

The DOA 360 Import Template is to be used for requesting large changes in DOA – adding, changing, or removing. Each Template can be for ONE BUSINESS UNIT ONLY, but can be for multiple people, DeptIDs, Funds, and approval levels. A CARS request may still be entered in OnBase for DOA, but if requesting numerous changes (one person adding DOA over numerous DeptIDs, or adding/changing DOA for numerous individuals) please feel free to use this form instead of the DOA tool in OnBase.

Any questions about the form or process should be directed to the Office of the Vice President for Administration at [vp-cfo@csus.edu](mailto:vp-cfo@csus.edu).

## FORMATTING

This form is uploaded into the DOA 360 system and as such formatting is key. The file cannot contain any spaces in any cells of the Excel spreadsheet. Even one space will make the file error out, requiring review, reformatting, and resubmission. When filling in numbers, dates, or other data, please ensure that there are no spaces before the data, in the data, or after the data, within a cell.

There is more information below regarding the formatting of names.

## TABS

1. **DOA Assignment Template:** This is the page of information that you are submitting for processing
2. **BU Limits Instructions:** This page outlines the levels of approval, their approval amounts, and the Titles/Roles these limits are associated with.
3. **DOA Assignment Sample & Info:** An example of what the “DOA Assignment Template” looks like when completed
4. **Assignment Values & Notes:** Information on items required in “DOA Assignment Template,” including CFS Roles and DOA Roles, Chartfield information, Function IDs, etc.

## “DOA Assignment Template” Columns

1. **BUSINESS UNIT\*:** Required Field. Each Template submitted can only be for ONE Business Unit. Multiple Business units require multiple Templates submitted. Sacramento State Business Units are:
  - a. SAFDN: Foundation (UFSS)
  - b. SACPR: CapRadio

- c. SACST: Sacramento State
- 2. **CHARTFIELD\***: Required Field. This is the DOA Determination field. DOA can be provisioned by Department (DeptID), Fund, or Project Code
- 3. **CF\_VALUE\***: Required Field. This is where the "CHARTFIELD" code gets listed. The submitter will list the DeptIDs, Fund Codes, or Project Codes for DOA
- 4. **FUNCTION ID\***: Required Field. The codes for functions IDs are listed on the Assignment Values & Notes tab and include items such as JGS (Jaggaer,P2P), TR (Travel Request), or TE (Travel Expense)
- 5. **APPROVAL LEVEL\***: Required Field. Indicate the dollar threshold of the approval level as indicated on "BU Limits Instructions" tab
- 6. **APPROVAL ORDER**: NOT CURRENTLY IN USE. This will be for Concur (TR, TE) only. Options are Primary (first), Secondary (second), and Tertiary (third). These are the order of approvals. Please note – Only Primary is needed if submitting this data. Any additional approval levels will be obligated to approve every Concur (TR, TE) associated with the indicated CHARTFIELD+ CF\_VALUE
- 7. **EMPLID\***: Required Field. This is the Sac State ID of the individual being given DOA. Note: Sac State EmplID, **not** CHRS #.
- 8. **EFFECTIVE DATE\***: Date this DOA should be/have been in place. This date can be in the past
- 9. **EFFECTIVE STATUS\***: Required Field. Status is either Active or Inactive. This indicates whether the DOA request is to ADD DOA or REMOVE DOA.
- 10. **APPROVER NAME**: This is the name of the individual being given DOA. As this form is uploaded into the system, there are very restrictive rules regarding formatting.
  - a. Names must be entirely devoid of spaces. Samples
  - b. Eddie Munson: Munson,Eddie
  - c. Jane Hopper-Wheeler: Hopper-Wheeler,Jane
  - d. Mad Max Mayfield: Mayfield,MadMax
- 11. **COMMENTS**: Notes to the person entering the DOA. Please include the name of the/a person in your area who has the authority to approve DOA. To Determine who, in your area, can grant DOA run SA\_DOA360\_APPROVER\_INQUIRY\_PUB in CFS