

CSU The California State University



Approvers



AGENDA

Module 1 System Introduction

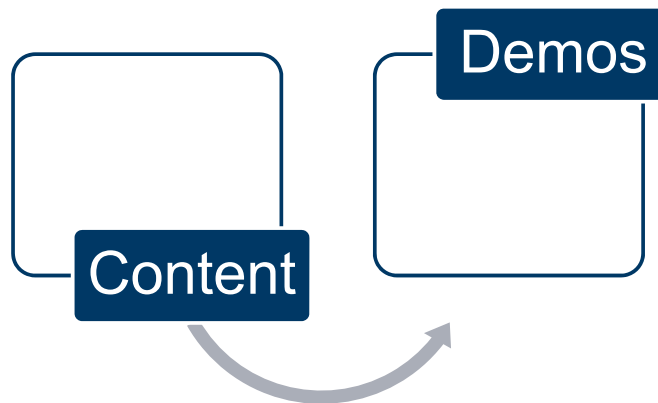
Module 2 Basic Ordering

Module 3 Approvals

Module 4 Searching and Reporting

Training Structure & Flow

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



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



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CSUBUY Overview

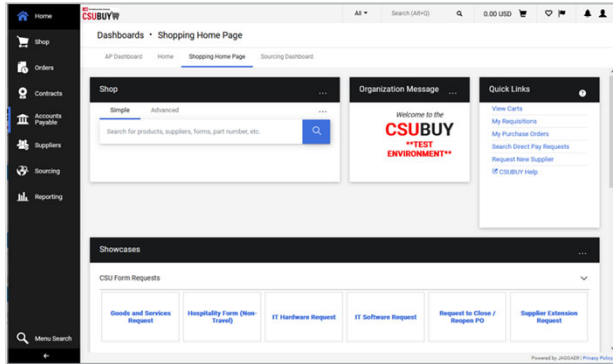
LESSON OBJECTIVES

- 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.



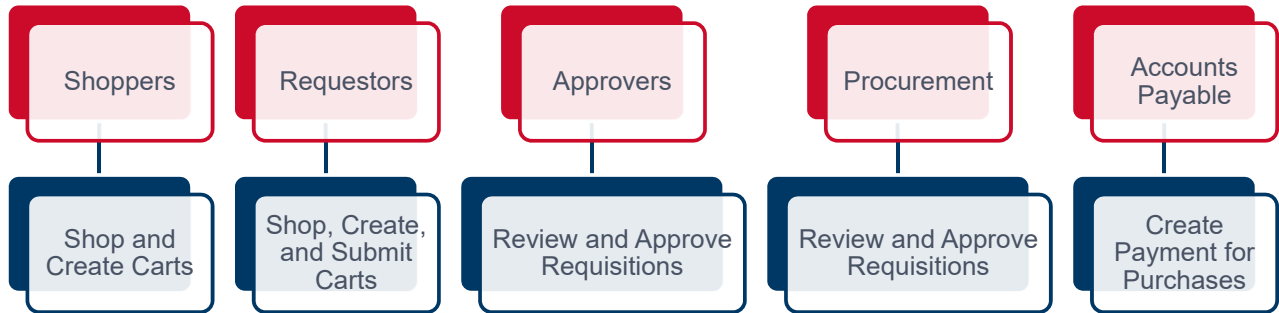
What is CSUBUY?

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

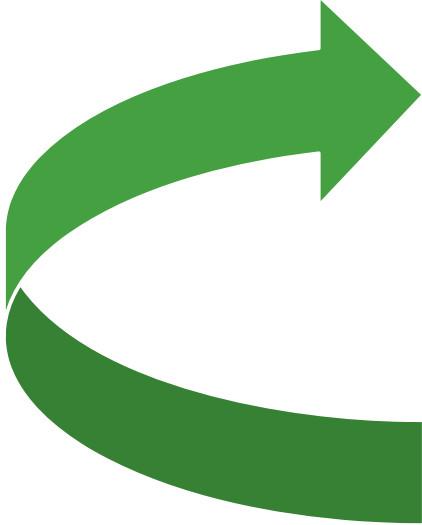


Who Uses CSUBUY?

Overview of the user groups that use CSUBUY for purchasing.



How Does This Change My Role?



In CSUBUY, Approvers will:

- Review and approve requisitions and vouchers.
- Communicate using comments.
- Complete the approval workflow.

How Do I Log In?



Where Do I Get Help?

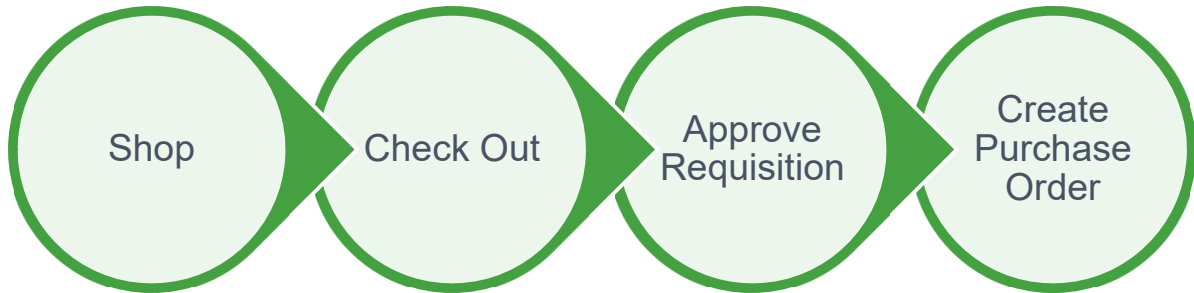
CSUBUY
System
Help

- Help button within the system

Support
Resources

- Local CSU admin
- CSUBUY Training & Resources

Process Overview



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

The screenshot displays the CSUBUY Shopping Home Page. At the top, there is a navigation bar with the CSUBUY logo on the left, a dropdown menu set to 'All', a search bar with the placeholder 'Search (Alt+Q)', and a shopping cart icon showing '0.00 USD'. On the far right of the navigation bar are icons for a heart, a flag, a bell, and a user profile.

Below the navigation bar, the page title is 'Shop • Shopping Home Page'. The main content area is divided into three columns:

- Shop:** Features a search bar with 'Simple' and 'Advanced' filters. The search bar contains the text 'Search for products, suppliers, forms, part number, etc.' and a blue search button.
- Organization Message:** Displays a welcome message: 'Welcome to the CSUBUY'.
- Quick Links:** Lists several navigation options: 'View Carts', 'My Requisitions', 'My Purchase Orders', 'Search Direct Pay Requests', 'Request New Supplier', and 'CSUBUY Help'.

At the bottom of the main content area, there is a 'Showcases' section with a dark header and a single item listed: 'CSU Form Requests'.

How to Access Profile Settings

The screenshot shows the CSUBUY user profile settings page. At the top, there is a navigation bar with the CSUBUY logo, a search bar, and a currency indicator (1,293.05 USD). Below the navigation bar, the page is divided into three main sections: a left sidebar, a main content area, and a right-hand menu.

Left Sidebar: Contains a list of navigation options under the heading "User Profile and Preferences". The options are: "User's Name, Phone Number, Email, etc." (highlighted), "Language, Time Zone and Display Settings", "App Activation Codes", "Early Access Participation", "Update Security Settings", "Default User Settings", "User Roles and Access", "Ordering and Approval Settings", "Permission Settings", "Notification Preferences", "User History", and "Administrative Tasks".

Main Content Area: Titled "User's Name, Phone Number, Email, etc.", it contains several form fields for user information: "First Name" (Demo), "Last Name" (User), "Phone Number" (with an "ext." field), "Mobile Phone Number", "E-mail Address" (demo.user@example.com), "Business Unit" (CSU Fresno P2P (FRXN0)), "Authentication Method" (Local), and "User Name" (demo.user). A "Save Changes" button is located at the bottom right of this section.

Right-hand Menu: Titled "Demo User", it contains a list of links: "View My Profile", "Dashboards", "Manage Searches", "Manage Search Exports", "Set My Home Page", and "Search Help For A Solution". Below these links, there is a message: "You do not have any recent orders" and buttons for "Logout" and "Help".

Set Up Your Notification Preferences

User Profile and Preferences

The screenshot shows the CSUBUY user profile page. The navigation menu on the left includes: Home, My Profile, Training User, User Profile and Preferences (selected), User's Name, Phone Number, Email, etc. (selected), Language, Time Zone and Display Settings, Early Access Participation, Additional User Settings, Update Security Settings, Default User Settings, User Roles and Access, Ordering and Approval Settings, Permission Settings, Notification Preferences, User History, and Administrative Tasks. The main content area is titled 'User's Name, Phone Number, Email, etc.' and contains fields for First Name, Last Name, Phone Number, Mobile Phone Number, E-mail Address, Business Unit (Cal State Univ, Chico P2P (CHXCO)), Department, Position, Authentication Method (Local), and User Name.

Notifications Preferences

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
PR submitted into Workflow	None
PR pending Workflow approval	None
PR pending Ad-Hoc Workflow approval	None

Basic Ordering

Ordering



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MODULE

2

Basic Ordering

Lessons in This Module

- Shopping using Punchout
- Shopping using Form Requests
- Checking Out

PunchOut Catalog

The screenshot displays a web interface for a PunchOut Catalog. On the left is a vertical navigation sidebar with icons for home, search, analytics, and settings. The main content area is titled "Showcases" and contains a list of categories, each with a right-pointing chevron: "CSU Form Requests", "GENERAL", "INFORMATION TECHNOLOGY", "LABORATORY & SCIENTIFIC, MEDICAL & ATHLETIC", and "FACILITIES MANAGEMENT". Below the "FACILITIES MANAGEMENT" category is a grid of vendor logos: BLACKBOX SAFETY, FORTENAL, GRAINGER, ing, LEON PRO, and STAPLES. A WAXIE logo is also visible in a separate box below the grid. At the bottom of the main content area, there is a "Test Hosted Catalogs" link with a right-pointing chevron.

Shop Using a Form

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

DEMO



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

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price			
1 HON Convergence Vinyl Task Chair with Seat Slide, Adjustable Arms, Black (HONCMY1AUR10)	2729611	EA	285.43	Qty: 1 EA	285.43	...		
ITEM DETAILS								
Manufacturer Name	HON COMPANY	Contract:	no value	Taxable	✓			
Manufacturer Part Number	HONCMY1AUR10	Commodity Code	150007 / Furniture	Asset	✗			
Supplier Part Auxiliary ID	2729611	Override Receiving Required	✗	Asset Profile ID	no value			
Prepayment	no value							
more info...								
GENERAL INFORMATION								
Values have been overridden for this line								
Tax Code	CA	CA State Tax						
ACCOUNTING CODES								
Values have been overridden for this line								
Business Unit	Fund	DeptID	Commodity CF	Account	Account Override	Program	Class	Project
no value	no value	no value	150007 Furniture	no value	no value	no value	no value	no value

Check Out and Submit Order

The screenshot displays the CSUBUY Shopping Cart interface. At the top, the CSUBUY logo is on the left, and navigation options like 'All', 'Search (Alt+Q)', and the total amount '1,293.05 USD' are on the right. Below the header, the page title is 'Shopping Cart • Shopping Cart'. A table lists the items in the cart, with one item selected: 'HON Convergence Vinyl Task Chair with Seat Slide, Adjustable Arms, Black (HONCMY1AUR10)'. The item details are expanded, showing manufacturer information (HON COMPANY), part numbers (HONCMY1AUR10, 2729611), and various attributes like 'Contract', 'Commodity Code' (150007), 'Furniture', 'Taxable' (checked), 'Asset', 'Override Receiving Required' (unchecked), and 'Prepayment'. A 'Proceed To Checkout' button is visible in the top right of the cart area.

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 HON Convergence Vinyl Task Chair with Seat Slide, Adjustable Arms, Black (HONCMY1AUR10)	2729611	EA	285.43	Qty: 1 EA	285.43

ITEM DETAILS

Manufacturer Name	HON COMPANY	Contract:		Taxable	<input checked="" type="checkbox"/>
Manufacturer Part Number	HONCMY1AUR10	Commodity Code	150007	Asset	<input type="checkbox"/>
Supplier Part Auxiliary ID	2729611	Override Receiving Required	<input type="checkbox"/>	Asset Profile ID	<input type="text" value="Search"/>
more info...		Prepayment	<input type="text"/>		

MODULE

3

Approvals

Lessons in This Module

- Approval Workflow
- Approval Actions
- Purchase Orders

Approval Workflow



Approvals

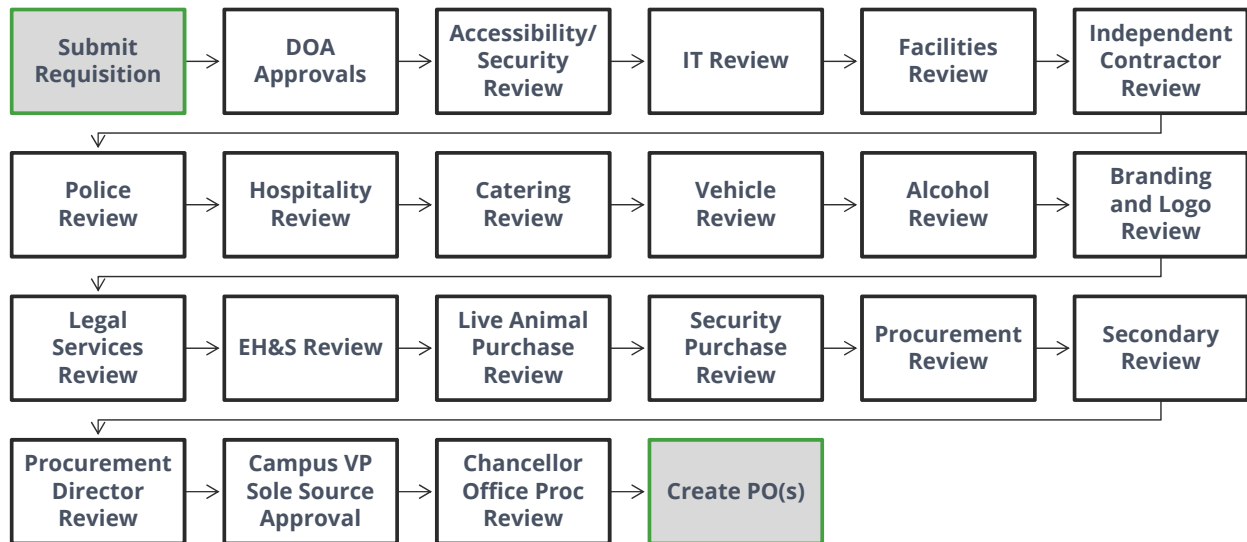
Approval Workflow

LESSON OBJECTIVES

- Explain the approval workflow for a requisition.



Workflow Overview



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.



Approval Queue

All ▾
Search (Alt+Q) 🔍
1,293.05 USD 🛒
🏠
📧
🔔
👤

Approvals

👁️
?
Submit Date Newest First ▾

Requisitions 1
Purchase Order
Change Requests 1
Vouchers
Contracts
Sourcing Events Evaluation
Sourcing Events

Your Selections ⏪

Date Range

All Dates ▾

View Approvals For

Melissa Taylor (20005207359) ▾

⚠️ You are reviewing "Requisitions" approvals for the approver Melissa Taylor (20005207359) - Remove from View Approvals for List

Total Results **1** Display **20 per folder** ▾

▾ **BLANK ASSET PROFILE ID - CHICO** 1

	REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITION
<input type="checkbox"/>	3761916	Acco Engineered Systems Inc	Not Assigned	4/26/2023 9:53 PM	Melissa Taylor

Requisition Name 2023-04-26 20005207359 **Folders** 11 Days in folder [Blank Asset Profile ID - Chico]

No. of line items 1

Filters

^ SUPPLIER

Acco Engineered Systems

Edit a Requisition

Edit Line 1: Item Details

Goods and Services Request

Contract:

Line	Description	EA	Unit Price	Qty	Total Price
1	TEST	EA	75.00	5	375.00

Commodity Code: 150007 (Furniture)

Override Receiving Required:

Prepayment:

Taxable:

Asset:

Asset Profile ID: OTHER_CHICO

Save Close

ACCOUNTING CODES Values have been overridden for this line Workflow

Forward a Requisition

The screenshot shows the CSUBUY requisition interface for requisition 3758112. The 'Approver/Complete Step' dropdown menu is open, displaying the following options:

- Approve
- Return to Shared Folder
- Place on Hold
- Return to Requisitioner
- Forward to ...
- Reject Requisition

The main requisition details are as follows:

Section	Field	Value
Shipping	Ship To	Contact: Layla Betar-Makhoul 940 West 1st Street Chico, CA 95929 United States
	Delivery Options	Ship Via: Best Carrier-Best Way Due Date: no value Deliver To Location: KNDL206_CHICO Glenn Kendall Hall 206
	PO Details	Accounting Date: no value Reference ID: no value Amount-Only / Blanket PO: <input checked="" type="checkbox"/> Terms/FOB: <input checked="" type="checkbox"/>
Billing Information	Bill To	Accounts Payable 400 West 1st St. Chico, CA 95929 United States
	Total	Subtotal: 6,895.00 Sales Tax: 499.90 Use Tax: 0.00 7,394.90

Assign a Substitute Approver

Assign Substitute ✕

Include Date Range for Substitution

Substitute Name ^{*} 🔍

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

DEMO



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

CSUBUY Vouchers Search (Alt+Q) 0.00 USD

Orders > Search > Purchase Orders

Search Purchase Orders

[Save As](#) [Pin Filters](#) [Export All](#)

Quick Filters My Searches

Created Date: Last 90 days Quick search [Add Filter](#) [Clear All Filters](#)

Page 1 of 4 1-20 of 62 Results [20 Per Page](#)

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
2300000201	Cole's Contracting Services	4/3/2023 10:10:06 AM	Completed	3745088	Robert Parkinson	Sent To Supplier	No Matches	4,400.00 USD
2300000199	Cole's Contracting Services	3/31/2023 1:37:19 PM	Completed	3744902	Robert Parkinson	Sent To Supplier	Fully Matched	4,400.00 USD
2300000197	Acis Group	3/30/2023 10:50:00 PM	Completed	3744300	Robert Parkinson	Sent To Supplier	Fully Matched	1,018.88 USD
2300000194	Acis Group	3/30/2023 1:05:24 PM	Completed	3743003	Robert Parkinson	Sent To Supplier	No Matches	1,018.88 USD
2300000174	IRG Plotters &	3/27/2023	Completed	3739982	Deepti	Sent To	No Matches	2,163.91 USD



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Save Search

All ▾
Search (Alt+Q) 🔍
1,293.05 USD 🛒
🏠
📄
🔔
👤

rs
Save As ▾
Pin Filters ▾
Export All ▾

Created Date: Last 90 days ▾ Quick search 🔍

Business Unit: Cal State Univ, ... ▾ ✕

Page 1 of 15 1-20 of 283 Results

Save As

- Manage Searches
- My Purchase Orders
- My Recent Approvals

PO Number ▾	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount ▾
2300000604	David's Doughnuts 🇸🇦	4/28/2023 7:37:20 AM	Completed	3751913	Layla Betar-Makhoul	Sent To Supplier	No Matches	450.45 USD
2300000603	Acs Group 🇸🇦	4/28/2023 7:37:04 AM	Completed	3751913	Layla Betar-Makhoul	Sent To Supplier	No Matches	18,478.42 USD
2300000595	Hewlett-Packard Company 🇸🇦	4/27/2023 3:28:33 PM	Completed	3762860	Chris Jones - Chico	Sent To Supplier	No Matches	516.18 USD
2300000594	Acs Group 🇸🇦	4/27/2023 3:25:32 PM	Completed	3757546	Layla Betar-	Sent To Supplier	No Matches	375.00 USD



Approvers 44

DEMO



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.

WRAP UP



System
Introduction



Approvals



Purchase
Orders

SUPPORT

CSUBUY System Help

- Help button within the system

Support Resources

- Local CSU admin

Q & A

