CSUBUY
A COLLABORATIVE PROCURE TO PAY MARKETPLACE

Quick Reference Guide

CSUBUY Support

How to Enter a Support Ticket



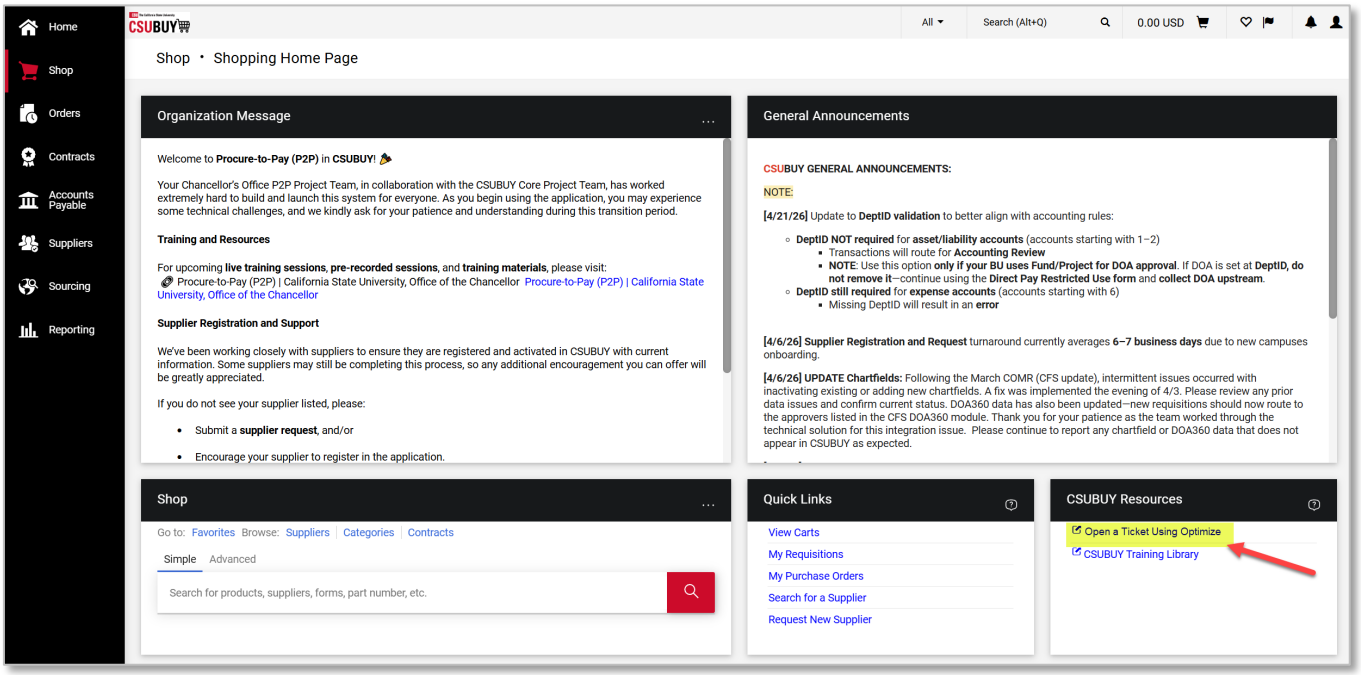
One of the ways to get help and support when using CSUBUY is to enter a support ticket. The support ticket system is powered by Optimize, which tracks and manages all aspects of the support.

This Quick Reference Guide (QRG) provides instructions on how to use Optimize for CSUBUY Support, including:

- How to submit a CSUBUY support ticket
- Viewing and updating CSUBUY support ticket
- Tips & tricks

How to Submit a CSUBUY Support Ticket

1. From the CSUBUY Shopping Home page, under CSUBUY Resources, click on “Open a Ticket using Optimize”.



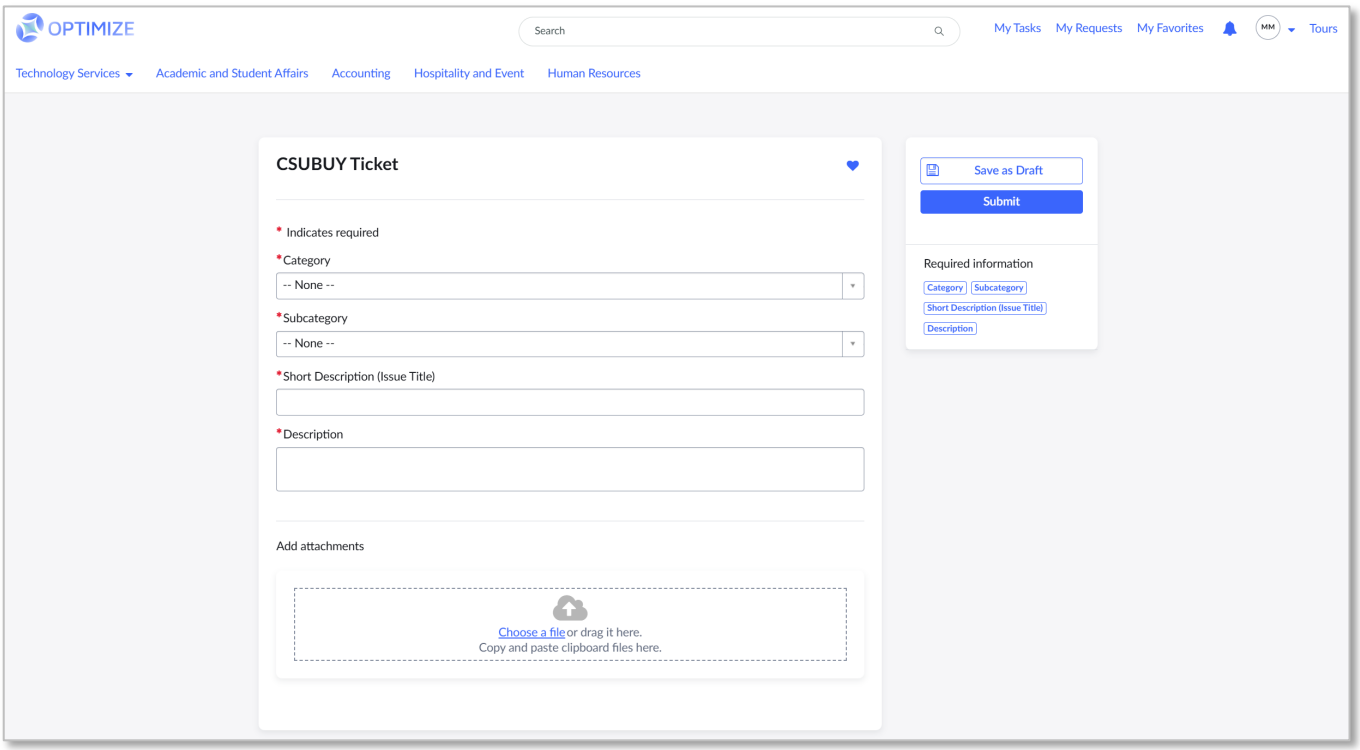
If you are unable to access CSUBUY, then you can navigate directly to the CSUBUY Ticket intake form.
https://optimize.calstate.edu/ec?id=sc_cat_item&table=sc_cat_item&sys_id=00ef7b271bc0c2108de43112cd4bcb46

2. This takes you to the CSUBUY Ticket intake form within Optimize.

OPTIMIZE



3. Complete all required fields of the CSUBUY Ticket form and click **Submit**.
   Note: * (asterisk) are required fields.
   A draft ticket can be saved for later, if desired.



4. **TIP:** Recommendations for entering a ticket:
   - Select the Category and Subcategory that best fits the issue. Scroll to see the complete list of categories.
   - Provide enough information for the support team to effectively troubleshoot the request.
   - Include specific details of the issue. Examples: name of impacted user, error message received, document number (requisition, purchase order or voucher), supplier name, campus or business unit, etc.
   - If applicable, include a screenshot as an attached file.

5. Ticket routing
   Depending on the category and subcategory listed, the ticket may route to the CSUBUY support team at your campus, or other systemwide CSUBUY support teams. If necessary, the ticket may get escalated to additional teams for support and resolving the issue.

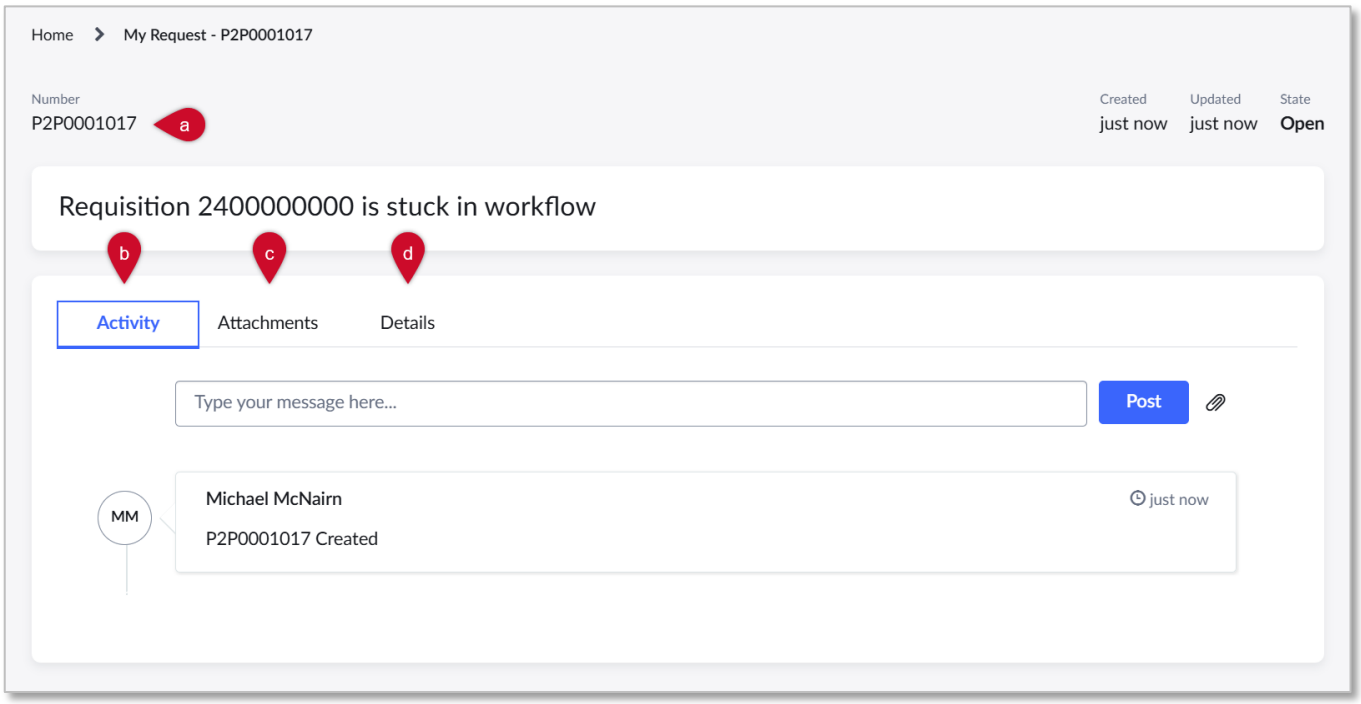
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Viewing and Updating a CSUBUY Support Ticket

1. After you submit the ticket, you will be redirected to the ticket view.
    a. **Ticket number.** A CSUBUY Ticket starts with "P2P". Use this as reference in communication.
    b. **Activity tab**: You can leave a comment by entering your comment in the message box and click **Post**. Comments from support team members may also be listed here. This is an easy way to Communicate with the CSUBUY Support Team(s).
    c. **Attachments tab**: You can add an attachment by clicking on the paperclip icon or drag and drop files.
    d. **Details tab:** This shows information from the original ticket submission.



2. Notifications
    - You should get email notifications from Optimize for the creation and updates to your ticket.
    - From the email you can, "View your ticket in the CSUBUY Support Portal: LINK"
    - You may reply to the email and your comments will post to the ticket's activity tab.

3. When the ticket is resolved, you have a chance to validate and comment on the ticket for confirmation.

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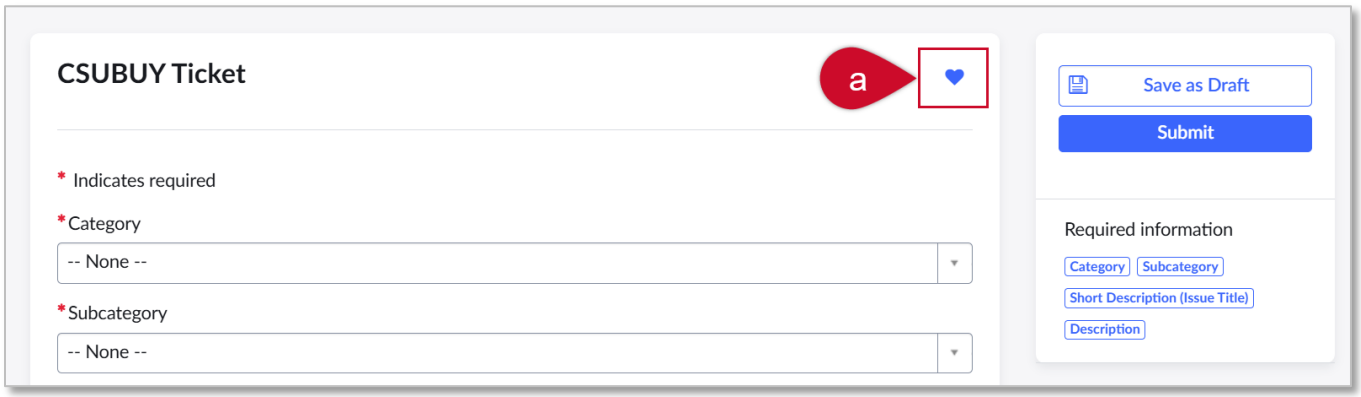


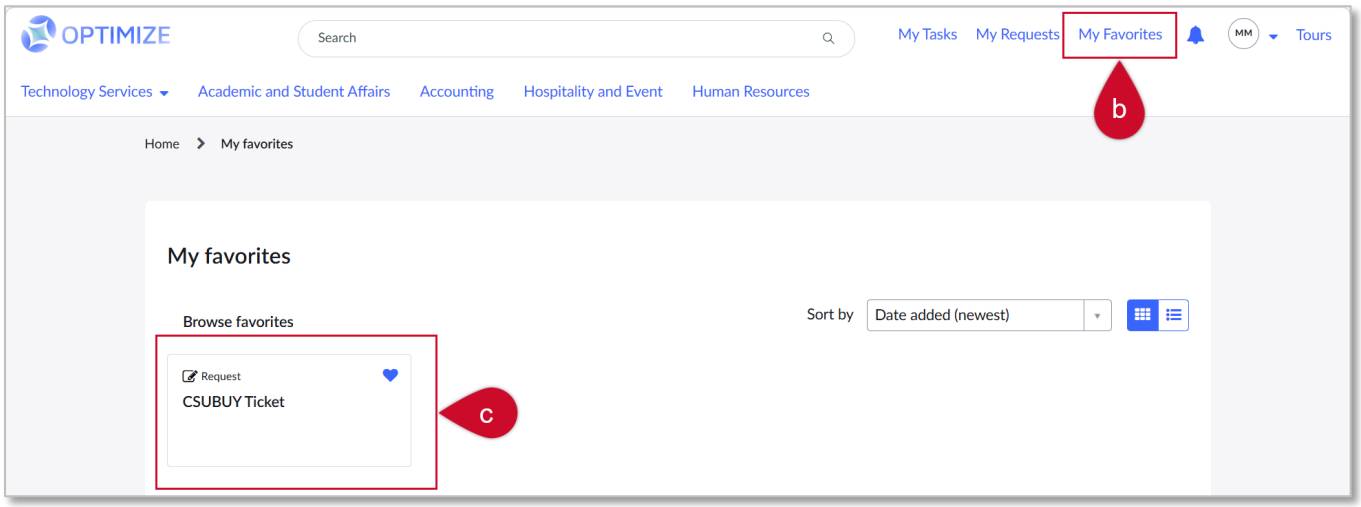
Tips and Tricks

1. Optimize is an issue tracking software which supports tickets from many systems across the CSU. CSUBUY is just one of those systems.
    a. The recommended way to enter a CSUBUY support ticket is to start from the CSUBUY Shopping Home Page and click on Open a Ticket using Optimize.
    b. If you are unable to access CSUBUY, then you can navigate directly to the CSUBUY Ticket intake form. https://optimize.calstate.edu/ec?id=sc_cat_item&table=sc_cat_item&sys_id=00ef7b271bc0c2108de43112cd4bcb46

2. If you are on the Optimize home page, you may see the quick link of "Create a Case".
   This is a general case which creates a general ticket starting with "GC". These tickets route to a central CSU team who re-route them to different support teams. While the ticket may eventually reach the CSUBUY team, it does not have the required category or subcategory fields. It may cause additional delays to resolve an issue.
   Entering a general case for a csubuy ticket is not recommended.

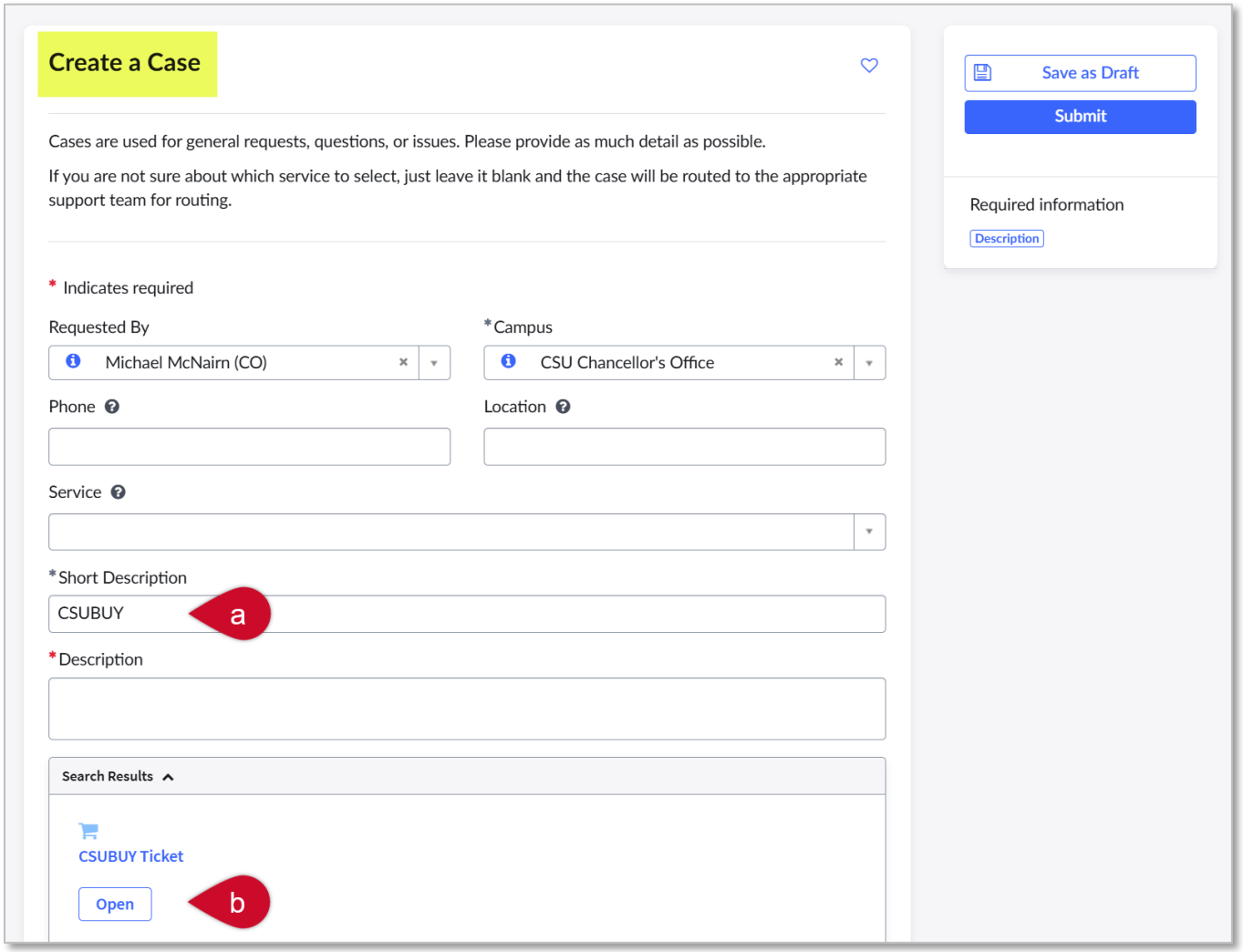
3. Tip: Favorite the CSUBUY Ticket. This will ensure you enter the correct ticket for CSUBUY Support.
    a. When on the CSUBUY Ticket, click the heart to make it a favorite
    b. Access your favorites from the Optimize top menu
    c. Find the CSUBUY Ticket form in your list of favorites.



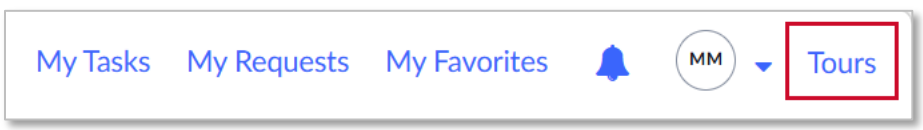




4. Tip: find the CSUBUY ticket within a general case form.
    a. If you start a general case and discover that you really wanted to report a CSUBUY issue, type "CSUBUY" in the Short Description. A CSUBUY Ticket link will show in the Search Results.
    b. Click on Open to open the CSUBUY Ticket. A pop-up window may remind you that if you leave the page, changes will be lost. Click Leave because you are abandoning this form to use the recommended CSUBUY Ticket form.



5. Tip: "Tours" is a quick online help guide to show and explain features for the selected page. Access Tours from the Optimize top menu on the far right.





6. Tip: Find your submitted tickets.
    a. From the Optimize home page, find "My active items", then click on "Requests"
    b. Find all your Submitted Requests (could be for any CSU system, not restricted to CSUBUY).
    c. The Drafts tab lists your saved, but unsubmitted draft tickets.

