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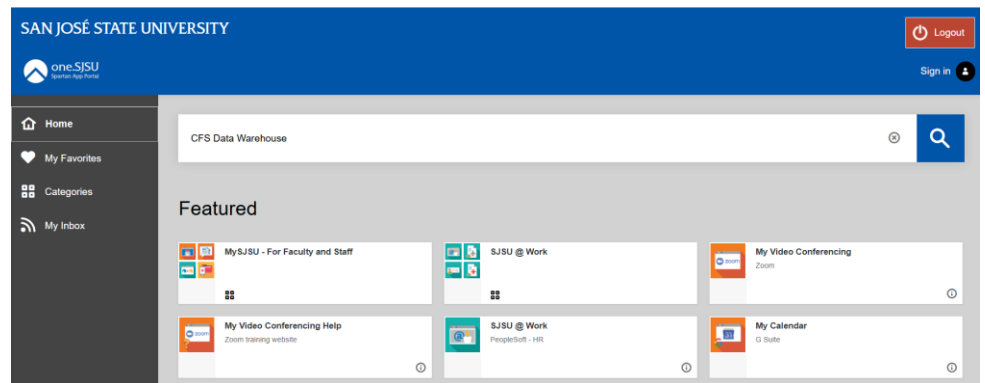
Overview

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

Step 1: Log into CFS Data Warehouse

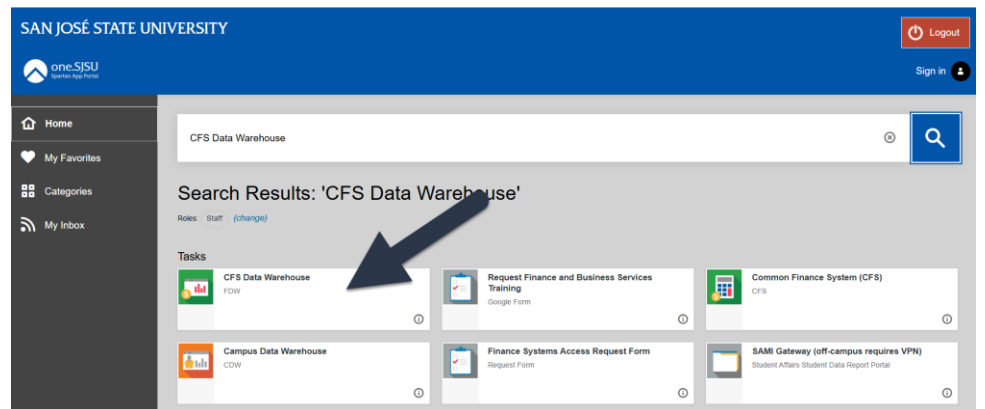
CFS Data Warehouse is the reporting system used by departments to extract financial data. New users can request access to Finance Data Warehouse by [completing training](#) and submitting a Finance System Access Request form (located on the [Security Forms](#) web page).

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

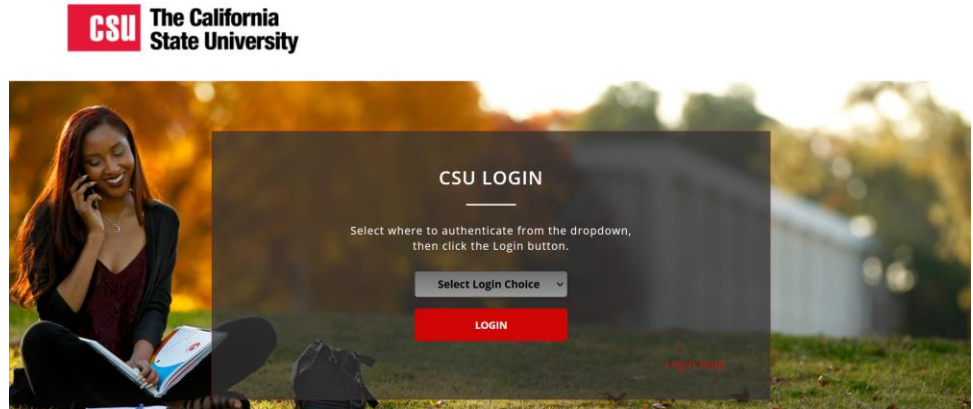


2. Click on the tile named “CFS Data Warehouse to login.

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

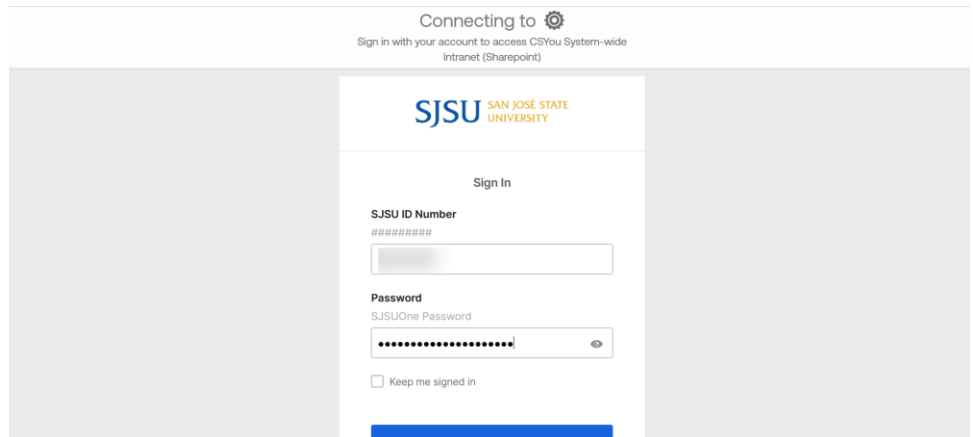


3. If you encounter the CSU Login page, click on the drop down menu and select "San Jose".

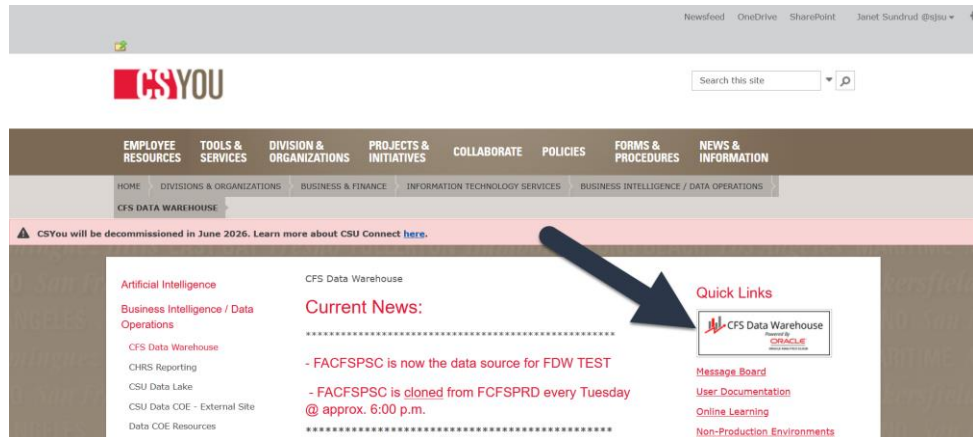


4. If you encounter the Single Sign On page, enter your SJSU login credentials. Click on "Sign In".

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



5. Click on the CFS Data Warehouse button.



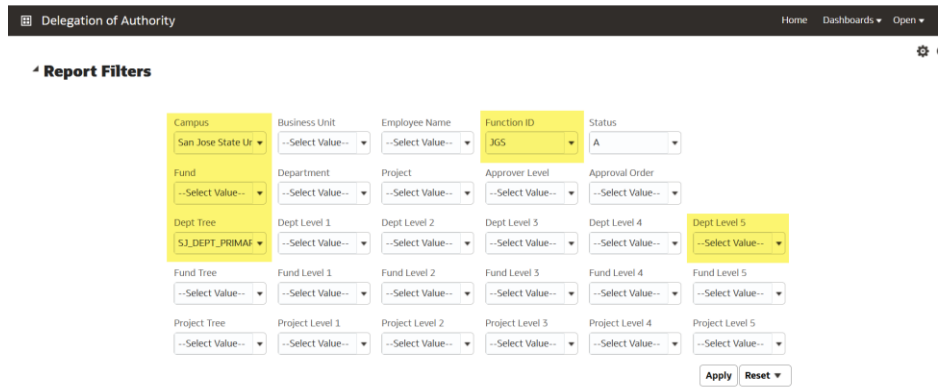
Step 2: Dashboard Set-Up

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



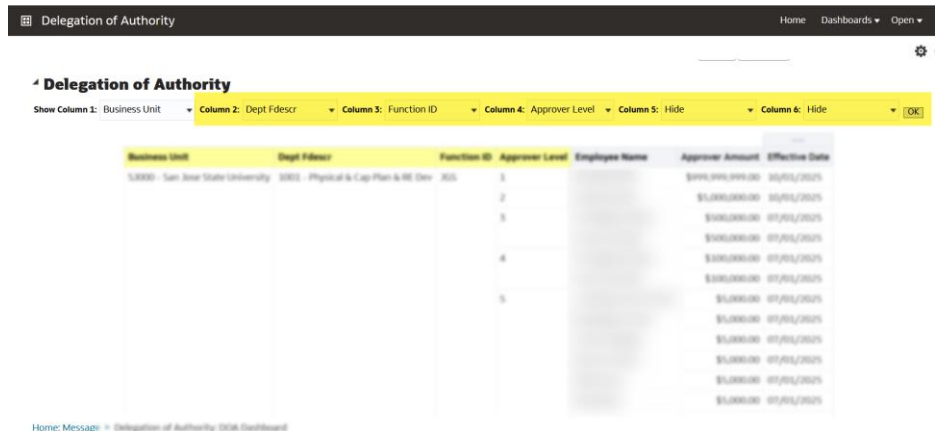
2. Update the Report Filters

- **Campus:** San Jose State University
- **Function ID:** JGS
- **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:** Approver Level
- **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”.

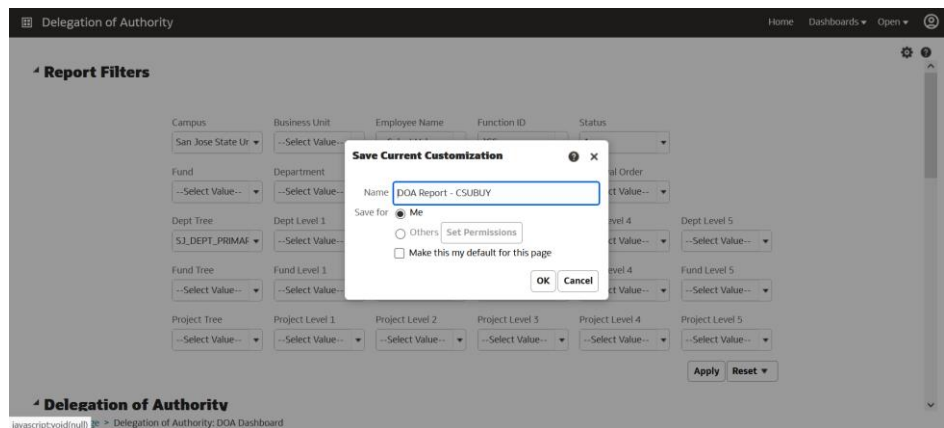


3. Name your Report.

Example: Delegation of Authority CSUBUY.

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 CSUBUY, this will be "JGS".
4. Approver Level: Identifies Levels 1-5. Each level has a different Approver Amount. Please see the [CSU DOA Standard](#) for more information.
5. Employee Name: Identifies the employee who is granted delegation of authority to approve purchases in CSUBUY.
6. Approver Amount: The highest dollar threshold the employee is authorized to approve.
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: Approver Level Column 5: Hide Column 6: Hide

Business Unit	Dept Fdescr	Function ID	Approver Level	Employee Name	Approver Amount	Effective Date
SJ000 - San Jose State University	1001 - Physical & Cap Plan & RE Dev	JGS	1		\$999,999,999.00	10/01/2025
			2		\$5,000,000.00	10/01/2025
			3		\$500,000.00	07/01/2025
					\$500,000.00	07/01/2025
			4		\$100,000.00	07/01/2025
					\$100,000.00	07/01/2025
			5		\$5,000.00	07/01/2025
		\$5,000.00	07/01/2025			
				\$5,000.00	07/01/2025	

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

Additional Information

Every department should have at least one employee in each level [1-5]. However, if more than one employee is listed in a particular level and a purchasing request comes through for that dollar threshold, all employee in that level will receive a notification prompting them to take action. Only one employee will be able to approve it.

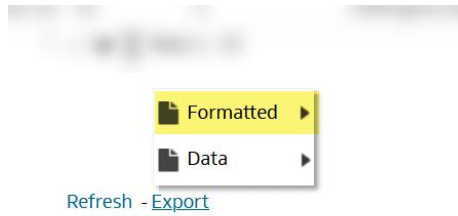
Step 5: Print/Export

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

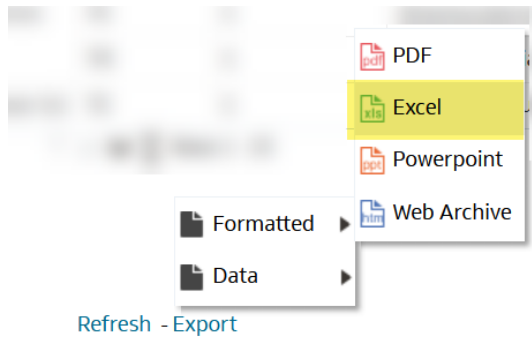
1. Click on "Export".



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.