CSUBUY, Procure to Pay (P2P)
End User Training

Agenda

Module 1- Introduction

Module 2- Basic Navigation

Module 3- Supplier

Module 4- Punchout Catalogs

Module 5- Form Requests

Module 6- Detailed Functionality

Module 7- Purchase Orders

Module 8- Receiving

Module 9 - Payment (Voucher)

Module 1- Introduction

- What is CSUBuy P2P?

- P2P vs. CFS

- Integration

- Roles and Permissions

What is CSUBUY?

CSUBUY is the implementation of strategic, standardized procurement processes that allows for the elimination of manual touchpoints and steps resulting in efficiencies through automation, risk mitigation and cost savings for the California State University

CSU The California State University

CSUBUY
A COLLABORATIVE PROCURE TO PAY MARKETPLACE

CSUBUY Procure-to-Pay

WHAT TO DO WHERE?

REQUISITIONS & POs
Requisitions & PO related activities including requesting, PO dispatch, and Change Orders

RECEIVING
Confirm goods have been received

PO INVOICES
Match, review and approval of invoices submitted by suppliers for voucher creation.

PO MANAGEMENT
Change Order processing, PO closures

SUPPLIER RECORD
Students & Employees: Originate and are updated **in CFS**
All Other Suppliers: Originate and are updated **in CSUBUY**
Withholding: All withholding settings **in CFS**

BUDGET CHECKING & POSTING
Purchase Orders (record Enc.), PO Invoices (reverse Enc.) & Invoice Posting

PAYMENT PROCESSING
Issuing/corrections/posting of checks, ACH, EFT and Wires

CLAIMS
Claim Process
(CSUBUY Invoice override available)

1099
1099 Processing
(CSUBUY Invoice override available)

STUDENT & EMPLOYEE PAYMENT REQUEST
Reimbursements & payments for students and employees

CSUBUY

CFS

P2P- Roles and Permissions

- **Shopper**- Ability to create shopping carts and assign to a requestor to submit into workflow.

- **Requestor**- Ability to query, create and submit requisitions.

- **Approver**- Ability to review and approve requisitions (Compliance Review) Examples: HR, IT, Fleet, EH&S….etc

- **DOA Approver**- Ability to review and approve requisitions (Financial Review)

Who Uses CSUBUY?

- Overview of the user groups that use CSUBUY for purchasing.

Shoppers	Requestors	Approvers	Procurement	Accounts Payable
Shop and Create Carts	Shop, Create, and Submit Carts	Review and Approve Requisitions	Review and Approve Requisitions	Create Payment for Purchases
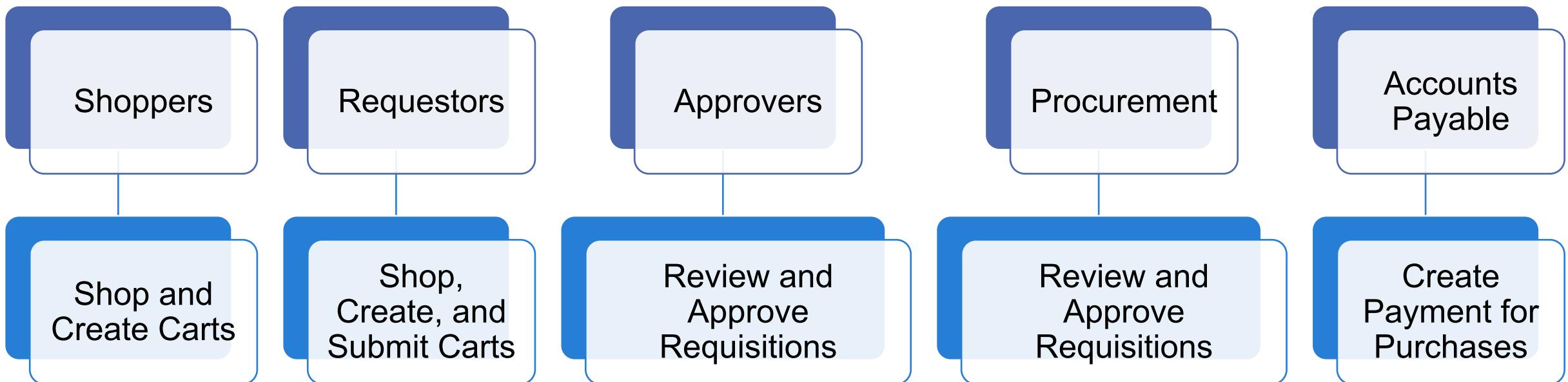
Q&A

Module 2- Basic Navigation

- Profile Settings

- Bill To/Ship To Set Up

- Notifications

- Default Settings

CSUBUY P2P Login –Need to update once P2P link is posted on Financial Services Home page and Procurement homepage

Shopping Home Page

- Shopping Cart and Total
- Heart – Bookmarks
- Flag- Action Items
- Bell- Notification
- Person- Profile

How to Access Profile Settings

You will need to go and make sure your Profile is updated

Update Default Address- Ship to and Bill to

Shopping Home Page

Shop • Shopping Home Page
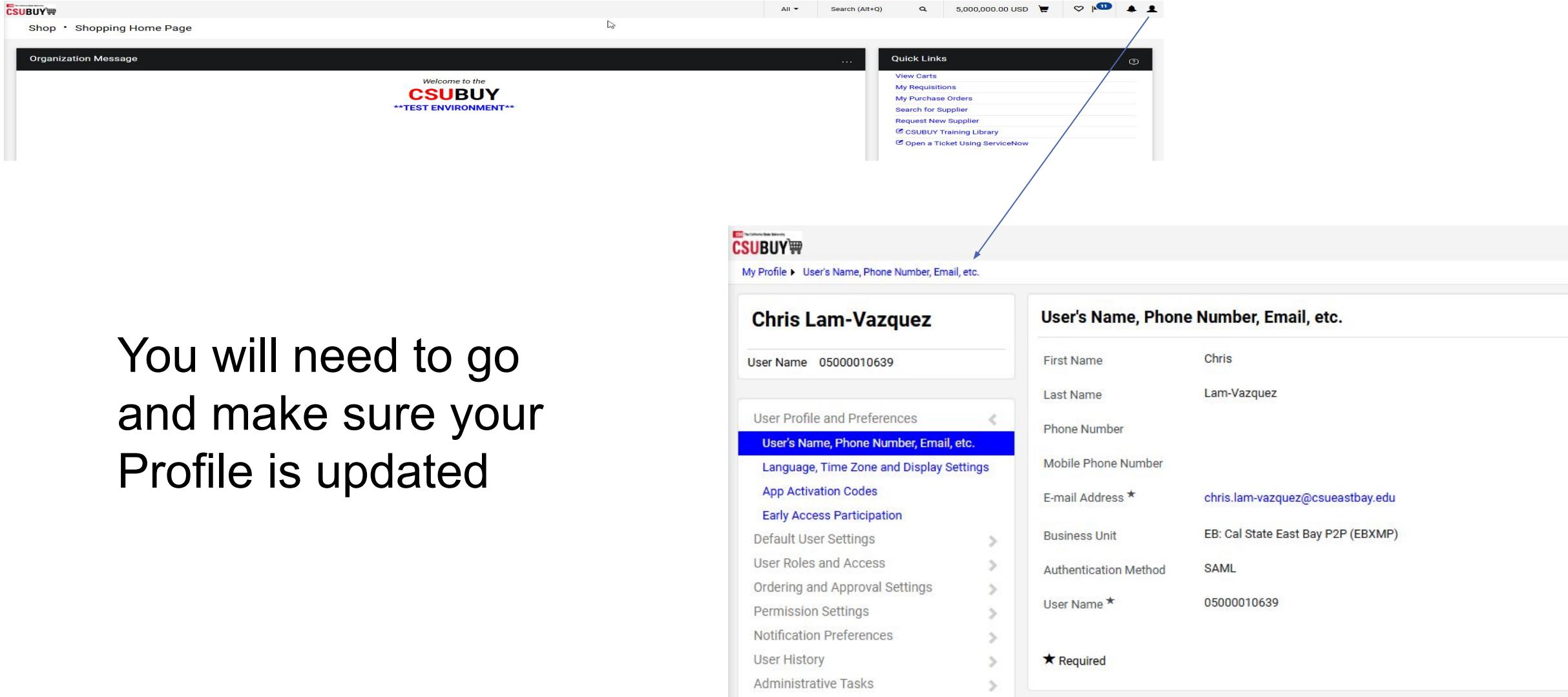
Organization Message

Welcome to the

CSUBUY

TEST ENVIRONMENT

Quick Links

View Carts
My Requisitions
My Purchase Orders
Search for Supplier
Request New Supplier
CSUBUY Training Library
Open a Ticket Using ServiceNow

❖ Quick Links
❖ Fly out Menu

Shop

Go to: Favorites   Browse: Suppliers | Categories | Contracts

Simple   Advanced

Search for products, suppliers, forms, part number, etc.

My Approvals

Showing Results **1 - 5** of 11   5 Per Page ▾   ① 2 3 →

TYPE	DETAILS	FOLDER NAME	DAYS IN FOLDER ↑
Requisitions	Number: 4345447 Name: 2025-08-25 05000010639 01	East Bay - Commodity - Bhavesh Patel	1
Requisitions	Number: 4345873	East Bay - Commodity - Chris Lam-Vazquez	1

Orders Search

All Orders ▾   Document Numbers, Supplier, Product Information

SHORTCUTS

My Requisitions

My Purchase Orders

My Vouchers

Sidebar menu: Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Sourcing, Reporting, Menu Search

Set Up Your Notification Preferences

• Notifications Preferences

Notification Preferences:
Shopping, Carts & Requisitions

Prepared By - Cart Assigned Notice ❓	None
Prepared By - PR line item(s) rejected ❓	None
Prepared By - PR rejected/returned ❓	None
Cart Assigned Notice ❓	None
Receive PR and PO notifications for Carts Assigned to Me ❓	None
Assigned Cart Processed Notification ❓	None
Assigned Cart Deleted Notification ❓	None

Notifications are globally defaulted and can be modified by the user.

❖ Notifications are individual

❖ You can customize options

❖ Turning on/off Email or Notifications per type

Note: Shop Fly Out—Browse By Suppliers will give you only CSUEB approved suppliers ready for shopping.

Home

Shop

Orders —

Contracts

Accounts Payable

Suppliers

Sourcing

Reporting

Menu Search

CSUBUY

Orders ▸ Search ▸ All Orders

All ▾   Search (Alt+Q)   🔍   5,000,000.00 USD 🛒   ♡

☰ Search All Orders

🖫 Save As ▾   📌 Pin Filters ▾   ⬆ Export All

Orders   Quick search   🔍

Search

My Orders

Approvals

All Orders

Requisitions

Purchase Orders

Change Requests

Procurement Requests

Vouchers

Receipts

te: Last 90 days ▾   Quick search   🔍 ⑦   Add Filter ▾   Clear All Filters

1-20 of 73 Results   ⚙ 20 Per Page ▾

	Type	Order Status	Order Owners	Created Date/Time ⬤	Completed Date ▾	Supplier	Total Amount ▾
	Purchase Order	Pending	Bhavesh Patel	8/27/2025 2:24:42 PM		Acme Corporation ⓘ	298.44 USD
	Purchase Order	Complete	Chris Lam-Vazquez	8/27/2025 9:09:09 AM	8/27/2025 9:09:35 AM	Acme Corporation ⓘ	429.60 USD
	Requisition	Pending	Chris Lam-Vazquez	8/26/2025 4:34:01 PM		Outstanding Officiating ⓘ	5,000.00 USD
	Requisition	Pending	Chris Lam-Vazquez	8/26/2025 4:18:28 PM		Edwin's Equipment New & Refurbished ⓘ	3,765.50 USD
	Purchase Order	Pending	Gisella Higgins	8/26/2025 3:44:15 PM		Acme Corporation ⓘ	10,000.00 USD
	Requisition	Pending	Chris Lam-Vazquez	8/25/2025 2:17:21 PM		BD Biosciences, Inc ⓘ	443.00 USD
	Voucher	Pending	Chris Lam-Vazquez, Sonia Libiran	8/22/2025 3:40:30 PM		Acme Corporation ⓘ	450.00 USD
☐ 4345063	Requisition	Pending	Lana Lewis	8/22/2025 10:29:47 AM		Acme Corporation ⓘ	415.31 USD
☐ 731460	Receipt	-	Chris Lam-Vazquez	8/20/2025 1:05:28 PM	8/20/2025 1:06:44 PM	Academic Recruiting Services ⓘ	
☐ 240003511T	Purchase Order	Pending	Chris Lam-Vazquez	8/20/2025 12:59:35 PM		Acme Corporation ⓘ	525.26 USD
☐ 4341988	Requisition	Complete	Chris Lam-Vazquez	8/20/2025 12:41:12 PM	8/20/2025 12:59:38 PM	Acme Corporation ⓘ	498.38 USD
☐ C002430T	Voucher	Pending	Bhavesh Patel	8/20/2025 11:45:12 AM		Acme Corporation ⓘ	4,468.00 USD
☐ 731427	Receipt	-	Bhavesh Patel, Nicole Yu	8/20/2025 10:33:12 AM	8/20/2025 10:33:33 AM	Acme Corporation ⓘ	4,468.00 USD
☐ 731435	Receipt	-	Chris Lam-Vazquez, Sonia Libiran	8/20/2025 10:31:47 AM	8/20/2025 10:32:32 AM	BD Biosciences, Inc ⓘ	
☐ 731397	Receipt	-	Chris Lam-Vazquez, Sonia Libiran	8/20/2025 10:30:26 AM	8/20/2025 10:33:19 AM	Steelcase Distributor ⓘ	
☐ 731395	Receipt		Chris Lam-Vazquez, Lana Lewis	8/20/2025 10:30:23 AM	8/20/2025 10:52:10 AM	Staples ⓘ	

Patel, Bhavesh   23
Libiran, Sonia   15
Lewis, Lana   11
Higgins, Gisella   8

▾ See More   ⟳ Show More

Approved By   ⌄

Patel, Bhavesh   18
Campos, Carlos   16
Lam-Vazquez, Chris   10
Libiran, Sonia   7
McNairn, Michael   5

CSUBUY

All ▼ Search (Alt+Q) 🔍 5,000,000.00 USD 🛒 ♡ 🚩 11 🔔 👤

🏠 Home
🛒 Shop
🕐 Orders
🏅 Contracts
🏛 Accounts Payable
👥 Suppliers
🌐 Sourcing
📊 Reporting

☰ Search Vouchers

🗎 Save As ▼   ➹ Pin Filters ▼   ⬆ Export All ▼

My Drafts   Search

Quick Filters   My Searches

Created Date: Last 90 days ▼   Quick search   🔍 ⑦   Add Filter ▼   Clear All Filters   ?

Accounts Payable   ⚙   Quick search   🔍   ⚙ 20 Per Page ▼

Vouchers   ▸   AP Home
Receipts   View Draft Vouchers
Approvals   Search For Vouchers
Reports   Search Direct Pay Requests
    Create New Voucher, Credit Memo...

		voice	Supplier	PO Number	Voucher Workflow Status ▼	Created Date/Time ◉	Due Date ▼	Discount Date ▼	Discount Amount ▼	Submitted Date ▼	Voucher Source	Voucher Type	Pay Status	Total Amount ▼
		T	Acme Corporation ⓘ	240003511T	Pending	8/22/2025 3:40:30 PM	9/21/2025		0.00 USD	8/22/2025 4:06:32 PM	Manual	PO Voucher	In Process	450.00 USD
			Acme Corporation ⓘ	240003497T	Pending	8/20/2025 11:45:12 AM	9/19/2025		0.00 USD	8/20/2025 11:46:08 AM	Manual	PO Voucher	In Process	4,468.00 USD
			Acme Corporation ⓘ	240003497T	Pending	8/20/2025 9:57:37 AM	9/19/2025		0.00 USD	8/20/2025 10:02:45 AM	Manual	PO Voucher	In Process	4,468.00 USD
•••	C002370T	TESTSL	Academic Recruiting Services ⓘ	240003383T	Pending	8/20/2025 9:49:19 AM	9/4/2025		0.00 USD	8/20/2025 9:56:05 AM	Manual	PO Voucher	In Process	12.00 USD
•••	C002363T	1004408292	Steelcase Distributor ⓘ	240003473T	Complete	8/20/2025 9:43:53 AM	9/19/2025		0.00 USD	8/20/2025 9:56:03 AM	Manual	PO Voucher	Payable	300.00 USD
•••	C002361T	12345	Academic Recruiting Services ⓘ	240003498T	Pending	8/20/2025 9:43:51 AM	9/19/2025		0.00 USD	8/20/2025 9:56:01 AM	Manual	PO Voucher	In Process	10,010.00 USD
•••	C002425T	test1z	Acme Corporation ⓘ	240003497T	Pending	8/20/2025 9:43:48 AM	8/20/2025		0.00 USD	8/20/2025 10:05:30 AM	Manual	PO Voucher	In Process	4,840.81 USD
•••	C002428T	12445	Acme Corporation ⓘ	240003474T	Pending	8/19/2025 4:10:41 PM	8/19/2025		0.00 USD	8/20/2025 11:27:36 AM	Manual	PO Voucher	In Process	1,750.00 USD
•••	C002345T	C002345T	Academic Recruiting Services ⓘ	DP0000180T	Pending	8/19/2025 12:18:01 PM	9/18/2025		0.00 USD	8/19/2025 12:18:01 PM	Automated	PO Voucher	In Process	10,000.00 USD

🔲 Show More

Voucher Type   ⌄
PO Voucher   10

Voucher Source   ⌄
Manual   8

Business Unit   ⌄
EB: Cal State East Bay P2P (EBXMP)   10

Invoiced By   ⌄
Libiran, Sonia   3
Patel, Bhavesh   3

🔍 Menu Search

❖ Supplier Fly Out- Search for all suppliers in CSUBuy

Q&A

Module 3- Supplier

Search for Suppliers

- Two Options for Searching
  - Shop Flyout
  - Supplier Flyout (All Campuses in P2P)
    - Supplier Extension Request Form
    - Request New Supplier Form

Search for CSUEB Suppliers Shop Flyout

- Check here to see if your supplier is available, if yes, you can select them and move your requisition forward

Search for Suppliers Flyout- All Campuses

Suppliers Menu

Suppliers	Type to Search Suppliers... 🔍	
Manage Suppliers ▶	Supplier Management Home	
Approvals	Search for a Supplier	
Requests	View Saved Searches	
Performance		

Manage Suppliers
❖ Search for Suppliers

Approvals
❖ Review Previously Requested Suppliers
❖ Review and Approve Suppliers

Requests
❖ Search for Previous Requests

Performance
❖ My Evaluations

Supplier Search

1. Who Approved the Supplier
2. Should always be In Network
3. Should always be Enabled for Procurement
4. Quick Search Field
5. Add Filter
6. Save As
7. Configuration Columns
8. Registration Status

Supplier Search

Supplier Status

Registration Status #8:	Definition
None	Loaded, not invited
Invited	Registration invitation sent to supplier
In Progress	Supplier has started registration
Registration Complete	Supplier has completed a registration
Approved	Supplier profile has been approved through registration workflow
Status #3:	**Definition**
Active for Shopping ✅	Active for Shopping/Requisition
Not Active for Shopping ❌	Inactive for Shopping/Requisition
CSUBUY Network Relationship #2	
In Network	Search results should be limited to "In Network"

*Is Supplier Available to CSUEB

Is Supplier Available to CSUEB

Supplier 360 - What BU's that Supplier is Extended to

MBU IDs in the Supplier 360 is where users can see if the supplier is available for their campus to shop from.

Supplier 360 - What BU's that Supplier is Extended to

CSUEB has 3 Business Units:
EBXMP (main campus)
EBXDN (Foundation)
EBXDF (Ed Foundation)
**The campus community will use EBXMP.

MBU IDs in the Supplier 360 is where users can see if the supplier is available for their campus to shop from.

Supplier 360 - What BU's that Supplier is Extended to

If EBXMP is not listed but this Supplier should be Extended to CSUEB for use, a Supplier Extension Request should be submitted

MBU IDs in the Supplier 360 is where users can see if the supplier is available for their campus to shop from.

Supplier 360 – Supplier Registration Invitation

Supplier Extension or Re-Invite Request

Supplier Extension or Re-Invite Request

Supplier Extension Request

Complete all Questions and Submit into Workflow
Helpful Hint:
Only the * are Required

If extending please extend to all 3 Business Units:
EBXMP
EBXDN
EBXDF
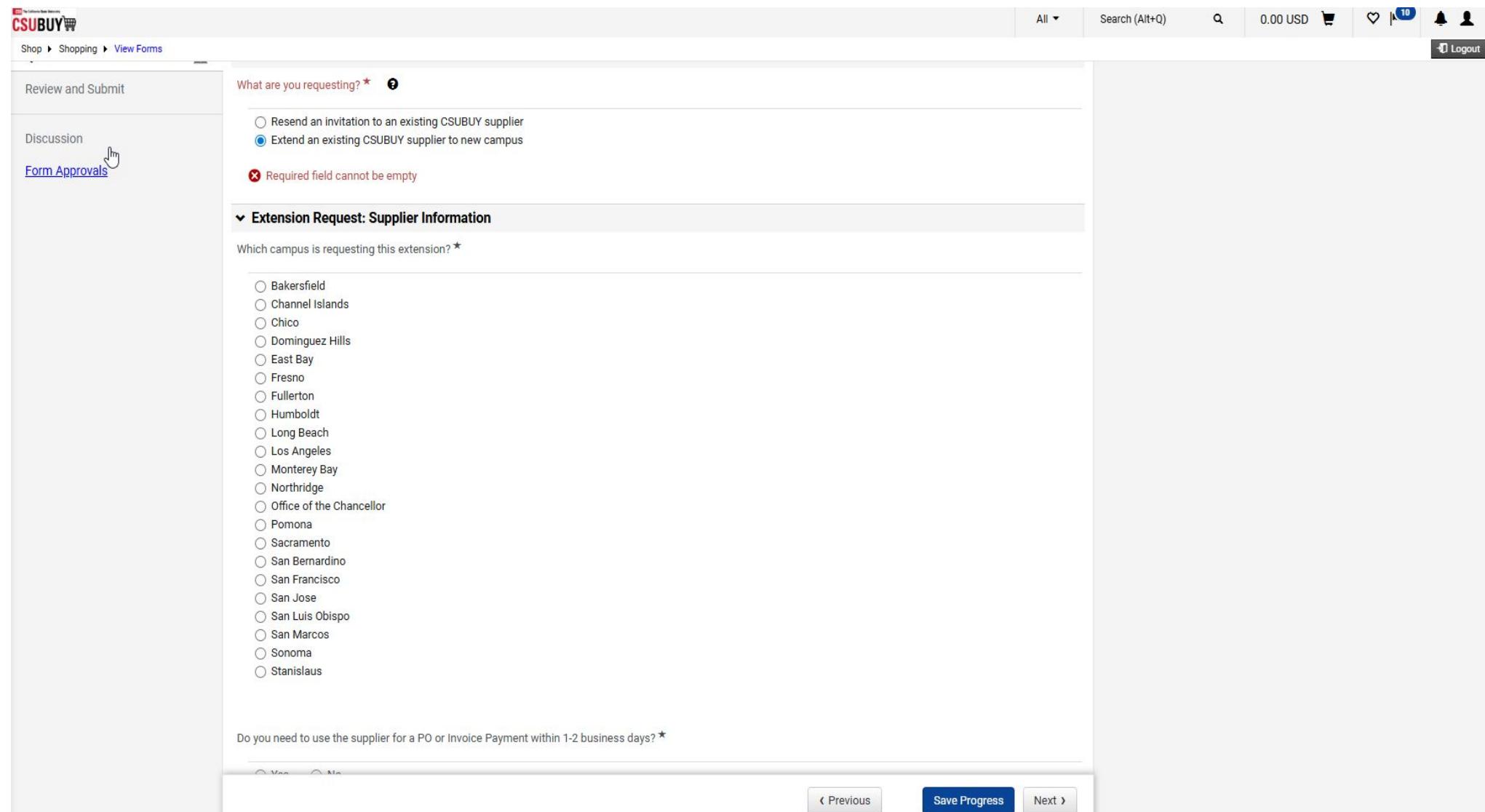
Supplier Re-Invite Request

Form Number **15398993**
Purpose **Generic Request**
Status **Incomplete**

Instructions

Questions ⚠

Review and Submit

Discussion

Form Approvals

★ Response Is Required

∨ Request Type

What are you requesting? ★ ❓

- ⦿ Resend an invitation to an existing CSUBUY supplier
- ◯ Extend an existing CSUBUY supplier to new campus

∨ Resend Invitation: Supplier Information

Suppliers Legal Company Name ★

CSUBUY Supplier Number ★

Invitation Email (Please see help text for guidance) ★ ❓

‹ Previous   **Save Progress**   Next ›

Shop ▸ Shopping ▸ View Forms

All ▾   Search (Alt+Q)   🔍

If Supplier Does Not Exist

Request New Supplier

Request New Supplier

JAGGAER revised its **Service Privacy Policy** effective May 25, 2018. By closing this banner, you acknowledge that when you use our Solution, we process your personal information as described in our Service Privacy Policy.

Request New Supplier

Supplier request form | Cal State Supplier Request

Supplier name *

Submit

Request New Supplier

Request New Supplier

Request New Supplier

○ Yes   ○ No

⌄ Additional New Supplier Request Details

Important Instructions:

For the Supplier to complete their registration, they must input important information such as legal structure, company financials and tax.
Please provide an email address of the supplier contact who will receive the invitation email, and who can accurately complete the registration.
This contact may not be your regular supplier representative.
Invitation emails cannot be forwarded to a different email address.
An incorrect email address will cause delays in processing the new supplier request.

Registration Contact First Name

[   ]

Registration Contact Last Name

[   ]

Email Address ★

[   ]

Will transactions with this Supplier need to distinguish between different divisions or departments (operating under the same TIN)?

○ No   ○ Yes

Please provide name(s) and address(es) for additional Supplier divisions or departments that need to be established in this Supplier's profile

★ Required   ‹ Previous   **Save Progress**   Next ›

Q&A

Module 4- Punchout Catalogs

❖ Do not have both P2P and Marketplace browsers open at the same time.

❖ Do not use punchout catalog (Dell, CDWG…) for IT equipment. See Module 5 IT Hardware Form Request.

Punchout Catalog Purchase

| Place order at the punchout supplier's website | → | Punch back in to CSUBUY Shopping Cart | → | Requisition | → | Purchase Order |
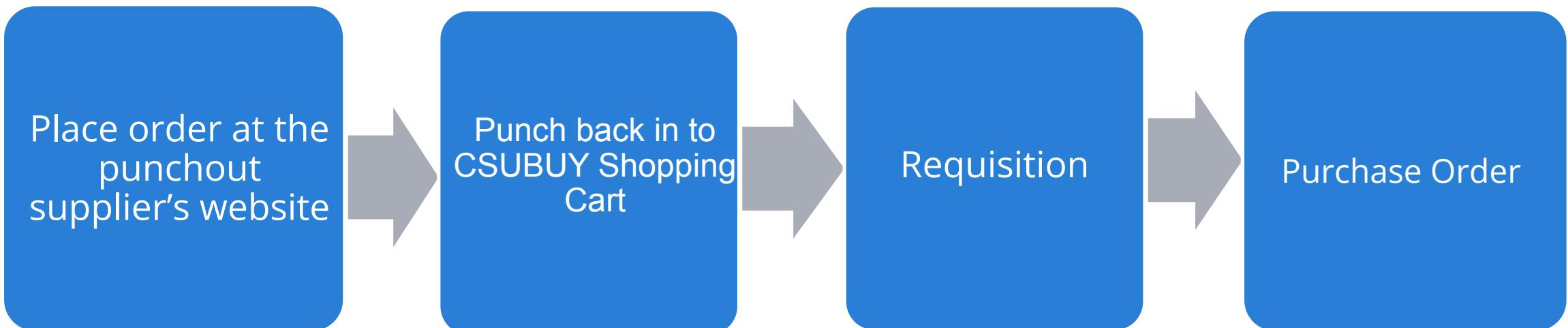
Punchout Catalogs

❖ Make sure you are in the correct Business Unit--EBXMP (Persona)

❖ Make sure your cart is empty before you start shopping otherwise you will have to re do all the shopping again!

| Home | | Purchase Orders ▾ | Search (Alt+Q) | 80.32 USD 🛒 | ♡ | 📋 63 |

Shopping Cart · Shopping Cart

👁 🖨 ⋯ | Assign Cart | **Proceed To Checkout**

Summary

Details

For

Joy Ming-Lan Sun

Total (81.26 USD)

Simple | Advanced ⋯

🔍 Search for products, suppliers, forms, part number, etc. 🔍

| Cart Name | 2024-11-05 85000000595 04 |

| Deliver To Location | Search ↙ |
| | ⊗ Required |

1 Item ☐ ▾

Staples · 1 Item · 74.89 USD ⋯ ☐

∧ SUPPLIER DETAILS   Sonoma State University P2P (SOXMP) : 7656 Eastland Road, Cleveland, Ohio 44024 United States

Contract   *no value*

Need to make changes? **MODIFY ITEMS** | **VIEW ITEMS**   Item(s) was retrieved on: 11/6/2024 3:53:09 PM
• Perk Ultra Soft Tissue, 2-Ply, 95 Sheets/Box, 6 Boxes/Pack, 6 Packs/Carton (PK57779CT)

	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	Perk Ultra Soft Tissue, 2-Ply, 95 Sheets/Box, 6 Boxes/Pack, 6 Packs/Carton (PK57779CT)	24416521	CT	74.89	Qty: 1 CT	74.89	☐

CSU BUY

Purchase Orders ▼   Search (Alt+Q)   80.32 USD   ♡ | 63   🔔 23 👤

Home
Shop
Orders
Contracts
Accounts Payable
Suppliers
Sourcing
Reporting
Menu Search

Requisition · 4156546

👁 🖨 ⑦ ⋯   Assign Cart   Submit Request

Summary   Taxes/S&H   PO Preview   Comments   Attachments   History

Cart Name	2024-11-05 85000000595 04	Attn: Joy Ming-Lan Sun	PO Type	no value
Business Unit	Sonoma State University P2P (SOXMP)	Receiving-Sonoma State University	Amount-Only / Blanket PO	✕
		1801 East Cotati Ave		
		Rohnert Park, CA 94928		
		United States	Multi-Year PO	✕

Deliver To

Deliver To Location   00011001B_SOCMP
Stevenson 1001B

Terms/FOB Override Needed   ✕

Ship Via   Best Carrier-Best Way

Reference ID   no value

Due Date   no value

Do Not Distribute   ✕

ⓘ Values vary by line.

Bill To

Accounts Payable, Sonoma State University
Sonoma State University
1801 East Cotati Ave
Rohnert Park, CA 94928
United States

Summary   →|

Draft

❌ **Correct these issues.**
You are unable to proceed until addressed.

Required: Business Unit
Required: Fund
Please add a DeptID to the Chartfield(s) for this requisition.

⚠️ **Be aware of these issues.**
You may review and proceed.

Empty: DeptID

Total (81.26 USD)   >

What's next for my order?   ∨

Next Step   Wait for Validation 1

Approver   Approver (DO NOT DELETE), Workflow

Workflow   ⋯

○ **Draft**
Active
Joy Ming-Lan Sun

◇ Start - Parallel Steps

○ **Requisition Validation 1**
Future

Chartfield   ✏ ⋯ ∨

ⓘ Values vary by line.

Business Unit	Fund	DeptID	Account	Account Override	Program	Class	Project
no value	no value	no value	no value	no value	no value	no value	no value
❌ Required	❌ Required	⚠️ Empty					

Other Participant Information ✏ ⋯	Internal Notes and Attachments ✏ ⋯	External Notes and Attachments ✏ ⋯ ∨
Prepared by Joy Ming-Lan Sun	Internal Note no value	Note to all no value

CSUBUY

Purchase Orders ▾   Search (Alt+Q)   81.26 USD 🛒   ♡ | 63   🔔 23 👤

Home

Shop

Orders

Contracts

Accounts Payable

Suppliers

Sourcing

Reporting

Requisition · 4156546

👁   🖨   ?   ···   **Assign Cart**   **Submit Request**

Summary   Taxes/S&H   PO Preview   Comments   Attachments   History

General Information ✏ ···

Transaction Details

Cart Name   2024-11-05 85000000595 04

Business Unit   Sonoma State University P2P (SOXMP)

CAL STATE EAST BAY

Address Information ✏ ···

Ship To

Attn: Joy Ming-Lan Sun
Receiving-Sonoma State University
1801 East Cotati Ave
Rohnert Park, CA 94928
United States

Deliver To

Deliver To Location   00011001B_SOCMP
Stevenson 1001B

Ship Via   Best Carrier-Best Way

Due Date   *no value*

Bill To

Accounts Payable, Sonoma State University
Sonoma State University
1801 East Cotati Ave
Rohnert Park, CA 94928
United States

PO Information ✏ ··· ⌄

Accounting Date   *no value*

PO Type   *no value*

Amount-Only / Blanket PO   ✕

Multi-Year PO   ✕

Terms/FOB Override Needed   ✕

Reference ID   *no value*

Do Not Distribute   ✕

ⓘ Values vary by line.

Summary →|

Draft
Total (81.26 USD)   ›

What's next for my order? ⌄

Next Step   Wait for Validation 1

Approver   Approver (DO NOT DELETE), Workflow

Workflow   ···

📍 **Draft**
Active
Joy Ming-Lan Sun

◇ Start - Parallel Steps

○ **Requisition Validation 1**
Future   ···

○ **Wait for Validation 1**
Future   ···
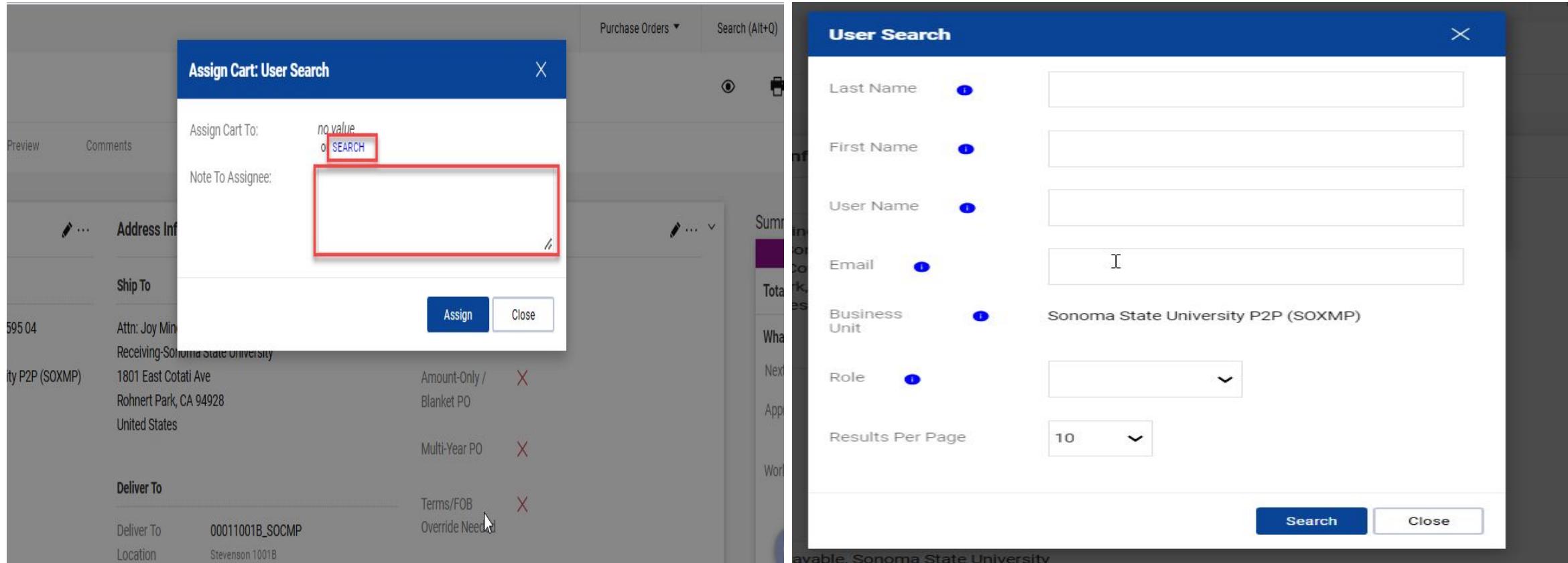
❖ Assign cart is only applicable to "shopper" role, please work with your department to identify the correct "requestor" in your department.

"Prepared By" Versus "Prepared For"

Prepared By	Prepared For
The user that submitted the cart into workflow: ❖ May have created the cart. ❖ May have been assigned the cart by another user. ❖ Must have the Requester role	User that created the cart: ❖ If a Shopper, must assign cart to a Requester ❖ Becomes the PO Owner

❖ "Prepared By" and "Prepared For" can be the same user.
❖ This is applicable to all requisitions.

- Shopping cart turn into a "Requisition" and a PO will be issued (Procard will no longer be utilized).
- Since punchouts are managed by the suppliers, each will have a unique look and feel.
- Ensure web browser allows for pop-ups. Punchout supplier's site will appear as a separate browser screen.
- Make sure shopping cart is empty before shopping.
- Receiving is now required on punchout catalogs purchase over $500.
- Best Practice – keep punchout catalog carts to eight (8) lines/items or less.

Q&A

Module 5-Form Requests

❖ Goods and Services Request

❖ IT Hardware Request-includes Technology Purchase Review (TPR)

❖ IT Software Request-includes Technology Purchase Review (TPR)

❖ Independent Contract Request- includes the ICR Process

❖ Hospitality Form (Non-Travel)- Includes the Hospitality Questions

❖ Payment for Unauthorized Purchase

Requisition Process
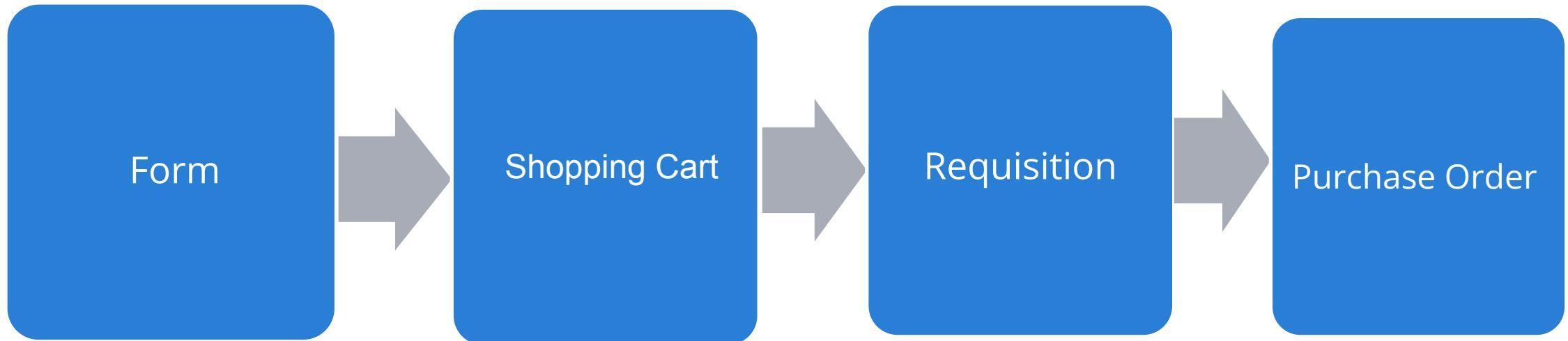
JAGGAER revised its **Service Privacy Policy** effective May 25, 2018. By closing this banner, you acknowledge that when you use our Solution, we process your personal information as described in our Service Privacy Policy.   ✕

Shop • Shopping Home Page

Search for products, suppliers, forms, part number, etc.   🔍

Approvals   ▼ ...

No results found

Orders Search   ...

All Orders ▾   Document Numbers, Supplier, Product Information   🔍

SHORTCUTS

My Requisitions

My Purchase Orders

My Vouchers

My Approvals

Advanced Search

Showcases   ...

CSU Form Requests   ⌄

Goods and Services Request	IT Hardware Request	IT Software Request	Independent Contractor Request	Hospitality Form (Non-Travel)	Payment for Unauthorized Purchase

Request to Close PO	Facilities and Construction Request For Facilities Use Only

Supplier Requests

CSUBUY

All ▾   Search (Alt+Q)   0.00 USD 🛒

🔓 Logout

ℹ JAGGAER revised its **Service Privacy Policy** effective May 25, 2018. By closing this banner, you acknowledge that when you use our Solution, we process your personal information as described in our Service Privacy Policy. ✕

‹ Back to Shopping Home

Goods and Services Requ…

Form Number	14630062
Purpose	**Procurement Request**
Status	**Incomplete**

Instructions

Suppliers ⚠

Form Fields ⚠

Review and Submit

Request Actions ▾ | History | ?

Instructions

Use this form to request goods and/or services that are not available via catalog through the search bar. Examples are:

- Goods - Other
- Services - other
- Classroom or Laboratory Supplies
- Equipment
- Furniture
- Marketing or Branded Items
- Transportation Charters
- Legal Services
- Drone
- Vehicles

This form should not be used if the request:

- Is for Hospitality (non-Travel). See the Hospitality Request Form.
- Is for IT Hardware and/or Software. See the IT Hardware and/or Software Request form.
- Is for services provided by an individual who is self-employed, guest speaker or guest lecturer. See the Independent Contractor Request Form.
- Is a payment for a Direct Payment invoice. See the Direct Payment Request Form.
- Is for a Capital Project or Public Works. See the Public Works Request Form.

Note: A supplier <u>must</u> be identified in the Suppliers section to submit the form. If the supplier does not exist, submit a Supplier Request form before completing this request form.

Next ›

❖ **Each Request form will have an Instructions Page and a Suppliers Page**

JAGGAER revised its **Service Privacy Policy** effective May 25, 2018. By closing this banner, you acknowledge that when you use our Solution, we process your personal information as described in our Service Privacy Policy.

‹ Back to Shopping Home

Goods and Services Requ...

Form Number 14630062
Purpose **Procurement Request**
Status **Incomplete**

Instructions

Suppliers ⚠
Form Fields ⚠

Review and Submit

Request Actions ▾ | History | ?

Instructions

Use this form to request goods and/or services that are not available via catalog through the search bar. Examples are:

- Goods - Other
- Services - other
- Classroom or Laboratory Supplies
- Equipment
- Furniture
- Marketing or Branded Items
- Transportation Charters
- Legal Services
- Drone
- Vehicles

This form should not be used if the request:

- Is for Hospitality (non-Travel). See the Hospitality Request Form.
- Is for IT Hardware and/or Software. See the IT Hardware and/or Software Request form.
- Is for services provided by an individual who is self-employed, guest speaker or guest lecturer. See the Independent Contractor Request Form.
- Is a payment for a Direct Payment invoice. See the Direct Payment Request Form.
- Is for a Capital Project or Public Works. See the Public Works Request Form.

Note: A supplier must be identified in the Suppliers section to submit the form. If the supplier does not exist, submit a Supplier Request form before completing this request form.

Next ›

❖ **The Instructions Area will list the forms needed to complete the Request, you can click on them interchangeably**

❖ **Or you can click Next through the forms required to complete the Request**

‹ Back to Shopping Home

Goods and Services Requ...

Form Number	14630062
Purpose	Procurement Request
Status	Incomplete

Instructions

Suppliers ⚠

Form Fields ⚠

Review and Submit

Suppliers

Request Actions ▾ | History | ?

Supplier	Please select a fulfillment center below.

Search Registered Suppliers

Supplier

Zip Code   Within   5 Miles ▾

Clear   🔍 Search

‹ Previous   Next ›

🔒 Logout

‹ Back to Shopping Home

Goods and Services Requ...

Form Number	14630022
Purpose	Procurement Request
Status	Incomplete

Instructions

Suppliers ⚠

Form Fields ⚠

Review and Submit

Form Fields - Form Fields

Request Actions ▾ | History | ?

🔍 Field Name Is Searchable
★ Response Is Required

⌄ General Information

What type of goods or services are you requesting? ★ 🔍

[dropdown ▾]

Is this a Blanket Order? ★

○ Yes ○ No

Is the request for a renewal of a previous purchase?

○ Yes ○ No

Does the request include performance terms (start & end date)? ★

○ Yes ○ No

Are you requesting the goods or services from a SOLE SOURCE or SOLE BRAND? ★

◉ No
○ Yes, Sole Source
○ Yes, Sole Brand

‹ Previous   **Save Progress**   Next ›

❖ Form Fields very depending on the type of Request

❖ The questions can be dynamic based on your answers

❖ The answer to the Sole Source or Sole Brand Question will always be NO, unless prior approval from Procurement

❖ Questions are required to move the form forward

❖ Once complete the form can be submitted into workflow

❖ Make sure your shopping cart is empty before you start a new requisition

Workflow Overview
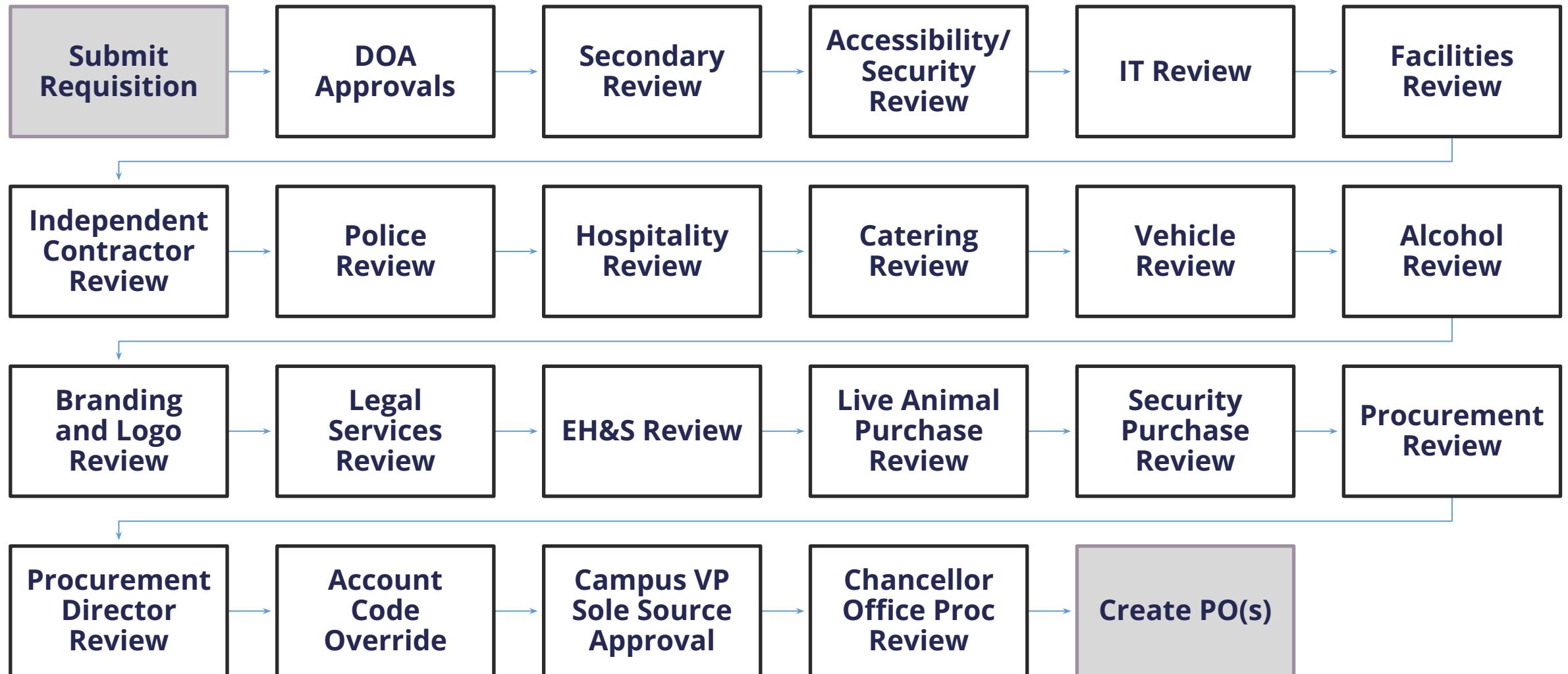
Workflow Goods/Services
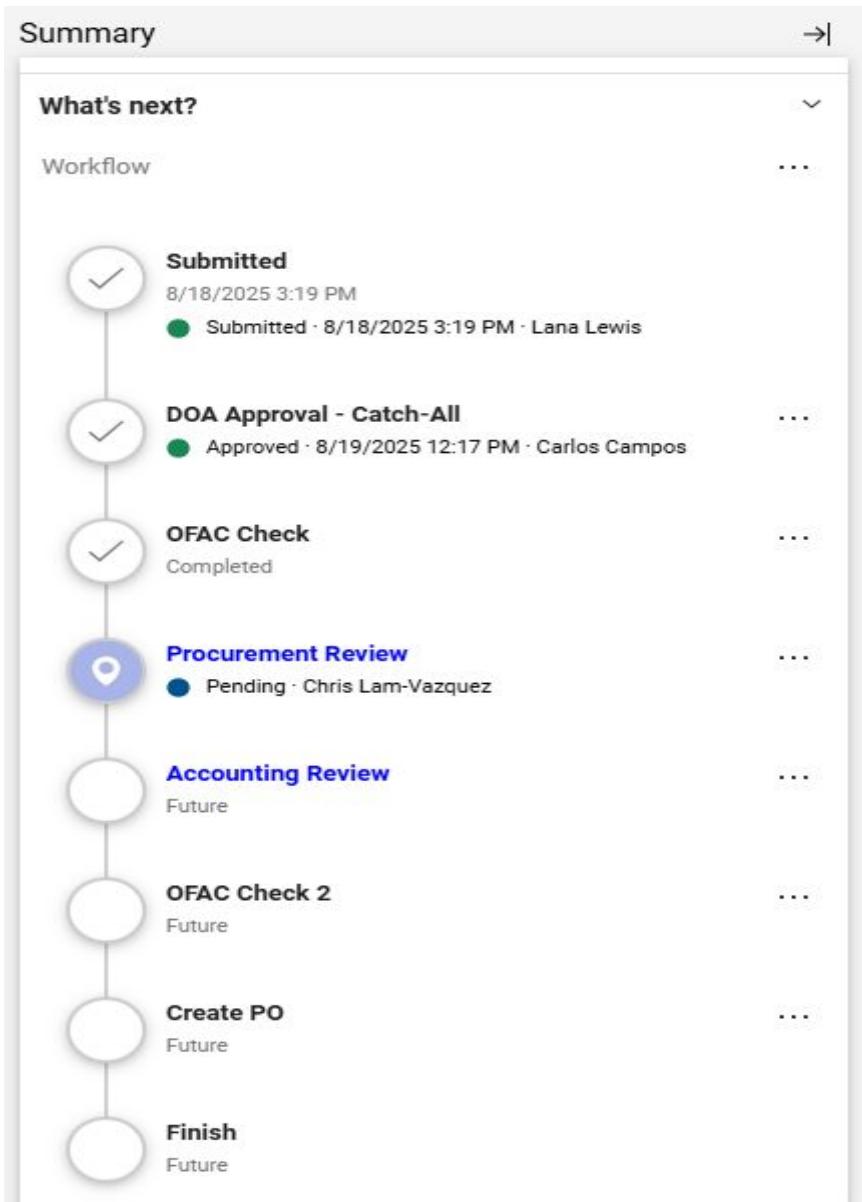
Workflow IT Hardware

Workflow IT Software

Draft
Active
Chris Lam-Vazquez

IT Review
Future

Start - Parallel Steps

Accessibility Review
Future

IT Security Review
Future

IT System Review
Future

End - Parallel Steps

OFAC Check
Future

Procurement Review
Future

OFAC Check 2
Future

Create PO
Future
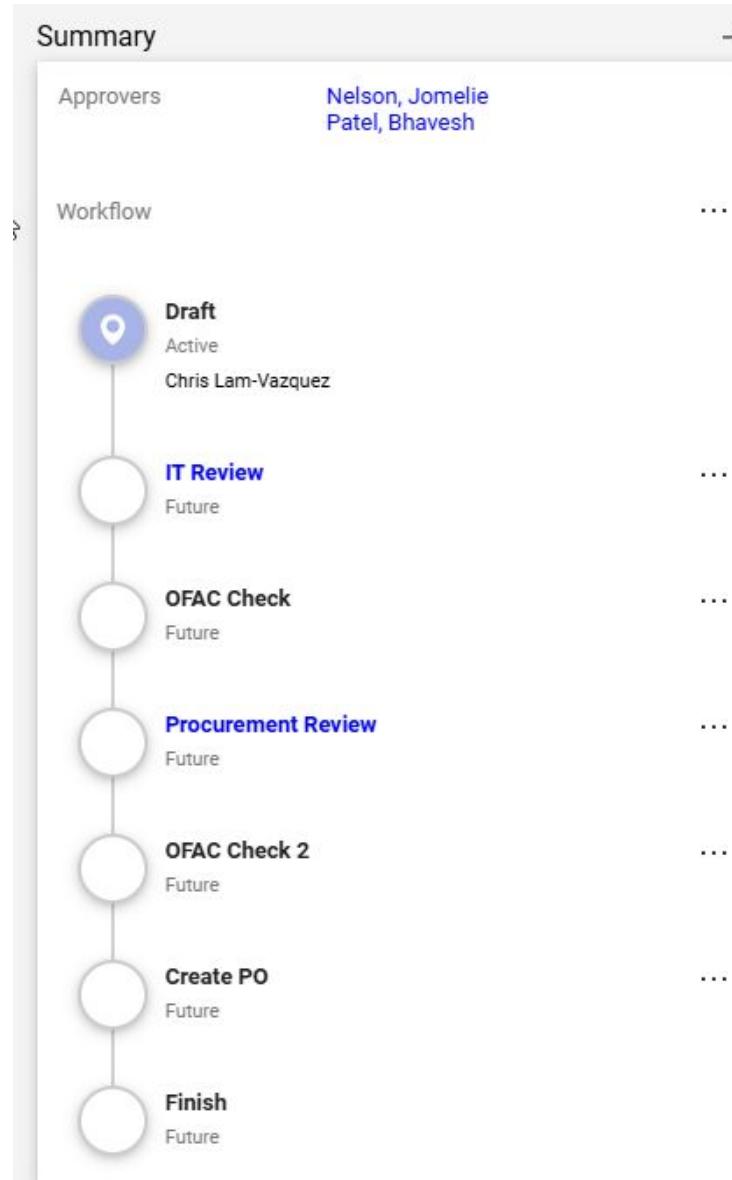
Finish
Future

IT Hardware/Equipment Purchase Process

❖ Work with IT to obtain a quote.

❖ Use IT Hardware Request Form. Do not use punchout catalog.

❖ Build the form/cart with information you have, for example -monitor, equipment or laptop/computer description, quantity, special request……

Other Workflow Steps

❖ Facilities Review

❖ Vehicle Review

❖ Branding and Logo Review

❖ EH&S Review

Workflow – Segregation of Duties

Requestor/Shopper can not approve their own requisition

For the purpose of this requisition, Jen Aaseth is the requestor and she is also listed under DOA Approval in the workflow therefore she can not approve this requisition. Amanda or Evan will have to approve this requisition.

Payment for Unauthorized Purchase

❖ Goods and/or services that are not placed on an authorize CSUBuy Form and completed workflow through finalization of Purchase Order, require the Unauthorized Purchase Form to be completed and appropriate documentation must be attached.

‹ Back to Shopping Home

Payment for Unauthorized...

Form Number	**1034093**
Purpose	**Procurement Request**
Status	**Incomplete**

Instructions

Suppliers ⚠

Form Fields ⚠

Review and Submit

Instructions

Request Actions ▾ | History | ?

Use this form to process a payment for a good or service that has already been received without a CSUBUY Purchase Order.

Note: Goods and services that are not placed on an authorized CSUBUY Purchase Order, or via the Direct Pay Request, leave the CSU exposed to risk and are not allowed per CSU Policy. In the future, all goods and services should be acquired using an authorized CSUBUY Purchase Order or Direct Pay Request prior to order placement.

This form should not be used if the request:

- Is a payment for a Direct Payment invoice. See the Direct Pay Request Form.
- Is for Hospitality (non-Travel). See the Hospitality Request Form.
- Is for IT Hardware and/or Software. See the IT Hardware and/or Software Request form.
- Is for services provided by an individual who is self-employed, guest speaker or guest lecturer. See the Independent Contractor Request Form.
- Is a payment for a Direct Payment invoice. See the Direct Payment Request Form.
- Is for a Capital Project or Public Works. See the Public Works Request Form.

Use the Direct Payment form for the following:

- Academic Recruitment Commission/Fee
- Attorney Fee
- Freight / Postage / Shipping
- Legal Settlement
- Local & Federal Government Payment
- Medical Service Payment
- Memberships
- Official/Referee Payment
- Permit / License (non-IT)
- Royalty Payment
- Subscription/Publication (non-IT)
- Utilities

❖ In order to complete the form, the supplier must have an APPROVED registration status available for shopping.

Next ›

Requisition · 4161425

Summary | Taxes/S&H | PO Preview | Comments | Attachments | History

General Information ✏ ⋯

Transaction Details

Cart Name | Testing Unauthorized Purchase Workflow
Business Unit | Sonoma State University P2P (SOXMP)

Address Information ✏ ⋯

Ship To

Attn: Carrie Schmidt
Receiving-Sonoma State University
1801 East Cotati Ave
Rohnert Park, CA 94928
United States

Deliver To

Deliver To Location | 00000000_SOCMP
| LAND SSU

Ship Via | Best Carrier-Best Way

Due Date | no value

Bill To

Accounts Payable, Sonoma State University
Sonoma State University
1801 East Cotati Ave
Rohnert Park, CA 94928
United States

PO Information ✏ ⋯

Accounting Date | no value
PO Type | no value
Amount-Only / Blanket PO | ✕
Multi-Year PO | ✕
Reference ID | no value
Do Not Distribute | ✕
Tax Code | no value

Chartfield ⋯

ⓘ Values vary by line.

Other Participant Information ✏ ⋯

Prepared by | Carrie Schmidt
Prepared for | Carrie Schmidt
Buyer | no value
Ad-Hoc Approver | Select

Internal Notes and Attachments ✏ ⋯

Internal Note | no value
Internal Attachments | Add

External Notes and Attachments ✏ ⋯

Note to all Suppliers | no value
Attachments for all suppliers | Add

15,000 Items ⋯

Consultant, David · 15,000 Items · 15,000.00 USD ⋯

Summary →|

- **Draft**
  Active
  Carrie Schmidt

  ◇ Start - Parallel Steps

  ○ **Requisition Validation 1** ⋯
  Future

  ○ **Wait for Validation 1** ⋯
  Future

  ◇ End - Parallel Steps

  ○ **Initial Review** ⋯
  Future

  ○ **DOA Approval - Catch-All** ⋯
  Future

  ○ **Secondary Review** ⋯
  Future

  ○ **Independent Contractor Review** ⋯
  Future

  ○ **Procurement Review** ⋯
  Future

  ◇ Start - Parallel Steps

  ○ **Requisition Validation 2** ⋯
  Future

  ○ **Wait for Validation 2** ⋯
  Future

  ◇ End - Parallel Steps

❖ A requisition and purchase order will be generated but the workflow will be different. Procurement review for these will be the Director of Procurement.

Q&A

Module 6-Detailed Functionality

- ❖ Blanket PO

- ❖ Multiple Line PO

- ❖ Ad-Hoc Approver

- ❖ Comments

- ❖ Internal Notes and Attachments

- ❖ External Notes and Attachments

- ❖ Assets

- ❖ Withdraw a Requisition

- ❖ Copy to New Cart

- ❖ Multiple Year PO

Blanket PO

Blanket PO

Multiple Line PO

How to create a multiple-line requisition:

1. Complete the first item/line, on the "Review and Submit" page, click on the **down arrow** next to Add and go to Cart, and click "**Save to Cart and Add Another**".
2. Repeat step 1 for each line.
3. For the last line, on the Review and Submit page, click "**Add and go to Cart**"

❖ If the quote/proposal has multiple lines, you must create multiple lines requisition.

Comments

Comments

Internal/External Notes and Attachments

Internal/External Notes and Attachments

❖ Internal notes and attachments stay within CSUBUY and can be viewed by any one has access to CSUBUY.

Internal/External Notes and Attachments
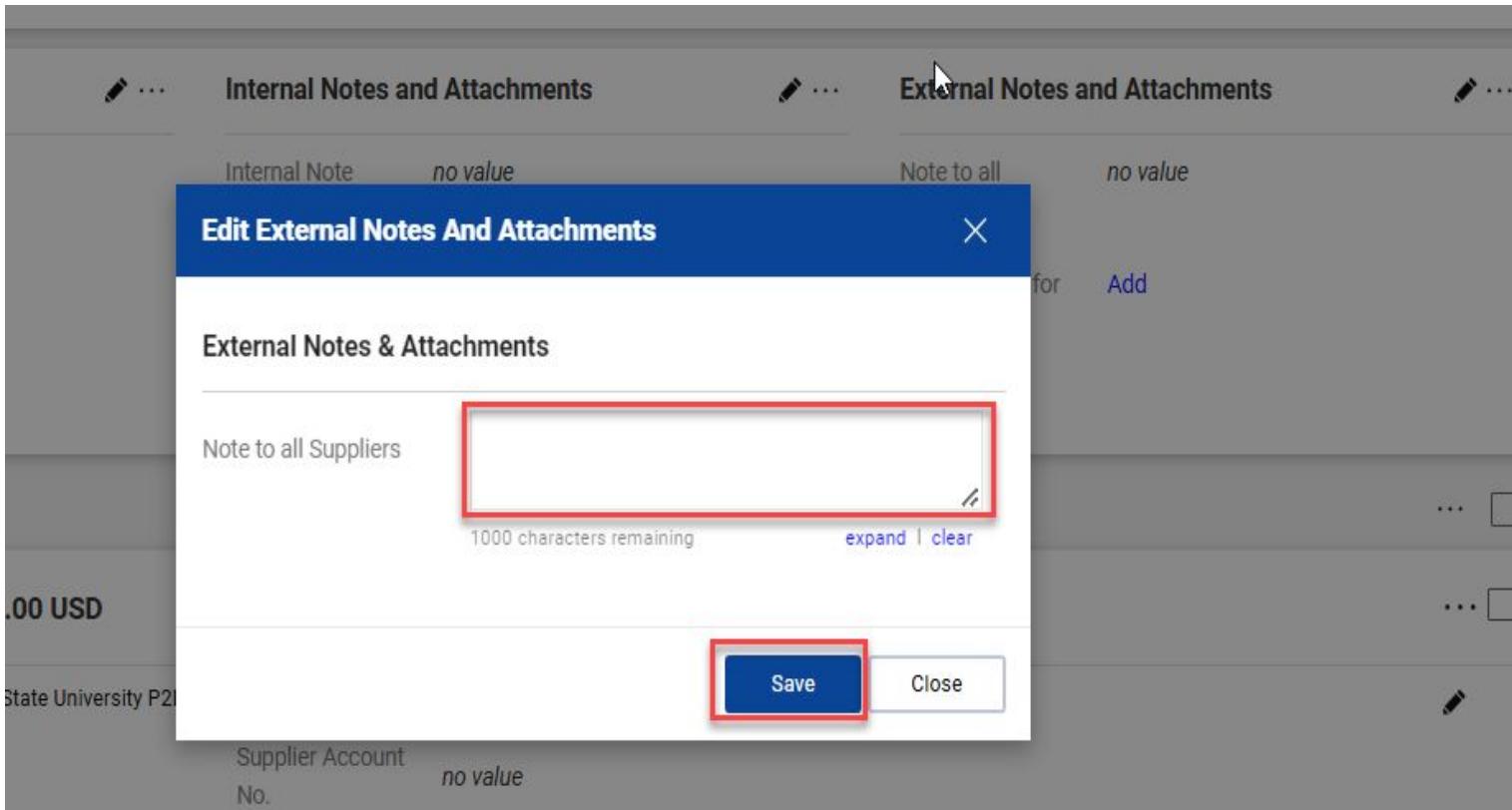
❖ External notes and attachments can be viewed by any one has access to CSUBUY and Suppliers.

Withdraw a Requisition

❖ Withdraw requisition can only be used while the order is in requisition workflow. Once it becomes a PO it can no loner be withdrawn.

❖ Once withdrawn, you cannot resubmit that order, however, you can easily copy the items to a new cart/requisition.

Copy to New Cart

Multiple-Year PO

1. Requestor
❖ Build multiple lines in the cart. Follow the "Multiple Line PO" instruction.
❖ Make sure to label each line with year (Year 1 - 2025, Year 2 – 2026….)and description in Cost Detail.
❖ Submit the Requisition. In the PO Information, check "Multiple-Year PO".

2. During Procurement Review (Buyer)
❖ Reduce the amount on the subsequent year PO line to $0.01 so PO will not be closed.

3. Requestor
❖ Submit "Change Request" each year to encumber the fund

Multiple-Year PO

Multiple Line PO

Q&A

Module 7-Purchase Orders

❖ Purchase Order Distribution

❖ Search for Purchase Orders & Locate Order Status

❖ Purchase Order Overview

❖ Purchase Order Change Requests

❖ Close a Purchase Order

Purchase Order Distribution

❖ There are 2 ways to distribute PO. The supplier's preferred PO distribution method is specified by the supplier during the registration process.

- Method 1 Email - CSUBUY sends POs to the suppliers automatically. Department will not be copied.

or

- Method 2 Manual – Buyer will distribute the PO to the supplier.

❖ Department can access CSUBUY and view PO.

❖ Department should never send PO to supplier.

❖ Set your notification preference is set up received notification once PO is distributed by CSUBUY.

Purchase Order Distribution

Search for Purchase Orders
If you are not the PO Owner

Type in PO number, supplier name, PO owner name…….

Search for Purchase Orders
If you are the PO Owner

Locate Purchase Order Status

Purchase Order Overview

Purchase Order Change Requests

Search the PO that needs a change and create change request

Purchase Order Change Requests

Purchase Order Change Request

Close a Purchase Order

Close a Purchase Order

Q&A

Module 8 – Receiving

Goods

- 3-Way
- Receipt Required
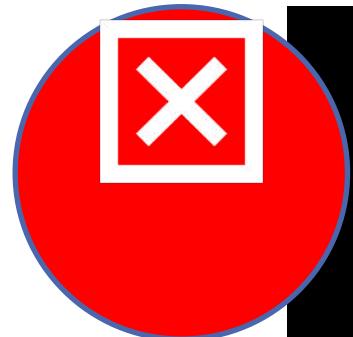
Services or Blanket POs

- 2-Way
- No Receipt Required

3-Way Goods Receiving

Department to search the PO in P2P → Department to notify Receiving by using "Comment" tab. Add bryan.hill@csueastbay.edu as recipient → Receiving will create the receipt

Not required for purchase under $500

2-Way Service Receipt

❖ Invoices will stop in workflow with the PO Owner.
❖ This person will have to approve before payment will move forward to Accounts Payable.
  - Service was complete
  - Service was satisfactory

2-Way Service Receipt

❖ PO Owner must open and review the invoice in the Attachment field.

Q&A

Module 9-Payment (Voucher)

❖ Invoice and Credit Memo Require PO

❖ Invoice Submission Options

❖ Voucher Process and Approval Workflow

❖ Payment Status

Invoice and Credit Memo Require PO

❖ Voucher creation is done when the supplier invoice is submitted into workflow.

Process Overview

PO — Receipt Creation/ Verification — Voucher Creation — AP Review — OK to Pay

Submission Of Invoice

- Supplier uploads its invoice(s) directly through their online portal

- For invoices that are not able to be uploaded by the supplier directly, such as PG&E invoices, those invoices can be routed to P2Pinvoice@csueastbay.edu as a separate attachment and will be uploaded by the AP Technician that handles that account.

Look up payment status in CSUBuy

Voucher Process and Approval Workflow

Vouchers
▪ Search for Vouchers

Receipts
▪ View Match Status in Voucher

Approvals
▪ View Vouchers Approval Workflow

Payment Status
▪ Locate Payment Status

Search for Vouchers

Capability to search invoice status through a variety of ways: Invoice #, Voucher #, Supplier Name, PO#

1. Quick Filters
2. Search Date Range
3. Quick Search
4. Add Filters
5. Pin Filters
6. Save Search
7. Change View/Configure Column Display
8. Pay Status

In the Quick Search, you can note the PO# to review the voucher

❖ Once you identify the voucher, for more detail, click Voucher Number

Voucher Details

- ❖ Summary
- ❖ Remit to Information
- ❖ Workflow Status
- ❖ Payment Status
- ❖ Matching Status
- ❖ Comments
- ❖ Attachments (including invoice)

...and much, much more

View Match Status in Voucher

Hold for Receiving:

- Unmatched
  - No Receipt has been entered
- Matched
- Matching Exceptions
  - Variety of reasons based on why it's a match exception

View Match Status in Voucher

Verify Received:

- ❖ Unmatched
- ❖ Matched
- ❖ Matching Exceptions

View Voucher Approval Workflow

Voucher Hold for Receiving
- ❖ 3-Way - Holds for 30 days, then goes to match exception, AP will reach out to the department for resolution before payment.
- ❖ 2-Way - A reminder is sent out to the requester for their approval before it moves forward for the AP Review

AP Review
- ❖ Assigned to AP Team to review by alphabet
- ❖ AP Manager Reviews
  - ❖ AP Actions:
    - Approve
    - Return Voucher (internal comments)
    - Place Voucher on Hold (internal comments)
    - Forward (internal comment)
    - Reject Voucher (internal comments)

Summary   →|

Purchase Order: 240002683T   🖶
Requisition: 4158223   🖶

What's next?   ⌄
Workflow   ...

✓   **Submitted**
    11/7/2024 9:21 AM
    🟢 Submitted · 11/7/2024 9:21 AM · Nicholas Courter

✓   **Invoice Validation 1**   ...
    Completed

◉   **Verify Received**   ...
    🔵 Pending · Nicholas Courter

○   **AP Review**   ...
    Future

○   **AP Manager Review**   ...
    Future

○   **Invoice Validation 2**   ...
    Future

○   **OK to Pay**   ...
    Future

○   **Auto-Close-PO**   ...
    Future

○   **Finish**
    Future

Payment Status

Payment Status

		Business Unit	Supplier	Voucher Number ▼	Supplier Invoice Number(s) ▼	Total Amount ▼	Matching Status	Pay Status	My Workflow Steps ▼	My Approval Date/Time ▼	Invoiced By	Payment ID Ref
❶	...	Sonoma State University P2P	Flooring by Fernando ⓘ	C001821T	1234	9,147.50 USD	Matched	In Process			Trudee Herman	
❶	...	Associated Students of SSU P2P	Flooring by Fernando ⓘ	C001772T	RETEST(SRVS)-ASIE2E2.8-E2E4.4	1,400.00 USD	Matched	Paid	AP Manager Review	10/18/2024 12:04:55 PM	Carrie Schmidt	118077
❶	...	Associated Students of SSU P2P	Flooring by Fernando ⓘ	C001771T	RETEST(C-ASI-E2E2.8-E2E4.4	1,292.95 USD	Matched	Paid	AP Manager Review	10/18/2024 12:05:03 PM	Carrie Schmidt	118077

- ❖ Payment ID Ref is the check/ACH number assigned to the voucher.

- ❖ This number is displayed after payment is issued.

- ❖ Suppliers receiving payment via check may receive a consolidated single check which includes multiple invoices.

- ❖ P2P functionality allows departments to search a variety of ways including: supplier name, invoice number, PO#.

- ❖ Once supplier located, departments can view all invoices associated with the check number.

Q&A

Thank You

&

Happy Shopping

Office hours information are available at Procurement website.