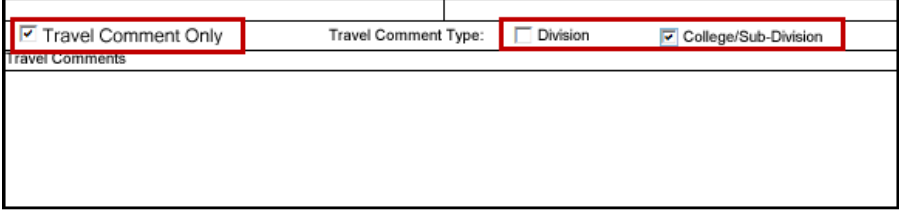
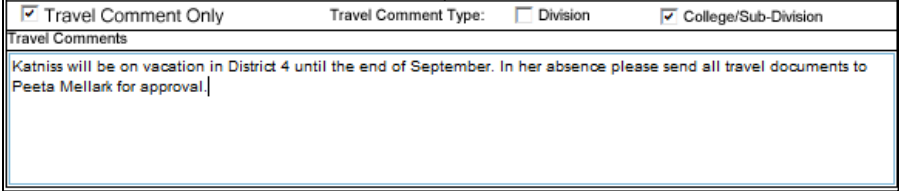
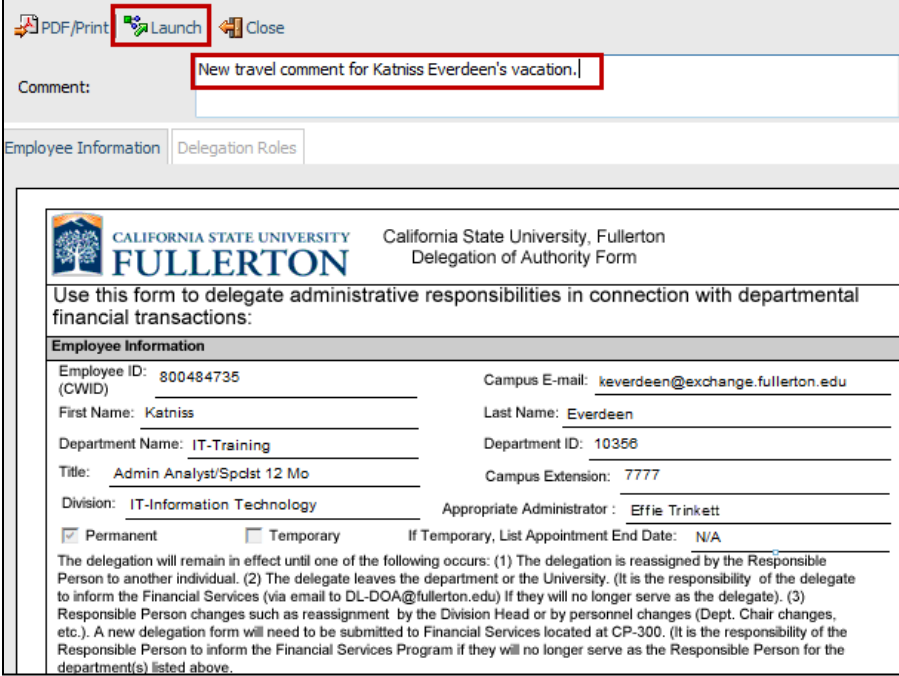
Processing Steps	Screen Shots
<p>Step 13: Only the Department IDs for the identified division are listed.</p> <p>Choose the appropriate department(s) and click OK.</p>	
<p>Step 14: (Optional) If the user needs to have authority for a department in a different division, click Select Other Division Depts.</p>	


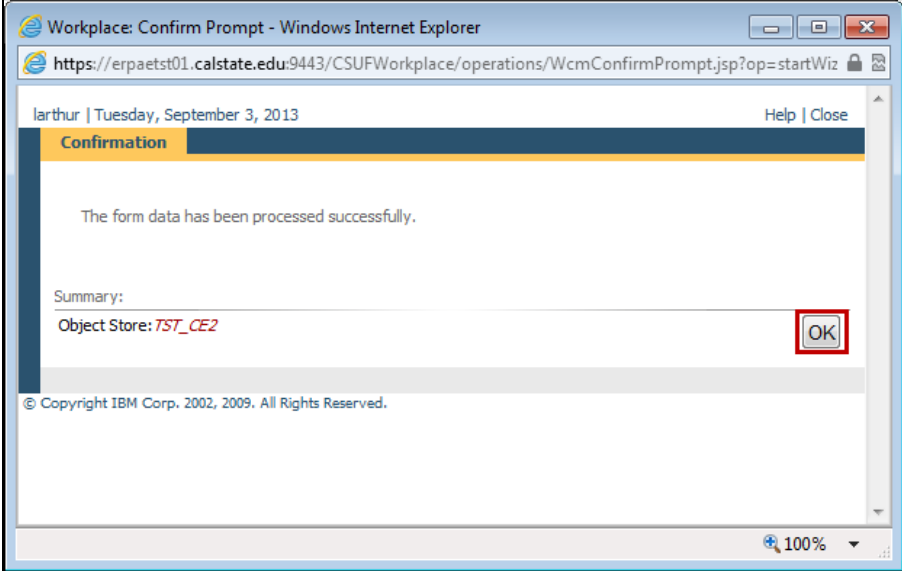
Processing Steps	Screen Shots																														
<p>Step 14a: Use the search function to find a department by its department ID or its department name.</p> <p>Click Add to add the department to the Selected Departments list.</p> <p>Click Remove to remove a department from the Selected Departments list.</p> <p>When you are finished, click Save.</p> <p> You must obtain approval from the other division's Financial Manager via email and forward it to DL-DOA@fullerton.edu in order for Financial Services to accept requests for authority to another division's department(s).</p>	 <p>Search for Other Division Departments</p> <p>Department ID : <input type="text"/></p> <p>Department Name : <input type="text" value="Art"/></p> <p><input type="button" value="Search"/></p> <p>Search Results:</p> <table border="1"> <thead> <tr> <th>Department Name</th> <th>Department ID</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Arts Marketing and Patron Svc</td> <td>10069</td> <td><input type="button" value="Add"/></td> </tr> <tr> <td>Dean ARTS</td> <td>10072</td> <td><input type="button" value="Add"/></td> </tr> <tr> <td>Art</td> <td>10245</td> <td><input type="button" value="Add"/></td> </tr> <tr> <td>Artists Village</td> <td>10291</td> <td><input type="button" value="Add"/></td> </tr> <tr> <td>Instruction ARTS</td> <td>10318</td> <td><input type="button" value="Add"/></td> </tr> <tr> <td>KCET Partnership</td> <td>10339</td> <td><input type="button" value="Add"/></td> </tr> <tr> <td>Educational Partnerships</td> <td>10357</td> <td><input type="button" value="Add"/></td> </tr> </tbody> </table> <p><input type="button" value="Save"/> <input type="button" value="Close"/></p> <p>Selected Departments</p> <table border="1"> <thead> <tr> <th>Department Name</th> <th>Department ID</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Testing Center</td> <td>10221</td> <td><input type="button" value="Remove"/></td> </tr> </tbody> </table>	Department Name	Department ID	Action	Arts Marketing and Patron Svc	10069	<input type="button" value="Add"/>	Dean ARTS	10072	<input type="button" value="Add"/>	Art	10245	<input type="button" value="Add"/>	Artists Village	10291	<input type="button" value="Add"/>	Instruction ARTS	10318	<input type="button" value="Add"/>	KCET Partnership	10339	<input type="button" value="Add"/>	Educational Partnerships	10357	<input type="button" value="Add"/>	Department Name	Department ID	Action	Testing Center	10221	<input type="button" value="Remove"/>
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Processing Steps	Screen Shots
<p>Step 15: Continue filling out each section for which the user needs authority.</p>	 <p>The screenshot shows the 'Delegation Roles / Approvers' section of the form. It includes fields for 'Effective Date' (9/1/2013), 'Budget Transfer' (checked), 'A/P Check Request', 'Travel Expense', and 'Travel Request' (checked). Each section has a 'Maximum authorized amount' field and a table for 'Departments' and 'Other Division Departments' with 'Select' buttons.</p>
<p>Step 15a: Note that if you are adding authority for Travel Requests, you will need to include the maximum amount that the user is allowed to authorize.</p> <p>Contact Travel at travel@fullerton.edu if you have questions about what to put in the maximum authorized amount field.</p>	 <p>This close-up shows the 'Travel Request' section with the 'Maximum authorized amount' field highlighted in red and containing the value '4000'.</p>

Processing Steps	Screen Shots
<p>Step 16: If necessary, add any comments in the 'Comment' field.</p> <p>Then, click the Launch button to complete processing of the form.</p>	
<p>Step 17: The form is now complete.</p> <p>The division Financial Manager is notified via email to electronically approve the delegation of authority form.</p> <p>Once routed to the Financial Manager, changes cannot be made to the form; however, the Financial Manager can reject the form and it will be routed back to the initiator who can make modifications to the form.</p>	

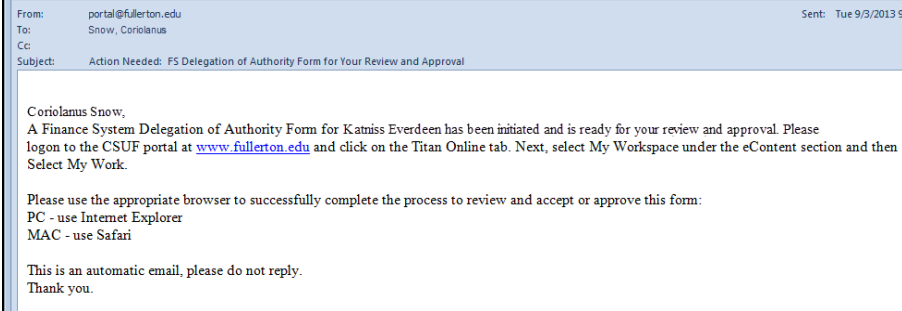


Processing Steps	Screen Shots
<p>Rejected Form: If the form is rejected and returned to the initiator:</p> <ul style="list-style-type: none"> The initiator can update and reprocess the form The initiator can delete the form and start over. 	
<p>Travel Comment Only</p> <p>You can use the Finance Delegation of Authority Form to create a Travel Comment. However, you cannot request any authority changes on the same form as a Travel Comment.</p> <p>Step 1: Follow steps 1-8 of the Data Entry Process.</p> <p>Enter the Effective Date for the travel comment.</p>	
<p>Step 2: Indicate whether this travel comment is permanent or temporary.</p> <p>If it is temporary, enter the end date for the travel comment.</p> <p> If you specify an end date for the travel comment, the comment will automatically expire on that day. No additional forms will need to be filled out to remove the comment.</p>	

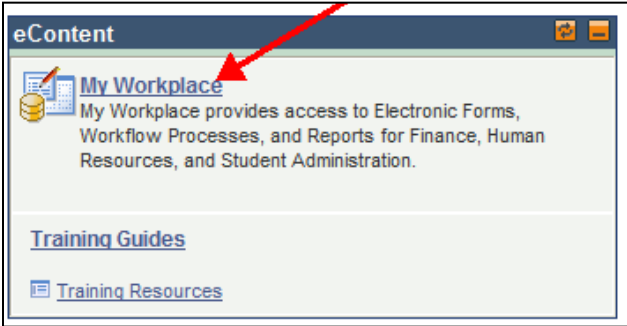
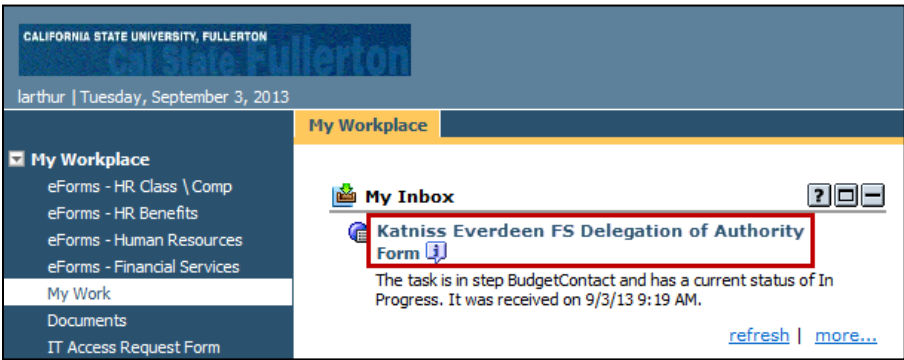
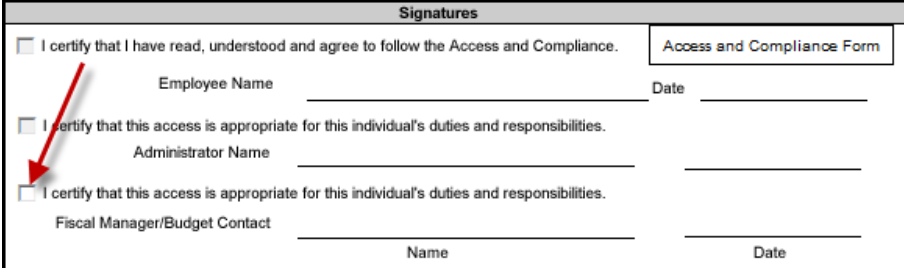
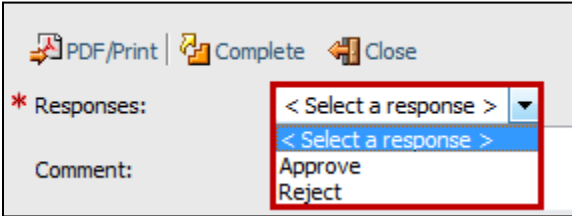
Processing Steps	Screen Shots
<p>Step 3: Place a checkmark next to Travel Comment Only at the bottom of the Delegation Roles page.</p> <p>Then indicate if this travel comment applies to a division or a college/sub-division.</p>	 <p>The screenshot shows a form with a checkbox labeled 'Travel Comment Only' which is checked. To its right, 'Travel Comment Type:' is followed by two options: 'Division' (unchecked) and 'College/Sub-Division' (checked). Below these options is a text area labeled 'Travel Comments' which is currently empty.</p>
<p>Step 4: Type in the travel comment.</p>	 <p>The screenshot shows the same form as in Step 3, but the 'Travel Comments' text area now contains the text: 'Katniss will be on vacation in District 4 until the end of September. In her absence please send all travel documents to Peeta Mellark for approval.'</p>
<p>Step 5: If necessary, add any comments in the 'Comment' field.</p> <p>Then, click the Launch button to complete processing of the form.</p>	 <p>The screenshot shows a 'Comment:' field with the text 'New travel comment for Katniss Everdeen's vacation.' entered. Above the field are buttons for 'PDF/Print', 'Launch', and 'Close'. Below the comment field are tabs for 'Employee Information' and 'Delegation Roles'. The 'Employee Information' tab is active, showing the California State University Fullerton logo and the following details: Employee Information Employee ID: 800484735 (CWID) Campus E-mail: keverdeen@exchange.fullerton.edu First Name: Katniss Last Name: Everdeen Department Name: IT-Training Department ID: 10356 Title: Admin Analyst/Spclst 12 Mo Campus Extension: 7777 Division: IT-Information Technology Appropriate Administrator: Effie Trinkett <input checked="" type="checkbox"/> Permanent <input type="checkbox"/> Temporary If Temporary, List Appointment End Date: N/A The delegation will remain in effect until one of the following occurs: (1) The delegation is reassigned by the Responsible Person to another individual. (2) The delegate leaves the department or the University. (It is the responsibility of the delegate to inform the Financial Services (via email to DL-DOA@fullerton.edu) if they will no longer serve as the delegate). (3) Responsible Person changes such as reassignment by the Division Head or by personnel changes (Dept. Chair changes, etc.). A new delegation form will need to be submitted to Financial Services located at CP-300. (It is the responsibility of the Responsible Person to inform the Financial Services Program if they will no longer serve as the Responsible Person for the department(s) listed above.</p>


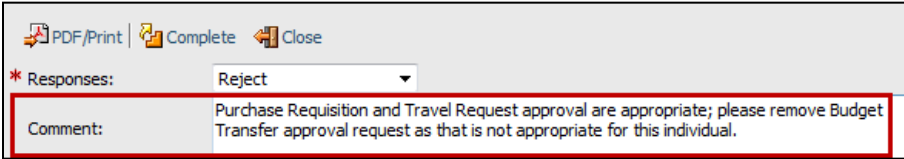
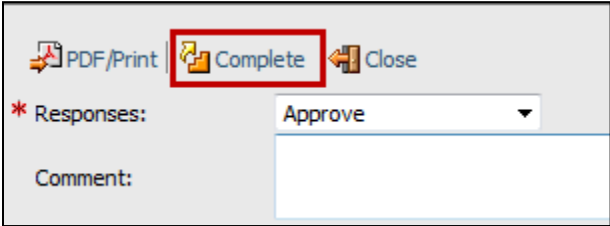
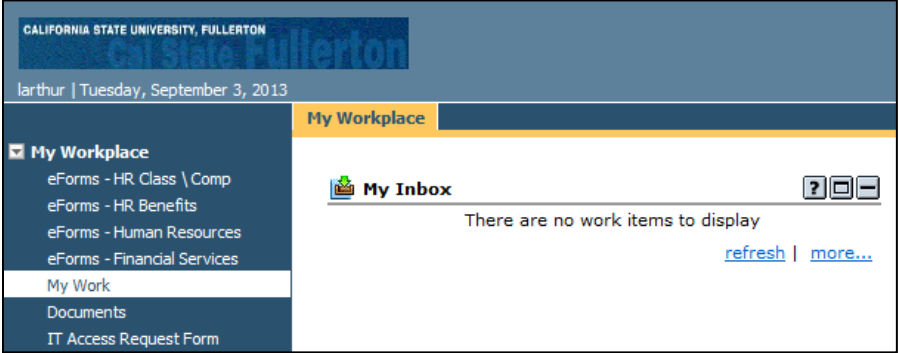
Processing Steps	Screen Shots
<p>Step 6: The form is now complete.</p> <p>The Finance Business Analyst is notified via email to review and process the form.</p> <p> The Financial Manager and Appropriate Administrator do not need to approve Travel Comment Only forms.</p>	 <p>The screenshot shows a web browser window titled "Workplace: Confirm Prompt - Windows Internet Explorer". The address bar shows the URL: https://erpaetst01.calstate.edu:9443/CSUFWorkplace/operations/WcmConfirmPrompt.jsp?op=startWiz. The page content includes a user name "larthur" and the date "Tuesday, September 3, 2013". A "Confirmation" header is followed by the message "The form data has been processed successfully." Below this is a "Summary:" section with the text "Object Store: TST_CE2". An "OK" button is visible and highlighted with a red box. The footer of the page contains the copyright notice "© Copyright IBM Corp. 2002, 2009. All Rights Reserved." and a zoom level of "100%".</p>

3.0 Financial Manager Approval Process

Once a form is complete the division Financial Manager is notified via email to review the Finance Delegation of Authority (DOA) form.

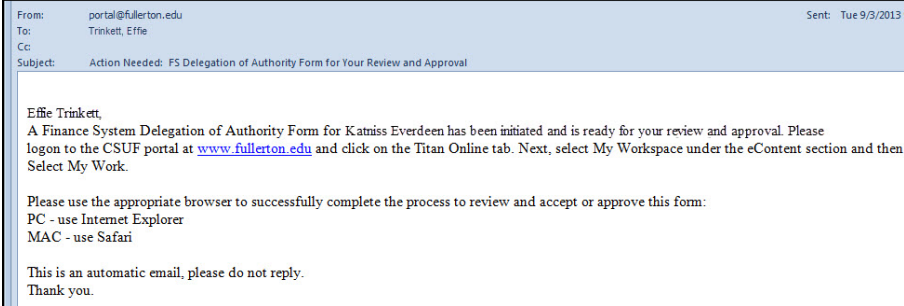


Processing Steps	Screen Shots
<p>Step 1: The division Financial Manager receives an email to review the Finance Delegation of Authority form electronically.</p>	 <p>The screenshot shows an email with the following details: From: portal@fullerton.edu To: Snow, Coriolanus Subject: Action Needed: FS Delegation of Authority Form for Your Review and Approval Sent: Tue 9/3/2013 9:00 AM Coriolanus Snow, A Finance System Delegation of Authority Form for Katniss Everdeen has been initiated and is ready for your review and approval. Please logon to the CSUF portal at www.fullerton.edu and click on the Titan Online tab. Next, select My Workspace under the eContent section and then Select My Work. Please use the appropriate browser to successfully complete the process to review and accept or approve this form: PC - use Internet Explorer MAC - use Safari This is an automatic email, please do not reply. Thank you.</p>
<p>Step 2: Log into the campus portal. Enter your campus username and password. Then, click Login.</p>	 <p>The screenshot shows the login page for California State University, Fullerton. It features the university's logo on the left and a login form on the right. The form includes fields for Username (containing 'csnow') and Password (masked with dots), a 'Sign In' button, and links for 'Can't access your account?', 'First time here?', 'New students and applicants', and 'Employees'.</p>
<p>Step 3: Next, select the Titan Online tab.</p>	 <p>The screenshot shows the navigation menu for the Faculty/Staff Portal. The menu items are: My CSUF, Email, Library, Classes, TitanCard, Services, Webcam, Training, Titan Online (highlighted with a red box), Documents, PCard, lynda.com, Web Meetings, and Online IT Help.</p>

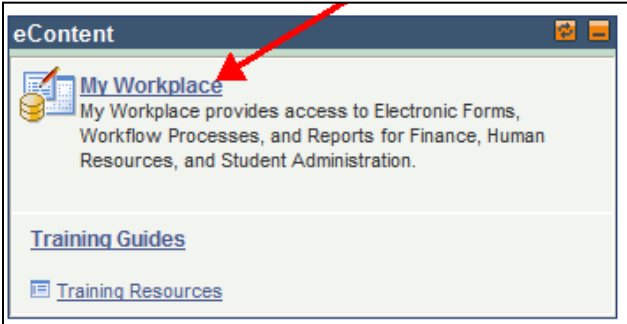
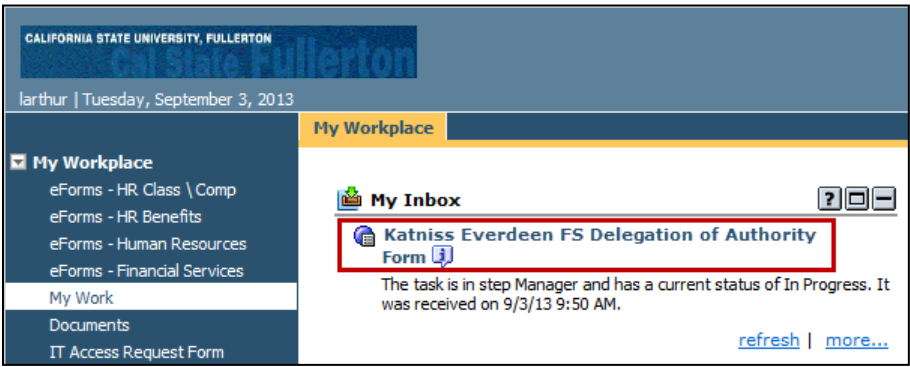
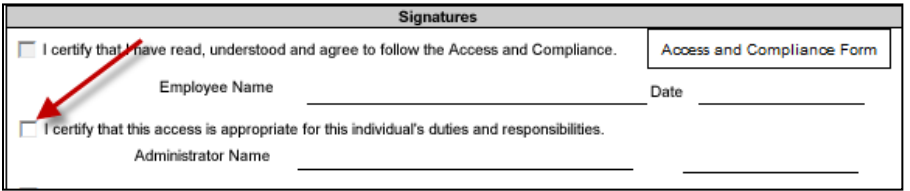
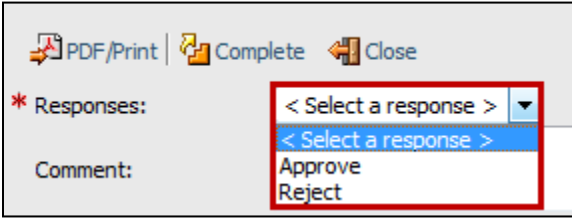
Processing Steps	Screen Shots
<p>Step 4: Next, select My Workplace under the eContent section.</p>	
<p>Step 5: Then select My Work.</p> <p>The pending Delegation of Authority form will appear.</p> <p>Click on the form you want to review.</p>	
<p>Step 6: Review the Delegation of Authority form.</p> <p>On the Employee Information tab in the Signatures section, place a checkmark next to "I certify that this access is appropriate for this individual's duties and responsibilities."</p>	
<p>Step 7: Next, either "Approve" or "Reject" the form using the drop-down menu at the top of the screen.</p> <p>If the request is rejected it will return to the form initiator.</p>	


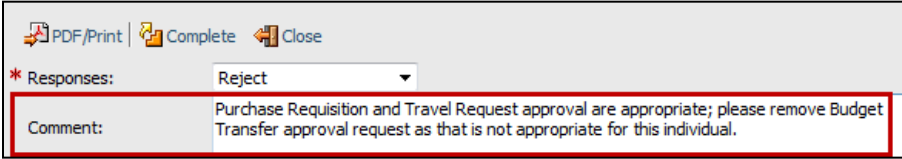
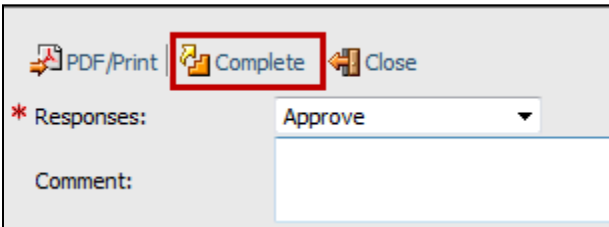
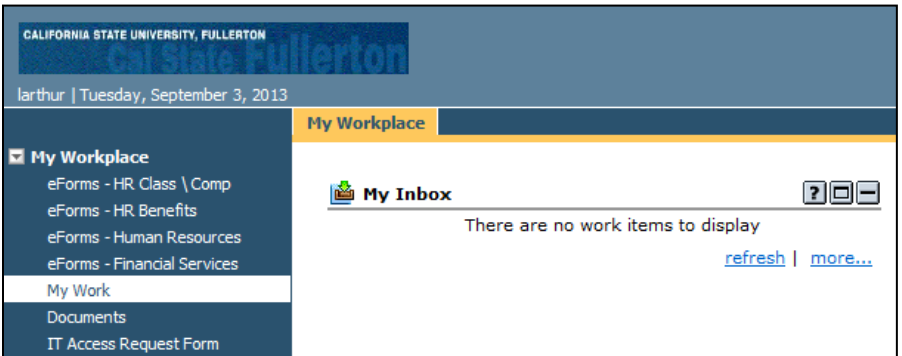
Processing Steps	Screen Shots
<p>Step 7a (optional): You may add an optional comment in the Comment section at the top of the form.</p> <p> It is highly encouraged to add a comment if you are rejecting the form so the initiator understands why the form was rejected and how to correct the form so it will be approved (if necessary). Comments, when the request is rejected, are included in the email notification sent to the initiator.</p>	 <p>The screenshot shows the top of the form with buttons for PDF/Print, Complete, and Close. The 'Responses' dropdown is set to 'Reject'. A red box highlights the 'Comment' field containing the text: "Purchase Requisition and Travel Request approval are appropriate; please remove Budget Transfer approval request as that is not appropriate for this individual."</p>
<p>Step 8: Once the response is selected, click the Complete button.</p> <p>Note:</p> <ul style="list-style-type: none"> • If the request is rejected it will return to the form initiator. • If the request is approved the form will move to the next appropriate party for processing. 	 <p>The screenshot shows the top of the form with buttons for PDF/Print, Complete, and Close. The 'Responses' dropdown is set to 'Approve'. A red box highlights the 'Complete' button.</p>
<p>Step 9: The Delegation of Authority form is approved and removed from the list of pending forms.</p>	 <p>The screenshot shows the user's workspace dashboard for 'larthur' on Tuesday, September 3, 2013. The 'My Workplace' menu is expanded, showing options like 'eForms - HR Class \ Comp', 'eForms - HR Benefits', 'eForms - Human Resources', 'eForms - Financial Services', 'My Work', 'Documents', and 'IT Access Request Form'. The 'My Inbox' section shows 'There are no work items to display' with 'refresh' and 'more...' links.</p>

4.0 Manager Approval Process

Once a form is complete the appropriate administrator/manager is notified via email to review the Finance Delegation of Authority (DOA) form.

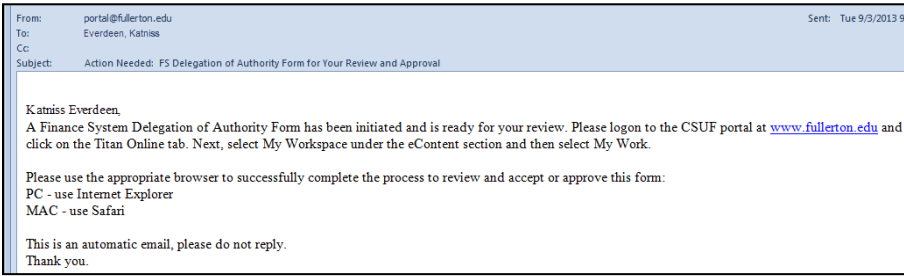
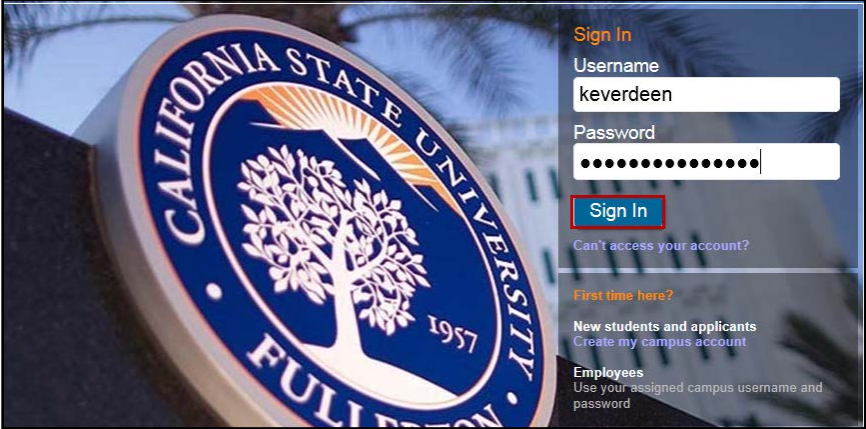

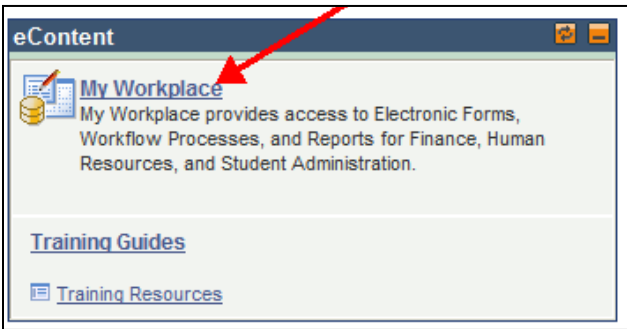
Processing Steps	Screen Shots
<p>Step 1: The appropriate administrator/manager receives an email to review the Finance Delegation of Authority form electronically.</p>	
<p>Step 2: Log into the campus portal. Enter your campus username and password. Then, click Login.</p>	
<p>Step 3: Next, select the Titan Online tab.</p>	

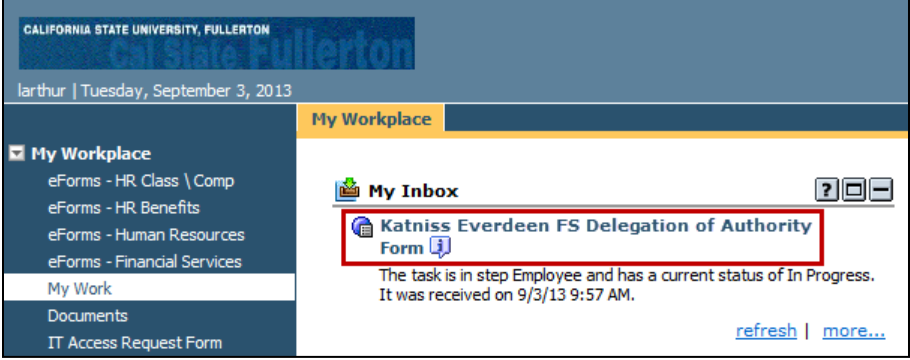
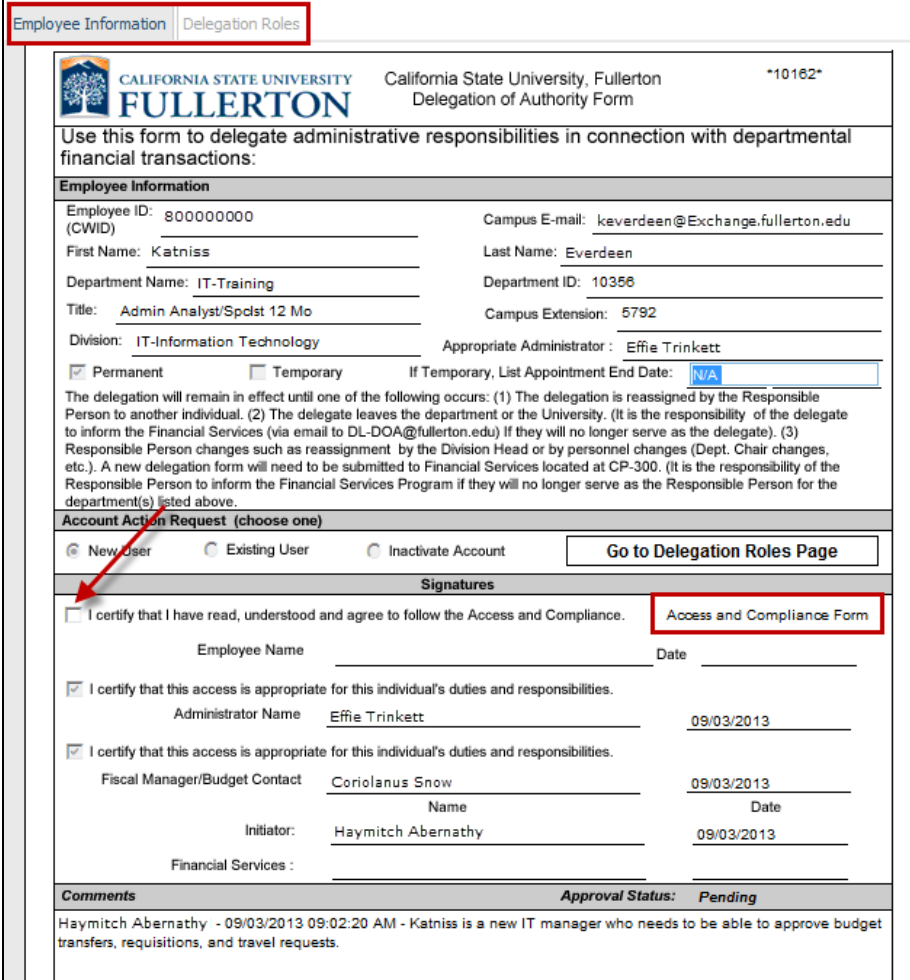
Processing Steps	Screen Shots
<p>Step 4: Next, select My Workplace under the eContent section.</p>	
<p>Step 5: Then select My Work.</p> <p>The pending Delegation of Authority form will appear.</p> <p>Click on the form you want to review.</p>	
<p>Step 6: Review the Delegation of Authority form.</p> <p>On the Employee Information tab in the Signatures section, place a checkmark next to "I certify that this access is appropriate for this individual's duties and responsibilities."</p>	
<p>Step 7: Next, either "Approve" or "Reject" the form using the drop-down menu at the top of the screen.</p>	

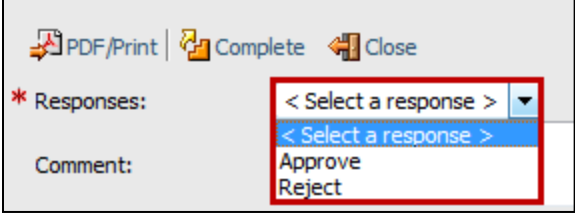

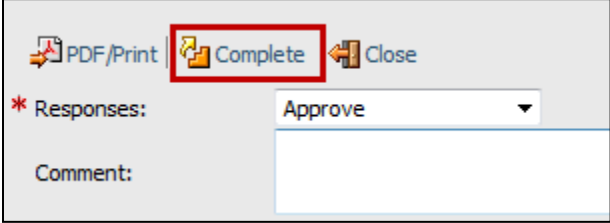

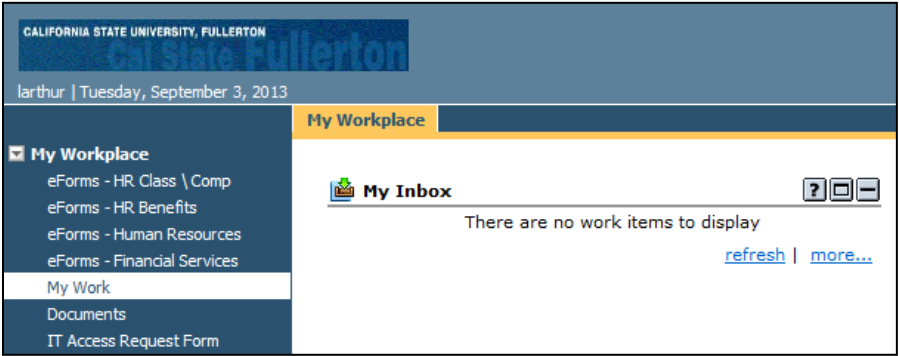
Processing Steps	Screen Shots
<p>Step 7a (optional): You may add an optional comment in the Comment section at the top of the form.</p> <p> It is highly encouraged to add a comment if you are rejecting the form so the initiator understands why the form was rejected and how to correct the form so it will be approved (if necessary). Comments, when the request is rejected, are included in the email notification sent to the initiator and fiscal manager.</p>	
<p>Step 8: Once the response is selected, click the Complete button.</p> <p>Note:</p> <ul style="list-style-type: none"> • If the request is rejected it will return to the form initiator. • If the request is approved the form will move to the next appropriate party for processing. 	
<p>Step 9: The Delegation of Authority form is approved and removed from the list of pending forms.</p>	

5.0 Employee Review Process

The employee must review and accept the form electronically, even if the employee initiated the Finance Delegation of Authority Form.

Processing Steps	Screen Shots
<p>Step 1: Employee receives an email to review the Finance Delegation of Authority form electronically.</p>	 <p>The screenshot shows an email with the following details: From: portal@fullerton.edu To: Everdeen, Katniss Cc: Subject: Action Needed: FS Delegation of Authority Form for Your Review and Approval Sent: Tue 9/3/2013 9:00 AM</p> <p>The body of the email reads: Katniss Everdeen, A Finance System Delegation of Authority Form has been initiated and is ready for your review. Please logon to the CSUF portal at www.fullerton.edu and click on the Titan Online tab. Next, select My Workspace under the eContent section and then select My Work.</p> <p>Please use the appropriate browser to successfully complete the process to review and accept or approve this form: PC - use Internet Explorer MAC - use Safari</p> <p>This is an automatic email, please do not reply. Thank you.</p>
<p>Step 2: Log into the campus portal. Enter your campus username and password.</p> <p>Then, click Login.</p>	 <p>The screenshot shows the login page for California State University, Fullerton. It features the university's seal on the left and a login form on the right. The form includes fields for 'Username' (containing 'keverdeen') and 'Password' (masked with dots). A 'Sign In' button is highlighted with a red box. Below the form are links for 'Can't access your account?', 'First time here?', 'New students and applicants', and 'Employees'.</p>
<p>Step 3: Next, select the Titan Online tab.</p>	 <p>The screenshot shows the navigation menu of the Faculty/Staff Portal. The 'Titan Online' link is highlighted with a red box. Other links include My CSUF, Email, Library, Classes, TitanCard, Services, Webcam, Training, Documents, PCard, lynda.com, Web Meetings, and Online IT Help.</p>
<p>Step 4: Next, select My Workplace under the eContent section.</p>	 <p>The screenshot shows the eContent page. The 'My Workplace' link is highlighted with a red arrow. The page text reads: 'My Workplace provides access to Electronic Forms, Workflow Processes, and Reports for Finance, Human Resources, and Student Administration.' Below this are links for 'Training Guides' and 'Training Resources'.</p>

Processing Steps	Screen Shots
<p>Step 5: Then select My Work.</p> <p>The pending Finance Delegation of Authority will appear.</p> <p>Click on the form you wish to electronically sign.</p>	 <p>The screenshot shows the 'My Workplace' navigation menu on the left with 'My Work' selected. The main content area displays the 'My Inbox' with a red box highlighting the 'Katniss Everdeen FS Delegation of Authority Form'. Below the form title, it states: 'The task is in step Employee and has a current status of In Progress. It was received on 9/3/13 9:57 AM.' There are 'refresh' and 'more...' links at the bottom right.</p>
<p>Step 6: The Finance Delegation of Authority form is displayed.</p> <p>Review the fields on both tabs (Employee Information and Delegation Roles) for accuracy.</p> <p>Click the Access & Compliance Form button to review the document.</p> <p>Electronically sign the form by checking the statement "I certify that I have read, understood and agree to follow the Access and Compliance form."</p> <p>By checking this statement your name and date will auto-populate in the Employee Name field.</p>	 <p>The screenshot shows the 'Delegation of Authority Form' with two tabs: 'Employee Information' (selected) and 'Delegation Roles'. The 'Employee Information' section contains fields for Employee ID (800000000), First Name (Katniss), Department Name (IT-Training), Title (Admin Analyst/Spclst 12 Mo), Division (IT-Information Technology), and other details. Below this is the 'Account Action Request (choose one)' section with radio buttons for 'New User', 'Existing User', and 'Inactivate Account'. A red arrow points to the 'Signatures' section, which includes a checkbox for 'I certify that I have read, understood and agree to follow the Access and Compliance.' with a red box around the 'Access and Compliance Form' button. Other signature fields include Administrator Name (Effie Trinkett), Fiscal Manager/Budget Contact (Coriolanus Snow), and Initiator (Haymitch Abernathy), all with dates of 09/03/2013. The 'Comments' section at the bottom states: 'Haymitch Abernathy - 09/03/2013 09:02:20 AM - Katniss is a new IT manager who needs to be able to approve budget transfers, requisitions, and travel requests.' The 'Approval Status' is 'Pending'.</p>

Processing Steps	Screen Shots
<p>Step 7: Next, either “Approve” or “Reject” the form using the drop-down menu at the top of the screen.</p>	 <p>The screenshot shows the top of the form with buttons for PDF/Print, Complete, and Close. Below these is a 'Responses' dropdown menu that is open, showing the options '< Select a response >', 'Approve', and 'Reject'. A red box highlights the dropdown menu.</p>
<p>Step 8: To complete the approval process, select the Complete link.</p> <p>Note:</p> <ul style="list-style-type: none"> • If the request is rejected it will return to the form initiator. • If the request is approved the form will move to the next appropriate party for processing. <p> Optionally, you can add a comment to the Comment field. Comments, when the request is rejected, are included in the email notification sent to the initiator, administrator, and fiscal manager.</p>	 <p>The screenshot shows the top of the form with buttons for PDF/Print, Complete, and Close. The 'Complete' button is highlighted with a red box. Below these is a 'Responses' dropdown menu that is closed, showing the option 'Approve'. Below the dropdown is a 'Comment' text field.</p>
<p>Step 9: The Access Request form is approved and removed from the list of pending forms.</p> <p>The form is routed to the Financial Services department for review and processing.</p> <p> The Finance Delegation of Authority form cannot be changed once approved by the employee. Please contact DL-DOA@fullerton.edu for assistance if you need to make changes.</p> <p>Once authority has been granted, the employee will be notified by email.</p>	 <p>The screenshot shows the PeopleSoft My Workplace dashboard. The header includes 'CALIFORNIA STATE UNIVERSITY, FULLERTON' and the user 'larthur Tuesday, September 3, 2013'. The main content area is divided into two sections: 'My Workplace' on the left and 'My Inbox' on the right. The 'My Inbox' section displays the message 'There are no work items to display' and includes links for 'refresh' and 'more...'. The 'My Workplace' section lists various eForms categories like 'eForms - HR Class \ Comp', 'eForms - HR Benefits', 'eForms - Human Resources', and 'eForms - Financial Services', along with 'My Work', 'Documents', and 'IT Access Request Form'.</p>

