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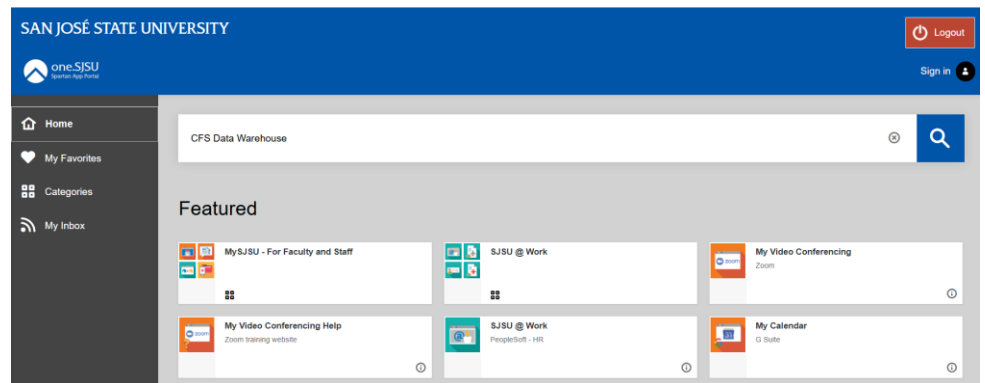
Overview

This guide provides basic instructions on how to set-up and run a **Delegation of Authority – Concur** report. This report is used to look up employees who have been granted authority to approve expenses in the SAP Concur system, based on department ID and approval order.

Step 1: Log into CFS Data Warehouse

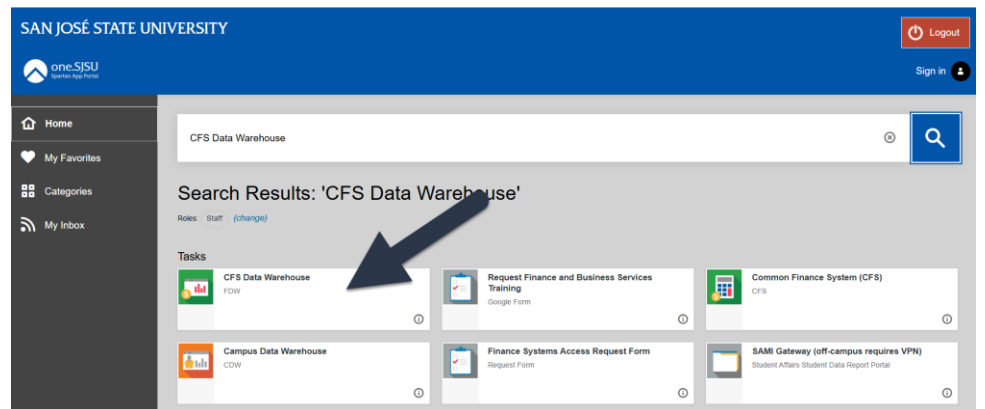
CFS Data Warehouse is the reporting system used by departments to extract financial data. New users can request access to Finance Data Warehouse by [completing training](#) and submitting a Finance System Access Request form (located on the [Security Forms](#) web page).

1. Go to [one.SJSU.edu](https://one.sjsu.edu) and search for “CFS Data Warehouse”

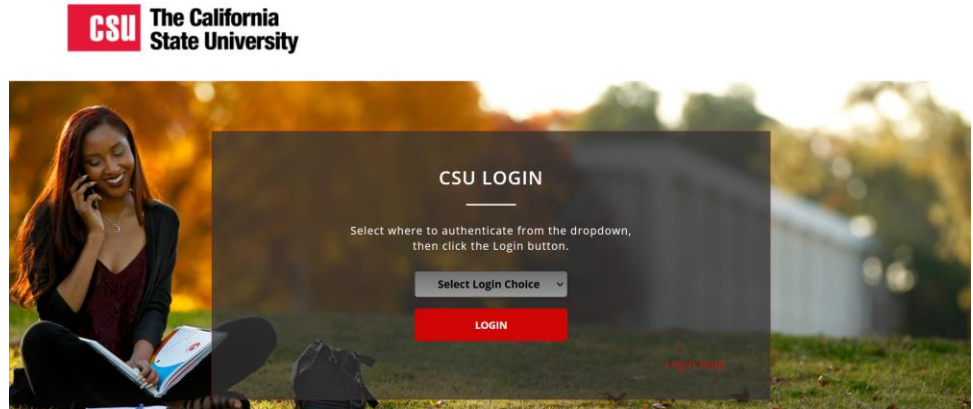


2. Click on the tile named “CFS Data Warehouse to login.

You can also sign in and save this as a favorite tile by clicking on the heart icon.

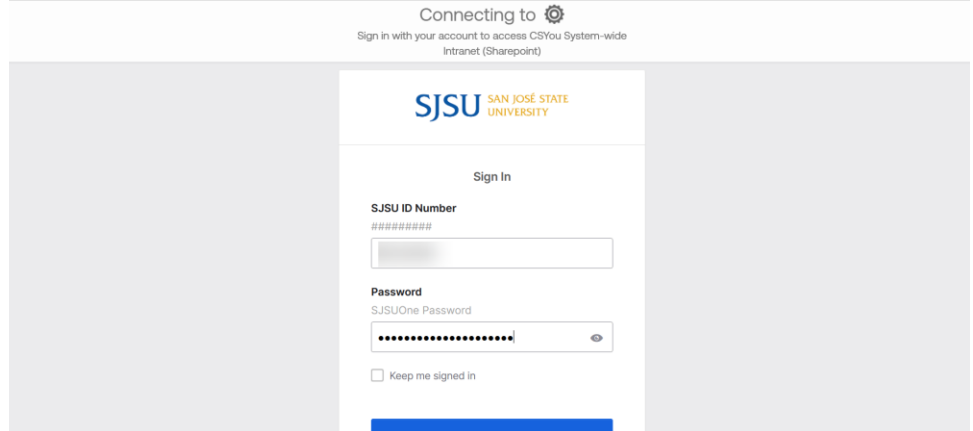


3. If you encounter the CSU Login page, click on the drop down menu and select "San Jose".

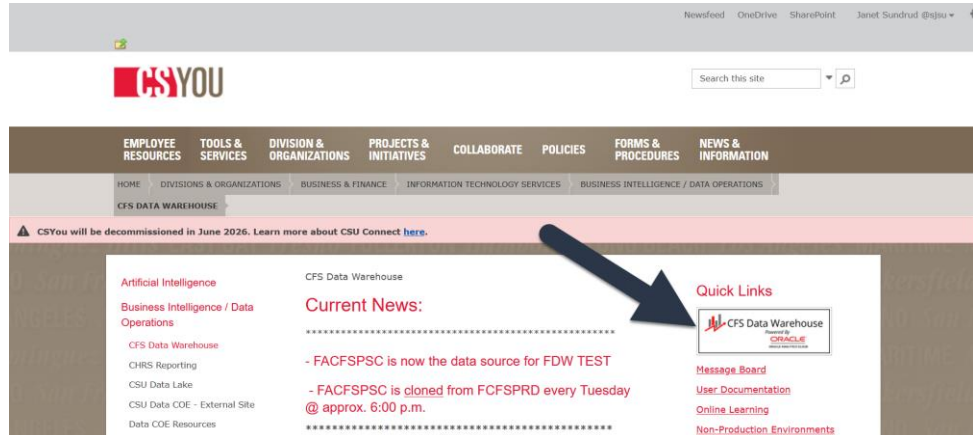


4. If you encounter the Single Sign On page, enter your SJSU login credentials. Click on "Sign In".

You will be prompted to authenticate with the DUO mobile app or fob.



5. Click on the CFS Data Warehouse button.



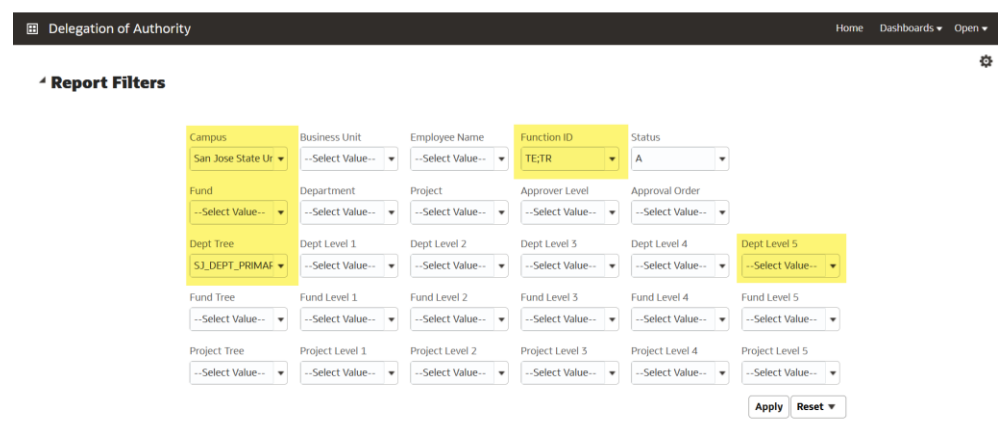
Step 2: Dashboard Set-Up

1. On the CFS Data Warehouse landing page, select the Delegation of Authority module.



2. Update the Report Filters

- **Campus:** San Jose State University
- **Function ID:** TE and TR
- **Fund:** Remove the "X"
- **Dept Tree:** SJ_DEPT_PRIMARY
- **Dept Level 5:** Search for your Dept ID using format N0000.



3. Update the Report Columns:

- **Column 2:** Dept Fdescr
- **Column 3:** Function ID
- **Column 4:** Approval Order
- **Column 5:** Hide
- **Column 6:** Hide



Step 3: Save Customizations

After applying the filters and choosing column header labels and report view, you can save your customized report for future use. The customizations are specific to the report where it was created and saved.

1. Click on the gear symbol near the top of the website.



2. Select “Save Current Customization”.

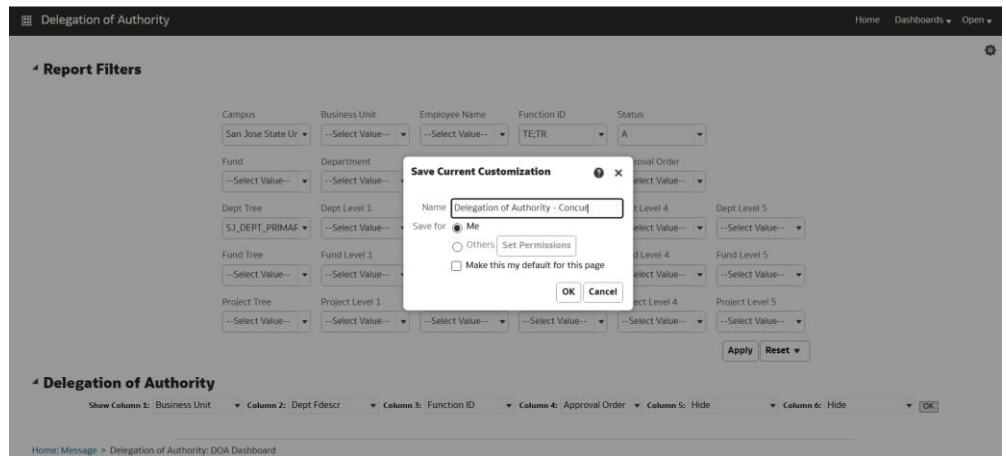


3. Name your Report.

Example: Delegation of Authority Concur.

4. [Optional] You can select “Make this my default for this page” if you want the report to load automatically.

5. Click “OK”.



Step 4: Results

For the Delegation of Authority Report, there are seven columns:

1. Business Unit: For SJSU, this will be SJ000.
2. Dept Fdescr: Identifies the department ID and name.
3. Function ID: For Concur, this will be "TE" (Concur Expense) and "TR" (Concur Request).
4. Approver Order: Identifies the order of approvals [1-3]. There can be a maximum of three approvers for each Function ID and Dept ID combination.
5. Employee Name: Identifies the employee who is granted delegation of authority to approve requests and expenses in Concur.
6. Approver Amount: This field can be ignored for Concur.
7. Effective Date: The date that this delegation became active.

Delegation of Authority

Show Column 1: Business Unit Column 2: Dept Fdescr Column 3: Function ID Column 4: Approval Order Column 5: Hide Column 6: Hide

Business Unit	Dept Fdescr	Function ID	Approval Order	Employee Name	Approver Amount	Effective Date
SJ000 - San Jose State University	1001 - Physical & Cap Plan & RE Dev	TE	1		\$5,000,000.00	04/06/2026
		TR	1		\$5,000,000.00	04/06/2026
	1002 - Strategic Plan, Portfolio Mgt	TE	1		\$5,000,000.00	04/06/2026
		TR	1		\$500,000.00	04/06/2026
	1003 - Aspire-McNair	TE	1		\$500,000.00	04/06/2026
		TR	1		\$500,000.00	04/06/2026
	1004 - Business & Admin Services	TE	1		\$500,000.00	04/06/2026
			1		\$500,000.00	04/06/2026
		TR	2		\$5,000,000.00	04/06/2026
	1005 - Contracts	TE	1		\$500,000.00	04/06/2026

[Home: Message](#) > Delegation of Authority: DOA Dashboard

Additional Information

The employee's direct supervisor must approve the request ahead of the DOA financial approvers. Every department should have between one and three employees in their DOA approval structure. Each request will route for signatures in this order: Primary > Secondary > Tertiary. If an employee does not take action within 10 days, the request will escalate to the next approver.

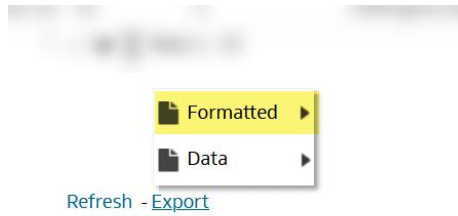
Step 5: Print/Export

Users can print to PDF or export to Excel by clicking the links found at bottom of page.

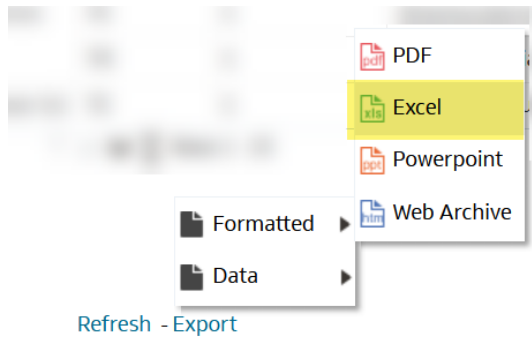
1. Click on "Export".



2. Select "Formatted".



3. Select "Excel."



4. Retrieve and open your downloaded report.

Business Unit	Dept Fdescr	Function ID	Approval Order	Employee Name	Approver Amount	Effective Date	
S1000 - San Jose State University	1001 - Physical & Cap Plan & RE Dev	TE	1		\$5,000,000.00	04/06/2026	
		TR	1		\$5,000,000.00	04/06/2026	
	1002 - Strategic Plan, Portfolio Mgt	TE	1		\$5,000,000.00	04/06/2026	
		TR	1		\$500,000.00	04/06/2026	
	1003 - Aspire-McNair	TE	1		\$500,000.00	04/06/2026	
		TR	1		\$500,000.00	04/06/2026	
	1004 - Business & Admin Services	TE	1		\$500,000.00	04/06/2026	
		TR	1		\$500,000.00	04/06/2026	
				2		\$5,000,000.00	04/06/2026
	1005 - Contracts	TE	1		\$500,000.00	04/06/2026	
		TR	1		\$500,000.00	04/06/2026	
	1006 - Civil Engineering	TE	1		\$100,000.00	04/06/2026	
		TR	1		\$100,000.00	04/06/2026	
				2		\$500,000.00	04/06/2026
	1007 - Occupational Therapy	TE	1		\$100,000.00	04/06/2026	
		TR	1		\$100,000.00	04/06/2026	
				2		\$500,000.00	04/06/2026
	1009 - IT Prog Mgt&Ops Excellence	TE	1		\$500,000.00	04/06/2026	
		TR	1		\$500,000.00	04/06/2026	
	1010 - Technology	TE	1		\$100,000.00	04/06/2026	

Contact

If there are any questions regarding Finance Data Warehouse, please contact Finance Support and Innovation at financeconnect@sjsu.edu or 408-924-1558.