

P2P Updates and Reminders

October 6, 2026

- **DOA Changes; Requisition Visibility and Ad Hoc Approvals**
- **Tips for Submitting a Ticket**
- **Requisition Tracking**
- **Questions and Resources**

P2P CSUBUY – DOA APPROVAL CHANGES

Background:

- Due to CSU audit findings, requesters can no longer approve their own requisitions. Following systemwide recommendations, DOA for Level 5 was removed. All requisitions route to Level 4.

Impact:

- Requisitions no longer go to Level 5 for DOA approval.
- All requisitions will go to a Level 4 approver.

Tips for Avoiding Issues:

- If you are submitting a requisition, make sure you have a Level 4 DOA assigned to approve that chartfield.
- If you are level 4 and submitting a requisition, make sure there is an additional level 4 DOA approver for that chart field.
- Reach out to FSO if you have questions about your current DOA setup or if you need to make any changes.

P2P CSUBUY – REQUISITION VISIBILITY

How to View Requisitions now that Level 5 DOA is not in the workflow:

- If you used be the DOA Approver for your area's requisitions as a Level 5 DOA, the requisitions now skip you and go to Level 4.
- How can you see them? Three Options:
 - The requester can add you as an **Ad Hoc** reviewer before the requisition goes to DOA.
 - The requester may enter the requisition and then **assign the cart** to you to review and submit. Note: you will be the PO Owner, which may be an unintended consequence.
 - Create a **Report** for requisitions by Dept ID. You can save and pull the report at any time, which will provide visibility into requisitions for the specified Dept ID.
- Questions on how to do any one of these fixes? Please come to Procurement & Contracts Office Hours (Thursdays at 1pm via Zoom) or view the guides on the Procurement P2P website.

P2P CSUBUY: SYSTEMWIDE OPTIMIZE TICKET TIPS

What to include:

Define the request

- Clear Title
- Request Type
- Environment
- Campus/BU
- Requested Action

Show the evidence

- Affected Document Numbers
- Screenshots
- Full Error Message
- Logs/History

Make it reproducible

- Exact Steps
- Actual Result
- Expected Result
- User
- Roles And Permissions

Explain the impact

- Users/Transactions Affected
- Business Risk
- Workaround
- Troubleshooting Completed

Why?

- Complete ticket details reduce follow-ups, expedite and improve resolution quality.
- The ticket needs to include enough information for the team to understand the request, investigate the issue, and determine the appropriate action.

P2P CSUBUY – REQUISITION TRACKING

Did you know that you can use reports in P2P to track all of your requisitions? A guide is at https://www.csusm.edu/procurement/procurementservices/csubuy_p2p/export-reports.pdf.

How does it help?

- Track requisitions 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).
- This will help identify PO's that need to be closed.
- This will 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.
- Come to Office Hours for tips on creating and saving a Report that has the information you need (PO Dates, match status, multi-year, etc.)

P2P CSUBUY – REQUISITION TRACKING

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... ▾ ✕													
< > Page 2 of 3 21-40 of 56 Results ⚙️ 20 Per Page ▾													
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	

P2P CSUBUY – REMINDERS

1. Please see the PCBO Notice and information on how to handle a \$0 line on a requisition.
2. Please see FAQ's (item 4) on how to handle IT Software requisitions when a supplier is not responsive to the supplier invite.
3. You can click on the workflow step to see who the potential approvers are and see your requisition status.
4. Please remember to confirm that the commodity code is accurate for each line, including punchout purchases.
5. What to do when someone leaves CSUSM? Please put in a ticket with their replacement and a list of open PO's that need the PO Owner updated. This is a great opportunity to clean up and close completed PO's.
6. Requisition Comments. All communications regarding a requisition, once submitted, should be done via req comments. Please be sure to add the intended recipient on the requisition comment. Remember to check comments!

P2P CSUBUY – CONTACTS

Who do I contact?

Question Topic	Subject Matter Expert	Contact Info
Supplier Setup Issues	Accounts Payable	Check P2P or email suppliersetup@csusm.edu
DOA Issues	Financial Systems Operations	fso@csusm.edu
Invoices/Payment Status	Accounts Payable	Check P2P or email accountspayable@csusm.edu
IT Review	IITS	Message the IT reviewer on the requisition in P2P.

P2P CSUBUY – QUESTIONS

Questions?

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

1. Training Videos
2. BERTI
3. Appointment Booking
4. Office Hours