

P2P Updates and Reminders

- **Updates and Reminders**
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P2P UPDATES AND REMINDERS

JANUARY 12TH JAGGAER UPDATE

- Same processes and forms but reorganized!

RETURNED REQUISITION DATA

- After analyzing data on returned requisitions, we have the following tips to ensure timely processing:
 - Make sure your quote and requisition match! The line items and dollar amounts on your requisition should align with your quote.
 - Make sure you review the commodity code on the requisition and update it, if needed, to align with the purchase
 - Be sure to include information and attachments related to the purchase

P2P UPDATES AND REMINDERS

GENERAL

- Please see FAQ's (item 4) on how to handle IT Software requisitions when a supplier is not responsive to the supplier invite.
- If there is a contract in place, please reference it and attach it.
- Requisition Comments. All communications regarding a requisition should be done via req comments. Please be sure to add the intended recipient on the requisition comment. Remember to check comments!
- Please remember your start and end dates on your requisitions!

Does the request include performance terms (start & end date)? ★ ☒ Yes ☐ No

Performance Start Date 🔍

7/1/2026



mm/dd/yyyy

Performance End Date 🔍

6/30/2027



mm/dd/yyyy

1 Auxiliary Organizations Risk Management Alliance (AORMA) - Insurance

^ ITEM DETAILS

Performance Start Date 7/1/2026

Performance End Date 6/30/2027

[more info...](#)

YEAR END RESOURCES - REPORTS

- Did you know that you can use reports in P2P to track all of your purchase orders and requisitions? Training guides are available on our website.
- How does it help?
 - Track requisitions and PO's from the past year to determine which ones need to be renewed
 - You can copy the past year's requisition to a new requisition for this year (don't forget to update the form info).
 - It can help identify PO's that need to be closed.
 - It can help identify PO's that require an invoice be submitted to AP.
 - This is especially helpful with knowing when to start the IT review for an annual renewal.

YEAR END RESOURCES - REPORTS

Created Date: All Quick search Add Filter Clear All Filters ?

PO Owner: Nance-Sotelo, Voucher Status: Partially Invoice, Voucher Pay Status: Paid,No Pay St.

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PO Number	Supplier	Created Date/Time	PO Status	Voucher Status	Voucher Pay Status	Voucher Payment Amount	Voucher Total	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
2400041116	KLATU Networks Inc	5/21/2025 8:28:05 AM	Completed	No Vouchers	No Pay Status		0.00 USD	201817815	Courtney Nance-Sotelo	Sent To Supplier	No Matches	1,566.00 USD
2400040301	Fisher Scientific Company LLC	5/15/2025 7:59:59 AM	Completed	Fully Invoiced	Paid		8,254.13 USD	201460817	Courtney Nance-Sotelo	Fully Shipped	Fully Matched	8,254.13 USD
2400040217	Fisher Scientific Company LLC	5/14/2025 12:25:51 PM	Completed	Partially Invoiced	Open		1,174.16 USD	201562176	Courtney Nance-Sotelo	Partially Shipped	Partially Matched	4,003.43 USD
2400038897	VWR Funding Inc	5/6/2025 2:57:19 PM	Completed	No Vouchers	No Pay Status		0.00 USD	201210696	Courtney Nance-Sotelo	Sent To Supplier	No Matches	921.60 USD
2400038799	VWR Funding Inc	5/6/2025 11:24:14 AM	Completed	No Vouchers	No Pay Status		0.00 USD	201190721	Courtney Nance-Sotelo	Sent To Supplier	No Matches	4,551.02 USD
2400037848	Amazon.com	4/30/2025 8:18:56 AM	Completed	Fully Invoiced	Paid		9.99 USD	200928743	Courtney Nance-Sotelo	Fully Shipped	Fully Matched	9.99 USD

YEAR END RESOURCES – HOW TO COPY A REQUISITION

- Visit our website for the guide and video
- Come to Office Hours for assistance!
- *You can copy from any requisition, not just your own!*
- Double check that you are using the correct form type and update the information in the form (dates of service, updated pricing, updated details or information).

Copy to New Cart and Reorder

Learn how to Reorder items not in a PunchOut. (For Requisitions 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**

P2P CSUBUY – QUESTIONS

Questions?

Available Resources at: <https://www.csusm.edu/procurement/procurementservices/index.html>:

1. Training Videos

2. BERTI

- Don't have time to sift through the P2P information on our website? Ask Berti to do it for you! Berti will even let you know where it found the information.
- Instructions on how to use Berti: https://www.csusm.edu/bfs/pcbo/archive_notices/berti_p2p_support.pdf

3. Appointment Booking

4. Office Hours