

CSUBUY P2P – DOA Conversion

Frequently Asked Questions

1. My form doesn't have any information on it, why is that?

If you fill in the information on the Gateway form, that information will appear in the Adobe power form when it is delegated to all of the recipients.


(This is the Gateway form portal that needs to be filled out properly before it being sent off for signatures.)

Recipients
Contact *
<input type="text" value="Search by Name or Email"/>
Previewer
<input type="text" value="Search by Name or Email"/>
Level 4 Approver
<input type="text" value="Search by Name or Email"/>
Level 3 Approver
<input type="text" value="Search by Name or Email"/>
Additional Level 3 or 4 Approver #1
<input type="text" value="Search by Name or Email"/>
Additional Level 3 or 4 Approver #2
<input type="text" value="Search by Name or Email"/>
Level 2 Approver
<input type="text" value="Search by Name or Email"/>
Approving Authority (Section 3 of the DOA form) *
<input type="text" value="Search by Name or Email"/>
GRASP (Required for Grants)
<input type="text" value="Search by Name or Email"/>
Accounting (Based on Business Unit; see instructions above) *
<input type="text" value="Search by Name or Email"/>

You will receive a link to the form above where you can begin filling in all yellow sections that are available and applicable to your request. Once all fields are properly entered and filled, each signer's name will auto fill once the form is delegated to the signers.

Example:

Acctg - DOA Chartfield Request (update) from BK001 for BKCMP

 CALIFORNIA STATE UNIVERSITY BAKERSFIELD
Delegation of Authority & Chartfield Request Form
Financial Services - Accounting & Reporting

Please select: (More than one option may be selected)

Request New Chartfields (Read instruction for sections) Explain: _____

Modify/Inactivate Existing Chartfields Sections 1 & 3 Explain: _____

Add/Remove Delegation of Authority Sections 2 & 3 Explain: _____

Dept Contact: _____ *Click here to sign Extension: * _____ Reviewer: _____

Section 1 Chartfield Maintenance

Add	Delete	Bus. Unit	Fund	Dept ID	Account	Program	Project	Class
<input type="radio"/>	<input type="radio"/>	Select...						

Effective Date: _____ Title: _____ Payroll Costs?

Projects Only: Start Date: _____ End Date: _____ GRASP: _____

2. What if the signer has separated and I cannot get a hold of them and I require their signature?


If the signer has been separated and there is no way to contact them, then you can delegate the form to your signing authority and have them sign on behalf of the individual. Make sure to sign using the name of

the separated employee. The approval in section 3 must be a valid authorized signer (not separated) and the approving authority for signers in section 2.

This only applies to situations where you are deleting signers, if you are adding on you need to wait until the person is back to sign the form

3. I am filling out the form and it won't let me uncheck boxes, what do I do?


Make sure to click on the box that says, 'Clear all data', and it will clear all the prior information and you can fill it the form the way that you need it to be.

 CALIFORNIA STATE UNIVERSITY BAKERSFIELD
Powered by Adobe Acrobat Sign

Options ▾

- Read agreement
- Delegate signing to another
- Decline to sign
- Clear document data**
- View history
- Download PDF
- Legal Notices

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 CALIFORNIA STATE UNIVERSITY BAKERSFIELD
Delegation of Authority & Chartfield Request Form
Financial Services - Accounting & Reporting

Please select: (More than one option may be selected)


Request New Chartfields (Read instruction for sections) Explain: _____

Modify/Inactivate Existing Chartfields Sections 1 & 3 Explain: _____

Add/Remove Delegation of Authority Sections 2 & 3 Explain: _____

Clear Document Data

Are you sure you want to clear all the data you filled out in this document?

Cancel 

select: (More than one option may be selected)

request New Chartfields (Read instruction for sections) Explain: _____


4. **What is Approving Authority?**

Approving Authority is the final approver in Section 3 of DOA form (Vice Presidents, Deans, AVPs, or Administrators). This is not related to the signers' approval levels (1 through 4) for P2P. This signer will approve the entire form and all signers in section 2.

Example

Approving Authority (Section 3 of the DOA form) *

Correlates to this section (example of Approving Authority)

Section 3 Approving Authority	
The persons named above are designated to act on behalf of the campus for the fiscal expenditures and associated payment authorizations.	
Approving Name & Title:	Bob Frakes Dean, Arts and Humanities
Approving Authority Signature:	 Date: 11/30/23
	<small>Bob Frakes (Nov 30, 2023 14:01 PST)</small>

5. **Can I switch around my signers? For example, change an approver from level 3 to 4?**

Prior to new information this was allowed but due to recent updates we can **no longer** do this since the levels **need to match the signer's HR Title**.

6. **What if I have Gaps in my signers?**

Before we required all signers; however, due to new information, we can move forward with gaps. We do recommend, if possible, to have two approvers at the lowest approval level (level 3 or 4) for that fund or department in the event an approver is on vacation or extended leave. This will ensure that your forms get processed in their absence. No additional forms are required if moving forward with gaps as they are currently shown in the DOA files.

7. **I messed up on an Adobe power DOA Chartfield form and it has been sent out. What should I do?**

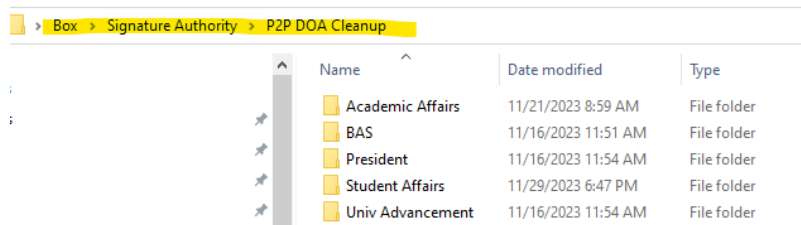
If you fill out a form incorrectly and it is in circulation, reach out to the next signer and have them reject the form and it will delete the form. If you are not sure where the form is at contact accounting@csub.edu with the following information:

- Name of the power form.
- State that you would like to delete the form.
- Include your extension number.

(Note: It might be faster to contact the next signer and have them reject the form but, in the case, where you cannot get ahold of them or you're not sure where the form is at, then contact Accounting. Expect a call from accounting confirming which form you would like to delete, and they will confirm specifics of the form to make sure the correct form is deleted. During this call have a copy of the Power form available to ensure that the information matches the form that they are deleting for you.)

8. **How do I check to see if my department has Gaps in Approval Levels?**

Access DOA file in BOX file using the path below.



From here you will click whichever folder applies to your division. You will then open the excel spreadsheet and click on the tab that mentions 'Gaps'.

Note: The title may be different for each division, but the correct tab will mention 'Gaps' in the title.

Example:

	A	B	C	D	E	F	G	H	I	J
1	Count of ID	Column Labels								
2	Row Labels		1	2	3	4	Grand Total			
3	BK001		194	93	176	105	568			
4	D10005		2	1	1		4			
5	D10010		2	1	1		4			
6	D10015		2	1	1		4			
7	D10020		2	1	1	1	5			
8	D10040		2	1	2	1	6			
9	D10041		2	1	2	1	6			
10	D10050		2	1	1		4			
11	D10091		2	1	1		4			
12	D10110		2	1	2	1	6			
13	D10115		2	1	2		5			
14	D10116		2	1	2	1	6			
15	D10120		2	1	2	2	7			
16	D10130		2	1	2	2	7			
17	D10131		2	1	2	1	6			
18	D10135		2	1	2	2	7			
19	D10140		2	1	2	2	7			
20	D10150		2	1	2	2	7			
21	D10152		2	1	2	1	6			
22	D10155		2	1	2	1	6			
23	D10160		2	1	2	2	7			
24	D10161		2	1	2	2	7			
25	D10170		2	1	2	2	7			
26	D10190		2	1	2	2	7			
27	D10200		2	1	2	1	6			
28	D10210		2	1	2	1	6			
29	D10215		2	1	2	1	6			
30	D10220		2	1	2	2	7			
31	D10230		2	1	2	1	6			
32	D10240		2	1	2	2	7			
33	D10250		2	1	2	1	6			
34	D10255		2	1	2	1	6			
35	D10301		2	1	2	1	6			
36	D10302		2	1	2	1	6			
37	D10305		2	1	2	1	6			
38	D10310		2	1	2	2	7			
39	D10320		2	1	2	1	6			
40	D10330		2	1	2	2	7			
41	D10340		2	1	2	1	6			
42	D10360		2	1	2	2	7			
43	D10365		2	1	2	1	6			
44	D10370		2	1	2	2	7			
45	D10380		2	1	2	2	7			

9. What if I don't have access to that box file?

If you do not have access to that box file, contact accounting@csub.edu and state:

- Your name
- Your position title
- The purpose for requesting access to this Box file

We will then process your request and either approve or deny request to this file.

10. What if I need to remove and add signers for the same fund or department?

One form can be submitted to add and remove signers. Complete the information for signers on the Gateway form and select the correct box to add or remove signers on the left of section 2 when prefiling the form.