
DART User's Guide

This document is intended to introduce users to DART.
The DART acronym stands for "Delegation of Authority and Reports To".

The purpose of DART is for users to lookup fiscal authority for each department. "Reports to" information is also included for those instances where an employee is seeking reimbursement and must have their manager's approval. DART is intended to be used by people who process payments and requests for purchases, travel, and transfers. It is for inquiry only. It is not for reporting nor updating DoA data.

The DART application resides in the PeopleSoft CMS environment, which may also be referred to as CS or SA.

This document assumes that the user has access to the Sac State CMS PeopleSoft environment and been granted privileges to view the DART data.

It uses the term "EMPLID", which is a common abbreviation for "Employee ID".

Table of Contents

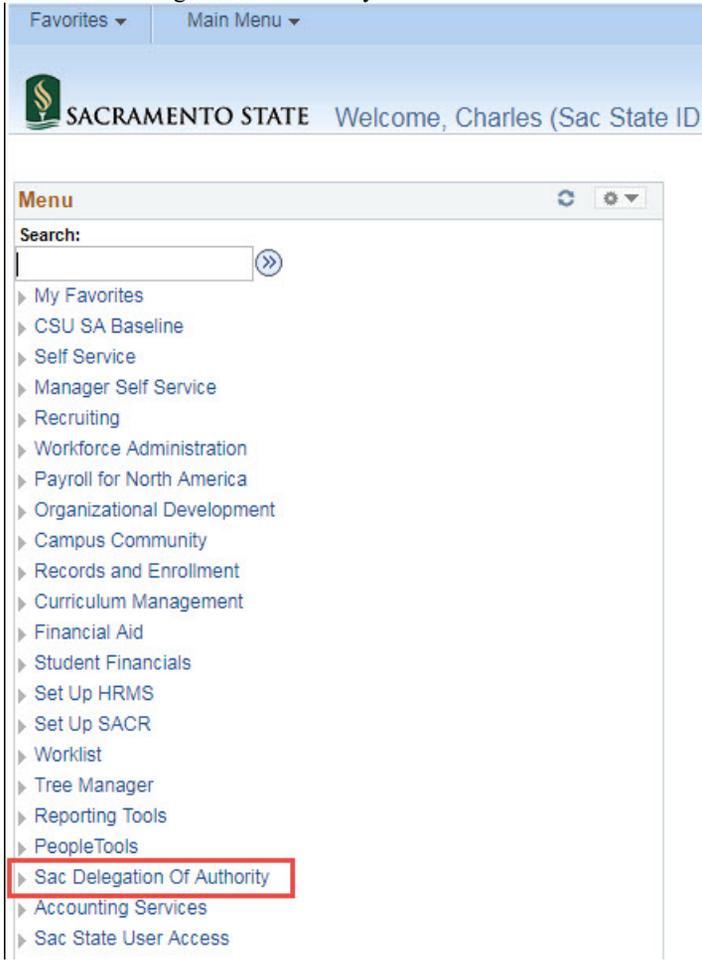
- I. [Access DART](#)
- II. [Delegation Inquiry](#)
 - A. [Enter Criteria](#)
 - B. [Click Search Button](#)
 - C. [Select EMPLID](#)
 - D. [How to Search for an EMPLID](#)
 - E. [Example: Search by Department](#)
- III. [Reports To Inquiry by Employee](#)
 - A. [Steps to Search Reports To Data](#)
 - B. [Example: Search DoA for a Department](#)

Access DART

1. Login to CMS.
Go to your "MySacState" page and select the "CMS Campus Solutions (SA) Access" link:



2. Select "Sac Delegation Of Authority"



3. Select one of two options to view Delegation of Authority:

- a. Delegation Inquiry - This option shows DoA authority for an employee. It only shows employees that have DoA authority.
- b. Report To Inquiry by Employee - This option shows all Sac State employees. It will show some information about the employee and that employee's manager.



Delegation Inquiry

This inquiry screen will allow users to view DoA privileges for an employee. Only employees that have DoA privileges will be displayed in this view.

In its most simple form, the Delegation Inquiry wants an EMPLID from you and it will return all the DoA granted to that employee. However, DART offers multiple options to search for that EMPLID, including a person's name, department, college, program center, division and even what DoA has been granted. So, this User's Guide exists to help you navigate all those options. But remember that these options are just there to help you get an EMPLID, because only an EMPLID drives the Delegation Inquiry.

A. Enter Criteria

The Delegation Inquiry returns all the DoA granted to an employee, as identified by an EMPLID. It offers many options to search for an EMPLID:

Ref.	Description
1	Always specify "SACST" for the SetID to

Delegation Inquiry

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

Find an Existing Value

Search Criteria

SetID: = SACST 1

Employee ID: begins with 2

Division: begins with 3

Program Center: begins with 4

Department ID: begins with 5

Reports To: begins with 6

CARS Request ID: begins with 7

Travel Approval 8

Direct Payment Request 9

Expenditure Transfer Approval 10

Budget Transfer Approval 11

Procurement Card Approval 12

Other Approval 13

Case Sensitive

Search Clear Basic Search Save Search Criteria

	indicate Sac State.
2	Search for an employee identified by EMPLID . Enter an EMPLID here, or the beginning numbers of an EMPLID. Or, you can click on the Search icon for additional functionality. See the " How to Search for an EMPLID " section below for addition information.
3	Search for all employees with DoA in a Division. Enter a Division ID here, or click the Search icon to search for Divisions by ID or Description.
4	Search for all employees with DoA in a Program Center or College. Enter a PC or College ID here, or click the Search icon to search for a Program Center by ID or Description.
5	Search for all employees with DoA in a Department. Enter a Department ID here, or click the Search icon to search for a Department by ID or Description.
6	Search for all employees with DoA that report to a specific person, identified by EMPLID.
7	Search for an employee with DoA that was granted by a specific CARS request .
8	Search for all employees that can approve travel
9	Search for all employees that can approve a direct payment
10	Search for all employees that can approve an expenditure transfer
11	Search for all employees that can approve a budget transfer
12	Search for all employees that can approve a ProCard transaction
13	Search for all employees that can approve other , or reprographics requests

The above search options can be used together to reduce your search results.

For example, use option numbers 4 and 8 to show all employees who can approve travel requests for a specific College.

After you enter some criteria, you can add more search criteria or proceed to click the Search button.

B. Click Search Button

The "Search" button will implement the Search Criteria. Clicking this button will cause DART to display the EMPLIDs that match the Search Criteria in the Search Results section.

You will find the "Search" button between the Search Criteria and the Search Results.

1. To Implement the Search Criteria, click the "Search" button, or Hit the "Enter" key on your keyboard.
2. Note that you can save a search, which you can reuse later.

Search 1 Clear Basic Search Save Search Criteria 2

C. Select EMPLID

After you click on the "Search" button (above), you will be presented with a list of employees that satisfy the above criteria. Click on the employee that you want to see (any field in that row will work), and DART will then present you with all the DoA data for that employee.

In the case where only one EMPLID is returned, DART will take you directly to that employee's DoA. DART will skip this "Select EMPLID" step, and you will not have to select the employee from a list of one employee.

Department 12200 will demonstrate this behavior. If you search for Department 12200, DART will skip this "Select EMPLID" step and go directly to the only employee that has DoA for that Department, which is Curissa Watts. It will display all Departments for which she has DoA.

D. How to Search for an EMPLID

The "Look Up Employee" screen can help users search for an EMPLID to be used in the Delegation Inquiry screen.

Navigate to this screen by clicking on the Search icon  next to the "Employee ID" field in the "Search Criteria" section.

This screen will help find an EMPLID, which will then be returned to the Delegation Inquiry screen to continue your DoA search.

1. Users can search for an EMPLID by a variety of fields:

a. Empl ID

b. Name

This is the employee's full name. The format is "FirstName LastName". *(Note a single space between the first and last names.)*

c. Last Name

For hyphenated names, do not include the hyphen or space.

For example:

Empl ID	Name	Last Name	First Name	Second Name	Alternate Character Name
	Laverne Simmons-Barnett	SIMMONSBARNETT	LAVERNE	(blank)	(blank)

d. First Name

e. Second Name *(ignore this field)*

f. Alternate Character Name *(ignore this field)*

Note that you can enter all or only part of a field value, and you can use a combination of fields.

For example, if you search for Last Name = "Nelsen" and First Name = "R", you will find that we have two "Robert Nelsen"s at Sac State. Neither of which have any DoA.

2. Click the "Look Up" button.

3. DART will refresh the Search Results section with the results of your search.

4. Click on the row (any field in that row will work) that contains the employee that you want.



Look Up Employee

Empl ID: begins with a

Name: begins with b

Last Name: begins with c

First Name: begins with d

Second Name: begins with e

Alternate Character Name: begins with f

Look Up Clear Cancel Basic Lookup

Search Results

Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last

Empl ID	Name	Last Name	First Name	Second Name	Alternate Character Name
	Neale Joy Losito	LOSITO	NEALEJOY	(blank)	(blank)
	Katherine Newman	NEWMAN	KATHERINE	(blank)	(blank)
	Richard Perry	PERRY	RICHARD	(blank)	(blank)
	Paul Besaw	BESAW	PAUL	(blank)	(blank)
	Graydon Garlough	GARLOUGH	GRAYDON	(blank)	(blank)
	Morris Stephens	STEPHENS	MORRIS	(blank)	(blank)
	James Young	YOUNG	JAMES	(blank)	(blank)
	Richard Brown	BROWN	RICHARD	(blank)	(blank)
	Patricia Kearly	KEARLY	PATRICIA	(blank)	(blank)

DART will return you to the Delegation Inquiry screen. The EMPLID that you selected will be populated in the "Employee ID" field. Click the "Search" button, as described in the [Click Search](#) Section.

E. Example: Search by Department

The following example demonstrates searching for all employees who have DoA for one Department:

1. I entered "47900" in the Department ID field.
2. Clicked the "Search" button. See the [Click Search Button](#) section above for more information.
3. DART returned many rows that have DoA for Department 47900. (Only some are in the screen shot below to save space.)
I clicked on the first row for "Ming-Tung Lee".
See the [Select EMPLID](#) section above for more information.

Find an Existing Value

▼ Search Criteria

SetID: = SACST

Employee ID: begins with

Division: begins with

Program Center: begins with

Department ID: begins with 47900

Reports To: begins with

CARS Request ID: begins with

Travel Approval

Direct Payment Request

Expenditure Transfer Approval

Budget Transfer Approval

Procurement Card Approval

Other Approval

Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

View All

SetID	Employee ID	Name	Division	Program Center	Department ID	Description	Reports To	CARS Request ID	Travel Approval	Direct Payment Request
SACST		Ming-Tung Lee	45000	47900	47900	Budget Planning and Admin		(blank)	Y	Y
SACST		Stacy Hayano	45000	47900	47900	Budget Planning and Admin		(blank)	Y	Y

After an EMPLID is selected, the DoA for that EMPLID is displayed.

The DoA for Ming-Tung Lee is displayed in the example screen shot below. The resulting screen is very wide, so only a portion of the entire screen is displayed:

Sac Doa Inquiry

Empl ID: Ming-Tung Lee

Primary Job Department: 45000 Vice President for Admin Division: 45000 D_ADMIN_AND_BUS_AFF

Employee Job Status: Active Program Center: 45000 PC_VP'S_OFFICE_ABA

Working Title: VP Admin ADMIN IV

Reports To Manager Data

Reports To Manager: Nelsen,Robert Steven

Manager's Department: 46700 President's Office

Division	Division Description	Program Center	Description	Department ID	Description	CARS ID	TVL	DPR	ET	BT	PC	OTH
1 45000	Admin and Business Affairs	45000	VP's Office - ABA	45000	Vice President for Admin		✓	✓	✓	✓	✓	✓
2 45000	Admin and Business Affairs	45000	VP's Office - ABA	45003	Cost Allocation		✓	✓	✓	✓	✓	✓
3 45000	Admin and Business Affairs	45000	VP's Office - ABA	45004	VP Admin Reserve		✓	✓	✓	✓	✓	✓

Reports To Inquiry by Employee

This screen allows users to view selected Human Resources (HR) information about an employee or "Person of Interest". All employees are available in this query, even those without DoA.

Some examples of what users can view are:

- Employee name
- Employee ID (EMPLID)
- Employee's status
- Employee's Department, Program Center and Division
- Employee's manager, and the manager's Department

A. Steps to Search Reports To Data

The steps to use this screen are:

1. Complete the Search Criteria:
 - a. SetID should be "SACST"
 - b. Enter the "Empl ID" field if you know some or all of the employee's EMPLID.
 - c. Enter the "Name (LN, FN)" if you know some or all of the employee's name.
Note that the format is "Last Name, First Name". There is **no space after the comma**.
2. Click the "Search" button. See the [Click Search Button](#) section above for more information.
3. DART will refresh the Search Results with the results of your search if your criteria returns multiple EMPLIDs.
4. Click on the row that contains the employee that you want.

The screenshot shows the 'Reports To Inquiry' search interface. At the top, there is a header 'Reports To Inquiry' and a sub-header 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a 'Find an Existing Value' button. The main search area is titled 'Search Criteria' and contains three input fields: 'SetID:' with a dropdown set to '=', a text box containing 'SACST', and a search icon; 'Empl ID:' with a dropdown set to 'begins with', an empty text box, and a search icon; and 'Name (LN, FN):' with a dropdown set to 'begins with', a text box containing 'eyster', and a search icon. A 'Case Sensitive' checkbox is also present. Below the search criteria is a 'Search' button, a 'Clear' button, a 'Basic Search' button with a magnifying glass icon, and a 'Save Search Criteria' button. The 'Search Results' section shows a table with columns 'SetID', 'Empl ID', and 'Name (LN, FN)'. The table contains six rows of results, all with 'SACST' in the SetID column. The first row is highlighted. A 'View All' button, 'First' button, '1-6 of 6' indicator, and 'Last' button are at the top of the results table. Red callout boxes with numbers 1 through 4 point to the search criteria section, the Search button, the search results table, and the first row of results, respectively.

Search Criteria

SetID: = SACST a

Empl ID: begins with b

Name (LN, FN): begins with eyster c

Case Sensitive

Search 2 Clear Basic Search Save Search Criteria

Search Results

SetID	Empl ID	Name (LN, FN)
SACST		Eyster, Todd C
SACST		Eyster, Evan Wynne
SACST		Eyster, Lauren
SACST		Eyster, Alan
SACST		Eyster, Charles V 4
SACST		Eyster, Miranda Leigh

B. Example: Search DoA for a Department

DART will present the "Reports To" data in a screen like this example:

Empl ID [REDACTED] Charles Eyster
Primary Job Department 47900 Budget Planning & Admin
Employee Job Status Active
Working Title Information Technology Consultant
Division 45000 D_ADMIN_AND_BUS_AFF
Program Center 47900 PC_BUDG_PLAN_ADM

Reports To Manager Data

Reports To Manager: [REDACTED] Hayano, Stacy J
Manager's Department: 47900 Budget Planning & Admin

 Return to Search  Previous in List  Next in List

This is an internal site for documentation of ABA technical and business processes. It is maintained by the Sac State Budget Planning and Administration Office. Direct any questions or issues to charles.eyster@csus.edu

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