Approvers
## AGENDA

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Training Structure & Flow

Each functionality covered today will follow the following 2-step process:

- Content
- Demos

Each functionality covered today will follow the following 3-step process:

- Watch the facilitator's lead to follow the steps of how the functionality works to accomplish the scenario
- Utilize the scripted example to facilitate a self-guided exercise
- **Collective recap of the scripted scenario focusing on:**
  - Key Takeaways
  - Challenges
  - Q & A
Module 1

System Introduction

Lessons in This Module

- CSUBUY Overview
- Basic Navigation
CSUBUY Introduction

System Introduction
LESSON OBJECTIVES

- Explain the purpose of the CSUBUY system.
- Identify how the CSUBUY system can benefit your role.
- Log in to the CSUBUY system.
- Locate system help and support resources.
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.
Who Uses CSUBUY?

Overview of the user groups that use CSUBUY for purchasing.
In CSUBUY, Approvers will:

- Review and approve requisitions and vouchers.
- Communicate using comments.
- Complete the approval workflow.
How Do I Log In?

CSUBUY

Production Site
- SSO
Where Do I Get Help?

CSUBUY System Help
• Help button within the system

Support Resources
• Local CSU admin
• CSUBUY Training & Resources
Process Overview

Shop → Check Out → Approve Requisition → Create Purchase Order
Basic Navigation

System Introduction
Basic Navigation

LESSON OBJECTIVES

- Navigate the Shopping dashboard.
- Use the search feature.
- Locate your user profile.
- Identify the key features of the notifications center.
- Update your system notification settings to your desired preferences.
Shopping Home Page
How to Access Profile Settings
# Set Up Your Notification Preferences

## User Profile and Preferences

### Training User

<table>
<thead>
<tr>
<th>User's Name, Phone Number, Email, etc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name:</td>
</tr>
<tr>
<td>Last Name:</td>
</tr>
<tr>
<td>Phone Number:</td>
</tr>
<tr>
<td>Mobile Phone Number:</td>
</tr>
<tr>
<td>Email Address:</td>
</tr>
<tr>
<td>Business Unit:</td>
</tr>
<tr>
<td>Department:</td>
</tr>
<tr>
<td>Position:</td>
</tr>
<tr>
<td>Authentication Method:</td>
</tr>
<tr>
<td>User Name:</td>
</tr>
</tbody>
</table>

## Notifications Preferences

<table>
<thead>
<tr>
<th>Notification Type</th>
<th>首选通知选项</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepared By - PR line item(s) rejected</td>
<td>None</td>
</tr>
<tr>
<td>Prepared By - PR rejected/returned</td>
<td>None</td>
</tr>
<tr>
<td>Cart Assigned Notice</td>
<td>None</td>
</tr>
<tr>
<td>Receive PR and PO notifications for Carts Assigned to Me</td>
<td>None</td>
</tr>
<tr>
<td>Assigned Cart Processed Notification</td>
<td>None</td>
</tr>
<tr>
<td>Assigned Cart Deleted Notification</td>
<td>None</td>
</tr>
<tr>
<td>PR submitted into Workflow</td>
<td>None</td>
</tr>
<tr>
<td>PR pending Workflow approval</td>
<td>None</td>
</tr>
<tr>
<td>PR pending Ad-Hoc Workflow approval</td>
<td>None</td>
</tr>
</tbody>
</table>
Basic Ordering

Ordering
Basic Ordering

Lessons in This Module

- Shopping using Punchout
- Shopping using Form Requests
- Checking Out
PunchOut Catalog
LESSON OBJECTIVES

- Access shopping forms.
- Submit shopping forms.
- Determine when to use each shopping form.
# Available Forms

- Goods and Services Request
- Hospitality
- Independent Contractor
- IT Hardware
- IT Software
- Payment for Unauthorized Purchase
- Facilities and Construction Requests
Forms

Learn how to submit forms.

- Goods and Services Request
- Hospitality
- Independent Contractor
- IT Hardware
- IT Software
- Payment for Unauthorized Purchase
- Facilities and Construction Requests
Checking Out

LESSON OBJECTIVES

- Update chartfields to check out.
## Chartfields

<table>
<thead>
<tr>
<th>Item</th>
<th>Catalog No.</th>
<th>Size/ Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>MON Convergence Vinyl Task Chair with Seat Slide, Adjustable Arms, Black (MONWY140R10)</td>
<td>27294111</td>
<td>EA</td>
<td>285.43</td>
<td>Qty: 1 EA</td>
<td>285.43</td>
</tr>
</tbody>
</table>

### Item Details
- **Manufacturer**: MON COMPANY
- **Manufacturer Part Number**: HONGWY140R10
- **Commodity Code**: 150007 / Furniture
- **Override Receiving Required**: No
- **Prepayment**: No

### General Information
- **Tax Code**: CA

### Accounting Codes
- **Business Unit**: no value
- **Fund**: no value
- **DeptID**: no value
- **Commodity Code**: 190007 / Furniture
Check Out and Submit Order

Shopping Cart - Shopping Cart

<table>
<thead>
<tr>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>HON Convergence Vinyl Task Chair with Seat Slide, Adjustable Arms, Black (HONCMY1AUR10)</td>
</tr>
</tbody>
</table>

Catalog No: 2726411
Unit Price: 285.43
Quantity: 1 EA
Ext. Price: 285.43

Manufacturer: HON COMPANY
Contract: 
Commodity Code: 150000
Supplier Part Number: 2726411
Prepayment: 
Asset Profile ID: 

Taxable: 
Asset: 
Override Receiving Required: 

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MODULE

Approvals

Lessons in This Module

- Approval Workflow
- Approval Actions
- Purchase Orders
Approval Workflow

LESSON OBJECTIVES

- Explain the approval workflow for a requisition.
Workflow Overview


Procurement Director Review → Campus VP Sole Source Approval → Chancellor Office Proc Review → Create PO(s)

Approvers 30
Approval Actions

Approvals
Approval Actions

LESSON OBJECTIVES

- Locate your approval queue.
- Review a requisition.
- Approve, reject, and return a requisition.
- Add comments to a requisition.
- Forward a requisition.
- Assign substitute approvers.
Edit a Requisition
Forward a Requisition
Assign a Substitute Approver

Assign Substitute

- Include Date Range for Substitution
- Substitute Name *
  Type to filter...
- Start Date *
  mm/dd/yyyy hh:mm a
- End Date *
  mm/dd/yyyy hh:mm a

* Required

Assign Close
Review a Requisition

- Add comments
- Put a request on hold
- Approve, return, or reject
Approval Actions

Learn how to complete approval actions.

- Update requisition and approve.
- Utilizing Comments.
- Return or reject via email.
- Forward the requisition to another approver.
- Assign a substitute approver.
PO Distribution

LESSON OBJECTIVES

- Identify the distribution methods for a purchase order.
Purchase Order Distribution

- cXML
- Email
- Fax
- Manual
Search and Report

Searching and Reporting
Search and Report

LESSON OBJECTIVES

- Locate requests and orders.
- Save a search.
Locate Requests and Orders

![Screenshot of a webpage showing search results for purchase orders. The search results include information such as PO Number, Supplier, Created Date/Time, Requisition Number, PO Owner, Shipment Status, Matching Status, and Total Amount.]

**PO Number**
- 2500000061
- 25000000199
- 25000000197
- 25000000164
- 25000000174

**Supplier**
- Colas Contracting Services
- Colas Contracting Services
- Acs Group
- Acs Group
- IRG Plothers &

**Created Date/Time**
- 4/3/2023 10:06 AM
- 3/31/2023 1:37:19 PM
- 3/30/2023 10:00:00 PM
- 3/30/2023 1:05:24 PM
- 3/27/2023

**Requisition Number**
- 3746088
- 3744902
- 3744500
- 3743003
- 3739982

**PO Owner**
- Robert Parkinson
- Robert Parkinson
- Robert Parkinson
- Robert Parkinson
- Deepi

**Shipment Status**
- Completed
- Completed
- Completed
- Completed
- Sent To

**Matching Status**
- Supplier
- Fully Matched
- Supplier
- No Matches
- Sent To

**Total Amount**
- 4,400.00 USD
- 4,400.00 USD
- 1,018.88 USD
- 1,018.88 USD
- 2,163.91 USD

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## Save Search

<table>
<thead>
<tr>
<th>PO Number</th>
<th>Supplier</th>
<th>Created Date/Time</th>
<th>PO Status</th>
<th>Requisition Number</th>
<th>PO Owner</th>
<th>Shipment Status</th>
<th>Matching Status</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2300000604</td>
<td>David's Doughnuts</td>
<td>4/28/2023 7:57:29 AM</td>
<td>Completed</td>
<td>3751913</td>
<td>Layla Better-Makhlou</td>
<td>Sent To Supplier</td>
<td>No Matches</td>
<td>450.46 USD</td>
</tr>
<tr>
<td>2300000603</td>
<td>ACS Group</td>
<td>4/28/2023 7:37:04 AM</td>
<td>Completed</td>
<td>3751913</td>
<td>Layla Better-Makhlou</td>
<td>Sent To Supplier</td>
<td>No Matches</td>
<td>18476.42 USD</td>
</tr>
<tr>
<td>2300000955</td>
<td>Hewlett-Packard Company</td>
<td>4/27/2023 3:28:23 PM</td>
<td>Completed</td>
<td>3762360</td>
<td>Chris Jones-Claro</td>
<td>Sent To Supplier</td>
<td>No Matches</td>
<td>516.18 USD</td>
</tr>
<tr>
<td>2300000956</td>
<td>ACS Group</td>
<td>4/27/2023 3:25:32 PM</td>
<td>Completed</td>
<td>3757546</td>
<td>Layla Better-Makhlou</td>
<td>Sent To Supplier</td>
<td>No Matches</td>
<td>375.00 USD</td>
</tr>
</tbody>
</table>

**Approvers:** 44
Search and Filters

Learn how to search and filter for requests and orders.

1. Navigate to Orders > Search > Requisitions.
2. Use Quick Filters on the left panel.
3. Use Add Filter for additional filters.
4. Add columns.
5. Export search results.
System Introduction

Approvals

Purchase Orders
CSUBUY System Help

• Help button within the system

Support Resources

• Local CSU admin