

# **CSUBUY Procure to Pay (P2P)**

# Agenda

- Project Overview
- Delegation of Authority
- Supplier Onboarding & System Flow
- Key Dates & Next Steps
- Q&A

# CSU Implementation

## CSUBUY P2P: Live vs. Future Campuses

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Live Campuses	
Fresno	Chancellor's Office
Chico	Humboldt
Bakersfield	San Marcos
San Luis Obispo	Sonoma

Future Campuses	
San Jose	Sacramento
San Francisco	Dominguez Hills
Monterey Bay	San Bernadino
Stanislaus	Pomona
Maritime Academy	Northridge
Channel Islands	Fullerton
East Bay	Long Beach
Los Angeles	San Diego

# Project Team

## **Campus Authorizing Sponsor**

VP of Administration & Finance/CFO Myeshia Armstrong

## **Campus Sponsor**

Charita Hill-Avent, AVP of Financial Services

## **Campus Project Lead**

Chris Lam-Vazquez, Director of Procurement

## **Project Manager**

Michelle Young

## **Change Management**

Veronica Salvador

## **Procurement and Supplier Management Functional Lead**

Chris Lam-Vazquez

## **Accounts Payable Functional Lead**

Lana Lewis

## **General Accounting Functional Lead**

Josephine Capiral

## **CFS Lead**

Miyesha Dickerson

## **DOA**

Nicole Yu

**Strategic Advisor:** Carrie Schmidt, Sonoma/CO

# What is CSUBUY Procure To Pay (P2P)

- CSUBUY P2P is a platform for the procurement and payment of all goods and services except travel and reimbursements to employees and students
- CSUBUY P2P is a comprehensive procurement platform designed to optimize the entire procure-to-pay process, ensuring seamless and efficient transactions from sourcing to payment within the CSU system
- Expected campus go-live: End of January 2026

# CSUBUY P2P Objective

- Implement an intuitive and easy to use solution to reduce manual work
- Create visibility to preferred and sustainable suppliers and guide end users to contracted suppliers
- Improve compliance, transparency and efficiency

# Key Benefits to Campus

- Faster, simpler purchasing and payment workflows
- Fewer errors, more transparency, and real-time tracking
- Improved compliance and CSU-wide alignment
- Cleaner supplier data and easier audit readiness



# Key Changes to Expect

- New, standardized workflows for requisitions, POs, and vouchers
- Supplier onboarding through a centralized CSU portal
- Supplier invoices submission
- Ensuring transparency throughout the entire P2P process
- New standardized DOA approval workflows and matrix



# Delegation of Authority (DOA)

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## What is DOA?

Provides permission to review and approve transactions, or authorize the expenditure of monies based on levels by job titles per campus

## Why do we need DOA?

Current approval structures varies by campuses within the CSU. With the implementation of Procure to Pay, a formalized structure will ensure consistently across the campuses

## Who decides the formalized structure?

Finance Business Rules Committee (FBRC) was formed by the Chancellor's Office and consists of members from 8 campuses\*. This body designed the approval matrix for all campuses to use

### **\*Finance Business Rules Committee (FBRC):**

Bakersfield, Chancellor's Office, Chico, Fresno, Humboldt, San Luis Obispo, San Marcos, Sonoma

# CSU: Formalized Approval Matrix

Current DOA Process::

Defined by Finance Business Rules Committee

## Current State:

Example:

CALIFORNIA STATE  
UNIVERSITY  
EAST BAY

Trust Fund Description

Department Name

Dept ID

Trust Fund Type:  
(select one)  
☐ Unrestricted  
☒ Restricted  
☐ Scholarship

Request Type:  
☐ New  
☒ Update

Purpose

Source of Revenue

Allowable Expenses

Disposition Upon Termination

University Trust Fund Agreement

Trust Fund Accounting Use Only

CSU Fund Number

Trust Fund Number

Trust Fund Title

Support the needs of the College Link Program per the donor agreement.

Donor restricted gifts and distributions designated for the College Link Program.

Any expense in support of the College Link Program.

Balances will be transferred to the Donor Restricted Student Affairs fund, D0081.

## New DOA Structure:

Level	Campus Role	Job Title	\$ Financial Approval Threshold
1	Individual with oversight of campus and auxiliaries	President and Chief Financial Officer (with presidential approval as designee)	Established by Individual Campuses <div></div> Cabinet Review and Approval
2	Individuals with oversight of divisions or auxiliaries	Provost, Vice Presidents, Executive Directors or CFO's Designee	
3	Individuals with oversight of sub-divisions or colleges	Deans, Associate Vice presidents, College Resource officers, Vice Provost	
4	Individuals with delegated authority to spend from and manage approved budgets	Department Chair/Head, MPP (Admin I & II)	
5	Individuals who process, monitor, and execute expenditures transaction on behalf of higher authority	Non-MPP, Fiscal Analysts or Admin Support personnel - individuals who process, monitor, and executive expenditures transactions on behalf of higher authority levels	

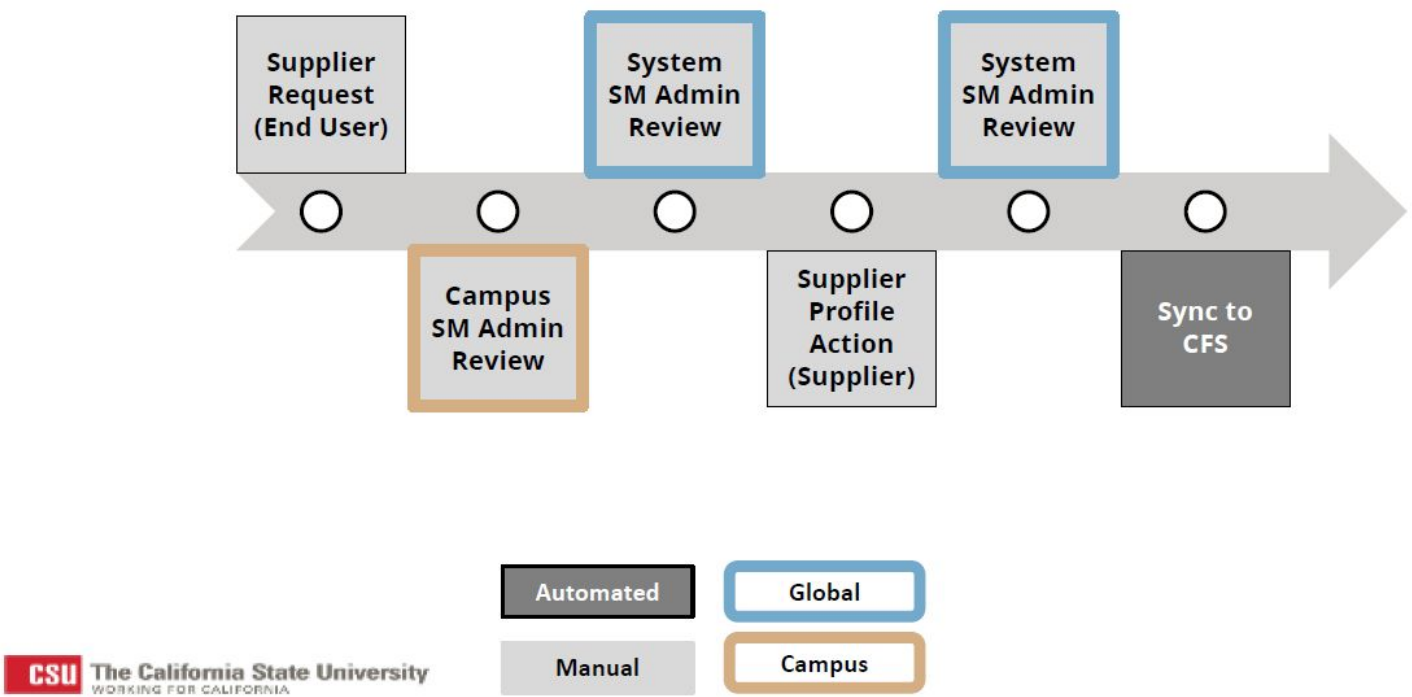
# CSUEB DOA Approval Threshold

Level	Roles/Title	Threshold
1	President and Chief Financial Officer (with presidential approval as designee)	\$999,999,999
2	Provost, Vice Presidents, Executive Directors or CFO's Designee	\$1,000,000
3	Deans, Associate Vice presidents, College Resource officers, Vice Provost	\$75,000
4	Department Chair/Head, MPP (Admin I & II)	\$20,000
5	Non-MPP, Fiscal Analysts or Admin Support personnel - individuals who process, monitor, and executive expenditures transactions on behalf of higher authority levels	Up to \$5,000

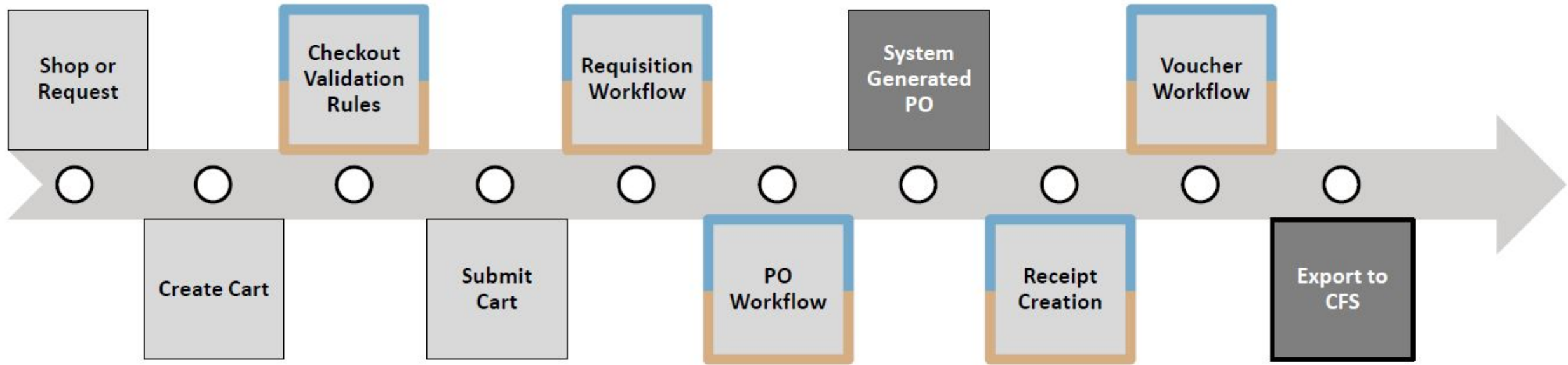
# **Supplier Onboarding & System Flow**

# Supplier Onboarding

## CSUBUY P2P: High Level Supplier Mgmt Overview



# CSUBUY P2P: High Level P2P Overview



Automated

Global

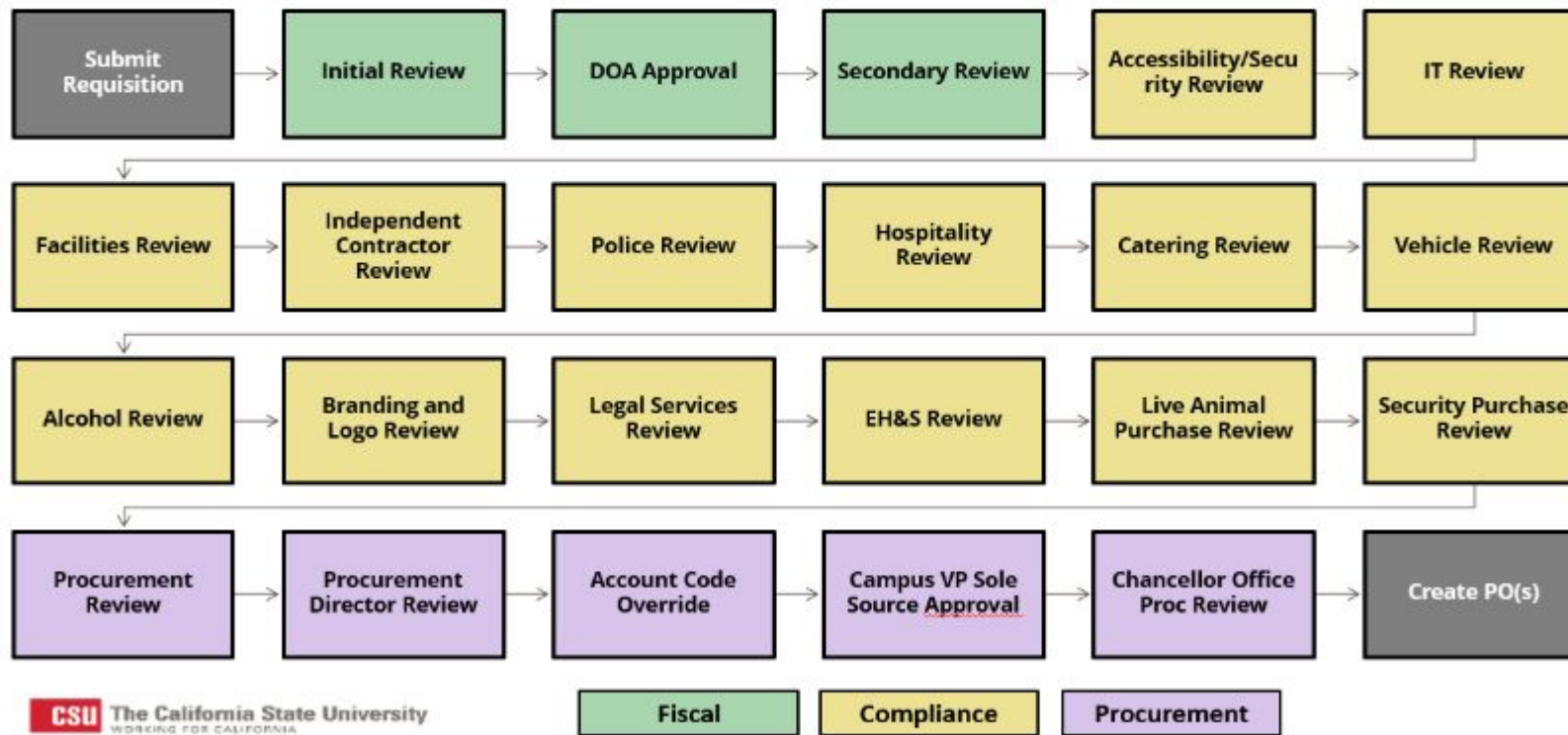
Manual

Campus



# CSUBUY P2P Workflow

## CSUBUY P2P: Requisition Workflow Steps are Grouped



## **Key Dates & Next Steps**

# Key Dates & Next Steps

- **Official Project Kickoff – February 24, 2025**

This date marked the formal start of the CSU-wide implementation effort. Planning, system configuration, and campus coordination activities are now underway

- **Demos, Training - July - November 2025**

- **CO demos:** Open to the campus community

Suppliers, Shoppers / Requesters, Workflow & Approver, Change Orders and Carts & Searches, Vouchers (Invoice) & Receiving, Open Town Halls

- Campus specific training by campus trainers

- **User Acceptance Testing (UAT) – September 2025**

Campus representatives will test the system using real-world purchasing scenarios to ensure functionality, accuracy, and readiness

- **End User Training – Mid January 2026**

All employees who will interact with the CSUBUY P2P system will receive guided training to ensure confidence and competence ahead of launch

- **Go-Live – End of January 2026**

The system becomes the official platform for procurement and payment processing

# Resources

- **FYI Recording & Slides**

Will be posted to CSUEB P2P Website

- **CSUEB P2P Website**

<https://www.csueastbay.edu/procurement/purchasing/p2p.html>

- **CO Demos**

- **Suppliers** – July 29, 2025 | 2:00 – 3:00 PM  
Zoom link: <https://calstate.zoom.us/j/82268606161>
- **Shoppers / Requesters** – August 4, 2025 | 10:00 – 11:00 AM  
Zoom link: <https://calstate.zoom.us/j/89000079348>
- **Workflow & Approver** – September 22, 2025 | 1:00 – 2:00 PM  
Zoom link: <https://calstate.zoom.us/j/84097021264>
- **Change Orders and Carts & Searches** – October 1, 2025 | 1:00 – 2:00 PM  
Zoom link: <https://calstate.zoom.us/j/89216700078?pwd=swPRrjPf7NfoAeAjn45pZsGlnXZiti.1>
- **Vouchers & Receiving** – October 8, 2025 | 1:00 – 2:00 PM  
Zoom link: <https://calstate.zoom.us/j/81644973009>
- **Open Town Halls** – November 3, 2025 | 1:00 – 2:00 PM  
Zoom link: <https://calstate.zoom.us/j/85778941866>

## Q&A

**THANK YOU**

