The California State University

CSUBUY

A COLLABORATIVE PROCURE TO PAY MARKETPLACE

Campus Customers

AGENDA

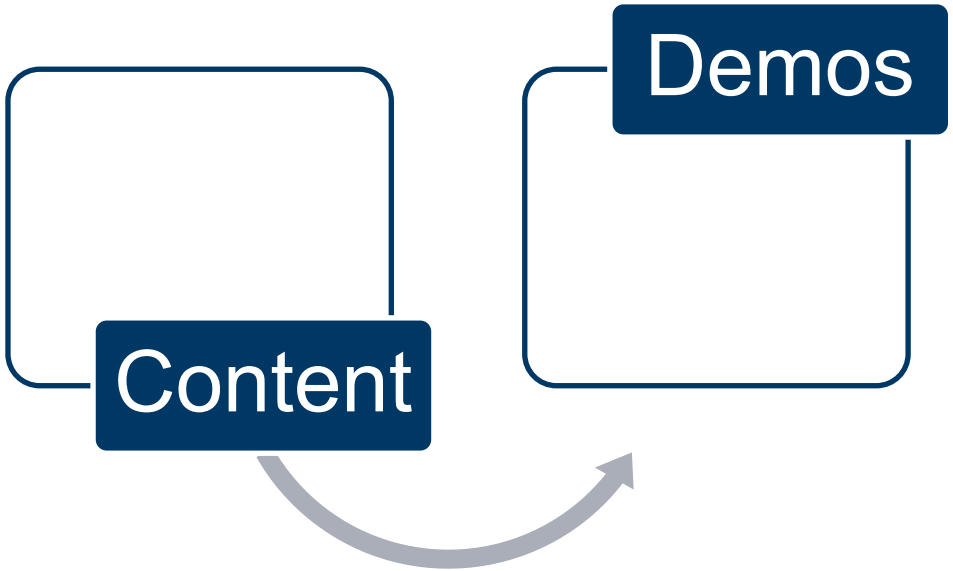
	A message from Steve Relyea
Module 1	System Introduction
Module 2	Shopping
Module 3	Other Shopping Forms & Functions
Module 4	Approvals
Module 5	Purchase Orders
Module 6	Receiving
Module 7	Voucher Payment Status
Module 8	Reporting

A message from Steve Relyea



Training Structure & Flow

Each functionality covered today will follow this 2-step process:



MODULE 1

System Introduction

Lessons in This Module

- CSUBUY Introduction
- Basic Navigation
- Searching
- Search for Suppliers

CSUBUY Introduction

System Introduction

CFS & CSUBUY

LESSON OBJECTIVES

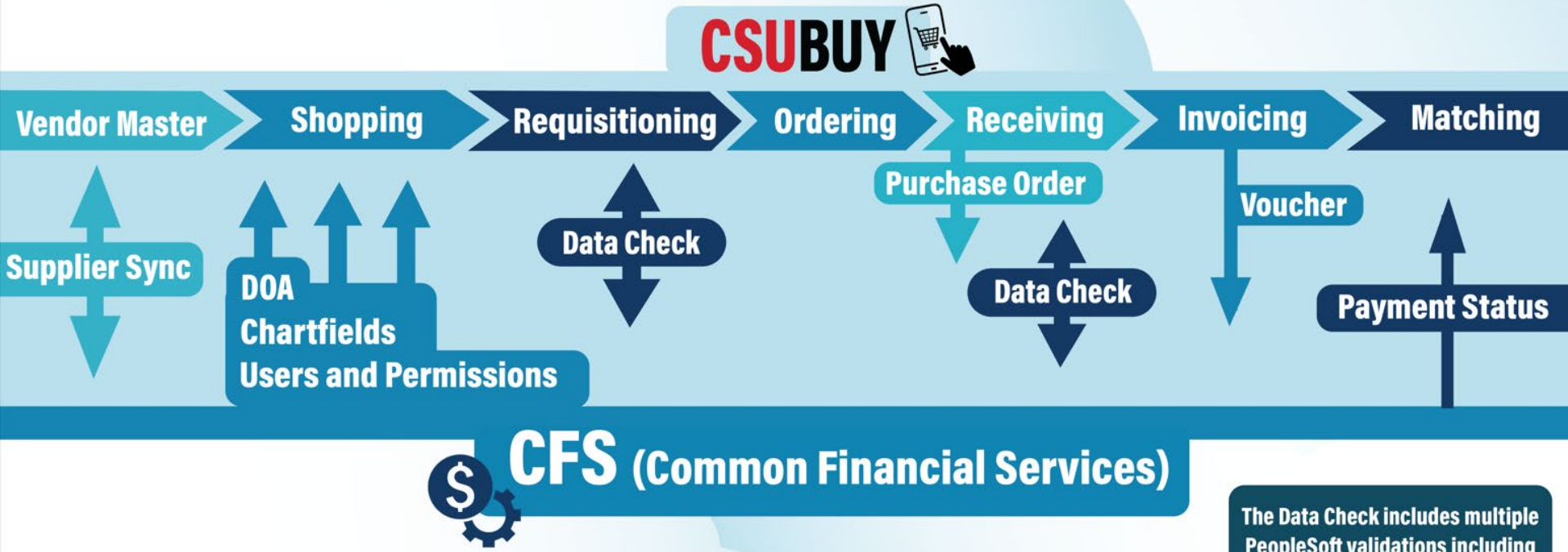
- Review integration types associated with CSUBUY.
- Learn what processes are in which system.



CSU The California State University

CSUBUY

HOW DOES DATA FLOW BETWEEN CSUBUY AND CFS?

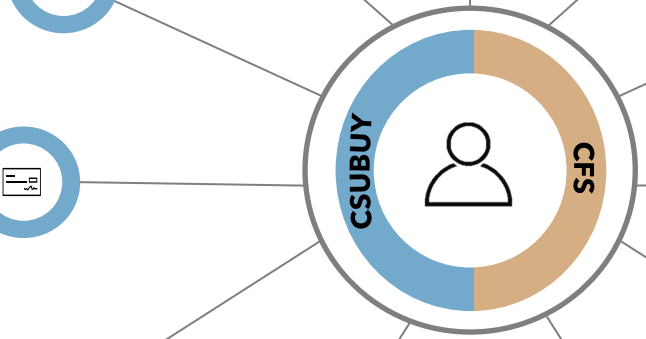


The Data Check includes multiple PeopleSoft validations including combo edits.

For detailed listing of the appropriate SetIDs and/or Business Units to use, reference the P2P: Business Unit Document.

CSUBUY Procure-to-Pay

WHAT TO DO WHERE?



BUYING
Requisitions & PO related activities including requesting, PO dispatch, and Change Orders

RECEIVING
Confirm goods have been received or services have been rendered by supplier

PUNCHOUT SUPPLIER DIRECT PO
Request direct PO's for goods and services provided by punchout suppliers

SUPPLIER PAYMENTS
Match, review and approval of invoices submitted by suppliers for voucher creation.

RECONCILIATION
Reconcile requests and purchase orders created including closing POs

BUDGET CHECKING
Purchase Orders (record Enc.), PO Invoices (reverse Enc.) & Invoice Posting

STUDENT & EMPLOYEE DIRECT PAYS
Reimbursements & payments for students and employees

PAYMENT
Posting of vouchers, payments and payment corrections

CLAIMS
Claim Process
(CSUBUY Invoice override available)

1099
1099 Processing
(CSUBUY Invoice override available)

CSUBUY
A COLLABORATIVE PROCURE TO PAY MARKETPLACE

For detailed listing of the appropriate SetIDs and/or Business Units to use, reference the P2P: Business Unit Document.

CSUBUY Overview

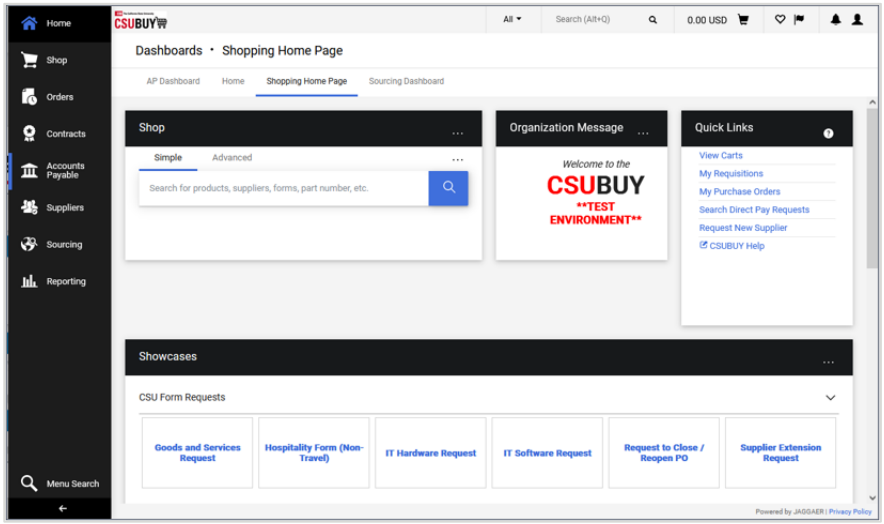
LESSON OBJECTIVES

- 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



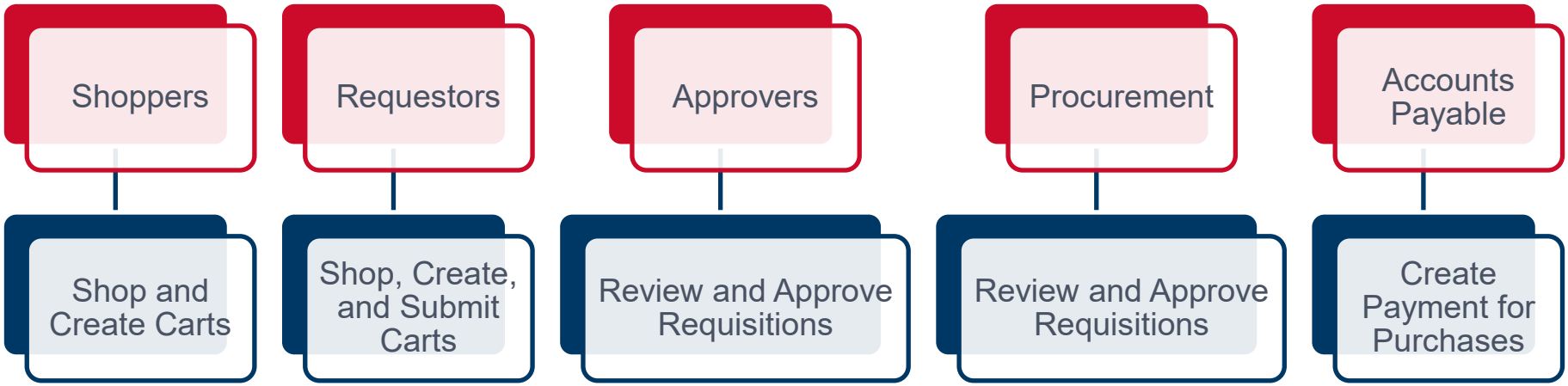
CSU The California State University

CSUBUY

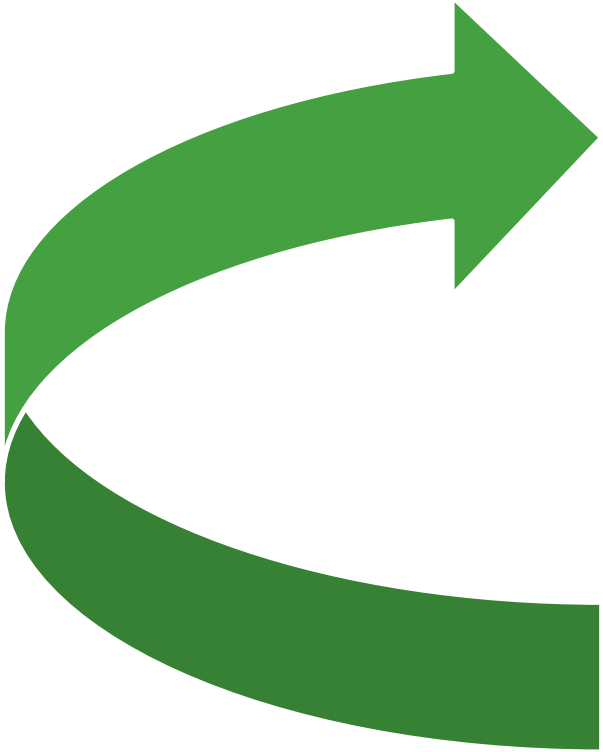
A COLLABORATIVE PROCURE TO PAY MARKETPLACE

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?

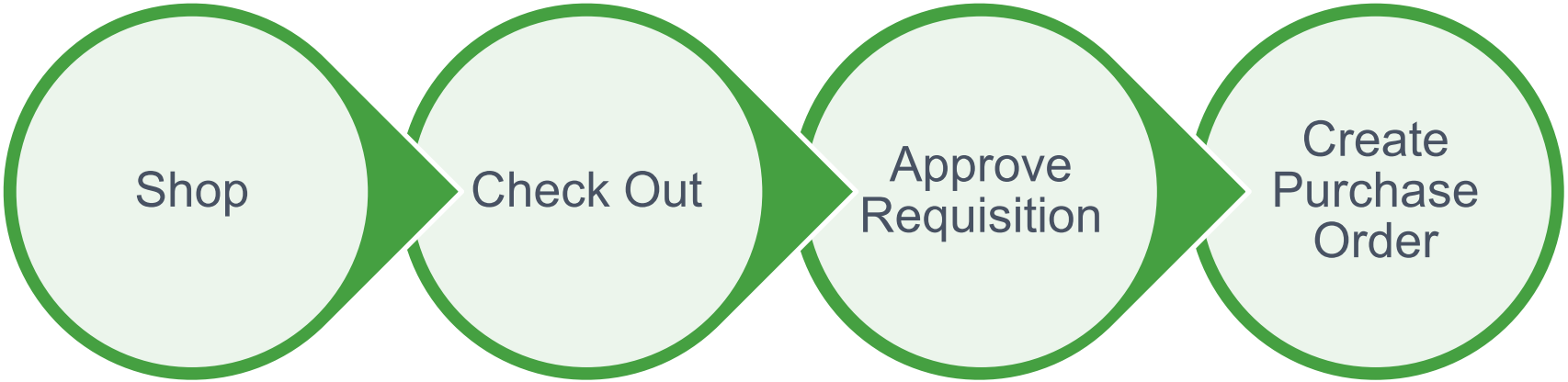
CSUBUY System Help

- Help button within the system

Support Resources

- Local CSU admin
- CSUBUY Training & Resources

Process Overview



Basic Navigation

System Introduction

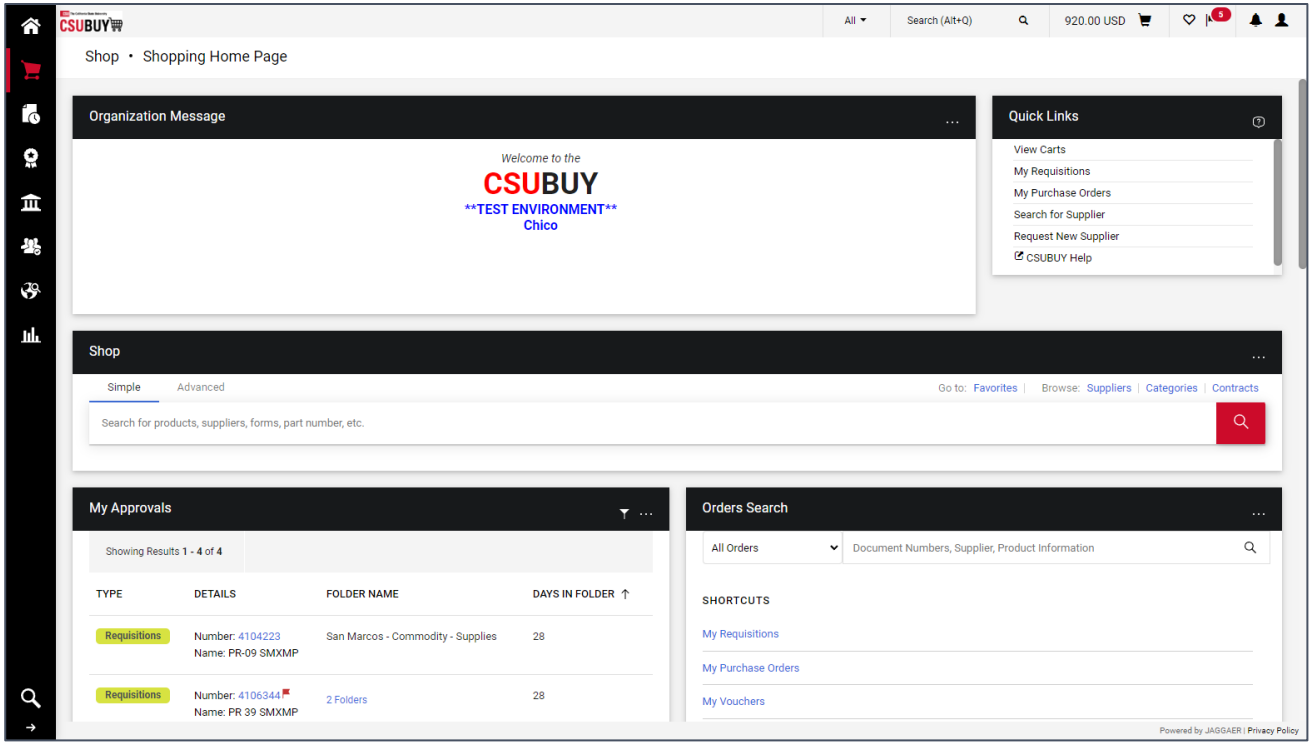
Basic Navigation

LESSON OBJECTIVES

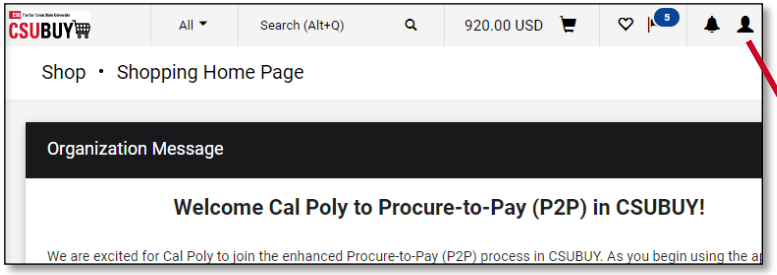
- Navigate the Shopping dashboard.
- Locate your user profile.
- Identify the key features of the notifications center.
- Update your system notification settings to your desired preferences.
- Use the search feature.

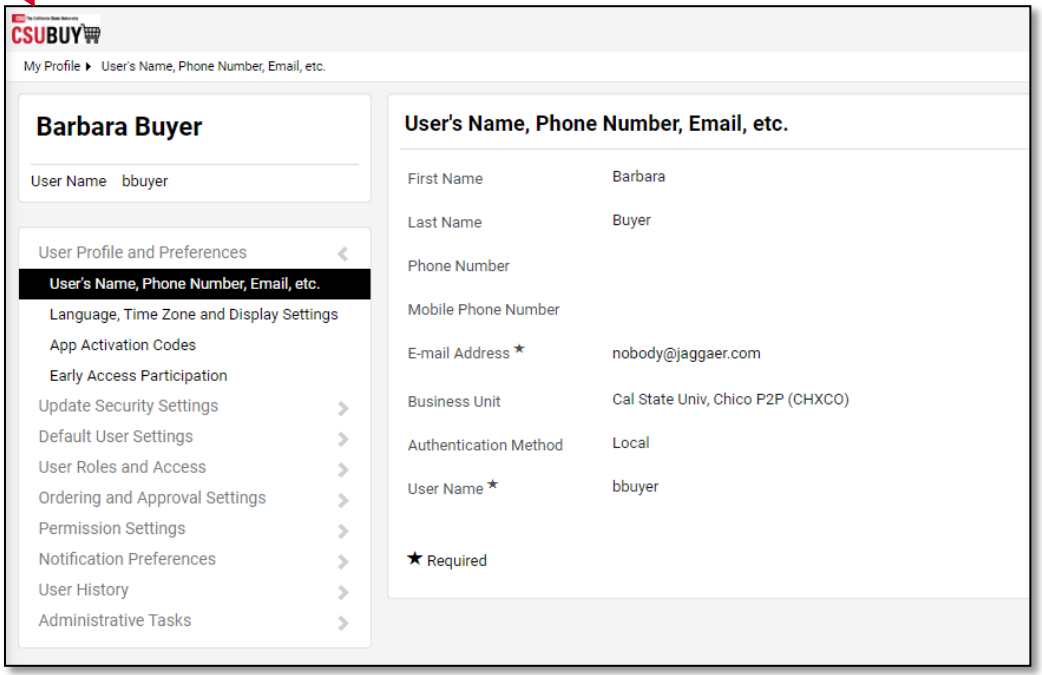


Shopping Home Page

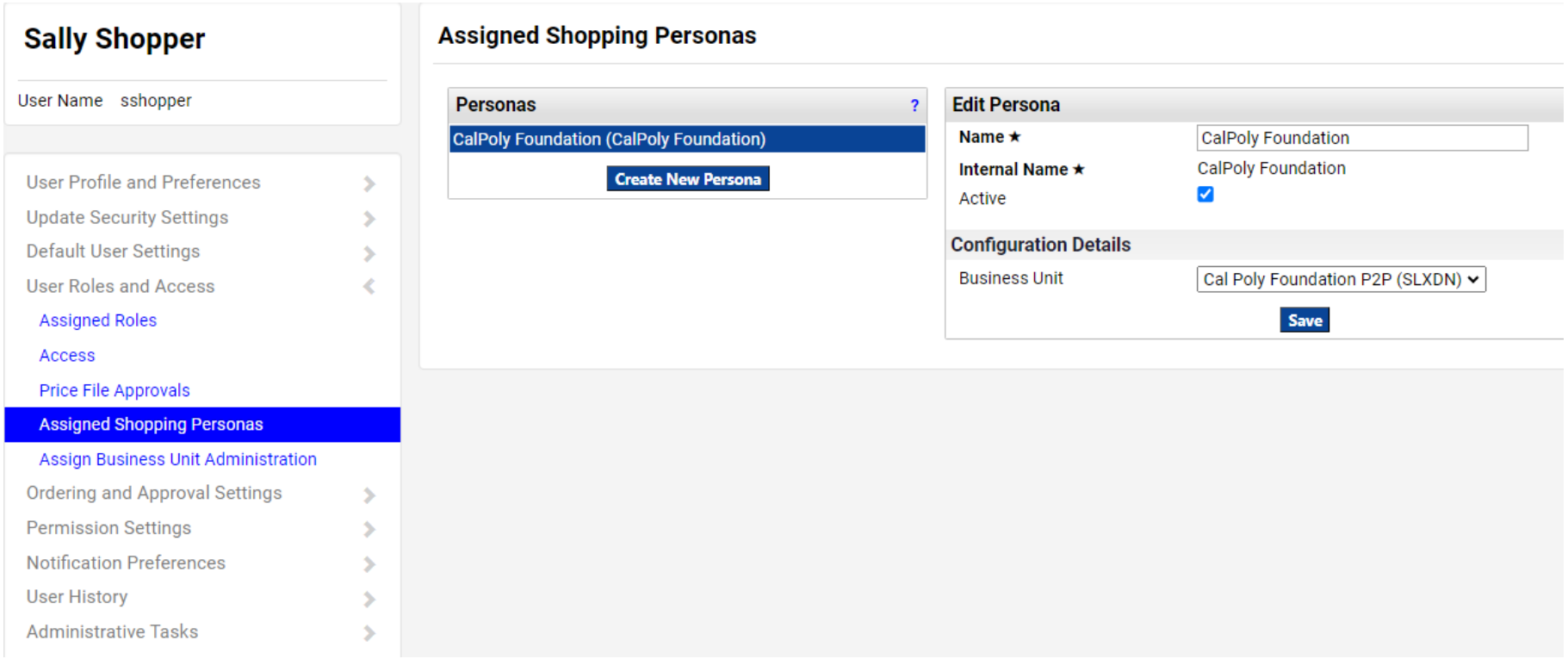


How to Access Profile Settings

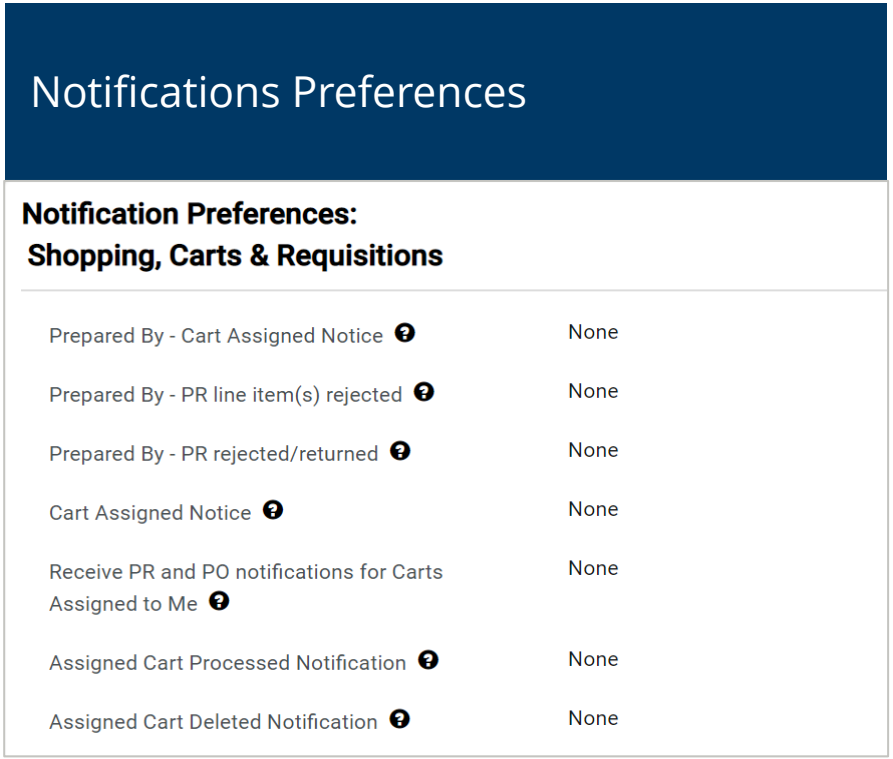




CSUBUY System Personas

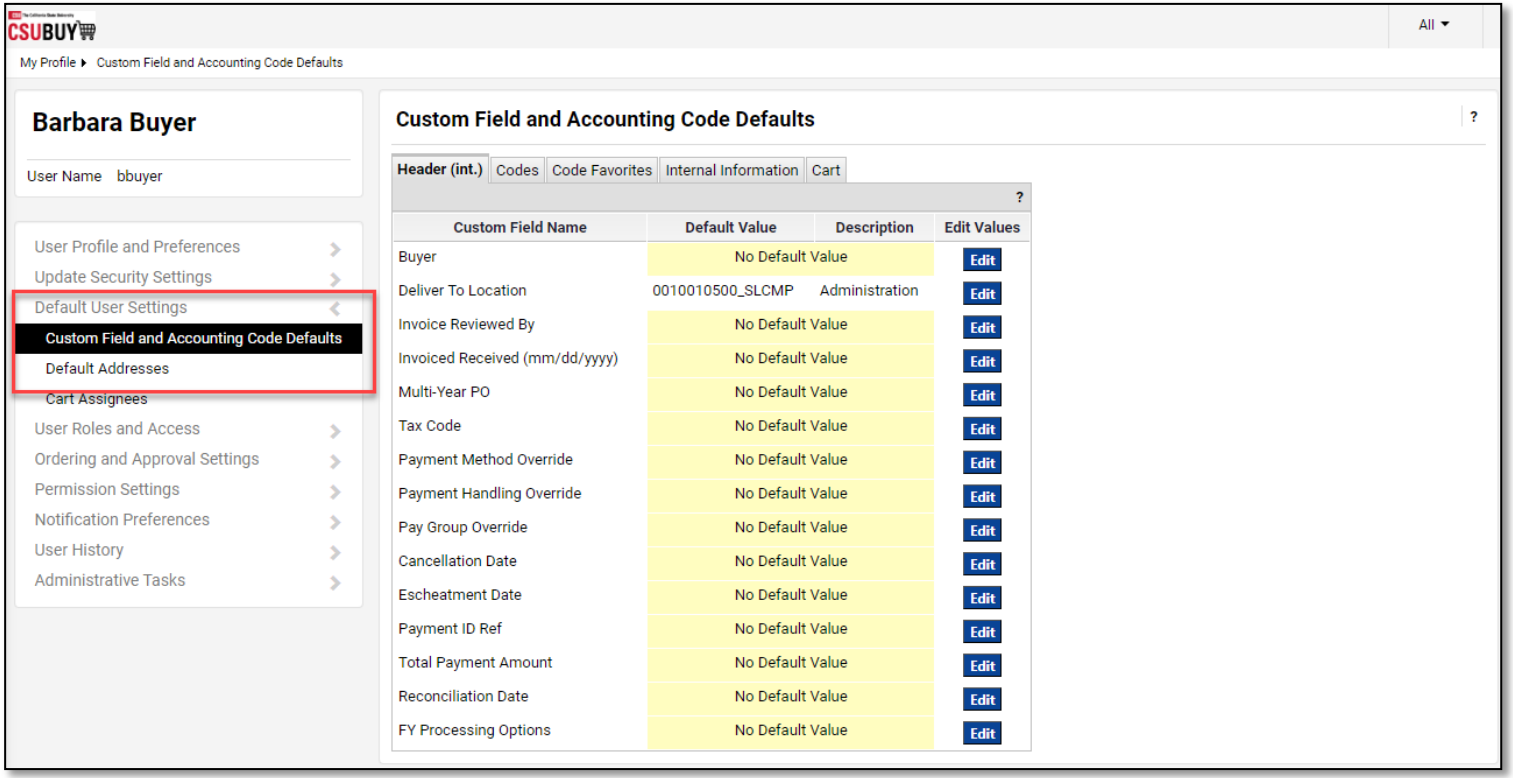


Set Up Your Notification Preferences



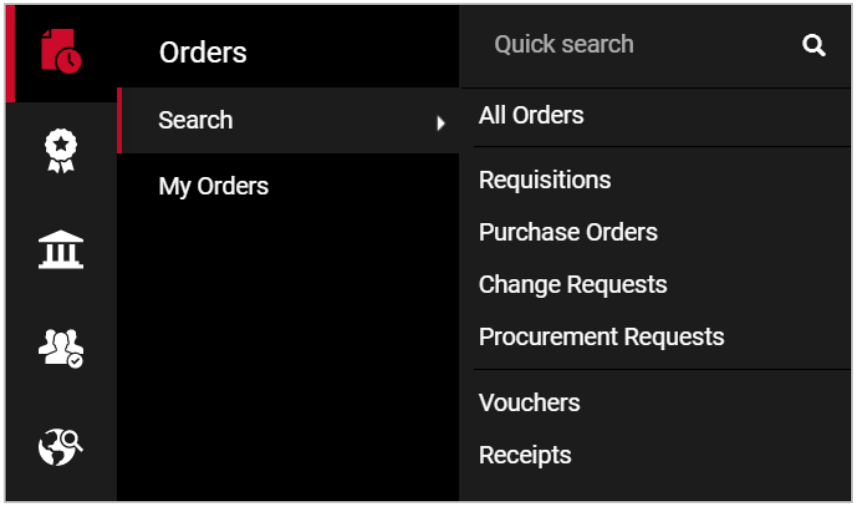
Notifications are globally defaulted and can be modified by the user.

Set Up Default Settings



Users who submit requisitions for multiple business units should not default their chartfields.

Orders Flyout: Use the Search Feature



Search

- Search for Requisitions
- Search for Purchase Orders
- Change Requests
- Vouchers

My Orders

- Items Assigned to Me

DEMO



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**.

Searching

System Introduction

Searching

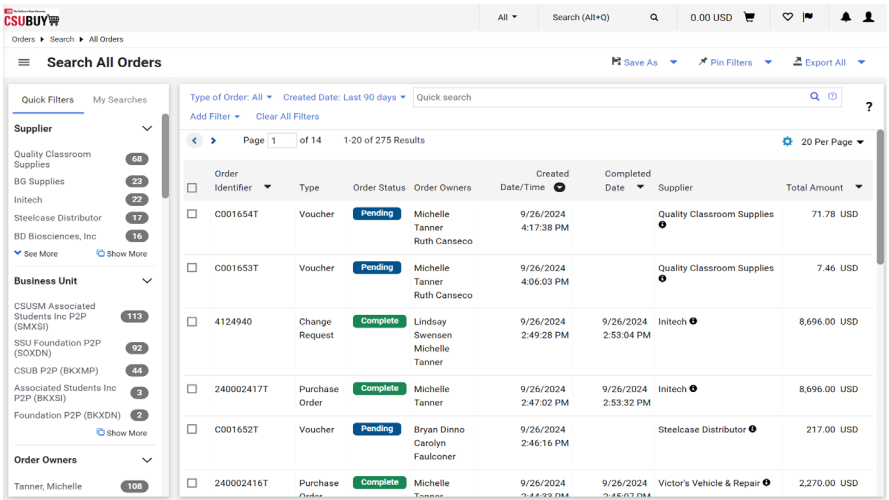
LESSON OBJECTIVES

- Locate requests and orders.
- Save a search.

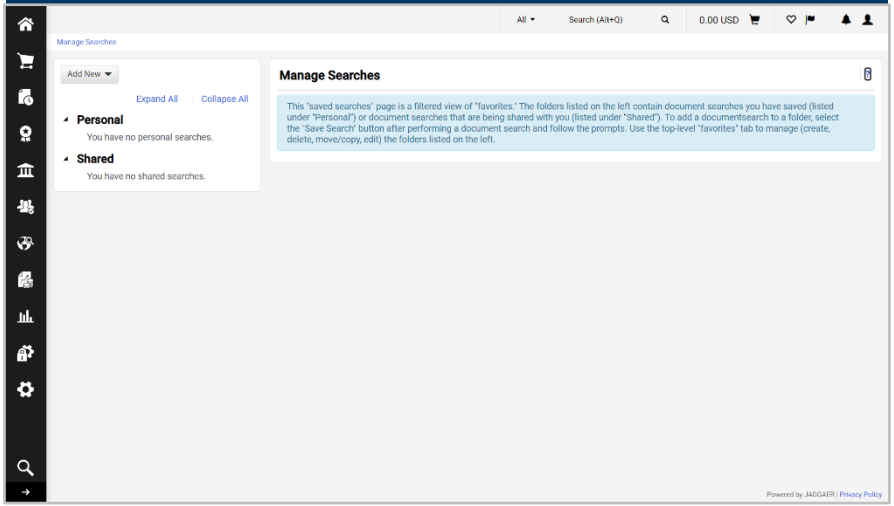


Introduction to Search

Searching and Advanced Search

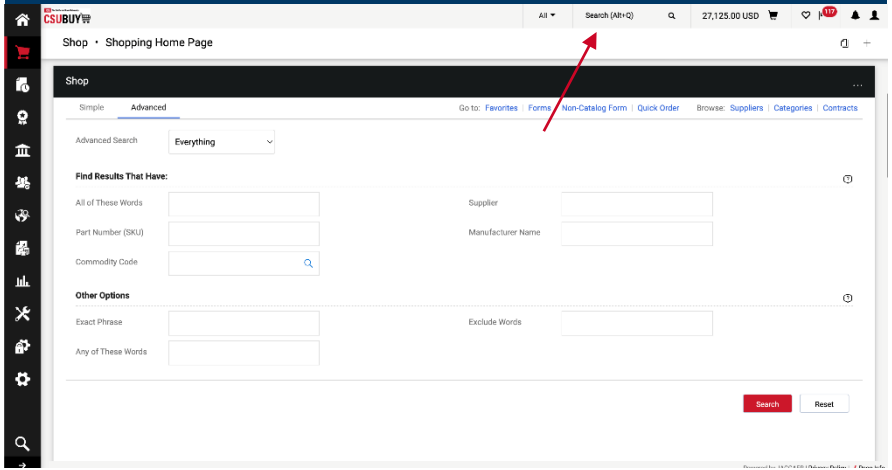


Saved Searches

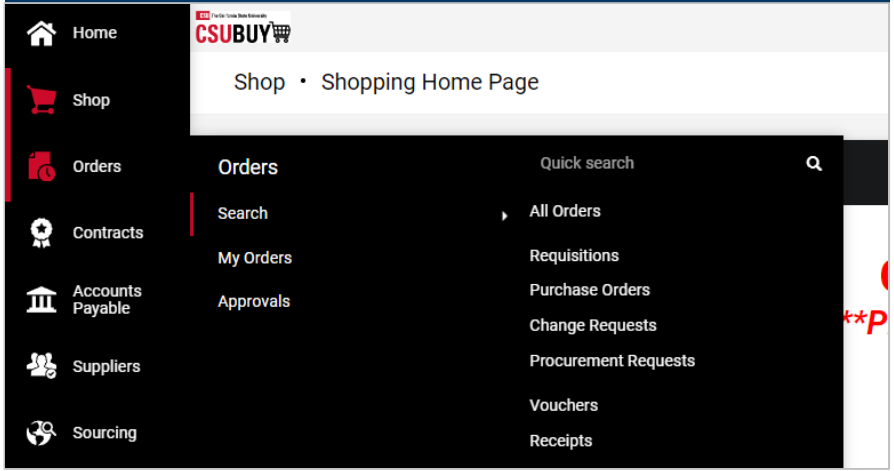


Search Options

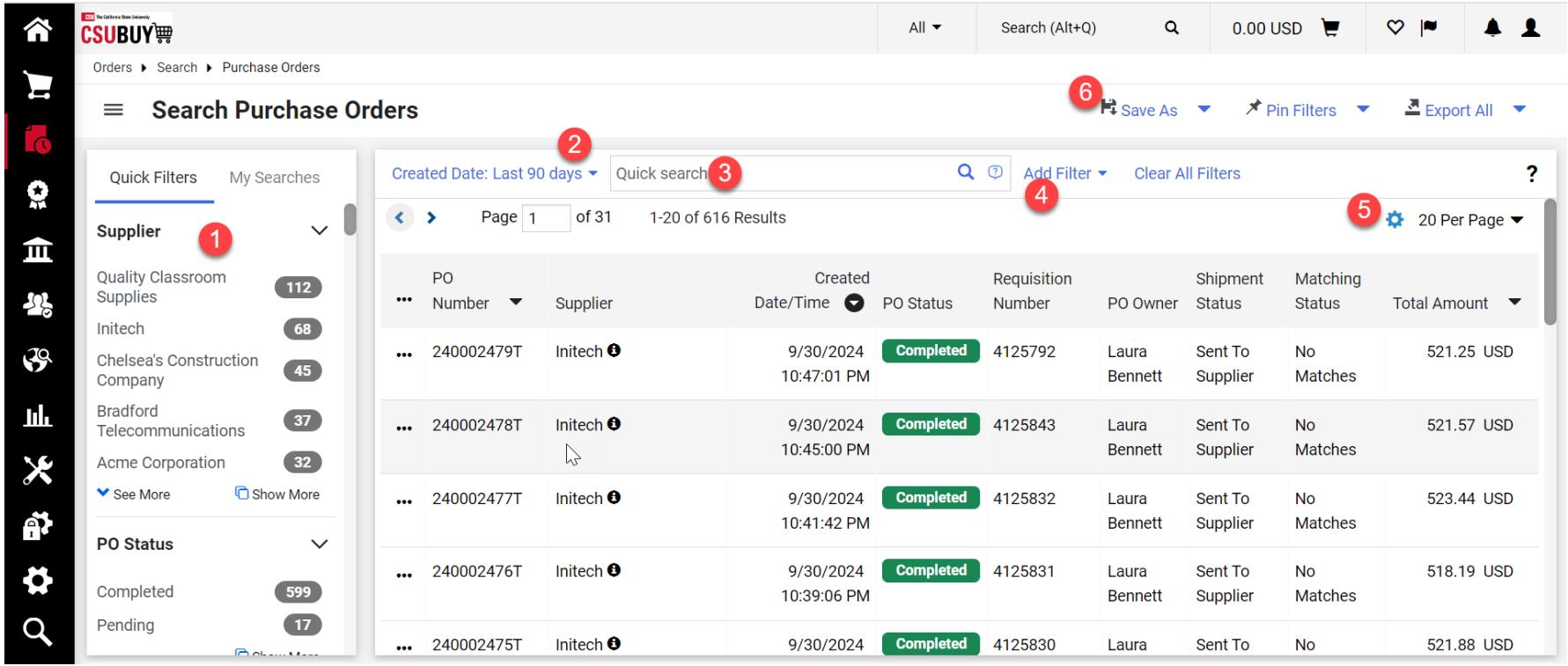
Global Search Field
Search specific documents and or suppliers



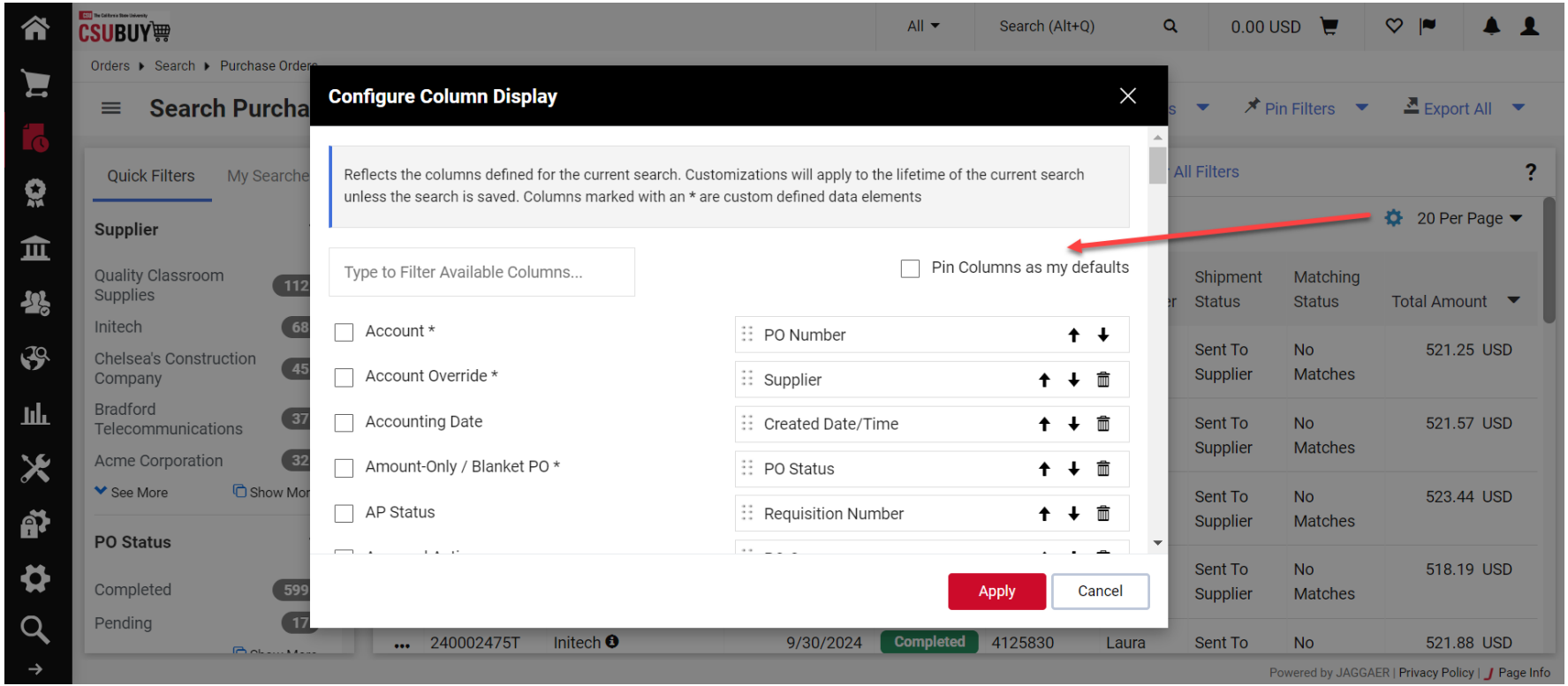
Module Fly-Out Searches
Search for documents in specific modules



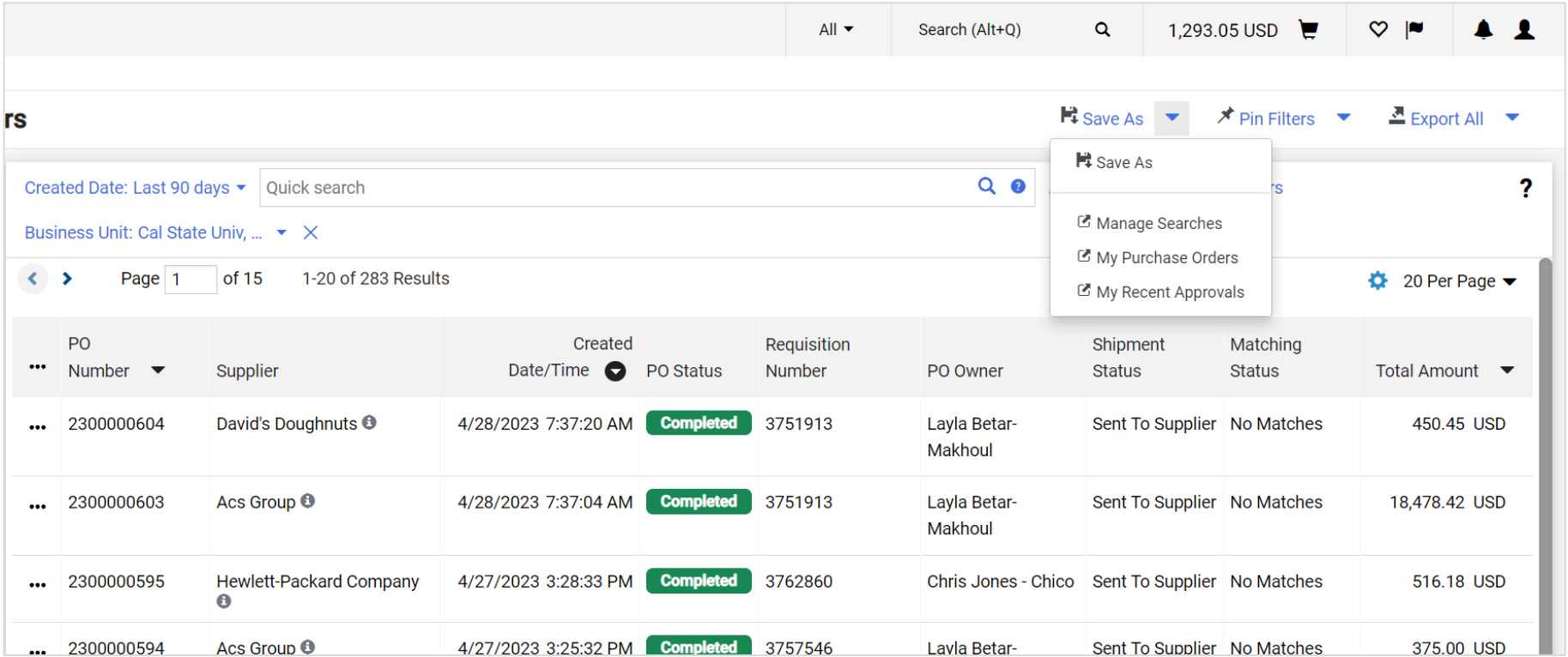
How to Build Your Search



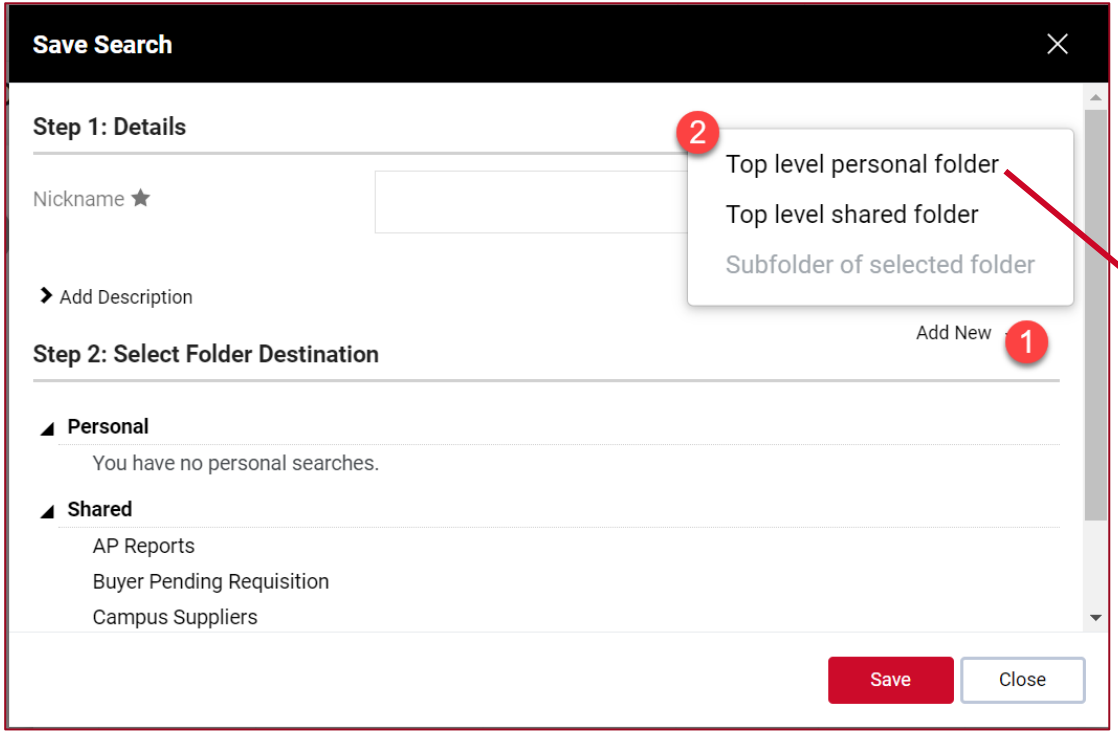
Step 5: Configure Column Display

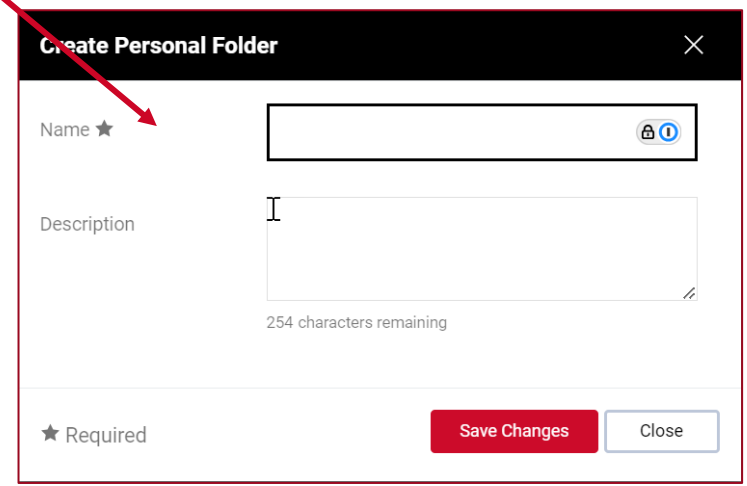


Step 6: How to Save Your Search



Step 6: Save Your Search : Create Personal Folder





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 refined results.
4. Add a column to the **Results Page**.
5. *Select **Export** search results.
6. Save **Search**.

***Additional Training on Export later**

Search for Suppliers

Shopping

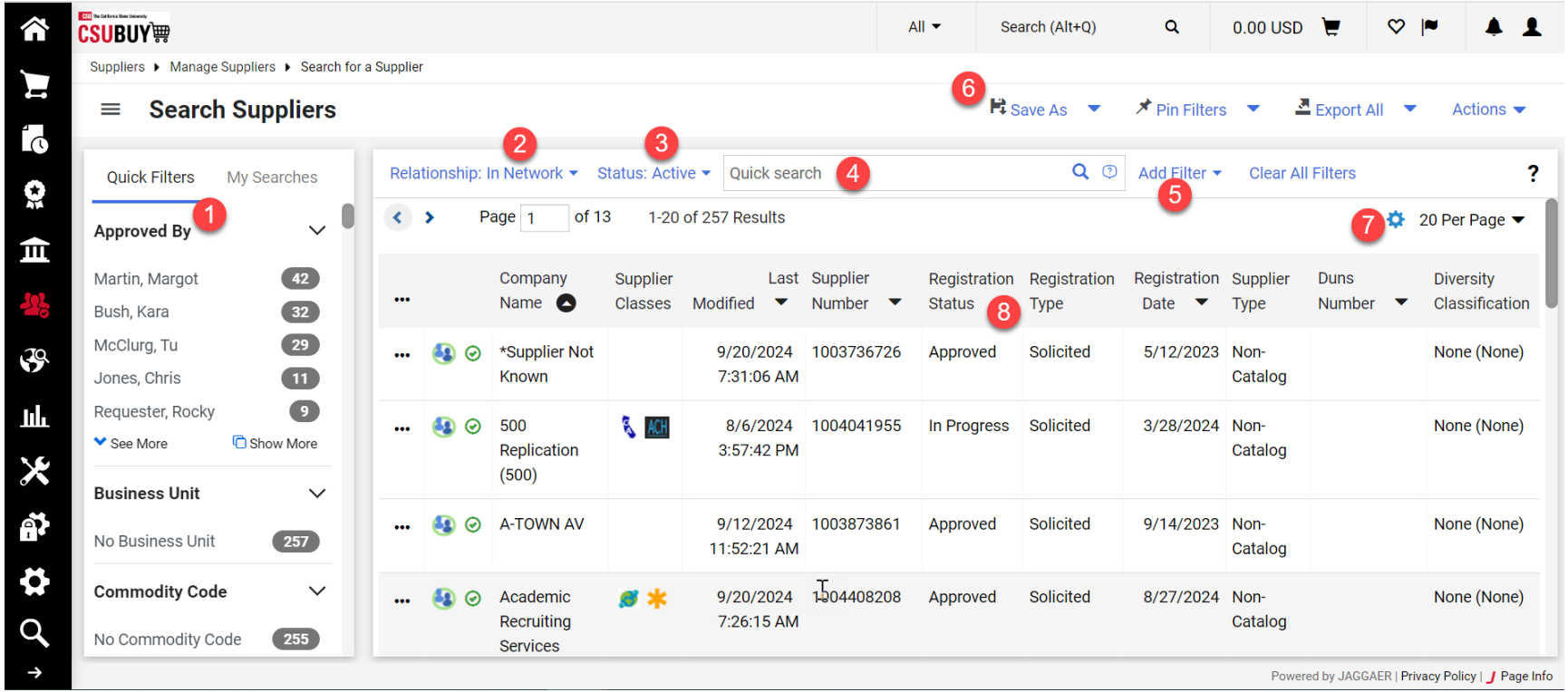
Search for Suppliers

LESSON OBJECTIVES

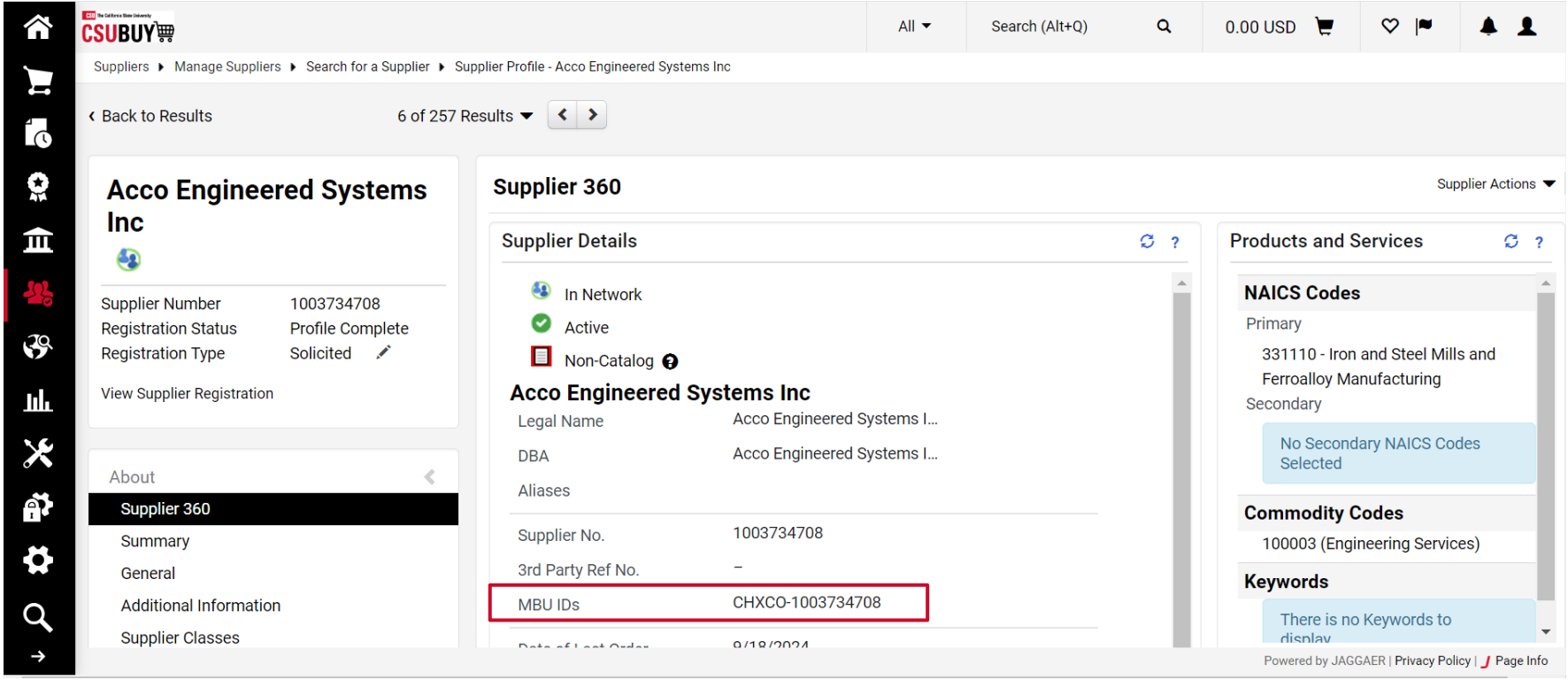
- Overview of searching for shoppable suppliers.
- Overview of searching all CSUBUY suppliers



Supplier Search



Supplier 360

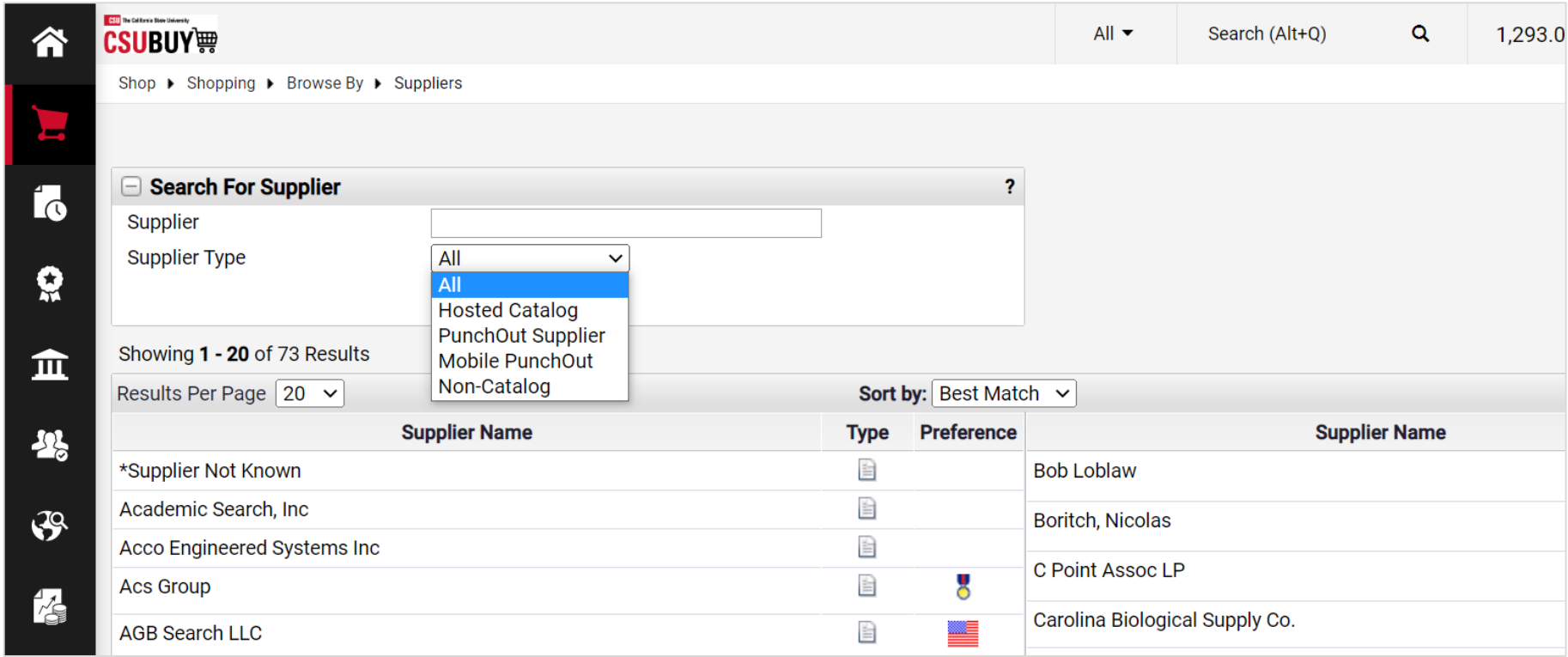


MBU IDs in the Supplier 360 is where users can see if the supplier is available for their campus to shop from.

Supplier Status

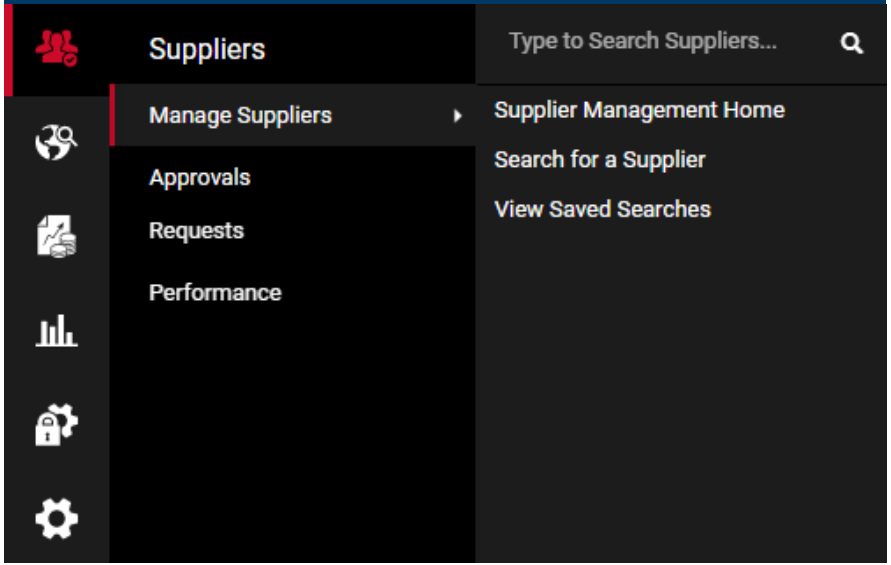
Registration Status:	Definition
None	Loaded, not invited
Invited	Registration invitation sent to supplier
In Progress	Supplier has started registration
Registration Complete	Supplier has completed a registration
Approved	Supplier profile has been approved through registration workflow
Status:	**Definition**
Enabled for Procurement 	Active for Shopping
Not Enabled for Procurement 	Inactive for Shopping
CSUBUY Network Relationship	
In Network 	Search results should be limited to “In Network”

Searching Shoppable Suppliers

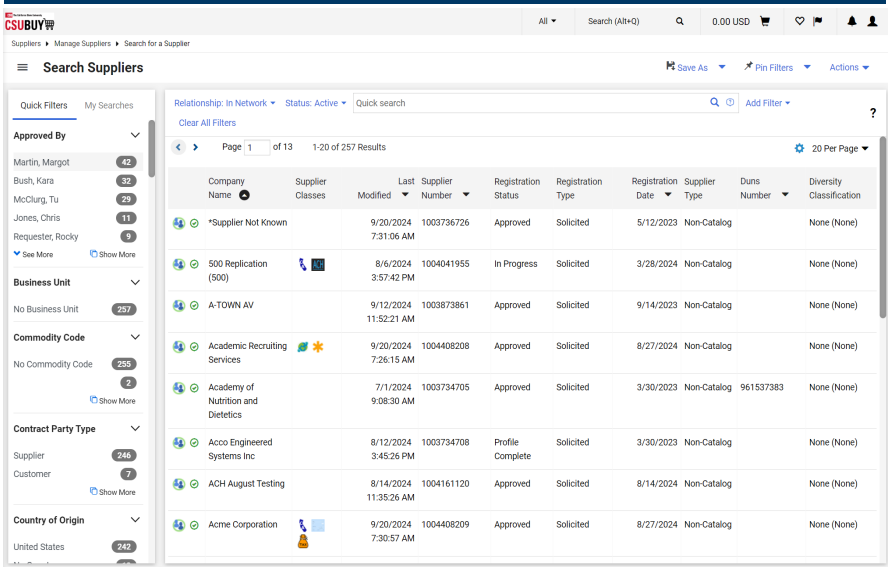


Searching CSUBUY Suppliers

Supplier Management Flyout

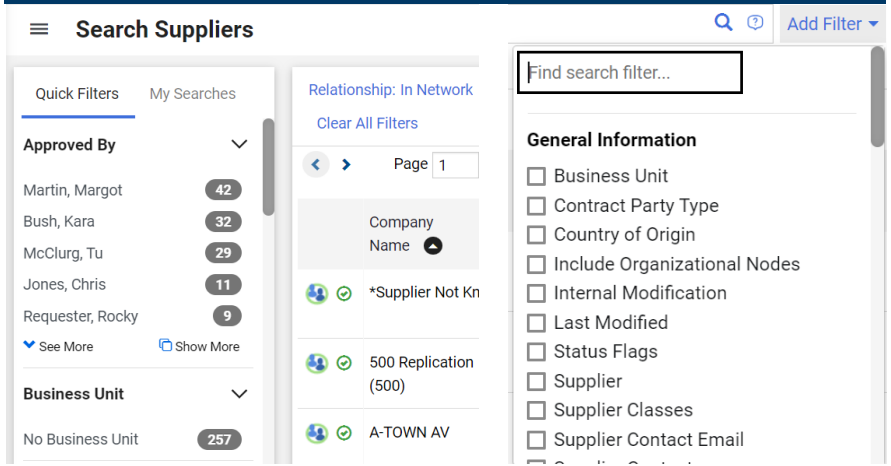


Supplier Profile Search

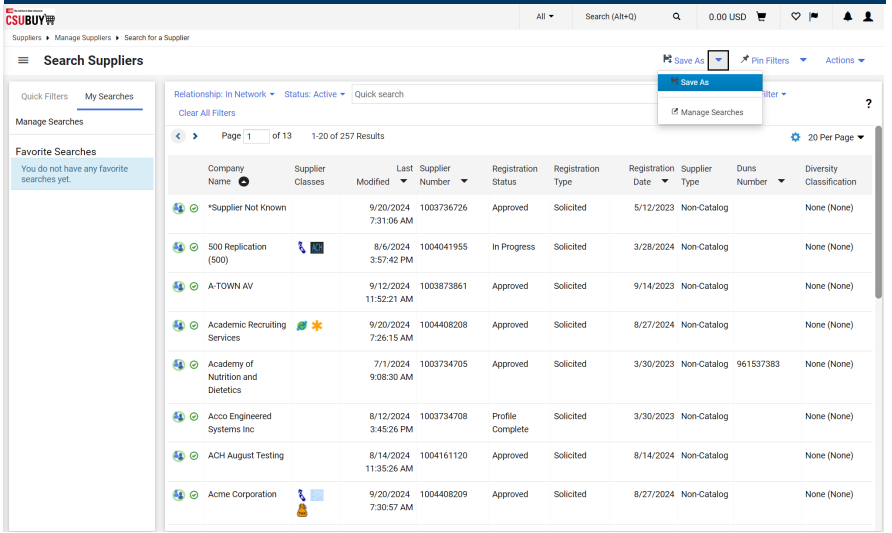


Supplier Filtering and Saved Searches

Supplier Filters



Supplier Saved Searches



MODULE

2

Shopping

Lessons in This Module

- Shop from a Punchout
- Chart fields
- Shop Using a Form
- Check Out

Shop from a PunchOut

Shopping

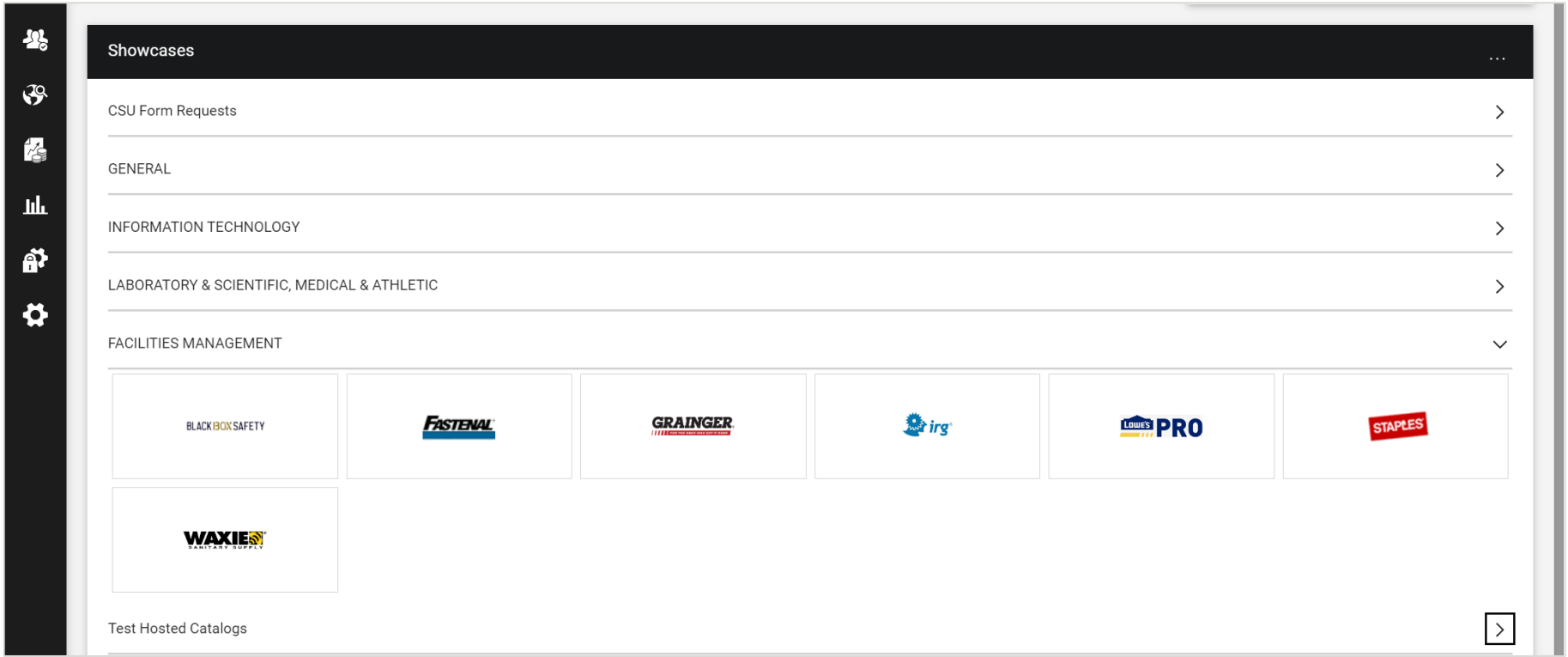
Shop from a PunchOut

LESSON OBJECTIVES

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



PunchOut Catalog



ChartFields

Shopping

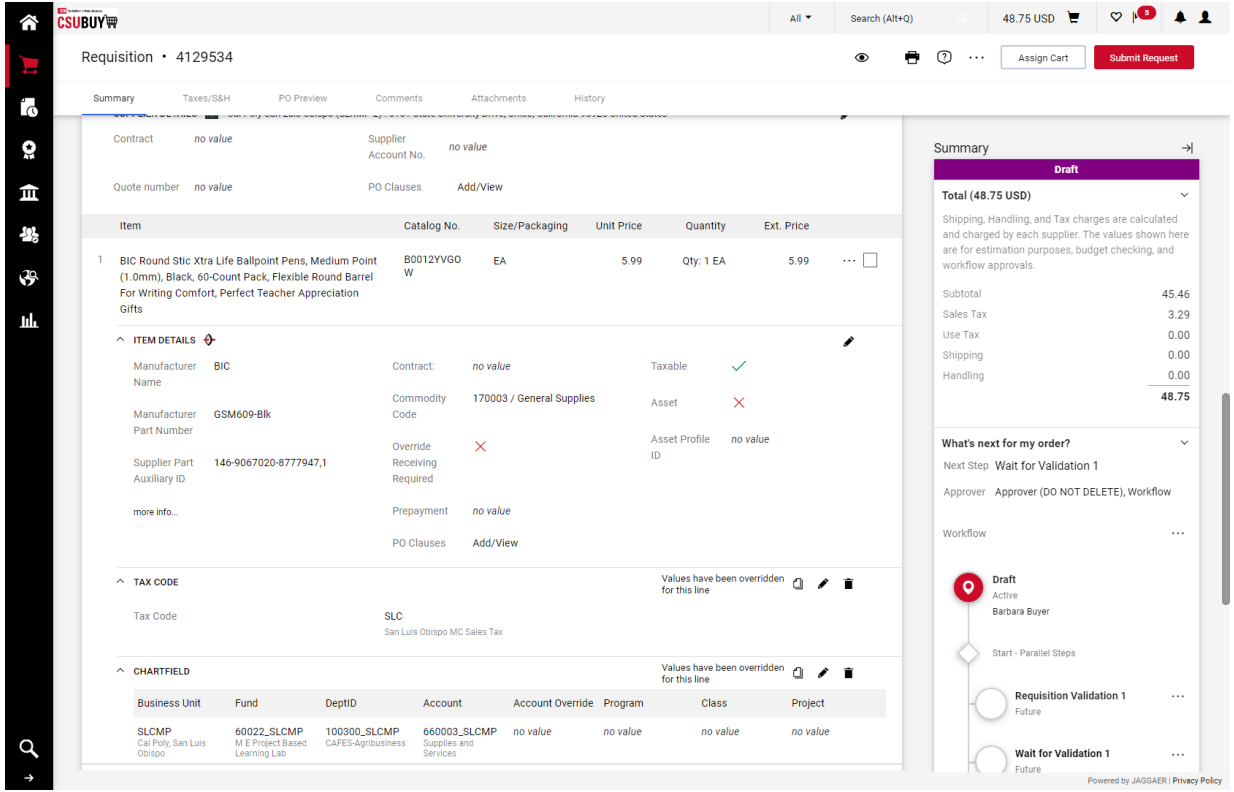
ChartFields

LESSON OBJECTIVES

- Update chartfields to check out.

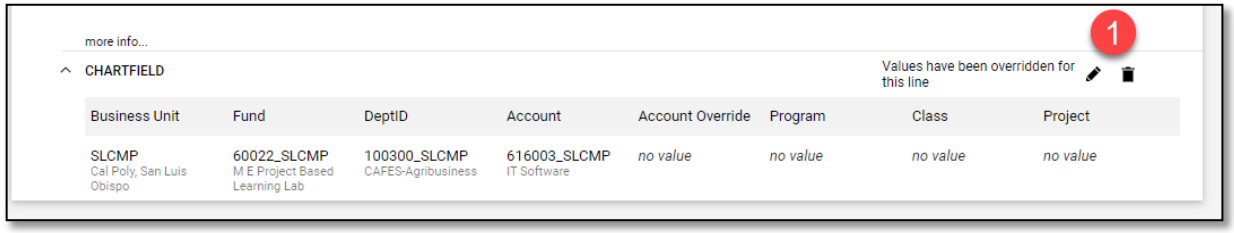


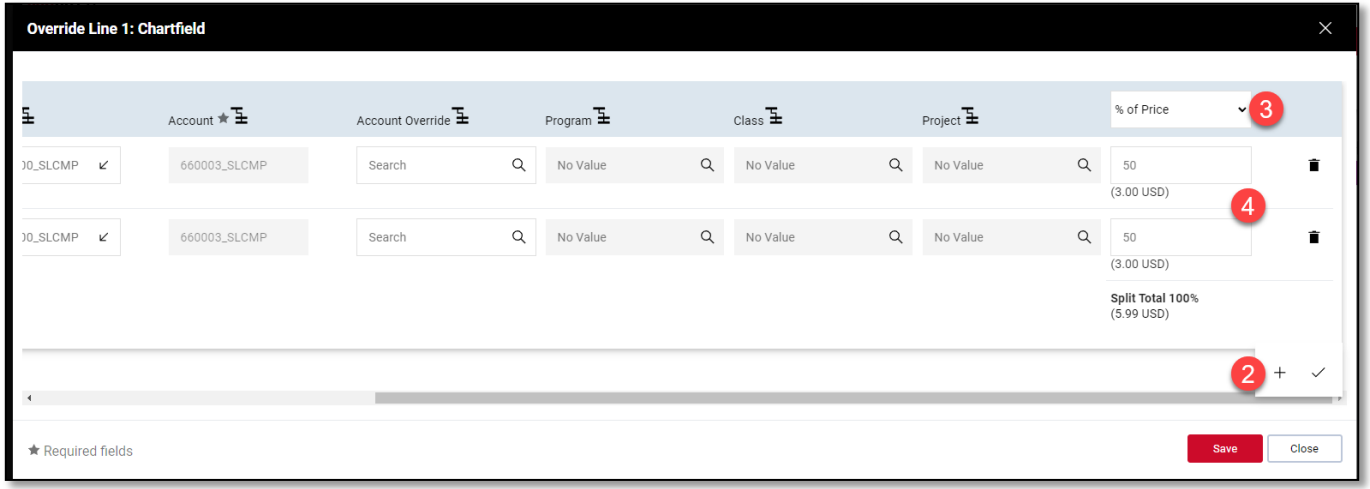
Chartfields



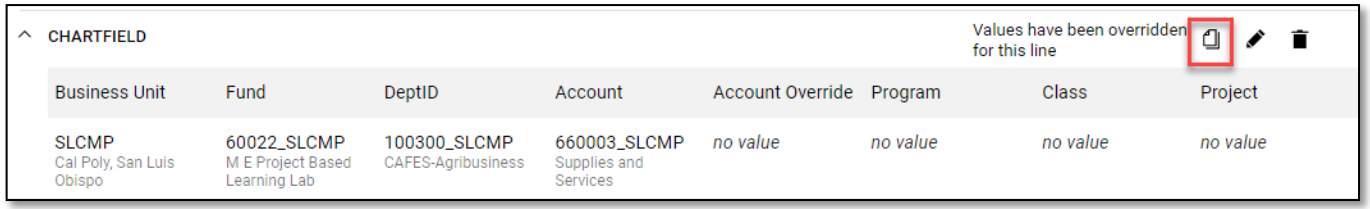
- Account Code is defaulted by the Commodity Code selected
- Account Code Override is populated to override the default account code

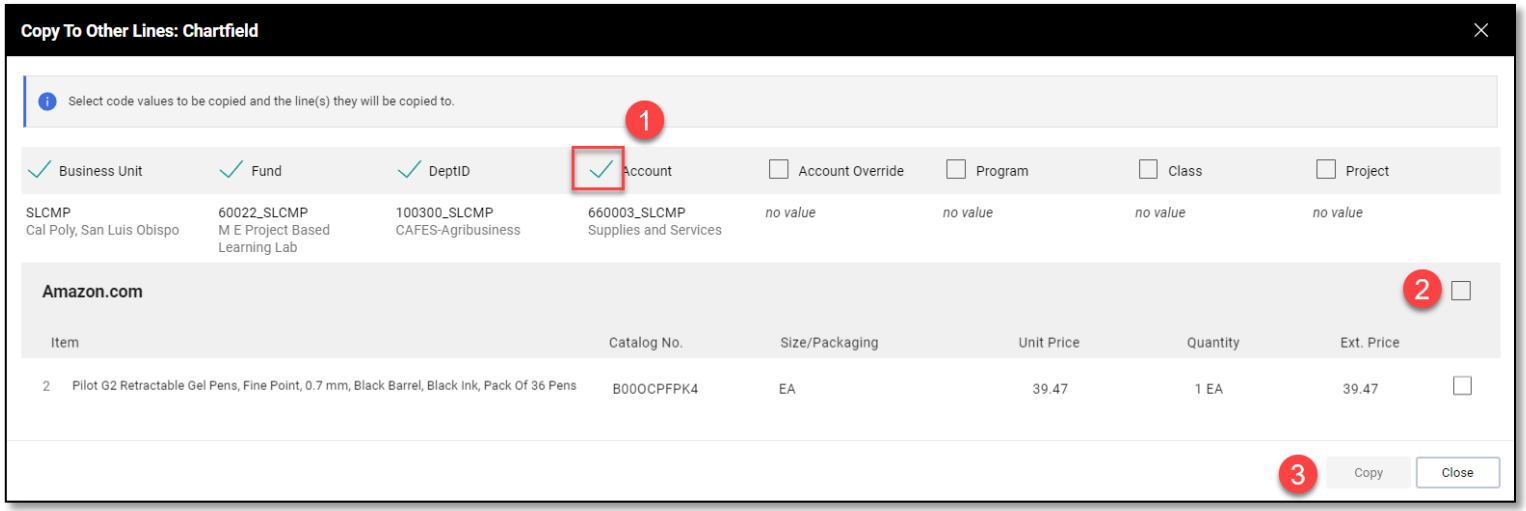
Splitting Chartfields





Copying Chartfields to Lines





Shop from a Punchout and Update Chartfields

DEMO



1. Locate the Supplier catalog.
2. Search for items.
3. Add items and quantity to your cart.
4. Review your cart in CSUBUY.
5. Review the accounting fields.
6. Update fields with the correct information.
7. Checkout.
8. Submit your cart from the PunchOut.

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

Check Out

Shopping

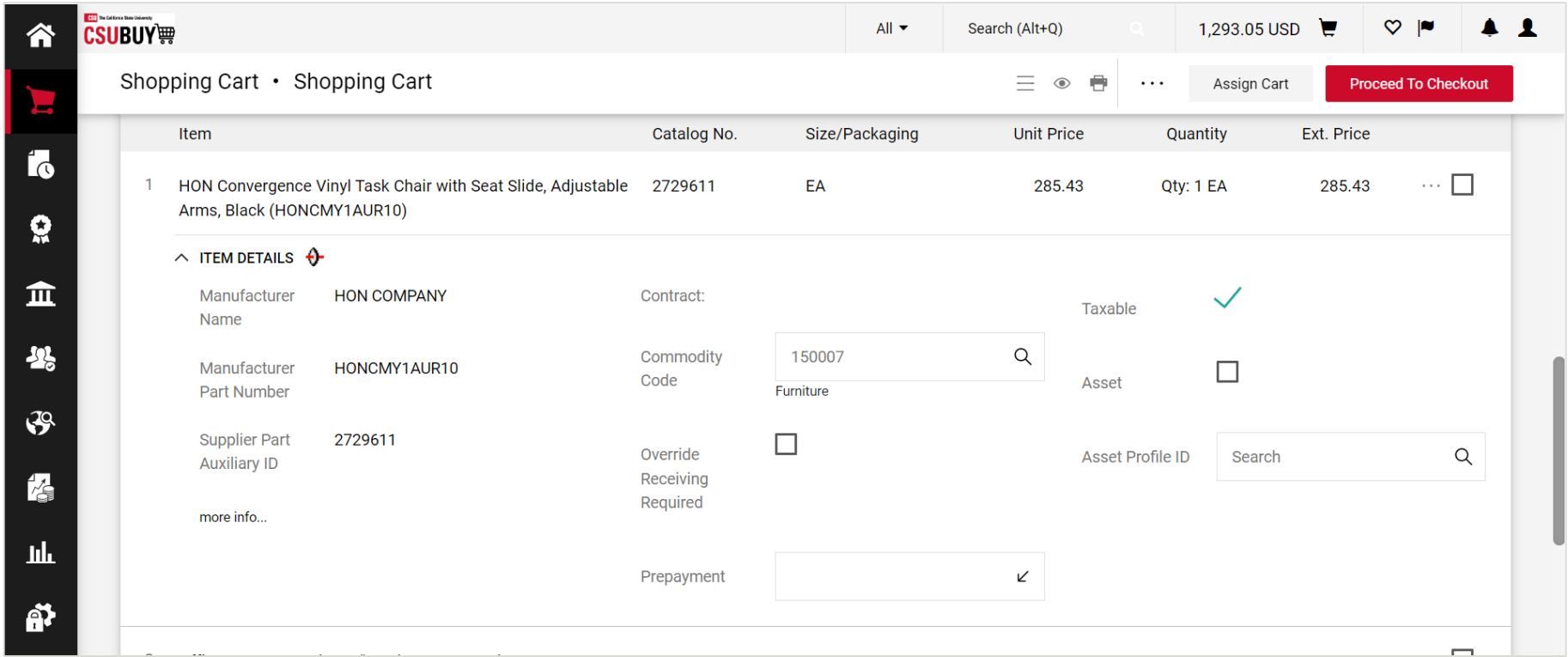
Check Out

LESSON OBJECTIVES

- Update accounting fields to check out.

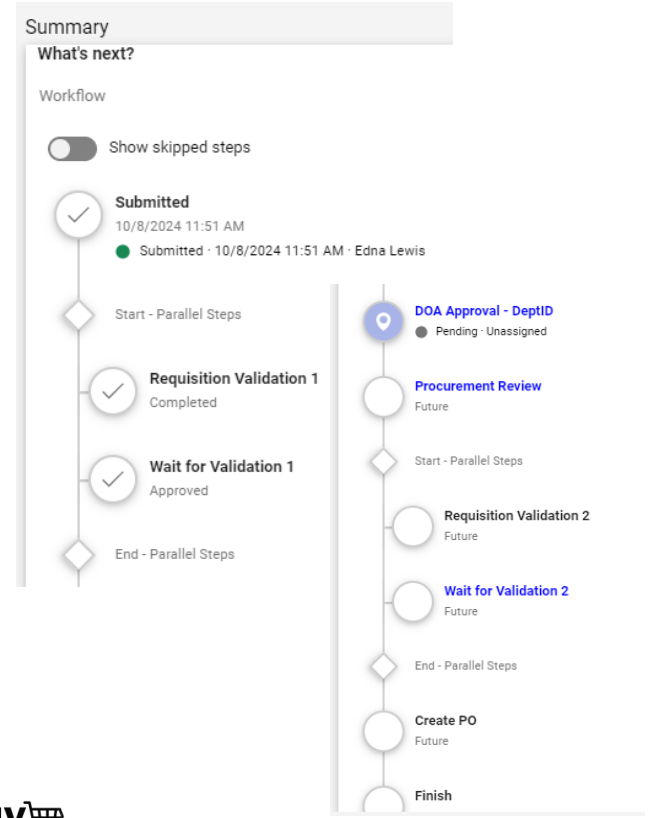


Check Out and Submit Order

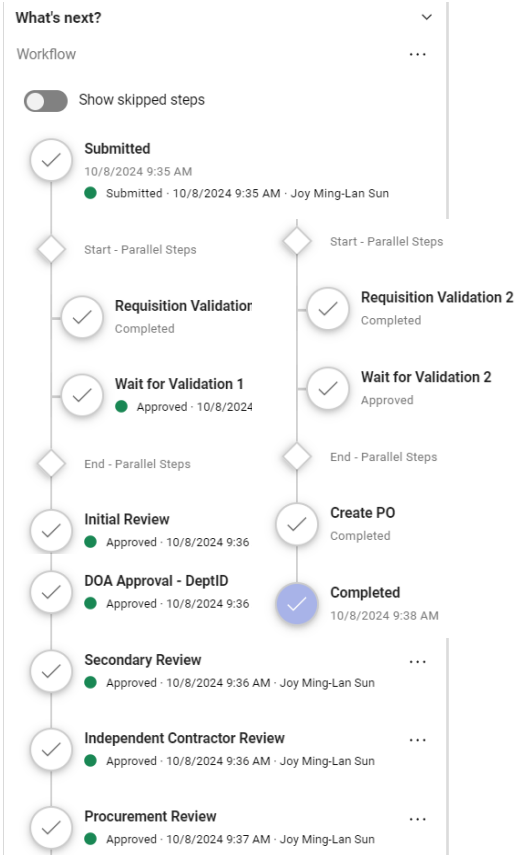


Requisition Approval Workflow

In Workflow



Complete



Check Out Validation Rules

Checkout Validation	Description	Error Message
Blank DeptID Error	Prevents requisitions from proceeding without a DeptID listed in the chartfield	Please add a DeptID to the Chartfield(s) for this requisition.
Independent Contractor Error 1, 2 & 3	Prevents requisitions for Independent Contractors from being submitted that do not comply.	You answered a question on the Independent Contractor Request that is not compliant with the Public Contract Code 10831-10832. Please contact HR to determine next steps.
Supplier Not Known on Unauthorized Purchase Error	Prevents Payment for Unauthorized Purchase from being submitted if the Supplier selected is the “Supplier Not Known” supplier.	You specified *Supplier Not Known on your Unauthorized Purchase Request. Please update your request with a valid Supplier selection.
Non-Facilities User Submission	Prevents Facilities & Construction requisitions from being submitted by department other than facilities	You specified a DeptID that isn't allowed for a Facilities and Construction Request. This form is only available to individuals in the Facilities Department.

End-Users will need to correct the error prior to submission of the cart.

DEMO



Checking Out

Learn how to check out and submit your order.

1. Review the Showcase section and Form Types
2. Select Goods and Services Form and create a shopping cart for a blanket purchase order.
3. Click Proceed to Checkout
4. Enter Chart Field data
5. Add an internal note and attachment
6. Note the approval workflow
7. Click Submit Request

MODULE

3

Other Shopping Forms and Functions

Lessons in This Module

- Request a New Supplier
- Extend or Re-Invite a Supplier
- Additional Forms
- Blanket Orders
- Multi-Year PO (penny lines) – Possible Future Enhancement
- Assign a Shopping Cart
- Reorder
- Withdraw Requisition

Request a New Supplier

Additional Shopping Requests

Request a New Supplier

LESSON OBJECTIVES

- Request a supplier to purchase goods or services form.



Review Process to Request a New Supplier

Create and submit a request for new supplier.

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

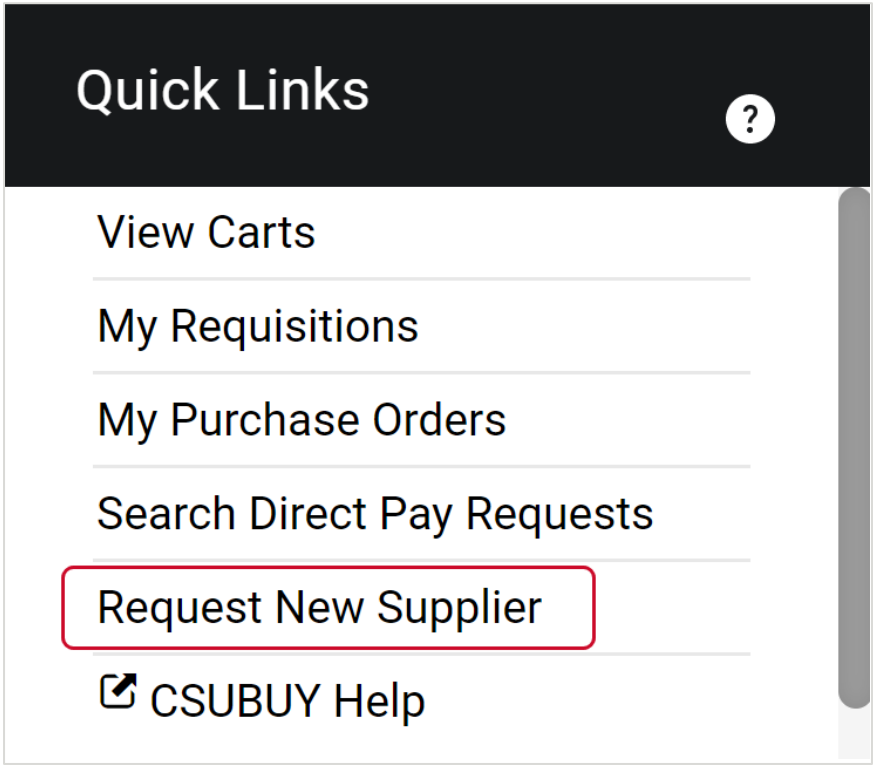
If approved, a supplier profile is created*

Supplier Management Team invites new supplier to register in the supplier portal.

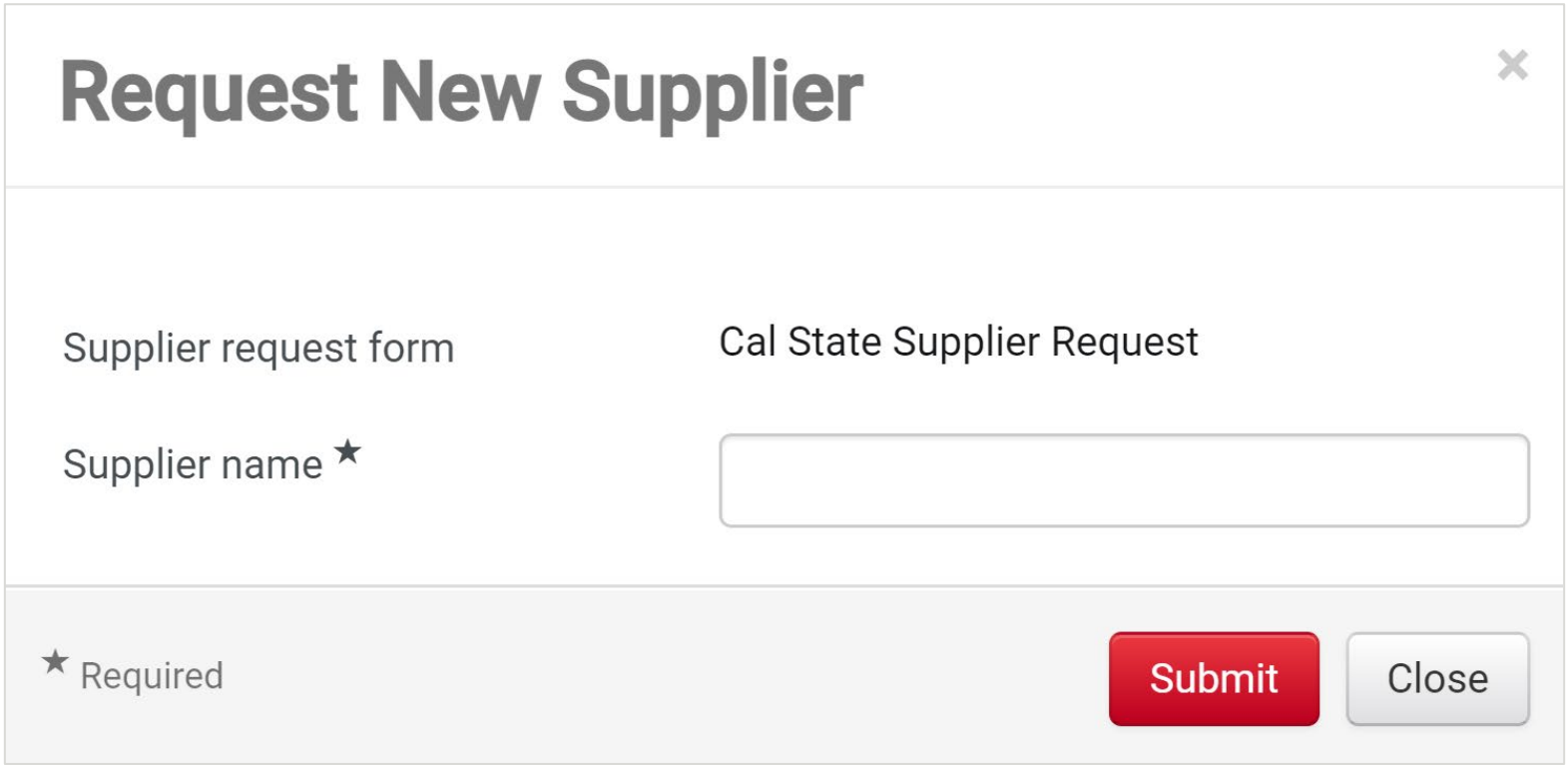
Once the supplier completes their profile, and is approved, a notification is sent that supplier is available for shopping.

Users may receive a "false" rejection for request due to the supplier not being in the CSU network but in the applications global network. If this occurs, the System Supplier Management team will provide additional context.

New Supplier Process



Request a New Supplier



Extend or Re-Invite a Supplier

Shopping

Extend or Re-Invite a Supplier

LESSON OBJECTIVES

- Extend a supplier to your campus that has an approved profile that is in use by other campuses
- Re-Invite a supplier that has an incomplete CSUBUY profile.



Extend or Re-Invite Process

Access the Extend/Re-Invite form from the showcase or view forms.

Select the desired request type: Extend or Resend an Invitation.

Complete questions, review the form, and submit.

Review Process

Create and submit the extend/re-invite request.

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

If approved, the supplier profile is extended or invited to register.

DEMO



Request a Supplier

Learn how to request a supplier.

1. Search for a supplier and identify if it needs extended or re-invited.
2. Access the Extend or Re-Invite form from the showcase or view forms.
3. Select “Resend an invitation to an existing CSUBUY supplier” or Extend an existing CSUBUY supplier to new campus”
4. Complete the form and submit.

Additional Forms

Additional Shopping Form Types & Functions

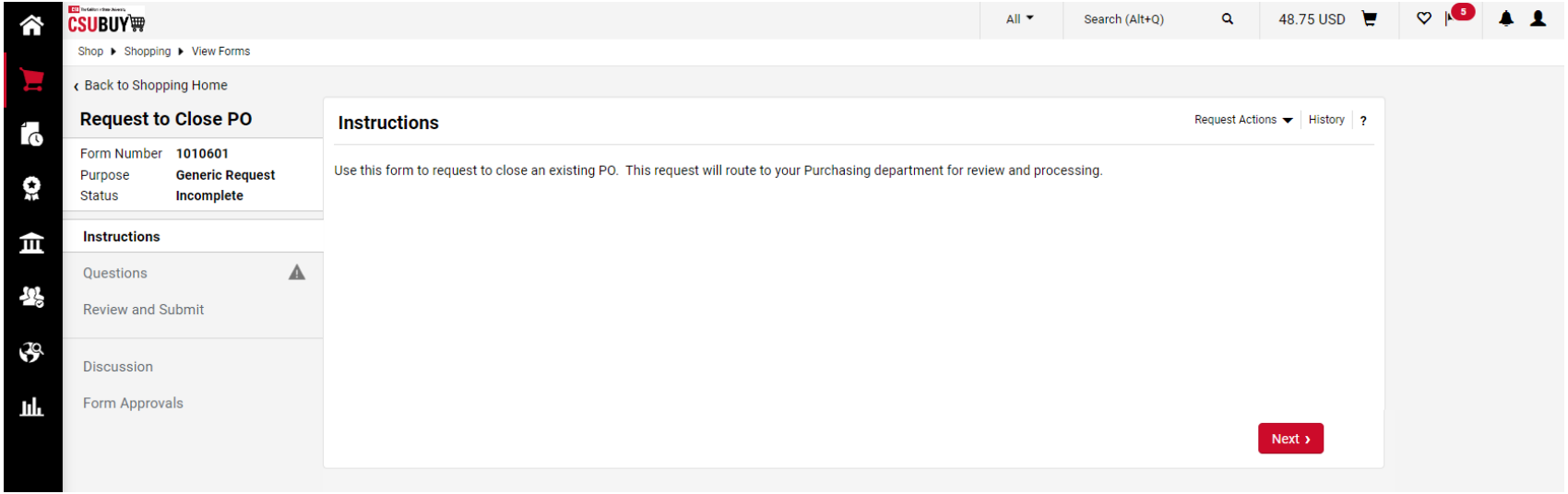
Additional Forms

LESSON OBJECTIVES

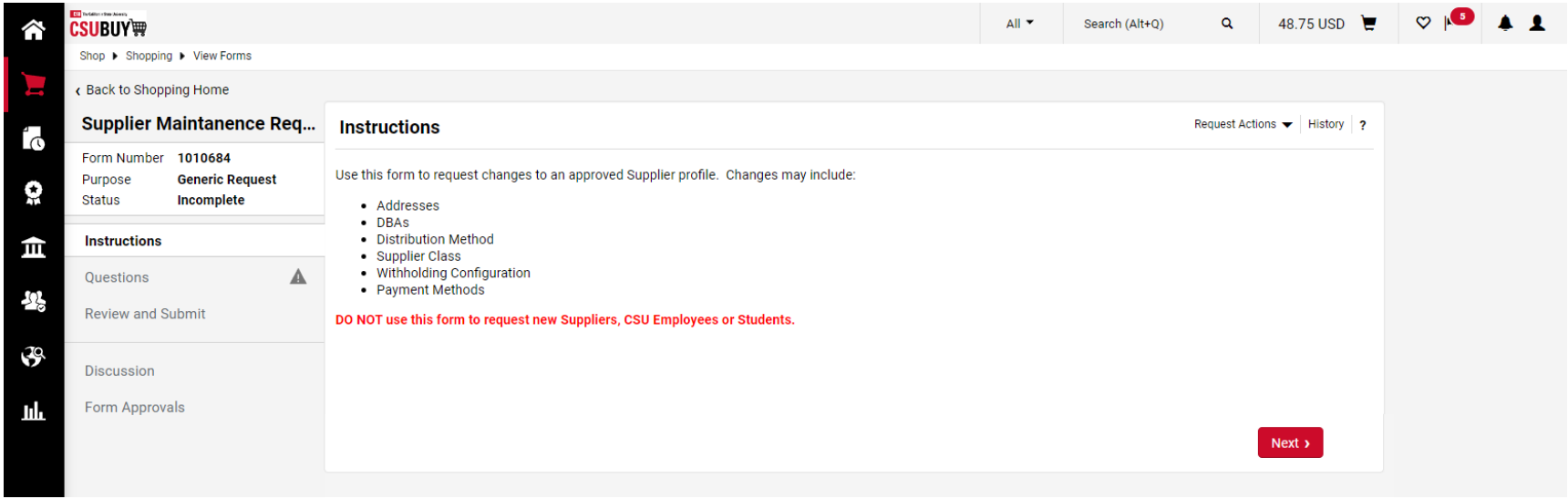
- Access form requests.
- Determine when to use each form request.
- Submit form requests.



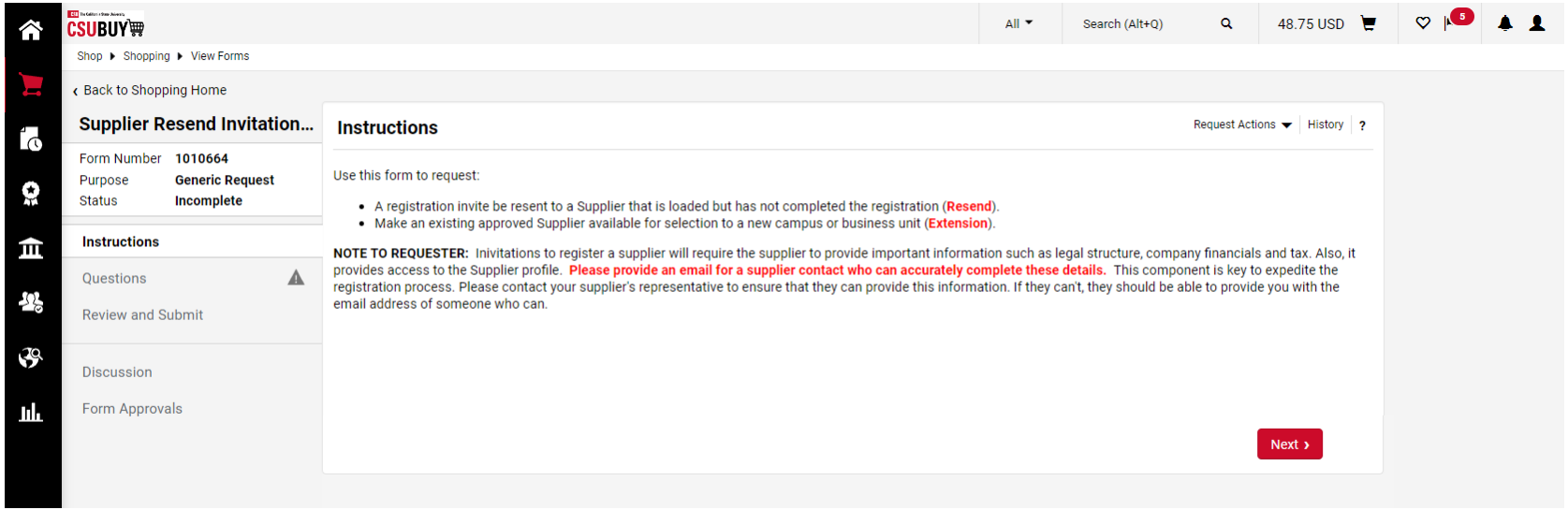
Request to Close PO



Supplier Maintenance Request



Supplier Extension or Reinvite



DEMO



Form Requests

Learn how to use form requests in CSUBUY.

- Request to Close PO
- Supplier Extension or Re-Invite
- Supplier Maintenance Request
- New Supplier Request

Blanket Orders

Other Shopping Requests

Blanket Orders

LESSON OBJECTIVES

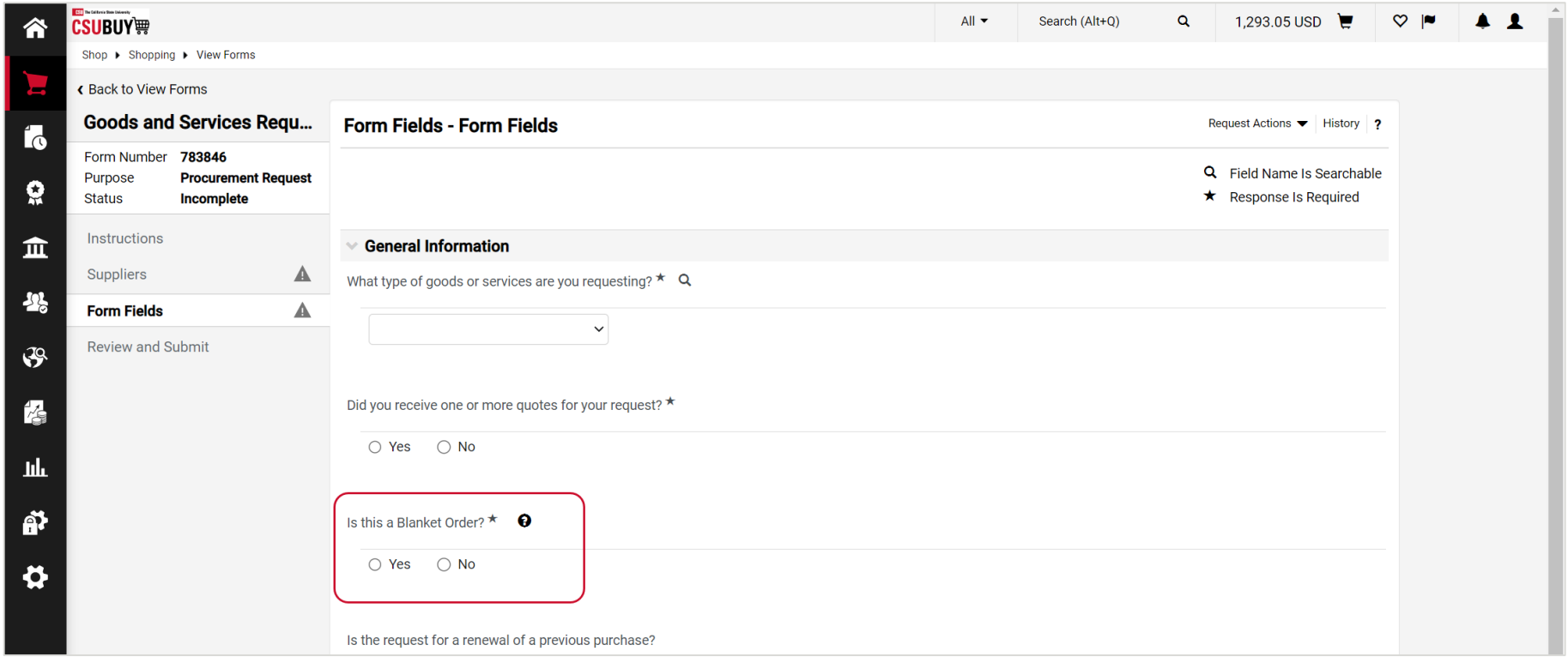
- Determine when a blanket order is applicable.
- Indicate a request is a blanket order.



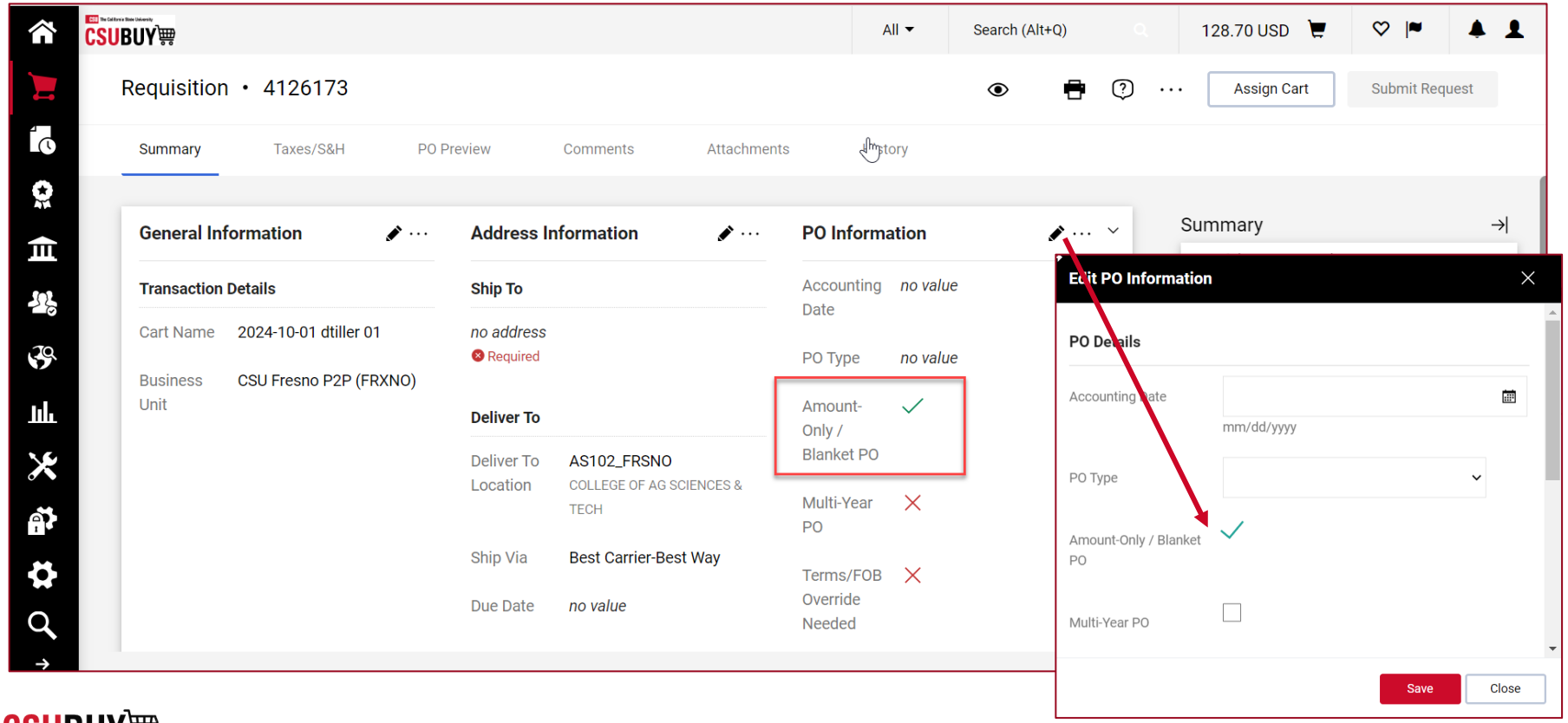
When to Use Blanket Orders



Specify a Blanket Order



Specify Amount Only/Blanket Order on Requisition



Assign a Shopping Cart

Shopping

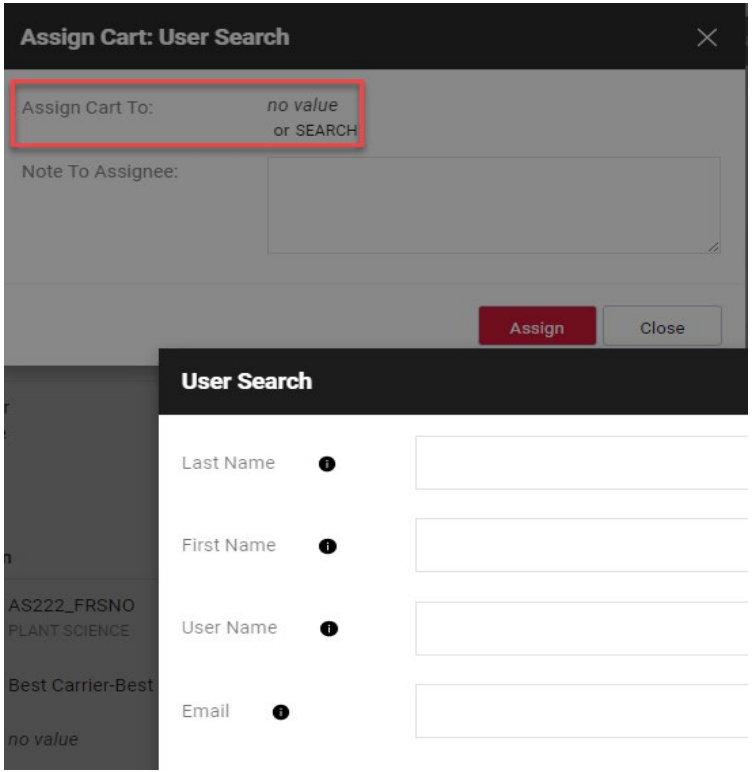
Assign a Shopping Cart

LESSON OBJECTIVES

- Identify when to assign a cart to another user.
- Determine who should be the assignee
- Add notes as necessary



Assign a Shopping Cart



“Prepared By” Versus “Prepared For”

Prepared By

The user that submitted the cart into workflow:

- May have created the cart.
- May have been assigned the cart by another user.
- Must have the Requester role

Prepared For

User that created the cart:

- If a Shopper, must assign cart to a Requester
- Becomes the PO Owner

Note: “Prepared By” and “Prepared For” can be the same user. If either of these are approvers, they will not be allowed to approver their own documents.

DEMO



Assign a 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**.

Reorder

Shopping

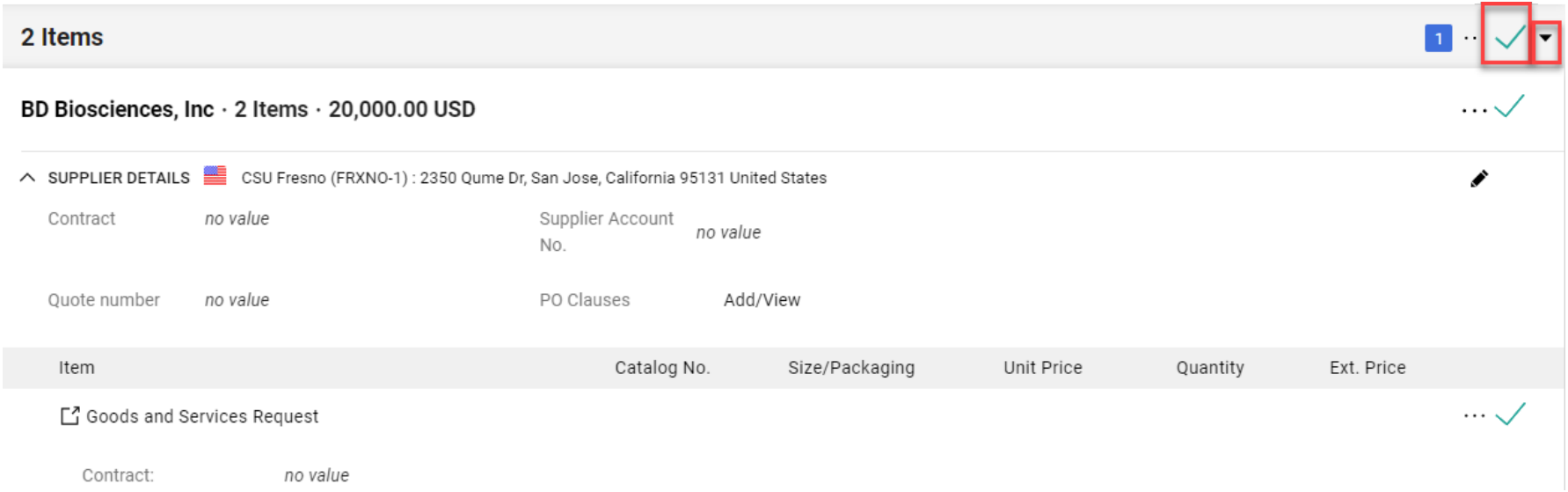
Reorder

LESSON OBJECTIVES

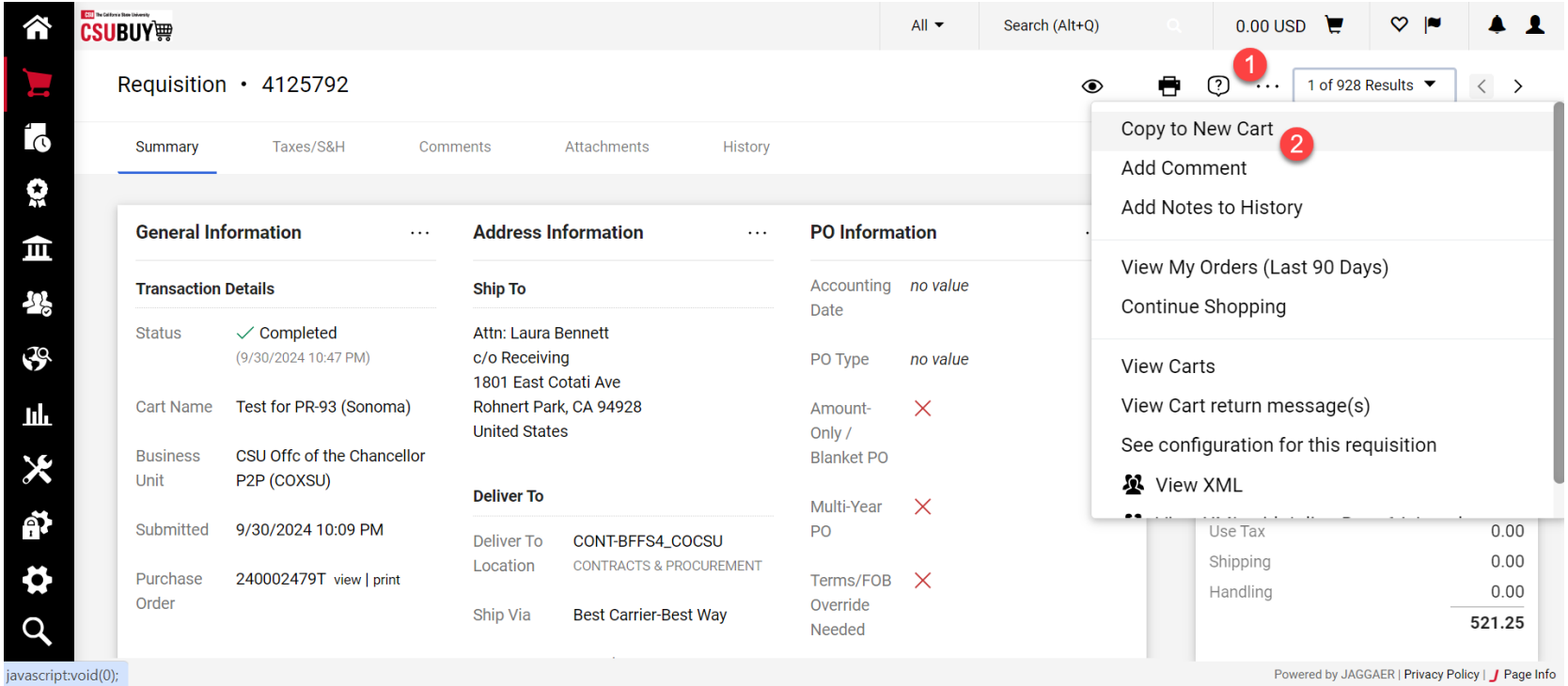
- Find a previous order.
- Add items to a new cart.
- Copy to new cart



Reorder


2 Items
1
BD Biosciences, Inc · 2 Items · 20,000.00 USD
SUPPLIER DETAILS
CSU Fresno (FRXNO-1) : 2350 Qume Dr, San Jose, California 95131 United States
Contract
no value
Supplier Account No.
no value
Quote number
no value
PO Clauses
Add/View
Item
Catalog No.
Size/Packaging
Unit Price
Quantity
Ext. Price
Goods and Services Request
Contract:
no value

Copy to New Cart



Note: Chartfields will not copy to the new cart.

DEMO



Copy to New Cart and Reorder

Learn how to Reorder items not in a PunchOut. (For Requestions that contain **Forms** only.)

Copy to New Cart (entire requisition)

1. Locate the **requisition** you would like to order again
2. Go to the **ellipses (“Three dots”)**.
3. Click “Copy to New Cart”.
4. Follow process as if you created the cart through shopping
5. **Checkout**

Reorder (form or line from requisition)

1. Locate the **requisition** containing the form you wish to add to your active cart.
2. Go to the **ellipses (“Three dots”)**.
3. Click Add to Active Cart.
4. **Checkout**

Withdraw a Requisition

Requisitions

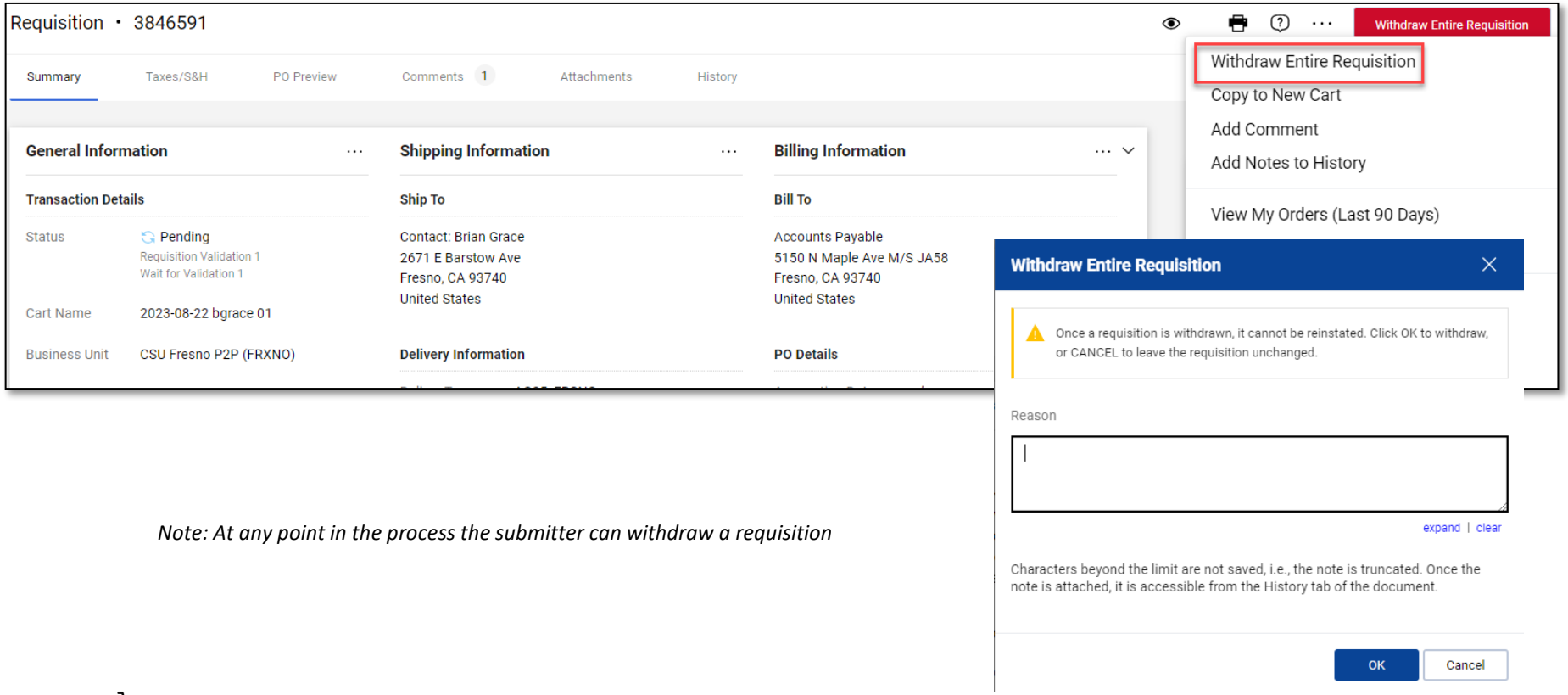
Withdraw a Requisition

LESSON OBJECTIVES

- Determine when to withdraw a requisition.



Withdraw a Requisition



Note: At any point in the process the submitter can withdraw a requisition

MODULE

4

Requisition Approval Workflow

Lessons in This Module

- Approval Workflow
- Approval Actions

Requisition Approval Workflow

Requisition Approvals

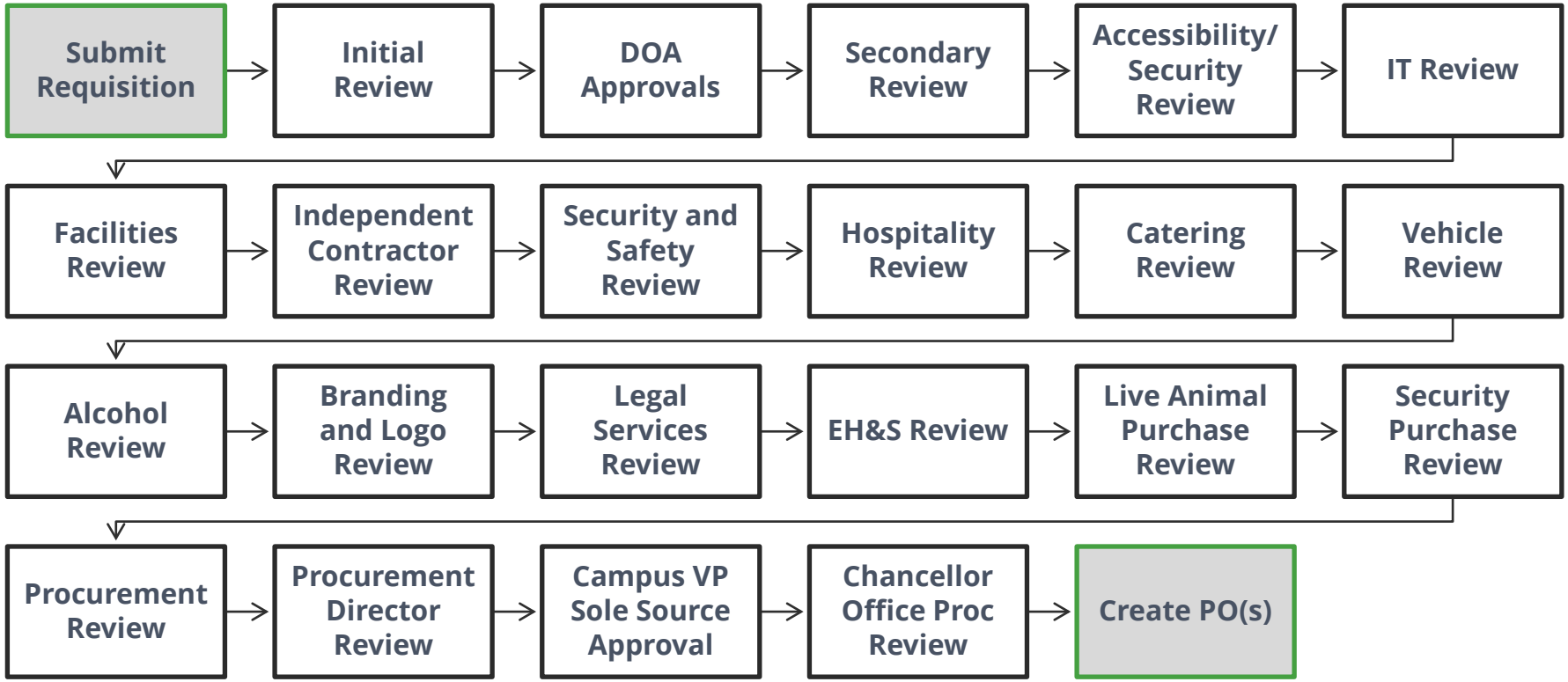
Requisition Approval Workflow

LESSON OBJECTIVES

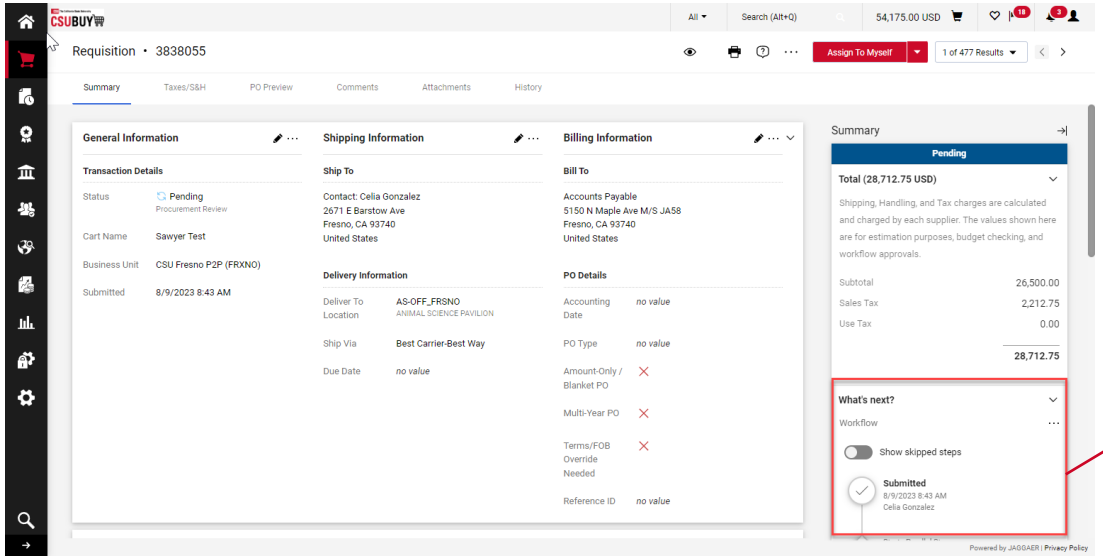
- Review approval workflow for a submitted requisition.
- Know difference between Manual and Automated approval steps

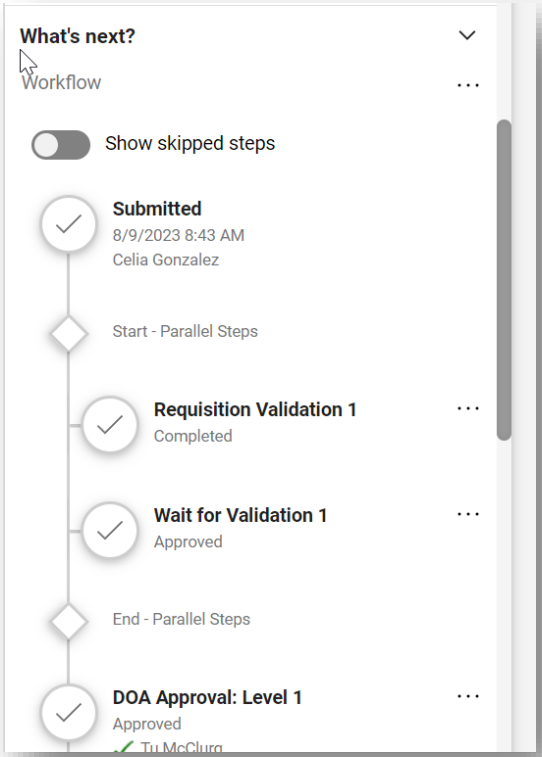


Workflow Overview



Approval Workflow View





Approval Actions

Approvals

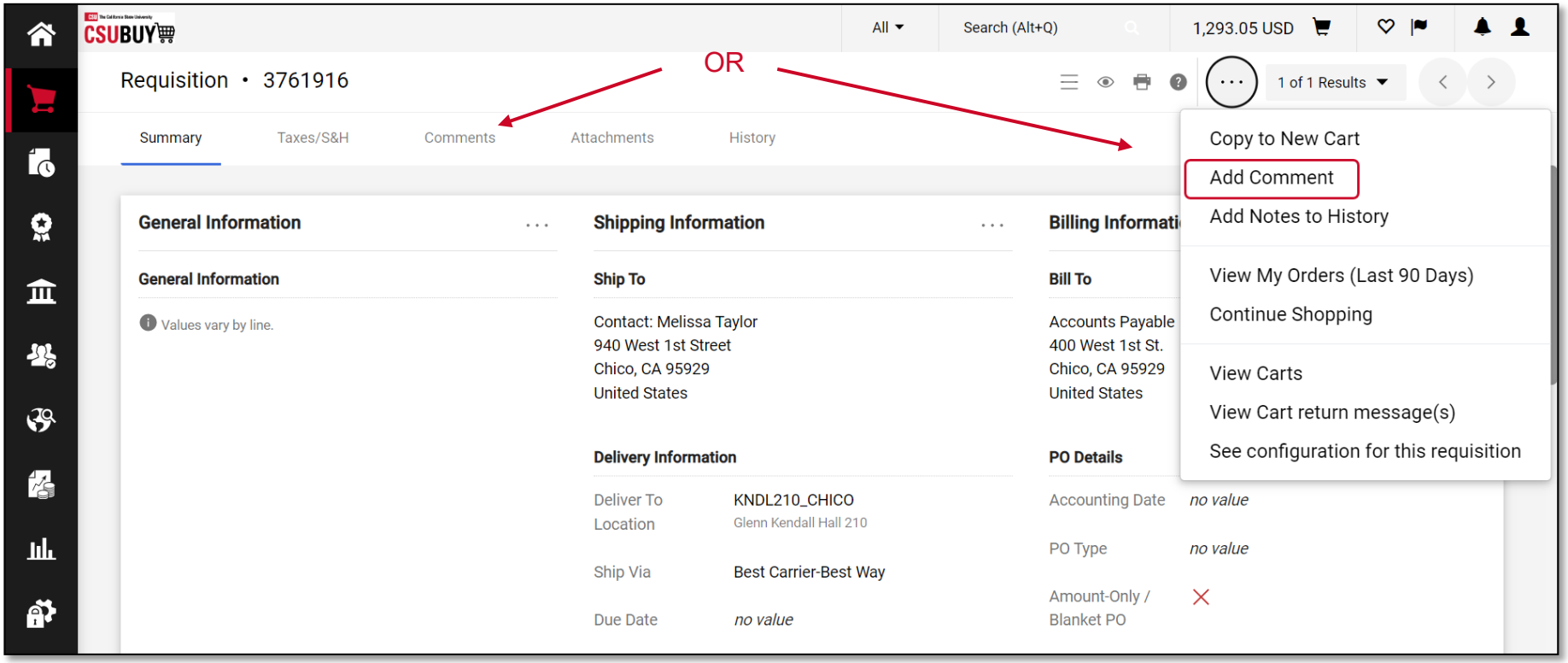
Approval Actions

LESSON OBJECTIVES

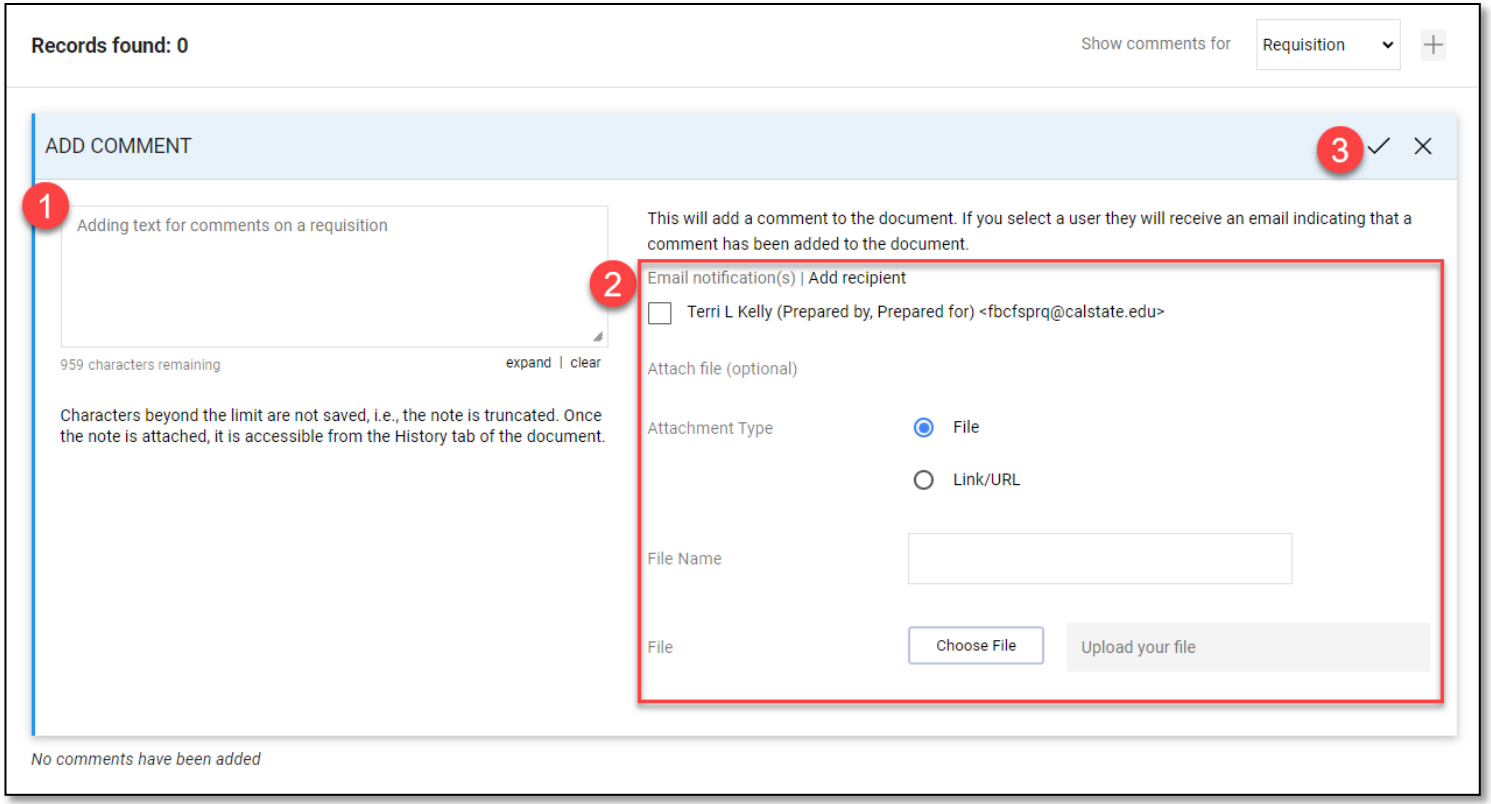
- Add comments to a requisition.
- Approve, reject, and return requisitions.



Comments on a Requisition



Create & Add a Comment



Review a Requisition



MODULE

5

Purchase Orders

Lessons in This Module

- Order Status
- Distribution
- Purchase Order Changes
- PO Close & Reopen Process

Order Status

Purchase Orders

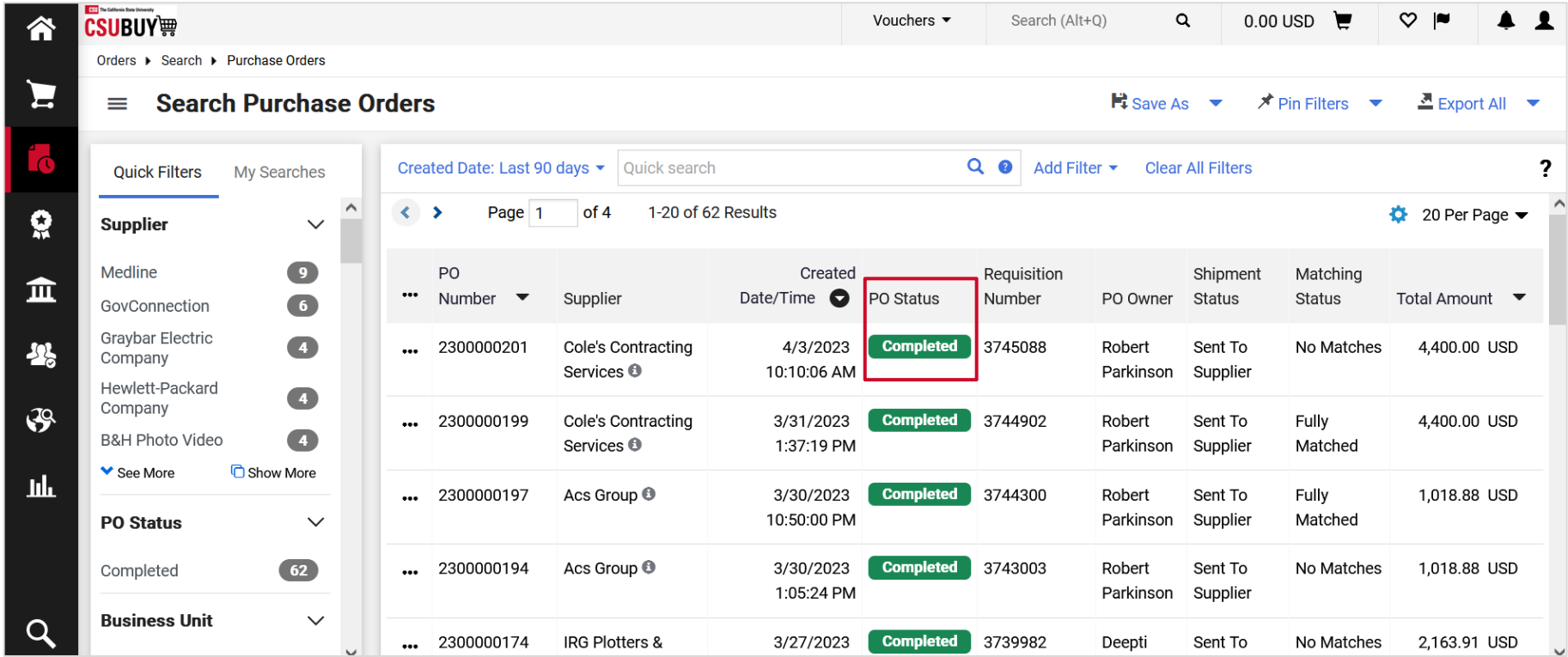
Order Status

LESSON OBJECTIVES

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



Search for Purchase Orders & Locate Order Status



PO Distribution

Purchase Orders

PO Distribution

LESSON OBJECTIVES

- Identify the distribution methods for a purchase order.
- Print PO for manual distribution
- PO failures are managed by the software provider (JAGGAER).



Purchase Order Distribution



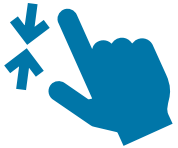
cXML



Email



Fax

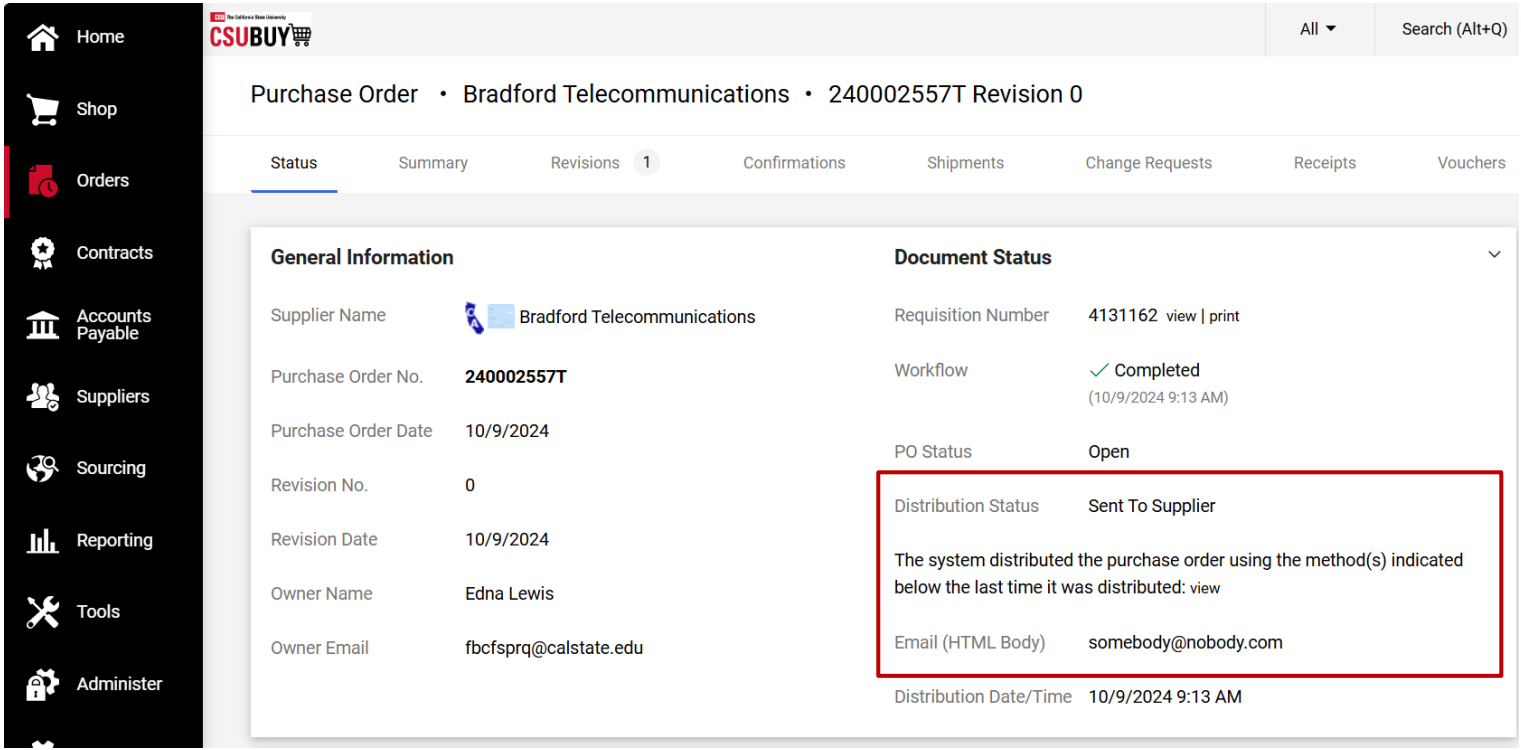


Manual

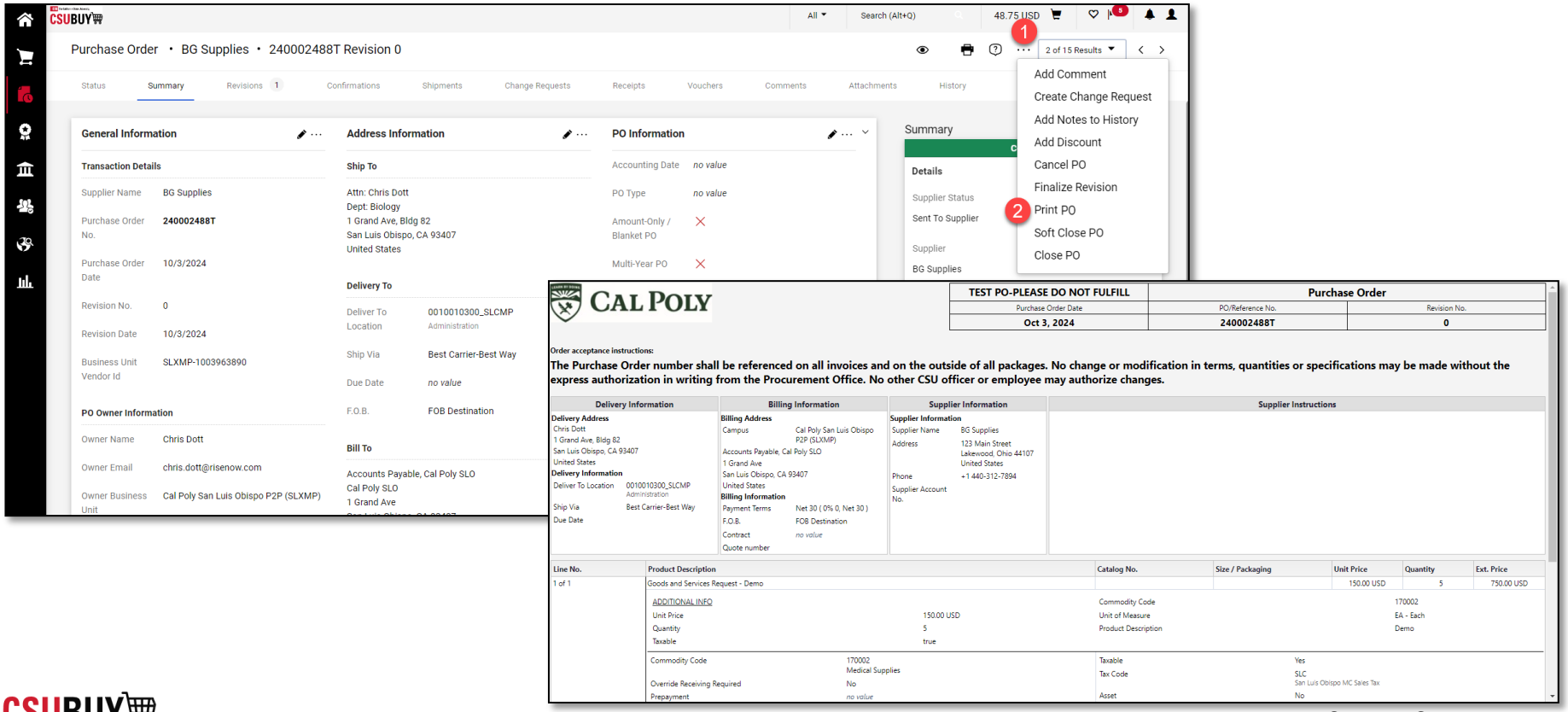


Supplier Portal

Email Distribution Confirmation



Print PO for Manual Distribution



Purchase Order Changes

Purchase Orders

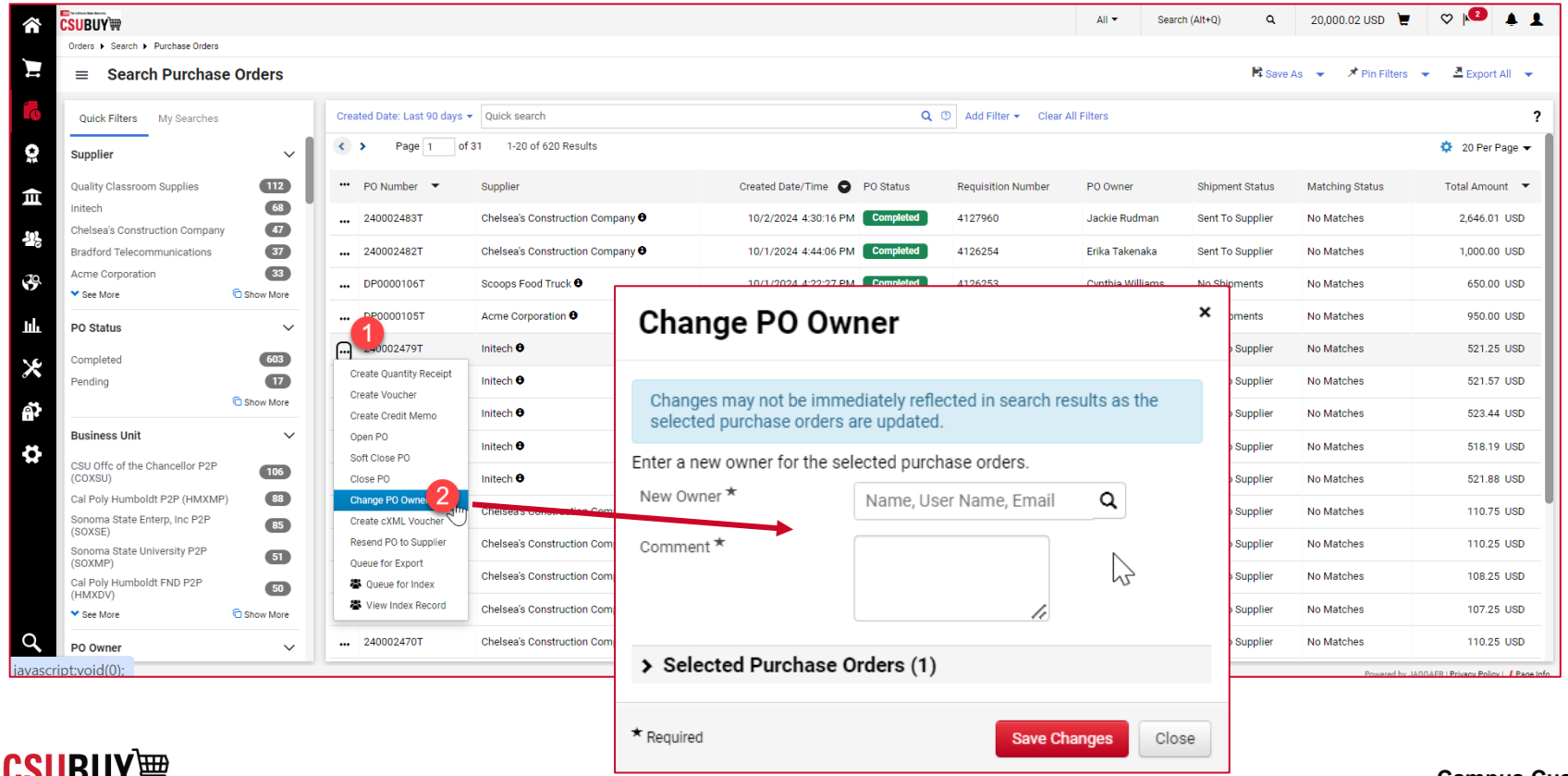
Purchase Order Changes

LESSON OBJECTIVES

- Change PO Owner.
- Purchase Order Change Process.
- Change Request.

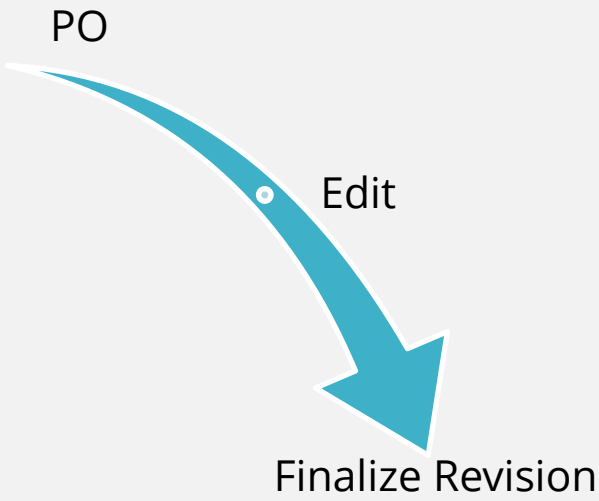


Change PO Owner

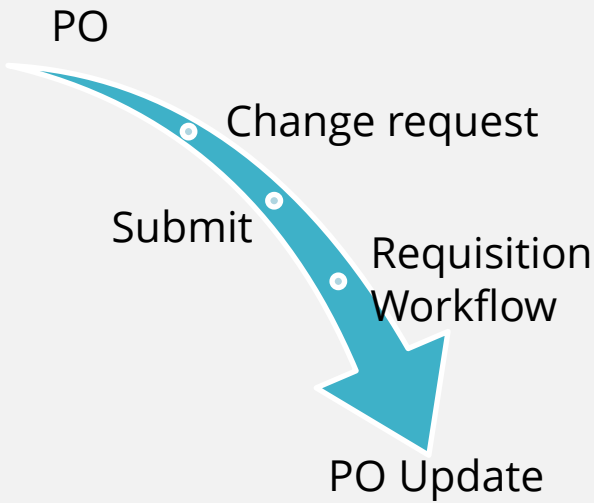


Purchase Order Change Processes

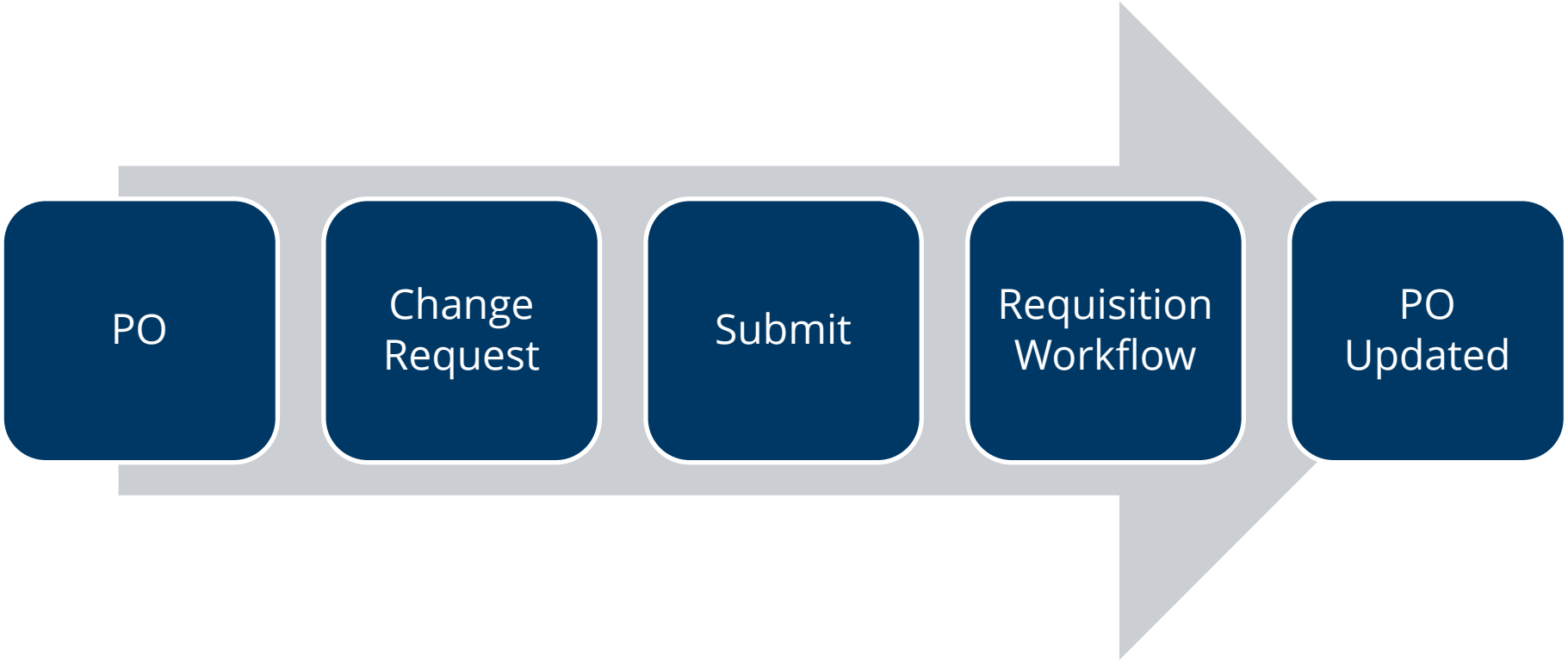
Change Order (Buyers)



Change Request (End Users)



Change Request



DEMO



Change Request Process

Learn how to make a change request.

1. Search PO's and note where you can see the PO status
2. Select the purchase order you would like to update.
3. Select the **Document Actions ellipsis** drop-down menu and select **Create Change Request**.
4. Select or enter the emails of individuals you would like to notify.
5. Enter the reason for the change request and select **Create Change Request**.
6. Select the **Edit** tab to make updates to the order and select **Save**.
7. Select **Submit Request**.

PO Close & Reopen Process

Purchase Orders

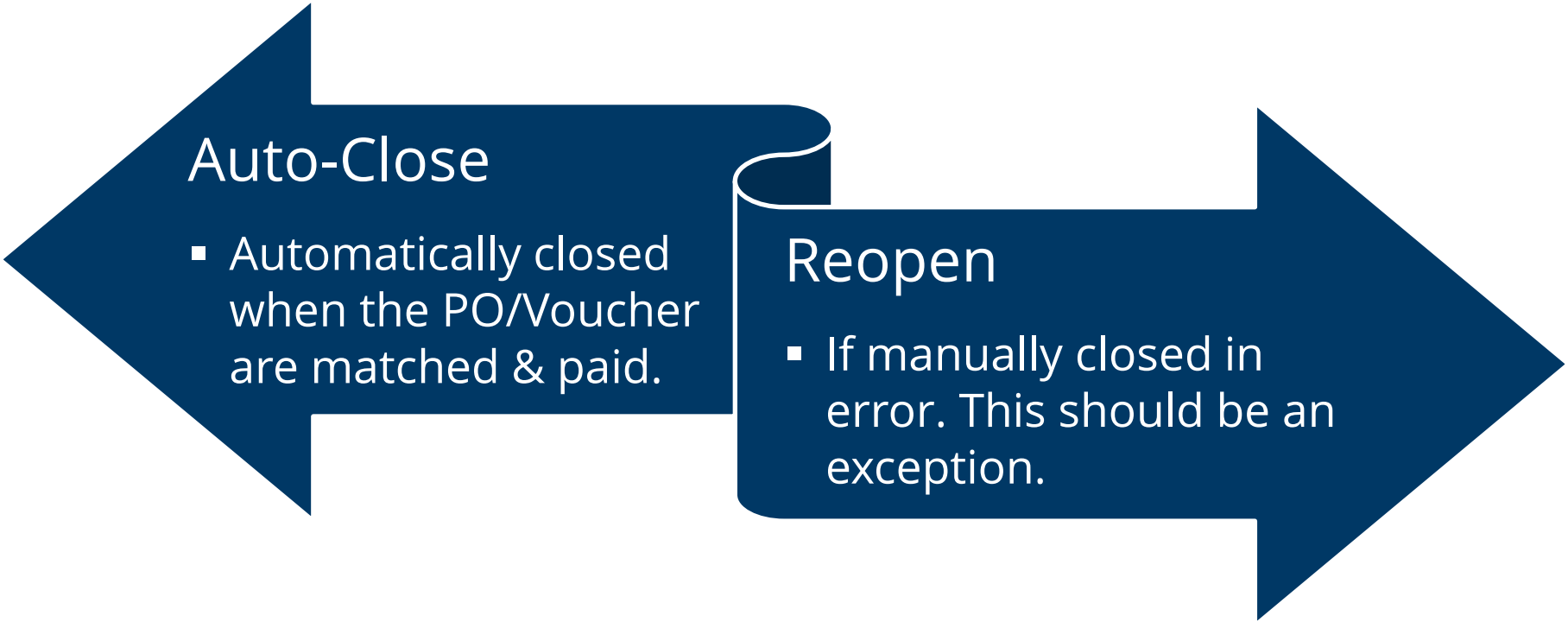
PO Close & Reopen Process

LESSON OBJECTIVES

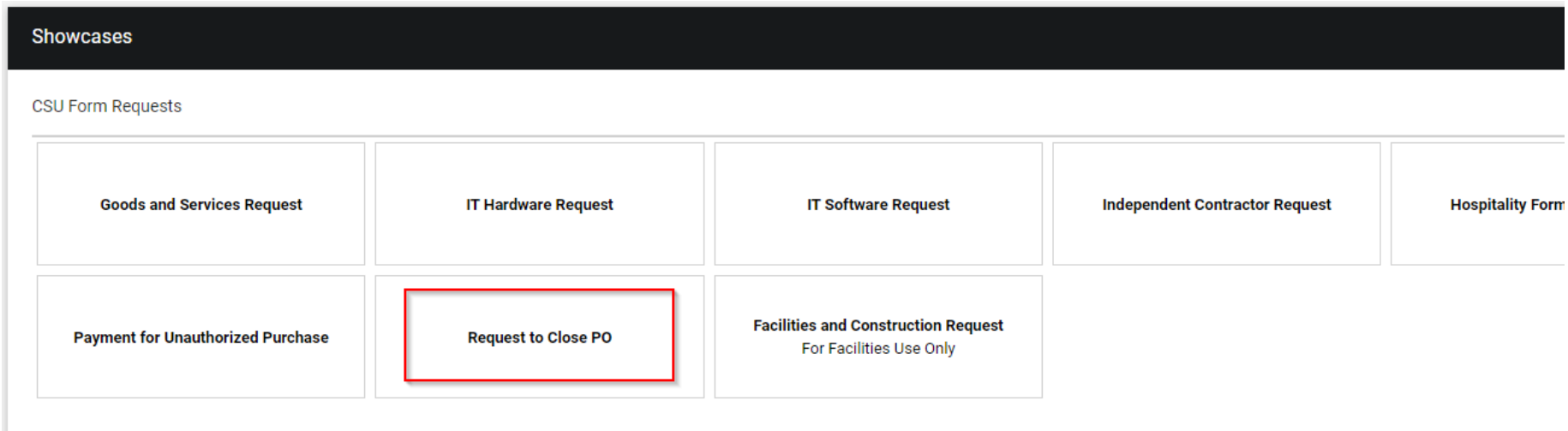
- PO Close & Reopen Process
- PO Close Process
- Bulk Close a Purchase Order
- Manually Reopen a Purchase Order



PO Close & Reopen Process



PO Close Process



Soft Close: Is a purchase order closed in the CSUBUY system but remains open in CFS. Receipts and vouchers are not able to be completed when a purchase order has been soft closed. Buyers have permissions in the system to close a purchase order.

PO Closed: Is a purchased order that is closed in both the CSUBUY system and CFS.

MODULE

6

Receiving

Lessons in This Module

- Receiving Goods and Services

Receiving

Receiving Goods and Services

Receiving

LESSON OBJECTIVES

- Identify the type of items that need a receipt.
- Compare the differences between cost and quantity receipts.
- Apply the process of receiving an order.

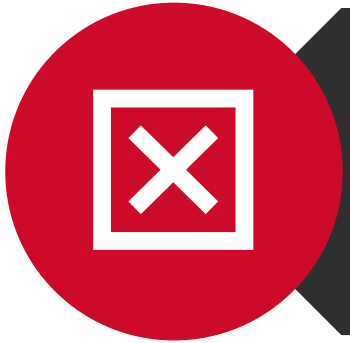


What needs a receipt?



Goods

- 3-Way
- Receipt Required



Services or Blanket POs

- 2-Way
- No Receipt Required

Cost vs Quantity Receipts

Quantity

Standard Receipts

1. Ordered 10 items.
2. Create quantity receipt for all 10 items.

Cost

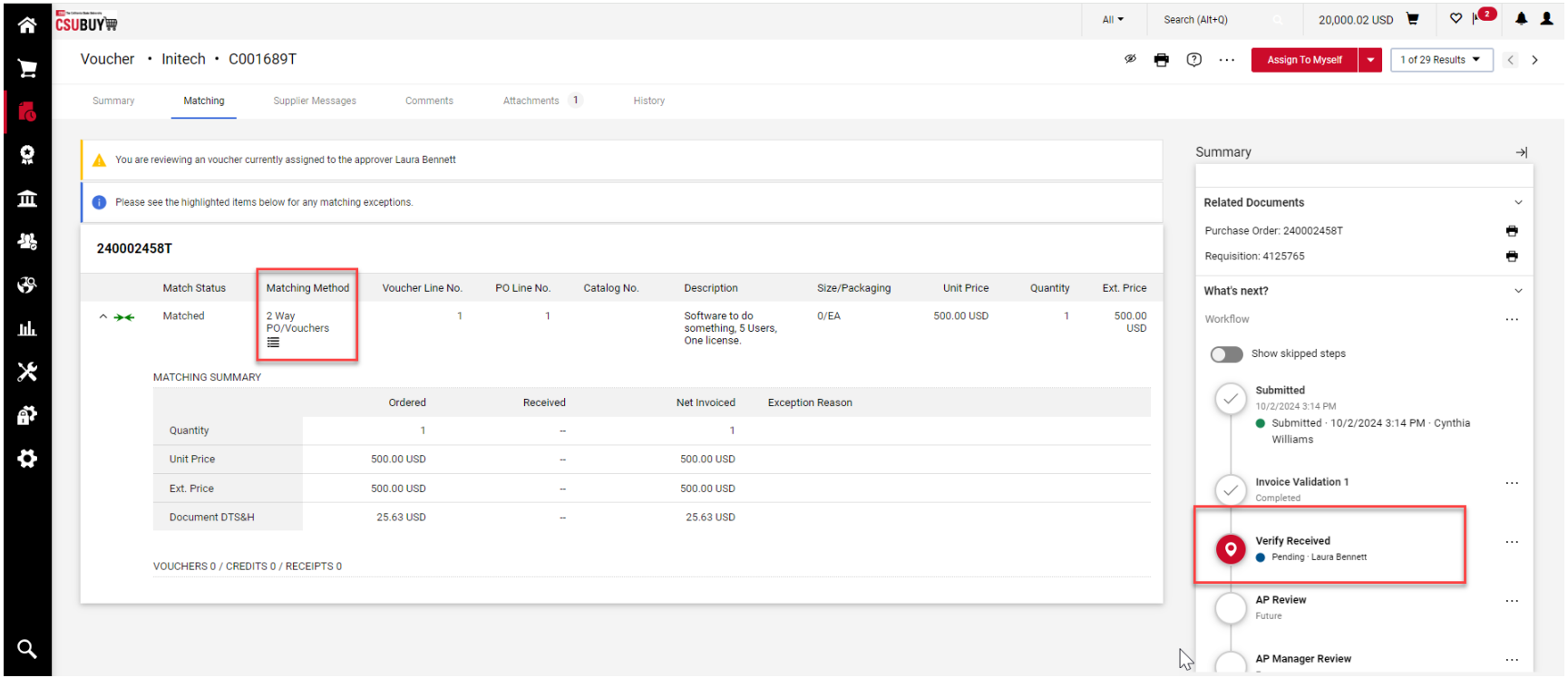
Amount Only or Blanket Orders

1. PO for 100 hours of legal services.
2. Verify Services Received approval step

Steps for Receiving



2-Way Match – Verify Receiving



MODULE

7

Voucher Payment Information

Lessons in This Module

- Locate Voucher Payment Status

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: Available at Go-Live

DEMO



Search for Payment Information

Learn how to search for payment information.

- Navigate to **Home > Accounts Payable > Search for Vouchers**.
- Search to review payment information on the voucher.
- View how a PO is linked to a voucher.

MODULE

8

Reporting

Lessons in This Module

- Search
- Voucher Payment Information

Search

Reports

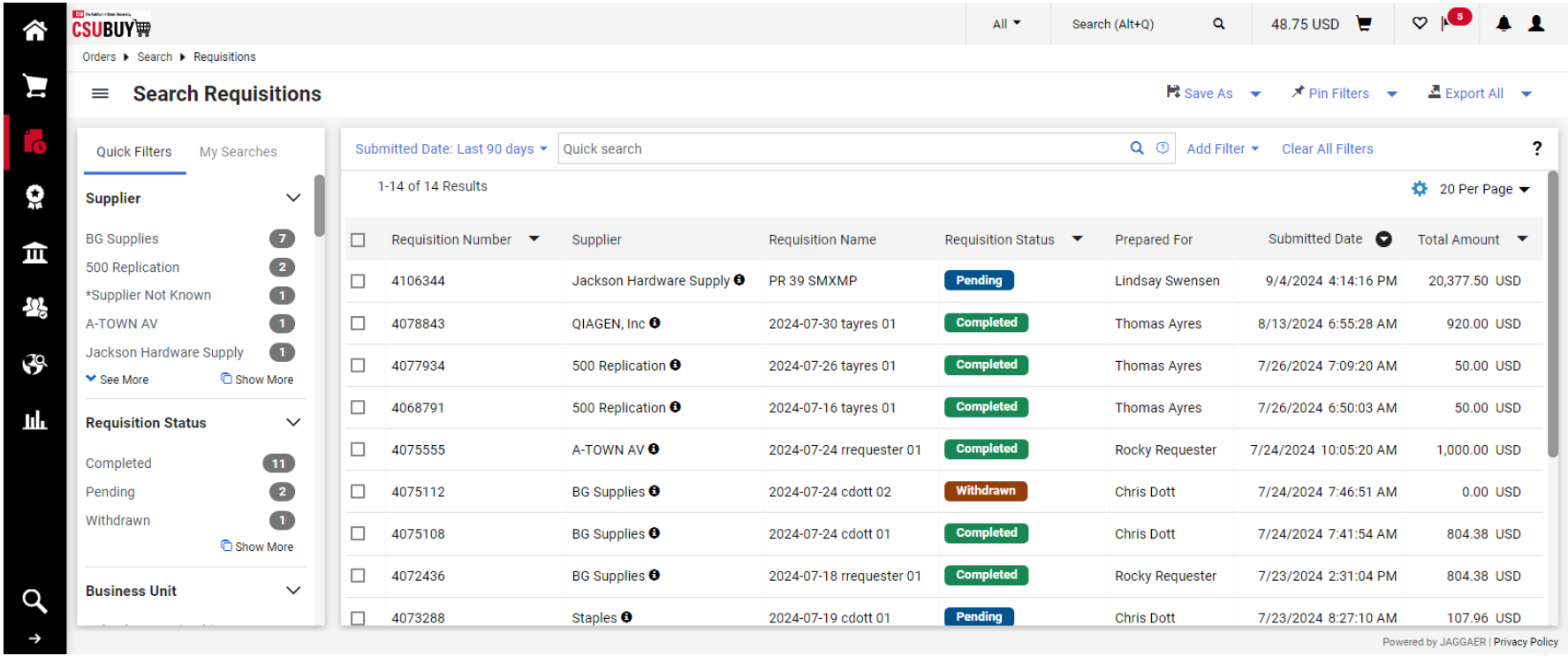
Search

LESSON OBJECTIVES

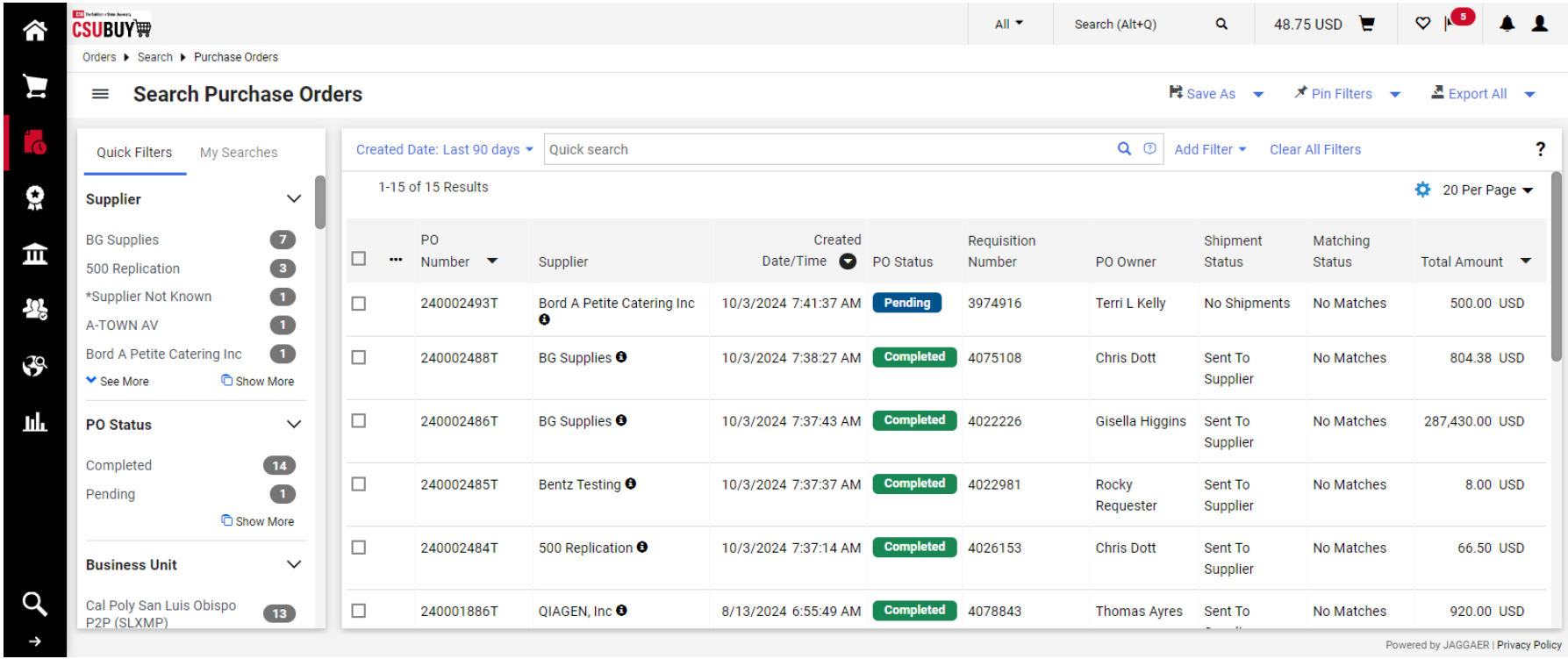
- Locate a Requisition.
- Locate a Purchase Order.
- Locate a Receipt.
- Locate a Voucher.
- Recycled Reporting.



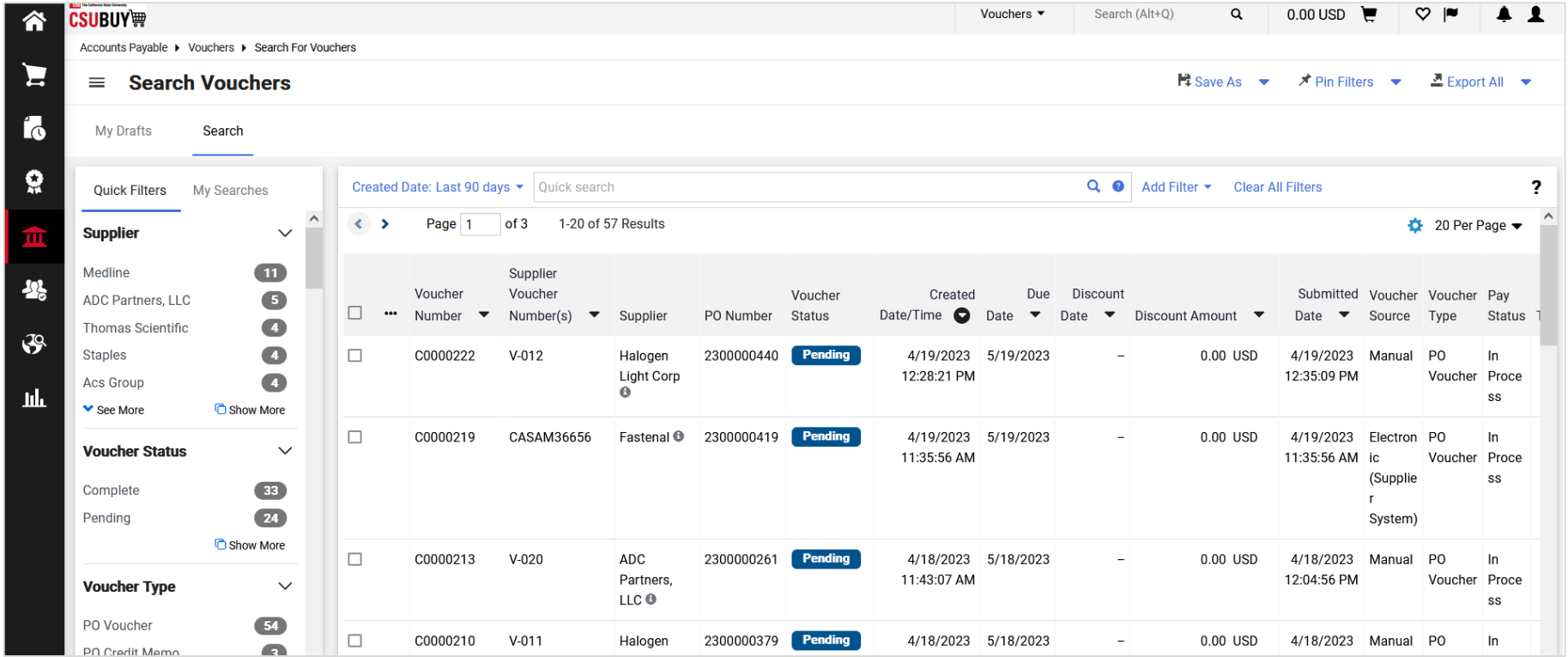
Find a Requisition



Find a Purchase Order



Find a Voucher



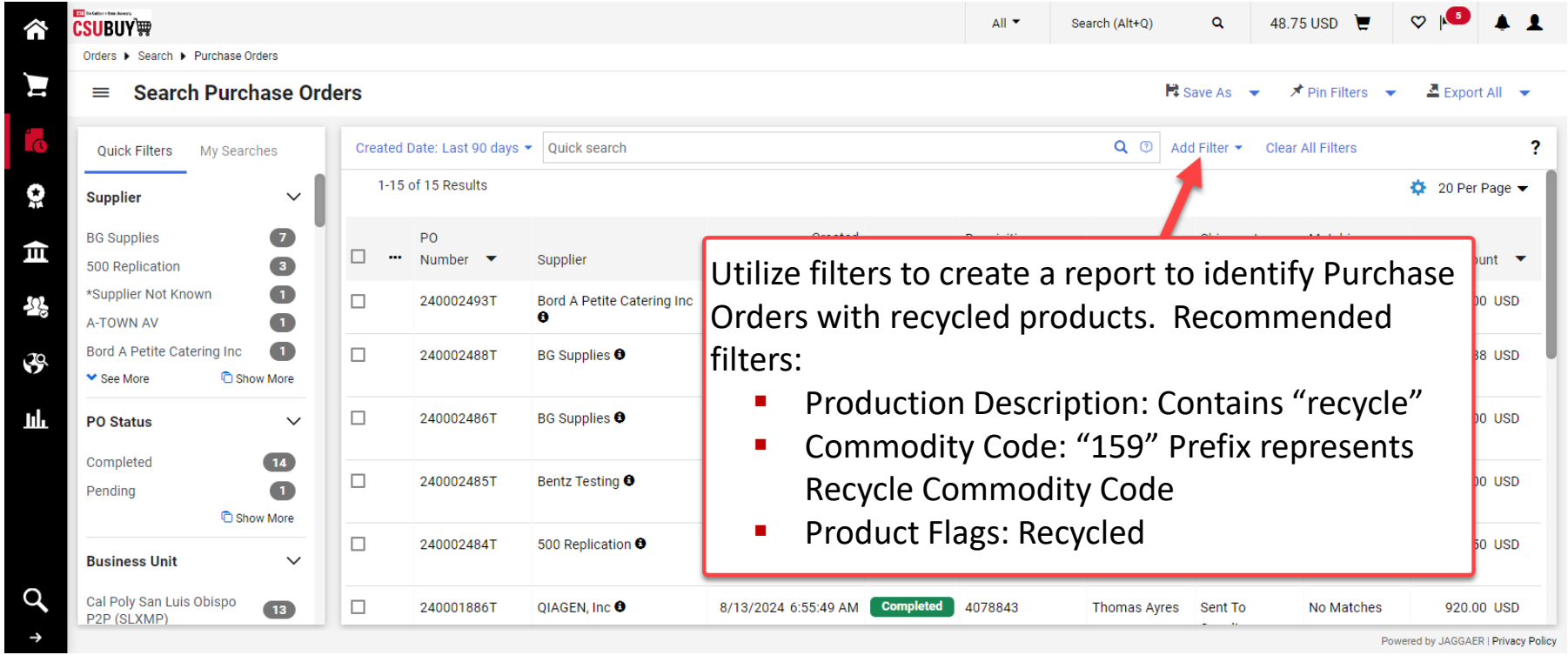
Voucher Pay Status

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.	*no value*
Payment Record Date	*no value*
Payment ID Ref	*no value*
Cancellation Date	*no value*

Recycled Reporting



Utilize filters to create a report to identify Purchase Orders with recycled products. Recommended filters:

- Production Description: Contains “recycle”
- Commodity Code: “159” Prefix represents Recycle Commodity Code
- Product Flags: Recycled

WRAP UP

- System Introduction
- Shopping
- Other Shopping Requests
- Approvals
- Purchase Orders
- Receiving
- Voucher Payment Status
- Reporting

SUPPORT

CSUBUY System Help

- Help button within the system

Support Resources

- Local CSU admin
- CSUBUY Training & Resources