

CSU The California State University

CSUBUY 

A COLLABORATIVE PROCURE TO PAY MARKETPLACE

CSUBUY Phase 3: Procure-to-Pay (P2P)

Roadshow: Deep Dive into CSUBUY



Agenda

Topic	Presenter
Introduction into CSUBUY	Video
CSUBUY Vision, Objectives, & Benefits	Tu
Timeline	Tu
General Project Update	Tu
Demo: <ul style="list-style-type: none">• General Navigation & Global Functionality• Create a Low Dollar Requisition• Create an Independent Contractor Request• Overview of an Approval Queue	Tu/Robert/Tonya
Training Overview & Opportunities	Maggie
Go-Live Timing	Maggie
Q&A	

Introduction into CSUBUY



CSUBUY P2P: Vision

This is Phase 3 of the CSUBUY Program. It 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

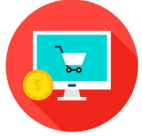


CSUBUY P2P: Objectives

- Develop a systemwide platform that integrates disparate data and processes into one streamlined solution
- Implement an intuitive and easy to use solution
- Create visibility to preferred and sustainable suppliers and guide end users to contracted suppliers.
- Drive process efficiency through integration and automation to reduce manual work
- Improve compliance and reduce costs



CSUBUY P2P: Benefits



Streamline Procurement and Payment Processes: Consolidate disparate data and processes into a single streamlined electronic solution, increasing automation to reduce manual inefficiencies

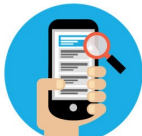


Improve User Experience: For both suppliers and internal customers, CSUBUY P2P will offer an intuitive and simplified experience.

- Suppliers will benefit from electronic receipt of PO's and submission of invoices, timely payment and self-service access to check invoice approval and payment status.
- Internal Customers will have easy shopping and check out, access to order and payment status, and a single tool for reconciliation of purchases and payments



Better Data Quality for Decision Making: Improve reporting capabilities, enabling CSU to better identify shared suppliers and leverage negotiating power to drive cost savings.

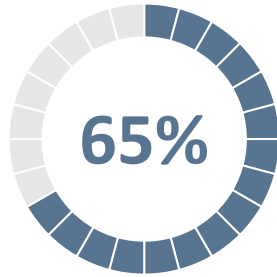


Increased Visibility: One consolidated P2P system will increase access to data and information for both CSU employees and our suppliers, enabling cross campus visibility in key areas.



Continuous Improvement: CSUBUY P2P drives forward the strategic, systemwide focus on continuous improvement to increase efficiency and effectiveness throughout the organization.

Project Progress

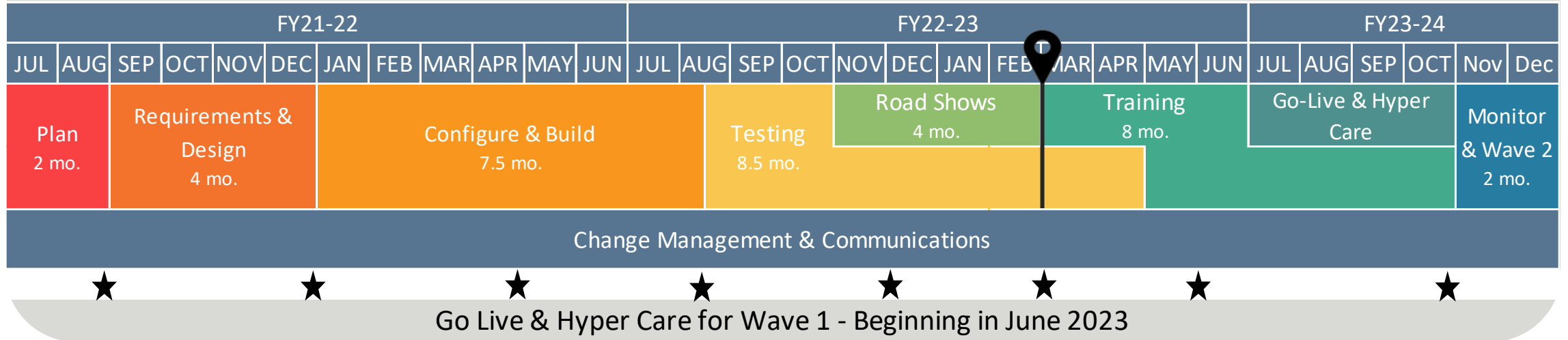


P2P Campuses

Wave 1 Campuses		
Bakersfield Chico Fresno San Bernardino	Los Angeles San Luis Obispo	Sonoma Chancellor's Office Humboldt

CSUBUY Phase 3 - Procure-to-Pay Implementation Pilot & Wave 1 Implementation (9 Campuses)

Project Timeline



CSUBUY P2P: General Project Update

Recently Completed

- Finalized Campus Roadshow Content & Preparation
- Completed Integration Testing for: User, Custom Fields, PR Validation, Invoice Validation & PO Export
- Finalized Reinforcement Strategy for post Go-Live
- Identified Campus Testers for UAT
- Analyzed supplier data to identify suppliers to be included in the initial load into CSUBUY

In Progress

- Conduct Campus Roadshows
- Test Supplier Sync and Payment Status Integration
- Prepare for training for Campus Tester for UAT Testing
- Confirmation of value sets including:
 - Commodity Codes & Default Account Codes
 - Common Value Sets: FOB, PO Types, Direct Pay Types, Payment Terms
 - Ship-To & Bill-To Addresses
- Confirmation of supplier list for initial load into CSUBUY

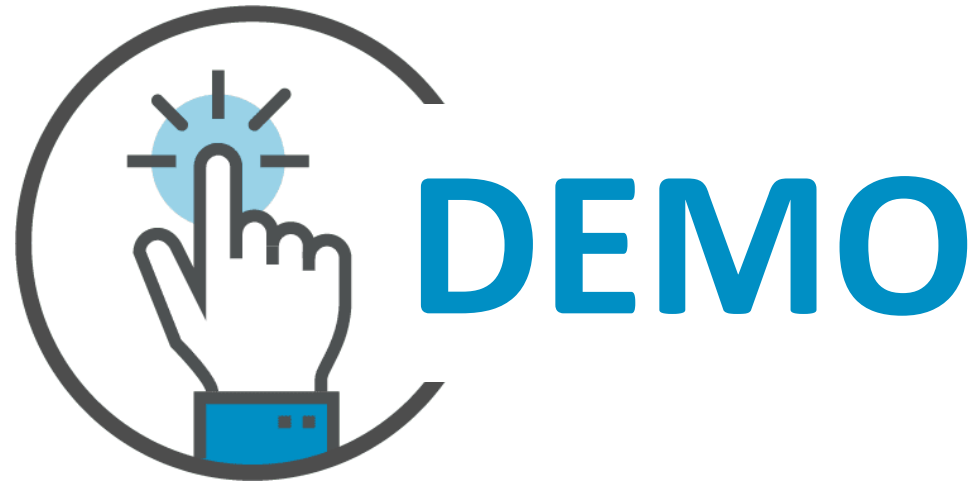
Coming Soon

- Training for UAT testing
- Conduct UAT Testing
- Develop Training Materials
- Define Cutover Strategies including the recommendation for in-flight transactions and reporting

CSUBUY P2P: Configuration Disclaimer

*All functional materials, recommendations, and application configurations have been defined by the CSUBUY P2P Core Project Team based on best practice, initial requirements and specific insights from the pilot campus. **The configuration shown today is pending Campus Pilot Team and additional Supporting Teams validation and may be subject change.***

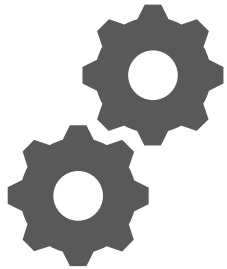
CSUBUY P2P: Configuration Disclaimer



CSUBUY P2P: Demo Details



User Profile Defaults



Application Values & Approvers

Activity	Role
General Navigation & Global Functionality: <ul style="list-style-type: none">• CSUBUY Layout• Profile Settings• Search	Requester
Create an Independent Contractor Request	Requester & Approver
Overview of Approval Queue	Procurement

CSUBUY P2P: The Foundation of our Training Approach

Purpose

Educate future CSUBUY Users on changes associated with roles, processes, data, and technology introduced with the rollout of CSUBUY P2P. Our goal is the development of sustainable educational, training, and learning materials to develop individual and organizational capability within the new solution.

Objectives

- Promote a smooth transition for Users from the “old” way of operating to the “new” way of operating
- Facilitate development of skills, capability, and knowledge across all areas of the procurement related activities, via the use of educational activities and tools
- Encourage adoption by providing the right level of knowledge at the right time to the right stakeholder
- Develop a comprehensive, sustainable and accessible knowledge program that makes it simple for Users to find what they need when they need it
- Set up the CSU for long term success post go-live and the ability to support ongoing training needs

CSUBUY P2P: Training Development

The RiseNow Instructional Design Team in partnership with the Core Team and a selection of Campus Subject Matter Experts (SME's) are working on the training materials for CSUBUY.

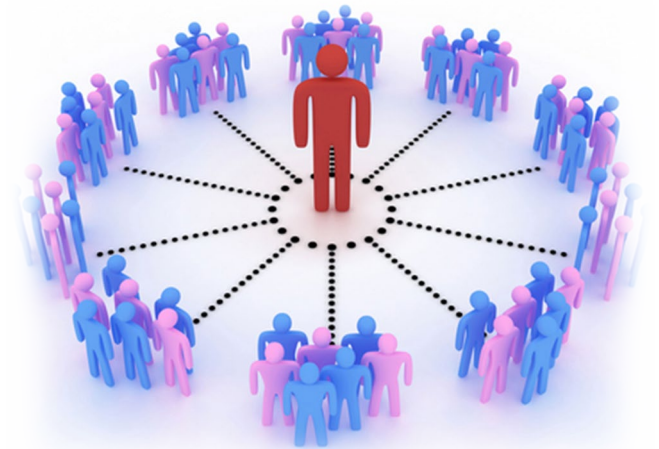
All CSUBUY training materials will be reviewed and approved by the CSU SME's prior to finalizing them for training delivery.

CSUBUY P2P: Train the Trainer

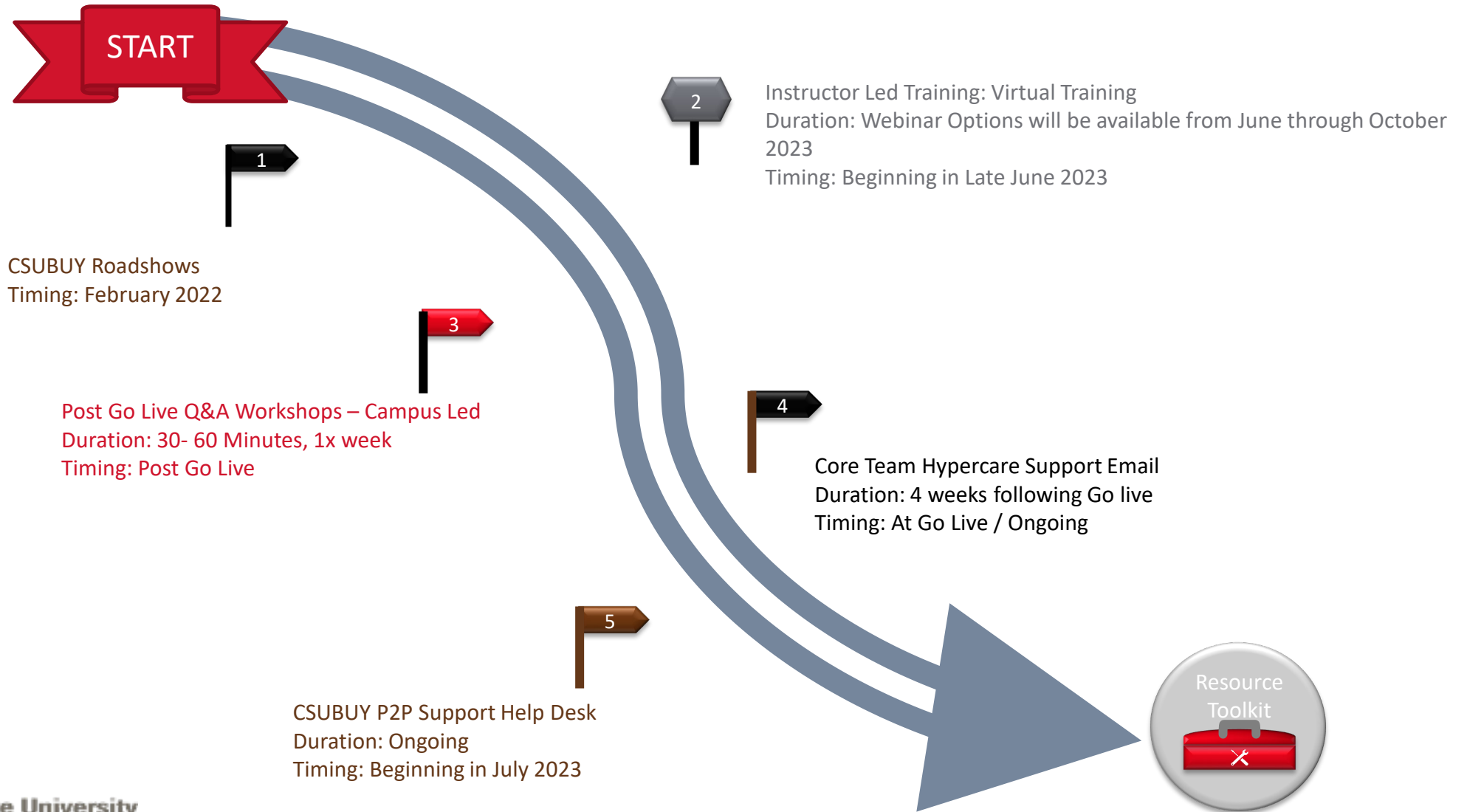
The train-the-trainer model is a training framework that turns campus team members into CSUBUY training subject matter experts who can then teach other members of your campus.

In June 2023, a Train the Trainer series will be hosted, and all pilot campuses have been asked to send at least one resource to this series to become familiar with the training tools and recommended format.

The goal of this series is to enable each campus to deliver training on an ongoing basis as needed following the initial Go Live Readiness trainings.



CSUBUY P2P: Training Experience



- Mandatory
- Optional

CSUBUY: Campus Roll Out



Go Live Readiness: Go Live instructions, Training Reminders, Updating Websites And Links, etc.

End User Training: Virtual or In Person Trainings, Sharing Out Training Materials

Hyper Care: Support, Sharing Tips & Tricks, Office Hours, Lessons Learned, etc....

Transition to Support: Moving CSUBUY Help Desk As Primary Support

CSUBUY P2P: Roll Out Plan

	Campus	May	June	July	August	September	October	November
Pilot Group 1	Chico	Readiness Activities	Training	Live Hyper Care				
Pilot Group 2	San Bernardino Bakersfield Fresno			Readiness	Training	Live Hyper Care		
Wave 1A	SLO LA				Readiness	Training	Live Hyper Care	
Wave 1B	Sonoma CO Humboldt					Readiness	Training	Live Hyper Care
	Go Live Timing			★	★	★	★	

NOTE: There are CFS Configuration activities in preparation for User Acceptance Testing (UAT) that may impact the roll out schedule. The Core Team will keep the Wave 1 Campuses & the CSU Community informed on this progression as we continue to strive to meet the roll out plan.



