

CSU The California State University



Campus Customers

AGENDA

Module 1 System Introduction

Module 2 Shopping

Module 3 Other Shopping Requests & Functions

Module 4 Approvals

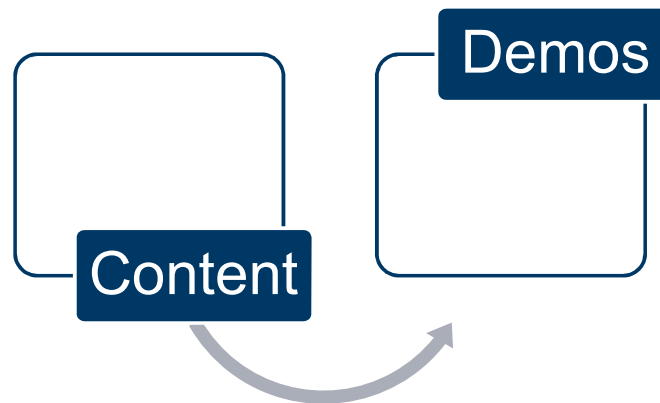
Module 5 Purchase Orders

Module 6 Receiving

Module 7 Reporting

Training Structure & Flow

Each functionality covered today will follow this 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
- Searching and Reporting
- Search for Suppliers

CSUBUY Introduction

System Introduction



CSUBUY Overview

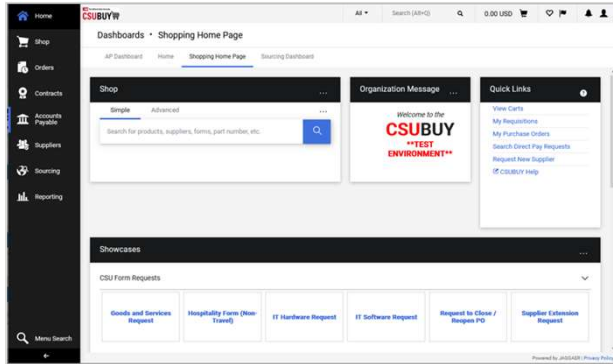
LESSON OBJECTIVES

- 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.



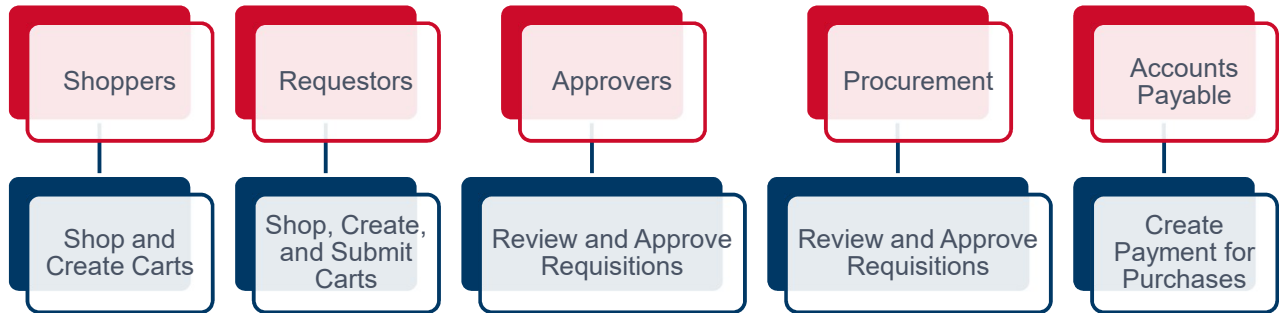
What is CSUBUY?

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, Campus Customers will:

- Shop for items and services.
- Track requests, purchases, and payments.
- Create receipts for goods and services.

How Do I Log In?



Where Do I Get Help?

CSUBUY
System
Help



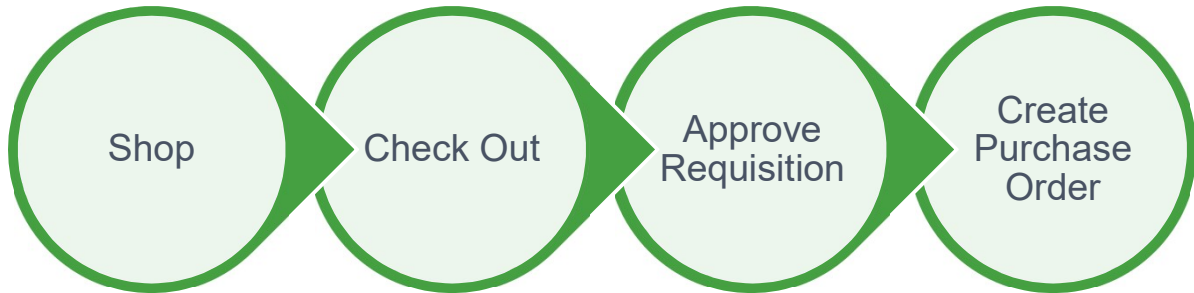
- Help button within the system

Support
Resources



- Local CSU admin
- CSUBUY Training & Resources

Process Overview



Basic Navigation

System Introduction



Basic Navigation

LESSON OBJECTIVES

- Navigate the Shopping dashboard.
- Locate your user profile.
- Identify the key features of the notifications center.
- Update your system notification settings to your desired preferences.
- Use the search feature.



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 currency selector set to 'All', a search bar with the placeholder 'Search (Alt+Q)', and a shopping cart icon showing '0.00 USD'. Below the navigation bar, the page title is 'Shop • Shopping Home Page'. The main content area is divided into three columns: 1. 'Shop' column: Features a search bar with 'Simple' and 'Advanced' filters, and a search input field with the placeholder 'Search for products, suppliers, forms, part number, etc.'. 2. 'Organization Message' column: Displays a 'Welcome to the CSUBUY' message with the CSUBUY logo. 3. 'Quick Links' column: Lists several navigation options: 'View Carts', 'My Requisitions', 'My Purchase Orders', 'Search Direct Pay Requests', 'Request New Supplier', and 'CSUBUY Help'. Below these columns is a 'Showcases' section with a 'CSU Form Requests' item. A vertical sidebar on the left contains various icons for navigation.

How to Access Profile Settings

The screenshot shows the CSUBUY user profile settings page. The user is logged in as 'Demo User'. The page is divided into three main sections: a left sidebar with navigation options, a central form for profile information, and a right sidebar with account management links.

Left Sidebar (Navigation):

- User Profile and Preferences
- User's Name, Phone Number, Email, etc. (Selected)
- 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
- Administrative Tasks

Central Form (User's Name, Phone Number, Email, etc.):

- First Name: Demo
- Last Name: User
- Phone Number: [Empty] ext. (Note: International phone numbers must begin with a plus sign)
- Mobile Phone Number: [Empty] (Note: International phone numbers must begin with a plus sign)
- E-mail Address *: demo.user@example.com
- Business Unit: CSU Fresno P2P (FRXNO)
- Authentication Method: Local
- User Name *: demo.user

Right Sidebar (Account Management):

- View My Profile
- Dashboards
- Manage Searches
- Manage Search Exports
- Set My Home Page
- Search Help For A Solution
- You do not have any recent orders
- Logout
- Help

Bottom Right: Save Changes

- Profile is not changeable
- Note favorites vs. defaults

Set Up Your Notification Preferences

User Profile and Preferences

The screenshot shows the CSUBUY user profile page. The breadcrumb trail is 'My Profile > User's Name, Phone Number, Email, etc.'. The page title is 'Training User'. The left sidebar contains a menu with the following items: 'User Profile and Preferences', 'User's Name, Phone Number, Email, etc.' (highlighted), '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 the following fields: First Name, Last Name, Phone Number (with an 'ext.' field), Mobile Phone Number, E-mail Address *, Business Unit (set to 'Cal State Univ, Chico P2P (CHXCO)'), Department (set to '-'), Position (set to '-'), Authentication Method (set to 'Local'), and User Name *.



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

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Log in and Notifications

Learn how to log in and access your profile and notification settings.

Log In

1. Open the login page for the site you want to access.
2. Enter your user credentials.
3. Select **Sign In**.

Update Notifications

1. Select your **user icon** in the top right corner.
2. Select **View My Profile**.
3. Update user profile settings.
4. Select **Notification Preferences** from the side menu.
5. Choose a set of notifications to update.
6. Select **Edit Section** to update your preferences.
7. Select **Save Changes**.

Search



System Introduction

Search

LESSON OBJECTIVES

- Locate requests and orders.
- Save a search.



Introduction to Search

Searching and Advanced Search

The screenshot shows the 'Advanced search' page in the CSUBUY system. The interface includes a search bar at the top with the text 'SEARCH (AP+Q)' and a currency indicator '0.00 USD'. Below the search bar, there are several filter categories with dropdown menus and input fields:

- Supplier:** Includes fields for 'Supplier' (with a search icon), 'Relationship' (dropdown), 'Type' (dropdown), 'Class' (dropdown), 'Shipping AP Status' (dropdown), 'Tax Identification Number' (input), and 'Country of Origin' (dropdown).
- Contract Party Type:** Includes a 'Type to filter...' dropdown.
- Include Organizational Nodes:** Includes a 'Profile Last Updated By Supplier' dropdown.
- Suppliers Set to Sync with ESP:** Includes a 'Current Supplier Review Workflow Step' dropdown.
- Zip Code:** Includes a 'Business Unit association' dropdown.
- Payment Method:** Includes a 'Select Country' dropdown and a 'Select Payment Type' dropdown.
- Supplier Contact Email Address:** Includes an input field.

At the bottom of the search filters, there are sections for 'Registration Information' and 'Products / Services'.

Saved Searches

The screenshot shows the 'Manage Searches' page in the CSUBUY system. The interface includes a search bar at the top with the text 'SEARCH (AP+Q)' and a currency indicator '0.00 USD'. Below the search bar, there are sections for 'Personal' and 'Shared' searches:

- Personal:** A section with the text 'You have no personal searches.'
- Shared:** A section with the text 'You have no shared searches.'

On the right side of the page, there is a 'Manage Searches' panel with a title 'Manage Searches' and a sub-title 'Add New'. Below this, there is a list of saved searches, currently empty. A blue informational box at the top right of the panel explains that the 'saved searches' page is a filtered view of 'favorites' and provides instructions on how to manage searches.

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	AcS Group	3/30/2023 10:50:00 PM	Completed	3744300	Robert Parkinson	Sent To Supplier	Fully Matched	1,018.88 USD
2300000194	AcS 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



Save Search

rs Save As Pin Filters Export All

Created Date: Last 90 days Quick search ?

Business Unit: Cal State Univ, ... X

Page 1 of 15 1-20 of 283 Results 20 Per Page

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



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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. Select **Export** search results.
6. Save **Search**.

Search for Suppliers



Shopping

Search for Suppliers

LESSON OBJECTIVES

- Search for a supplier.



Search Options

All ▾
Search (Alt+Q) 🔍
1,293.0

Shop ▸ Shopping ▸ Browse By ▸ Suppliers

Search For Supplier ?

Supplier

Supplier Type

All ▾

All

Hosted Catalog

PunchOut Supplier

Mobile PunchOut

Non-Catalog

Showing 1 - 20 of 73 Results

Results Per Page
Sort by: Best Match ▾

Supplier Name	Type	Preference	Supplier Name
*Supplier Not Known			Bob Loblaw
Academic Search, Inc			Boritch, Nicolas
Acco Engineered Systems Inc			C Point Assoc LP
Acs Group			Carolina Biological Supply Co.
AGB Search LLC			

A COLLABORATIVE PROCURE TO BUY MARKETPLACE

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Find a Supplier

All ▾

0.00 USD

Shop > Shopping > Browse By > Suppliers

Search For Supplier ?
back to shop...

Supplier Type All ▾

Search

Showing 1 - 20 of 68 Results
Sort by: Best Match ▾
Page 1 of 4 ▾
legend ?

Supplier Name	Type	Preference	Supplier Name	Type	Preference
*Supplier Not Known			Black Box Safety		
Academic Search, Inc			Boritch, Nicolas		
Acco Engineered Systems Inc			C Point Assoc LP		
Acs Group			Carolina Biological Supply Co.		
ADC Partners, LLC			Central Calif Faculty Med Grp		
AGB Search LLC			Central Valley Fuego		
Amazon.com			Cintas Corporation		
Avis Car Rental			Circuit City		
B&H Photo Video			Cole's Contracting Services		
BD Biosciences			College Agency LLC		

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Suppliers

Learn how to search for a supplier.

1. From the Shopping flyout, select **Browse By > Supplier**.
2. Expand the Search for Supplier Filter by selecting the **Plus** icon.
3. Enter the Supplier or choose the Supplier Type from the drop-down menu.
4. Select **Search**.

MODULE

2

Shopping

Lessons in This Module

- Shop from a Punchout
- Check Out
- Shop Using a Form
- Reorder
- Assign a Shopping Cart

Shop from a PunchOut



Shopping



Shop from a PunchOut

LESSON OBJECTIVES

- Locate the PunchOut
- Add items to a cart with a PunchOut.
- Transfer items in PunchOut cart to CSUBUY cart.



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: "CSU Form Requests", "GENERAL", "INFORMATION TECHNOLOGY", "LABORATORY & SCIENTIFIC, MEDICAL & ATHLETIC", and "FACILITIES MANAGEMENT". Below these categories is a grid of vendor logos: BLACKBOX SAFETY, FOSTENAL, GRAINGER, irg, LEON'S PRO, and STAPLES. A "WAXIE" logo is also visible in a separate box. At the bottom of the main area, there is a "Test Hosted Catalogs" link with a right-pointing arrow icon.

DEMO



Shop from a PunchOut

Learn how to shop from a PunchOut.

1. Locate the Supplier catalog.
2. Search for items.
3. Add items and quantity to your cart.
4. Submit your cart from the PunchOut.
5. Review your cart in CSUBUY.
6. Checkout.
7. Submit request.

Shop Using a Form

Shopping

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



Request Forms

Learn how to submit request forms listed below.

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

Assign a Shopping Cart

Shopping



Assign a Shopping Cart

LESSON OBJECTIVES

- Identify when to assign a cart to another user.



Assign a Shopping Cart

Assign Cart To: *no value*
or SEARCH

Note To Assignee:

Assign Close

Note assign same or higher role. If you don't see name, the individual may not be in CSUBUY

“Prepared By” Versus “Prepared For”

Prepared By

1. Submitted the cart.
2. Created the requisition.

Prepared For

1. Created the cart .
2. Then assigned it to another user.

Note: “Prepared By” and “Prepared For” can be the same user.



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- **Prepared By:** The user submitting the cart, creating the requisition
- **Prepared For:** The user who created the cart and then assigned it to another user. This individual owns the requisition

Note that the Prepared By and Prepared For can be the same user.

DEMO



Shopping Cart

Learn how to manage a shopping cart.

1. Create a shopping cart with items.
2. Select **Assign Cart**.
3. Search for the individual to assign the cart to.
4. Enter their information.
5. Select **Search**.
6. Enter a note to the assignee.
7. Select **Assign**.

Check Out

Shopping



Check Out

LESSON OBJECTIVES

- Update accounting fields 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	
more info...		Prepayment	no value			
GENERAL INFORMATION						
Tax Code	CA	Values have been overridden for this line				
	CA State Tax					
ACCOUNTING CODES						
Business Unit	Fund	DeptID	Commodity CF	Account	Account Override	Program
no value	no value	no value	150007 Furniture	no value	no value	no value
						Class
						Project
						no value
						no value
						no value
2 Office to go Superior 48" Desk, Autumn Walnut (TDDT623BNDAMI)	24450240	EA	783.00	Qty: 1 EA	783.00	...



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 table columns are Item, Catalog No., Size/Packaging, Unit Price, Quantity, and Ext. Price. Below the table, the 'ITEM DETAILS' section is expanded, showing fields for Manufacturer Name (HON COMPANY), Manufacturer Part Number (HONCMY1AUR10), Supplier Part Auxiliary ID (2729611), Contract, Commodity Code (150007), Furniture, Override Receiving Required, Asset, Asset Profile ID, 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"/>		

DEMO



Update Chartfields

Learn how to accurately select accounting fields.

1. Navigate to the shopping cart.
2. Review the accounting fields.
3. Update fields with the correct information.

Show favorites of the charfield

MODULE

3

Other Shopping Forms & Functions

Lessons in This Module

- Other Forms
- Request a New Supplier
- Reorder
- Blanket Orders

Other Forms

Shopping

Other Forms

LESSON OBJECTIVES

- Access other forms.
- Submit other forms.
- Determine when to use each form.



Direct Pay

CSUBUY

Shop > Shopping > View Forms

Back to View Forms

Direct Pay Request

Form Number **781830**

Purpose **Procurement Request**

Status **Incomplete**

Instructions

Suppliers ▲

Form Fields ▲

Direct Pay Information ▲

Cost Details ▲

Review and Submit

Suppliers Request Actions History ?

Supplier Please select a fulfillment center below.

Search Registered Suppliers

Supplier

Relationship

Zip Code Within

Clear

Request to Close/Reopen Purchase Order

CSUBUY All Search (AR+Q) 1,293.05 USD 🛒 🏠 📄 🔔 👤

Shop ▶ Shopping ▶ View Forms

◀ Back to View Forms

Request to Close / Reopen...

Form Number **781777**
Purpose **Generic Request**
Status **Incomplete**

Instructions

Questions ⚠️

Review and Submit

Discussion

Form Approvals

Questions - Request Details

Request Actions History ?

★ Response Is Required

Request Details

Action Needed *

Purchase Order Number *

Supplier Name *

Justification for Request *

DEMO



Other Forms

Learn how to use form requests in CSUBUY.

- Direct Pay
- Request to Close/Reopen Purchase Order

Request a New Supplier

Shopping



Request a New Supplier

LESSON OBJECTIVES

- Request a new supplier from which to purchase goods or services.



Review Process

Create and submit request for new supplier.

Request routes for review/approval by CSU Supplier Management team.

If approved, a supplier profile is created.

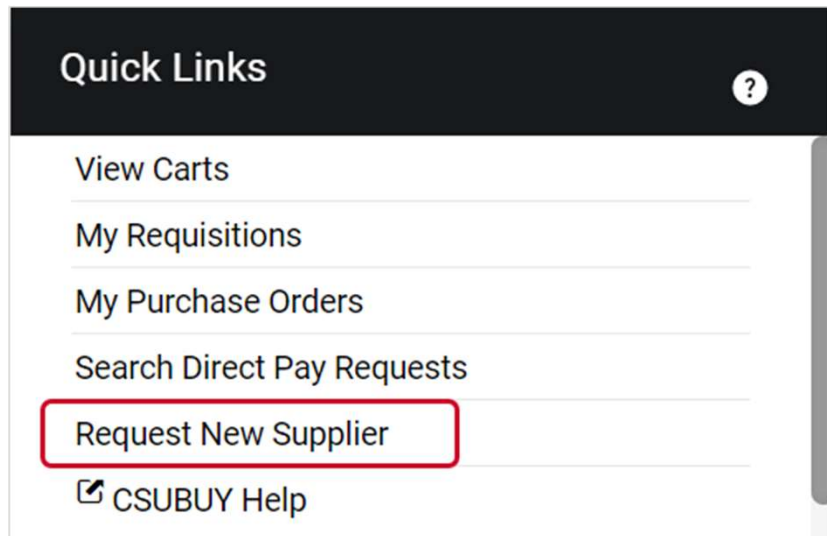
Notification is sent that supplier is available for shopping.



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1. User creates and submits request for new supplier
2. Request routes for review/approval by CSU Supplier Management team
3. If approved, supplier profile gets created
4. User gets notified that supplier is available for shopping

New Supplier Process



The image shows a screenshot of a web application's 'Quick Links' menu. The menu is titled 'Quick Links' in a dark header bar with a question mark icon. Below the header, the following links are listed: 'View Carts', 'My Requisitions', 'My Purchase Orders', 'Search Direct Pay Requests', 'Request New Supplier', and 'CSUBUY Help'. The 'Request New Supplier' link is highlighted with a red rectangular border. The 'CSUBUY Help' link includes an external link icon.

When to use each process (standard vs emergency)

Request a New Supplier

Request New Supplier ×

Supplier request form Cal State Supplier Request

Supplier name *

* Required

DEMO



Request a Supplier

Learn how to request a supplier.

1. Select the **Supplier Request Form** from the Quick Links widget on the home page.
2. Enter in the Supplier name.
3. Select **Submit**.
4. Complete the supplier request.

Reorder



Shopping

Reorder

LESSON OBJECTIVES

- Find a previous order.
- Update items in the new cart.



Reorder

for supplier

Accounting Codes ✎ ...

Business Unit	Fund	DeptID	Commodity CF	Account	Account Override	Program	Class	Project
CHICO <small>California State Univ. Chico</small>	G1006_CHICO <small>CSU OPERATING FUND</small>	D01200_CHICO <small>HFA Course Fees Art/Clay</small>	160001 <small>General Services</small>	660003_CHICO <small>Supplies And Services</small>	613001_CHICO <small>Contractual Services</small>	<i>no value</i>	<i>no value</i>	<i>no value</i>

1 Item ... □

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
	<div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> 📄 Goods and Services Request </div> <p>Contract: <i>no value</i></p>					
1 ✓	SERVICES 1 <small>Procurement Request: Goods and Services Request</small>		EA	65.00	Qty: 10	650.00

ITEM DETAILS ✎

Commodity Code	160001 / General Services	Taxable	✗
PO Clauses	Add	Asset	✗
Prepayment	<i>no value</i>	Asset Profile ID	<i>no value</i>

Total (650.00 USD) ▼

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	650.00
Sales Tax	0.00
Use Tax	0.00
	650.00

Related Documents ▼

- [Add To Active Cart](#)
- [Add to Draft Cart or Pending PR/PO](#) >
- [Add to PO Revision](#)

Completed

Workflow 📄 🖨

Show skipped steps

Submitted
4/28/2023 10:14 AM
Michael Melheim

Powered by JAGGAER | Privacy Policy

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DEMO



Reorder

Learn how to shop for items that were previously purchased.

1. Locate the purchase order that has the items to add to your active cart.
2. Go to the Summary subtab.
3. Scroll down to the list of items in the order.
4. Select the **item**.
5. Select **Add to Active Cart**.

Blanket Orders

Shopping



Blanket Orders

LESSON OBJECTIVES

- Determine when to use a blanket order.
- Identify an order as a blanket order.



When to Use Blanket Orders



Specify a Blanket Order

The screenshot shows a web interface for CSUBUY. At the top, there is a navigation bar with the CSUBUY logo, a search bar, and a currency indicator showing 1,293.05 USD. Below the navigation bar, the main content area is titled 'Form Fields - Form Fields'. On the left side, there is a sidebar with a 'Goods and Services Requisition' section. The main form area contains a 'General Information' section with the following fields:

- Form Number: 783846
- Purpose: Procurement Request
- Status: Incomplete
- Instructions
- Suppliers
- Form Fields
- Review and Submit

The 'General Information' section includes the following questions and options:

- What type of goods or services are you requesting? * (Dropdown menu)
- Did you receive one or more quotes for your request? *
 Yes No
- Is this a Blanket Order? *** (This question is highlighted with a red box)
 Yes No
- Is the request for a renewal of a previous purchase?

On the right side of the form, there are two options: 'Field Name Is Searchable' and 'Response Is Required'.

DEMO



Blanket Orders

Learn how to create a Blanket Order.

1. Navigate to **Goods and Services Request Form**.
2. From the Instructions page select **Next**.
3. Complete the supplier information, then select **Next**.
4. Complete the Form Fields information. Be sure to select **Yes** under “Is this a Blanket Order?”.
5. Select **Next**.
6. Review the request, then select **Submit**.

MODULE

4

Approvals

Lessons in This Module

- Approval Workflow
- Approval Actions

Approval Workflow



Approvals

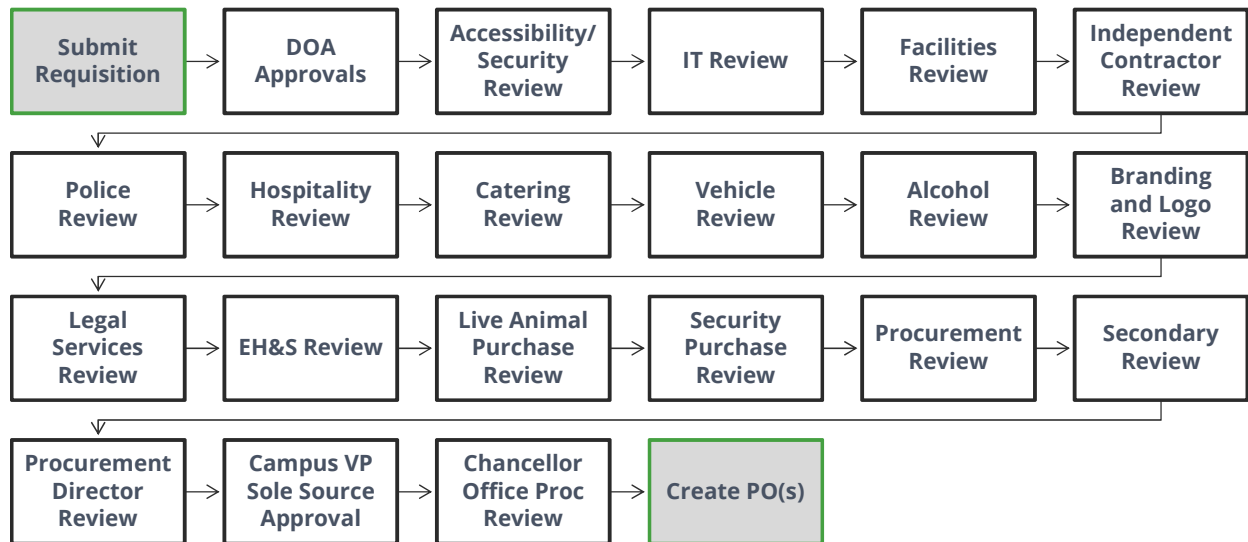
Approval Workflow

LESSON OBJECTIVES

- Explain the approval workflow.



Workflow Overview



End users specifically approves vouchers. That's something we will need to cover but not necessary approving requisitions

Approval Workflow View

Requisition • 3838055

Summary | Transaction | PO Preview | Comments | Attachments | History

General Information	Shipping Information	Billing Information
Transaction Details Status: Pending Cart Name: Sanyer Test Business Unit: CSU Fresno PDP (FRKND) Submitted: 8/9/2023 8:43 AM	Ship To Contact: Celia Gonzalez 2971 E Barstow Ave Fresno, CA 93740 United States Delivery Information Deliver To: AS-OFF_FRIEND Location: ANIMAL SCIENCE BUILDING Ship Via: Best Carrier Best Way Due Date: no value	Bill To Accounts Payable 5130 N Maple Ave M/S J45B Fresno, CA 93742 United States PO Details Accounting: no value Date: no value PO Type: no value Amount Only / Blanket PO: no value Multi-Year PO: no value Terms/FOB: no value Override: no value Reference ID: no value

Summary
Total (28,712.75 USD)
Subtotal: 26,500.00
Sales Tax: 2,212.75
Use Tax: 0.00
28,712.75

What's next?

Workflow

Show skipped steps

- Submitted
8/9/2023 8:43 AM
Celia Gonzalez
- Start - Parallel Steps
- Requisition Validation 1
Completed
- Wait for Validation 1
Approved
- End - Parallel Steps
- DOA Approval: Level 1
Approved
T. McClum

End users specifically approves vouchers. That's something we will need to cover but not necessary approving requisitions

Approval Actions

Approvals

Approval Actions

LESSON OBJECTIVES

- Add comments to a requisition.
- Approve, reject, and return requisitions.



Create & Send Comments

The screenshot shows the CSUBUY requisition interface for requisition 3761916. The page is divided into sections: General Information, Shipping Information, and Billing Information. A dropdown menu is open over the 'Add Comment' option, which is highlighted with a red box. The menu includes options like 'Copy to New Cart', 'Add Notes to History', 'View My Orders (Last 90 Days)', 'Continue Shopping', 'View Carts', 'View Cart return message(s)', and 'See configuration for this requisition'.

General Information	Shipping Information	Billing Information
General Information Values vary by line.	Ship To Contact: Melissa Taylor 940 West 1st Street Chico, CA 95929 United States	Bill To Accounts Payable 400 West 1st St. Chico, CA 95929 United States
	Delivery Information Deliver To: KNDL210_CHICO Location: Glenn Kendall Hall 210 Ship Via: Best Carrier-Best Way Due Date: no value	PO Details Accounting Date: no value PO Type: no value Amount-Only / Blanket PO: X

Review a Requisition

Put a
request
on hold

Add
comments

Approve,
return, or
reject

MODULE

5

Purchase Orders

Lessons in This Module

- Distribution
- Order Status

Distribution

Purchase Orders

Distribution

LESSON OBJECTIVES

- Identify the distribution methods for a purchase order.
- Apply the process for error handling with purchase orders during distribution.



Purchase Order Distribution



cXML



Email



Fax



Manual

Order Status



Purchase Orders

Order Status

LESSON OBJECTIVES

- Search for a purchase order.
- Identify the status of a purchase order.



Define Order Status

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

Supplier: Medline (9), GovConnection (6), Graybar Electric Company (4), Hewlett-Packard Company (4), B&H Photo Video (4)

PO Status: Completed (62)

Business Unit



DEMO



Search for an Order

Learn how to search for an order and check the status of it.

1. Select **Orders** from the flyout menu.
2. Select **Purchase Orders**.
3. Use the Quick Filters to view purchase orders with a specific order status.

MODULE

6

Receiving Goods and Services

Lessons in This Module

- Receiving

Receiving

Receiving Goods and Services



Campus Customers 88

End users do not create 3-way good receipt at every campus. Chico/Fresno does not. They would do services receipt. That is what should be demo for them.

Receiving

LESSON OBJECTIVES

- Identify the type of items that need a receipt.
- Determine the locations where items may be received.
- Compare the differences between cost and quantity receipts.
- Apply the process of receiving an order.

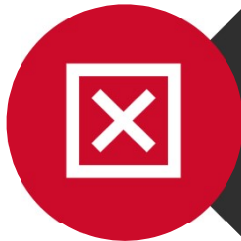


What Needs a Receipt?



Goods

- 3-way
- Receipt required
- Created by Central Receiving



Services or Blanket PO

- 2-way
- No Receipt Required –Verification Approval
- Verified by Campus User

Needs to say that services need a 2-way (no receipt) by Campus Users while goods need a 3-way (receipt required) by Central Receiving

DEMO



Receipt Verification

Learn how to verify services are received:

1. Navigate to the Orders flyout, select **Accounts Payable > Vouchers to Approve**.
2. Locate the voucher to **Verify Services Received**.
3. Review and approve or reject the voucher.

This will have to be toggled. Chico/Fresno campus customers does not create receipts. They approve services.

MODULE

7

Reporting

Lessons in This Module

- Locate reports using the search function.
- Voucher Payment Information

Search



Reports

Search

LESSON OBJECTIVES

- Locate a Requisition.
- Locate a Purchase Order.
- Locate a Receipt.
- Locate a Voucher.



Find a Requisition

CSUBUY All Search (Alt+Q) 1,293.05 USD 🛒 🏠 📌 🔔 👤

Orders > Search > Requisitions

Search Requisitions Save As Pin Filters Export All

Submitted Date: Last 90 days 🔍 Add Filter Clear All Filters ?

Page 1 of 39 1-20 of 771 Results 20 Per Page

Requisition Number	Supplier	Requisition Name	Requisition Status	Prepared For	Submitted Date	Total Amount
<input type="checkbox"/> 3770463	Hewlett-Packard Company	2023-05-10 bgrushcow 01	Completed	Bryan Grushcow	5/10/2023 7:16:13 AM	3,070.20 USD
<input type="checkbox"/> 3770293	Cintas Corporation	TEST E2E03-01 HAZMAT	Completed	CELIA GONZALEZ	5/9/2023 6:25:46 PM	3,004.90 USD
<input type="checkbox"/> 3770030	Circuit City	E2E02 - 01 (Retest) EHS & Facilities Review	Completed	Antoinette Castanon	5/9/2023 10:53:46 AM	15,000.00 USD
<input type="checkbox"/> 3770121	David's Doughnuts	2023-05-09 20004620604 01	Pending	Layla Betar-Makhoul	5/9/2023 10:50:23 AM	3,777.00 USD
<input type="checkbox"/> 3770062	Circuit City	TEST - E2E02-01	Completed	CELIA GONZALEZ	5/9/2023	14,999.90 USD

Find a Purchase Order

CSUBUY All Search (Alt+Q) 1,293.05 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 38 1-20 of 750 Results ⚙️ 20 Per Page

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
2300000747	Hewlett-Packard Company	5/10/2023 7:16:56 AM	Completed	3770463	Bryan Grushcow	Sent To Supplier	No Matches	3,070.20 USD
2300000746	Cintas Corporation	5/10/2023 7:10:58 AM	Completed	3770293	CELIA GONZALEZ	Sent To Supplier	No Matches	3,004.90 USD
2300000745	Bob Loblaw	5/9/2023 4:58:39 PM	Completed	3770020	Layla Betar-Makhoul	Sent To Supplier	No Matches	5,630.63 USD
2300000744	Boritch, Nicolas	5/9/2023 11:00:28 AM	Completed	3769681	CELIA GONZALEZ	Sent To Supplier	No Matches	2,000.00 USD

Supplier

- BD Biosciences 64
- Acs Group 63
- Dell 41
- David's Doughnuts 30
- Carolina Biological Supply Co. 29
- [See More](#) [Show More](#)

PO Status

- Completed 743
- Pending 7
- [Show More](#)

Find a Voucher

CSUBUY Accounts Payable > Vouchers > Search For Vouchers Vouchers Search (Alt+Q) 0.00 USD 🛒 🏠 🔔 👤

Search Vouchers Save As Pin Filters Export All

My Drafts Search

Quick Filters My Searches

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

Page 1 of 3 1:20 of 57 Results 20 Per Page

<input type="checkbox"/>	Voucher Number	Supplier Voucher Number(s)	Supplier	PO Number	Voucher Status	Created Date/Time	Due Date	Discount Date	Discount Amount	Submitted Date	Voucher Source	Voucher Type	Pay Status
<input type="checkbox"/>	C0000222	V-012	Halogen Light Corp	2300000440	Pending	4/19/2023 12:28:21 PM	5/19/2023		0.00 USD	4/19/2023 12:35:09 PM	Manual	PO Voucher	In Process
<input type="checkbox"/>	C0000219	CASAM36656	Fastenal	2300000419	Pending	4/19/2023 11:35:56 AM	5/19/2023		0.00 USD	4/19/2023 11:35:56 AM	Electronic (Supplier System)	PO Voucher	In Process
<input type="checkbox"/>	C0000213	V-020	ADC Partners, LLC	2300000261	Pending	4/18/2023 11:43:07 AM	5/18/2023		0.00 USD	4/18/2023 12:04:56 PM	Manual	PO Voucher	In Process
<input type="checkbox"/>	C0000210	V-011	Halogen	2300000379	Pending	4/18/2023	5/18/2023		0.00 USD	4/18/2023	Manual	PO	In



Voucher Pay Status

Voucher Type	Pay Status	Total Amount
PO Voucher	In Process	56,320.00 USD
PO Voucher	In Process	1,608.75 USD
PO Voucher	In Process	3,011.75 USD
PO Voucher	In Process	314.03 USD
PO Voucher	Payable	107,250.00 USD
PO Voucher	Payable	314.50 USD

Payment Information	
Pay Status	Payable
Payment Method	Unknown
Payment Record No.	<i>no value</i>
Payment Record Date	<i>no value</i>
Payment ID Ref	<i>no value</i>
Cancellation Date	<i>no value</i>



DEMO



Filter Options and Export

Learn how to filter options and export.

1. Navigate to **Home > Accounts Payable > Search for Vouchers.**
2. Select **Add Filter.**
3. Select filters under **Identifiers, Dates, General Information, Item Details, and Custom Fields.**
4. Select the box beside each voucher.
5. Select **Export All** or **Export Selected Rows.**
6. Complete **Title** and **Type.**
7. Select **Submit.**

Voucher Payment Information

Purchase Orders



Voucher Payment Information

LESSON OBJECTIVES

- Locate voucher payment details.



Look Up Payment Information

Included with the Paid Voucher:

- Pay Status
- Payment Method
- Payment Record No.
- Payment Record Date
- Payment ID Ref.
- Payment Partially Paid
- Cancellation Date
- Escheatment Date
- Reconciliation Date
- Total Payment Amount
- Voucher Payment Amount

End users won't see all of this. First 5-6

DEMO

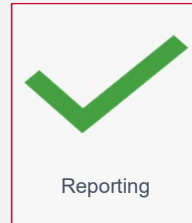
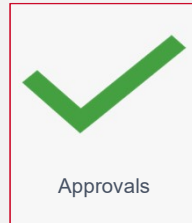
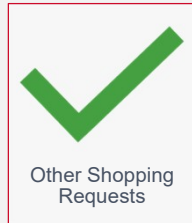
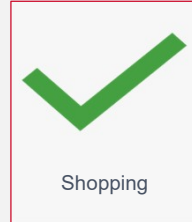
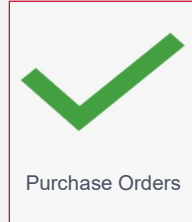
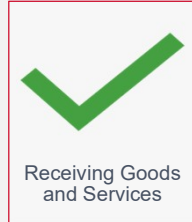
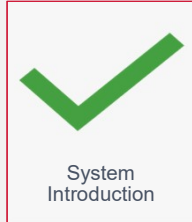


Search for Payment Information

Learn how to search for payment information.

- Search to review payment information on the voucher.
- View how a PO is linked to a voucher.

WRAP UP



SUPPORT

CSUBUY System Help

- Help button within the system

Support Resources

- Local CSU admin
- CSUBUY Training & Resources

Q & A

