CSUBUY 🛒

A COLLABORATIVE PROCURE TO PAY MARKETPLACE

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

Roadshow: Deep Dive into CSUBUY

Agenda

Topic	Presenter
Timeline	Tu
General Project Update	Tu
Demo: • General Navigation & Global Functionality • Create a Low Dollar Requisition • Process Request Requiring Sourcing • Review AP Dashboard • AP Process for Direct Pays • Create a new supplier	Tu/Robert/Tonya
Training Overview & Opportunities	Maggie
Go-Live Timing	Maggie
Q&A	

Project Progress

65%

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

FY21-22												FY22-23												FY23-24					
JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	Nov	Dec

- Plan 2 mo.
- Requirements & Design 4 mo.
- Configure & Build 7.5 mo.
- Testing 8.5 mo.
- Road Shows 4 mo.
- Training 8 mo.
- Go-Live & Hyper Care
- Monitor & Wave 2 2 mo.

Change Management & Communications

★ ★ ★ ★ ★ ★ ★ ★

Go Live & Hyper Care for Wave 1 - Beginning in June 2023

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
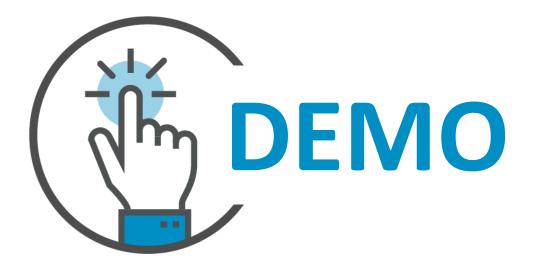
CSUBUY P2P: Configuration Disclaimer

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: • CSUBUY Layout • Profile Settings • Search	Requester
Create a Low Dollar Requisition	Requester
Process a Request that Requires Sourcing	Procurement
Review AP Dashboard	Account Payable
Understanding AP Review through Direct Pay • Creation of Direct Pay • Review Invoice Document • AP Review Process	Requester & Accounts Payable
Create a Supplier	Supplier & Supplier Admin

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

START

1 CSUBUY Roadshows
Timing: February 2023

2 Instructor Led Training: Virtual or In Person Depending on Your Role
Duration: 2 Day Training Workshops for AP and Procurement, 1 Day Supplier Management
Timing: (2 weeks prior to Go Live), Train the Trainer in June

3 Post Go Live Q&A Workshops – Campus Led
Duration: 30- 60 Minutes, 1x week
Timing: Post Go Live

4 Core Team Hypercare Support Email
Duration: 4 weeks following Go live
Timing: At Go Live / Ongoing

5 CSUBUY P2P Support Help Desk
Duration: Ongoing
Timing: Beginning in July 2023

Mandatory

Optional

Resource Toolkit

The California State University
WORKING FOR CALIFORNIA

CSUBUY: Campus Roll Out

4 weeks before	3 Weeks Before	2 Weeks Before	1 Week Before	Week of Go Live	1 Weeks After	2 Weeks After	3 Weeks After	4 Weeks After	5 Weeks After	6 Weeks After

Go Live Readiness Activities (4 weeks before – 1 Week Before)

End User Training Sessions (2 Weeks Before – 2 Weeks After)

Go Live (Week of Go Live)

Hyper Care (1 Weeks After – 5 Weeks After)

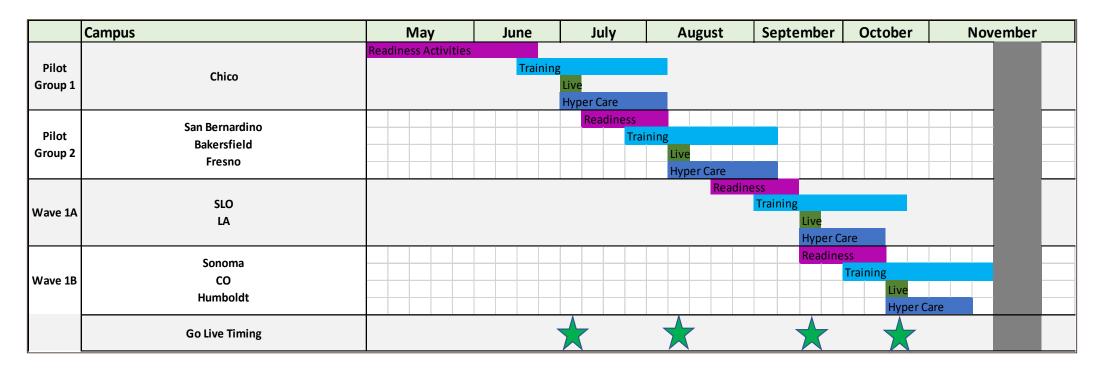**Transition to Support** (6 Weeks After)

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.*

Appendix