

CSU The California State University



A COLLABORATIVE PROCURE TO PAY MARKETPLACE

Approvers

AGENDA

A message from Steve Relyea

Module 1 System Introduction

Module 2 Shopping

Module 3 Approvals

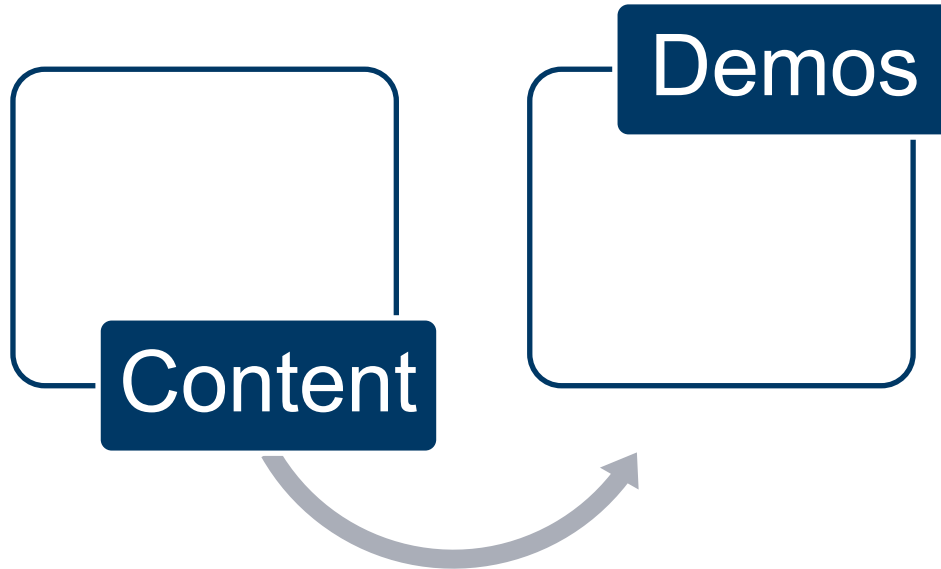
Module 4 Reporting

A message from Steve Relyea



Training Structure & Flow

Each functionality covered today will follow the following 2-step process:



MODULE

1

System Introduction

Lessons in This Module

- CSUBUY Overview
- Basic Navigation

CSUBUY Introduction

System Introduction

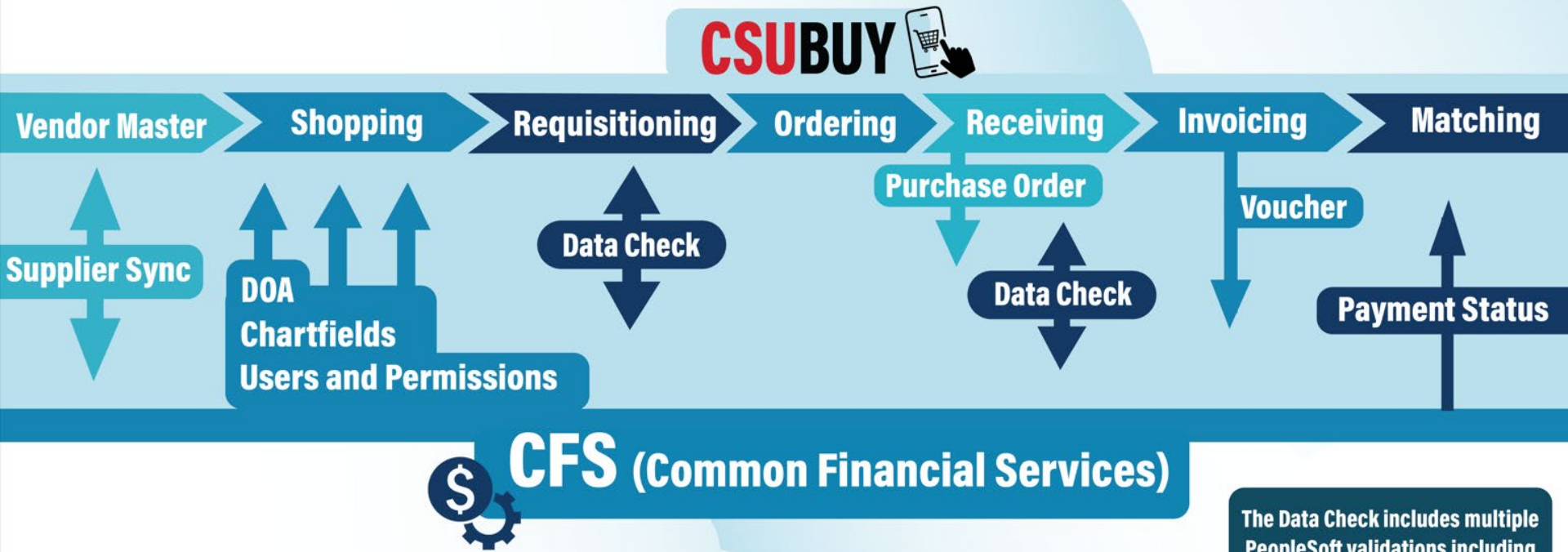
CSUBUY Overview

LESSON OBJECTIVES

- Explain the purpose of the CSUBUY system.
- Identify how the CSUBUY system can benefit your role.
- Log in to the CSUBUY system.



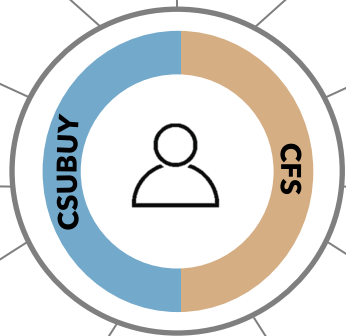
HOW DOES DATA FLOW BETWEEN CSUBUY AND CFS?



The Data Check includes multiple PeopleSoft validations including combo edits.

CSUBUY Procure-to-Pay

WHAT TO DO WHERE?



BUYING

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



BUDGET CHECKING

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

RECEIVING

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



STUDENT & EMPLOYEE DIRECT PAYS

Reimbursements & payments for students and employees



PUNCHOUT SUPPLIER DIRECT PO

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



PAYMENT

Posting of vouchers, payments and payment corrections



SUPPLIER PAYMENTS

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



CLAIMS

Claim Process (CSUBUY Invoice override available)



RECONCILIATION

Reconcile requests and purchase orders created including closing POs



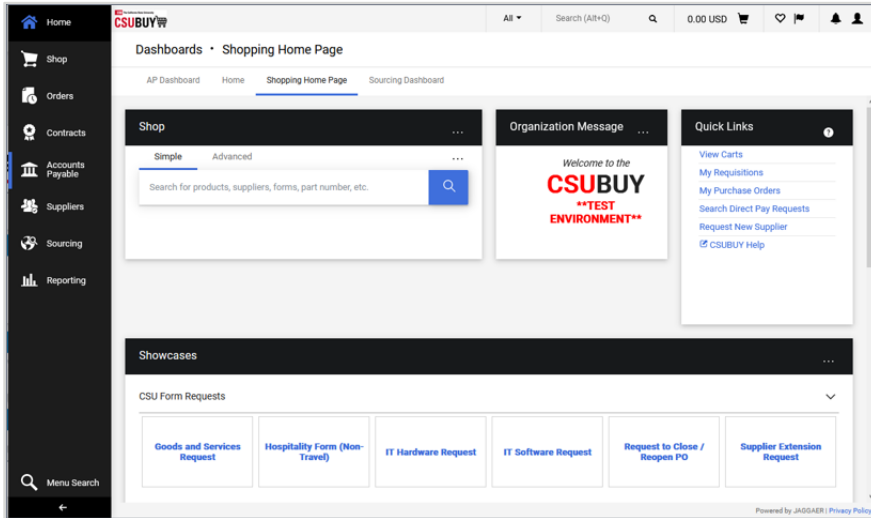
1099

1099 Processing (CSUBUY Invoice override available)



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

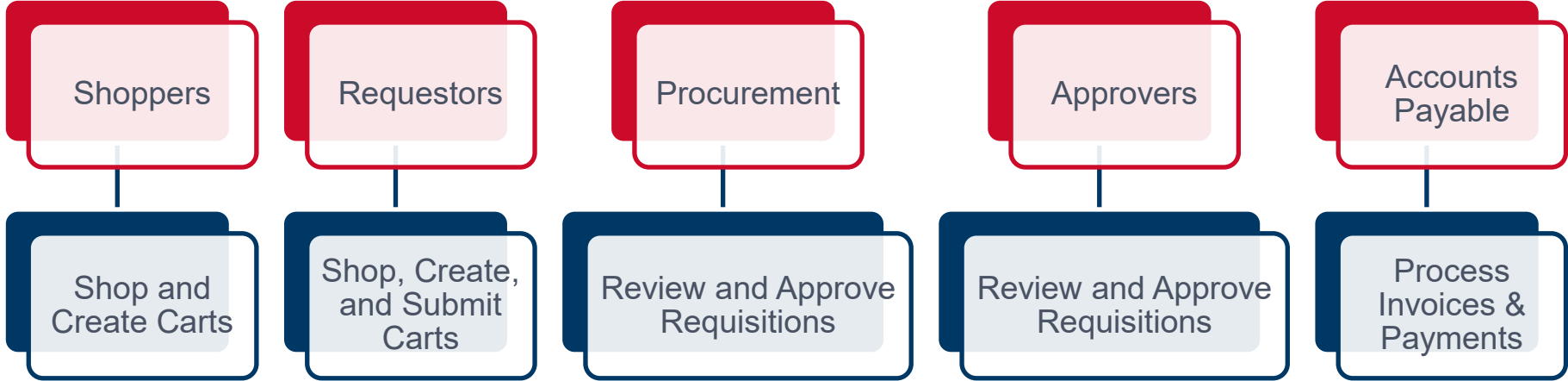


CSU The California State University

CSUBUY 
A COLLABORATIVE PROCURE TO PAY MARKETPLACE

Who Uses CSUBUY?

Overview of the user groups that use CSUBUY for purchasing.



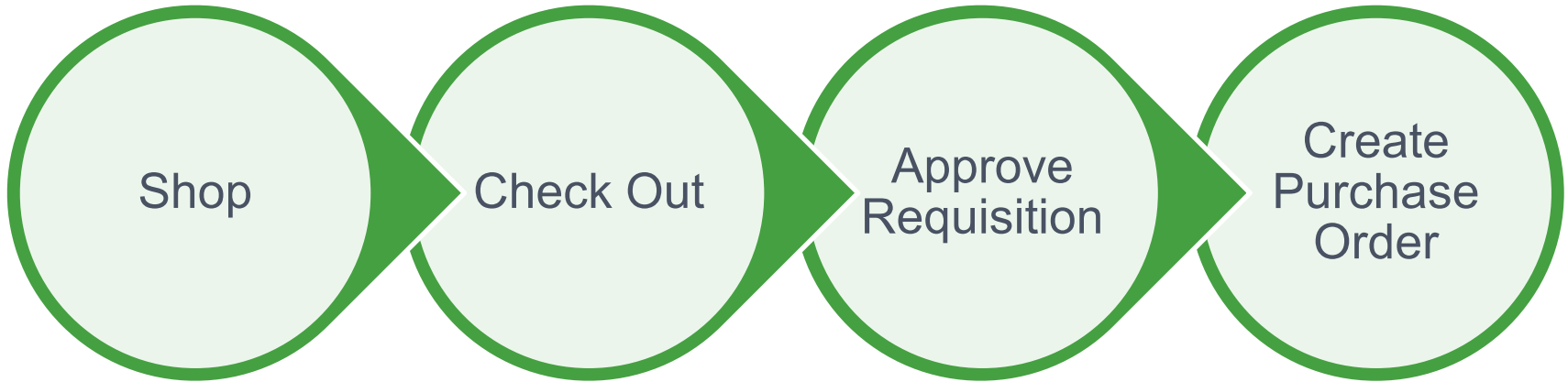
How Does This Change My Role?



In **CSUBUY**, Approvers will:

- Review and approve requisitions and vouchers.
- Communicate using comments.
- Complete the approval workflow.

Process Overview



Basic Navigation

System Introduction

Basic Navigation

LESSON OBJECTIVES

- Locate your user profile.
- Update your system notification settings to your desired preferences.
- Identify the key features of the notifications center.
- Set up user defaults
- Navigate the Shopping dashboard.
- Use the search features.
 - Advanced Search
 - Search Toolbar



Shopping Home Page

Shop • Shopping Home Page

Welcome to the
CSUBUY
TEST ENVIRONMENT
Chico

Quick Links

- View Carts
- My Requisitions
- My Purchase Orders
- Search for Supplier
- Request New Supplier
- CSUBUY Help

Shop

Simple | Advanced

Go to: Favorites | Browse: Suppliers | Categories | Contracts

Search for products, suppliers, forms, part number, etc.

My Approvals

Showing Results 1 - 4 of 4

TYPE	DETAILS	FOLDER NAME	DAYS IN FOLDER ↑
Requisitions	Number: 4104223 Name: PR-09 SMXMP	San Marcos - Commodity - Supplies	28
Requisitions	Number: 4106344 Name: PR 39 SMXMP	2 Folders	28

Orders Search

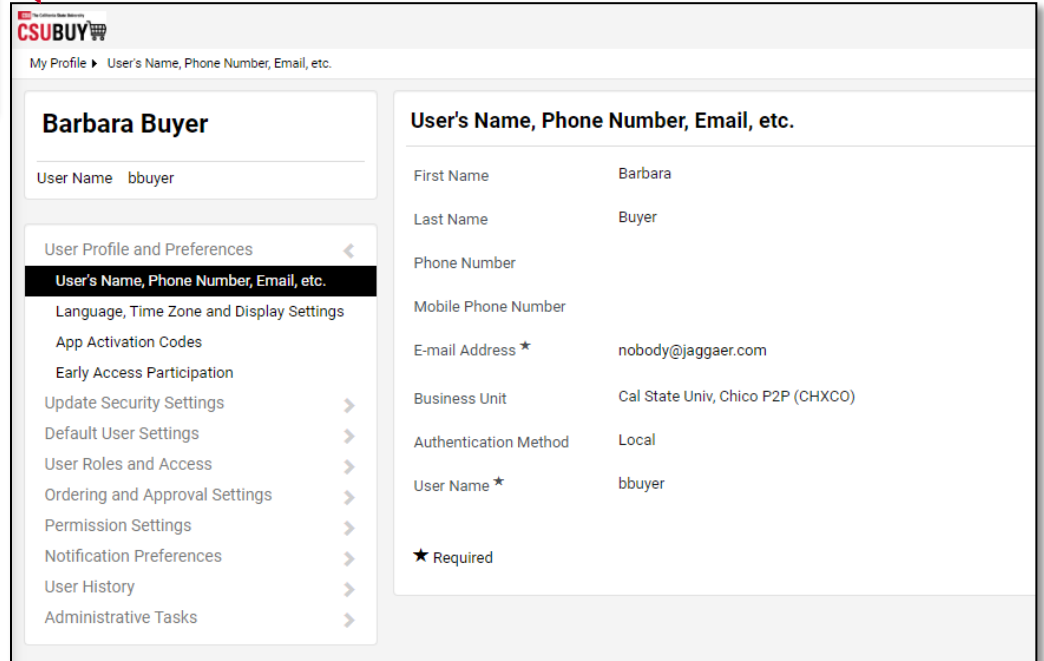
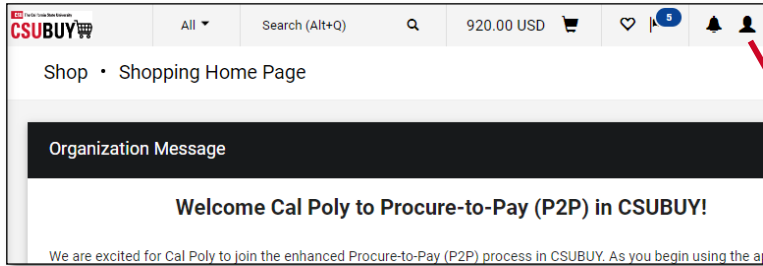
All Orders | Document Numbers, Supplier, Product Information

SHORTCUTS

- My Requisitions
- My Purchase Orders
- My Vouchers

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How to Access Profile Settings



Set Up Your Notification Preferences

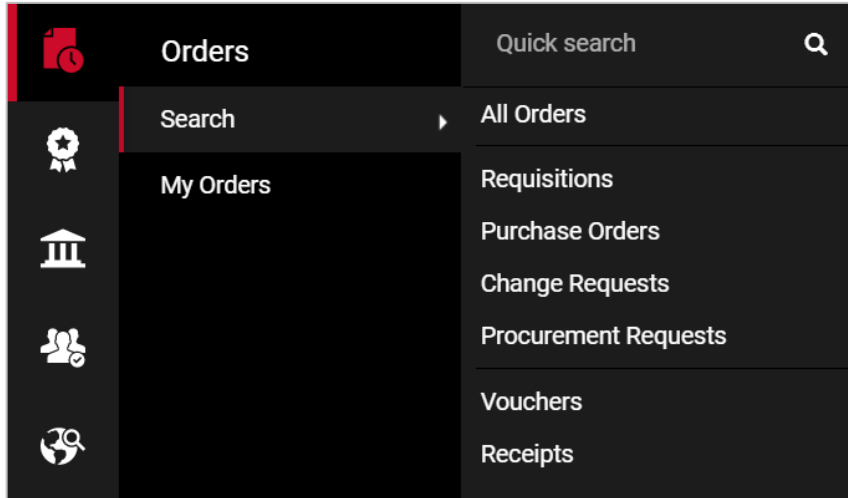
Notifications Preferences

Notification Preferences: Shopping, Carts & Requisitions

Prepared By - Cart Assigned Notice ?	None
Prepared By - PR line item(s) rejected ?	None
Prepared By - PR rejected/returned ?	None
Cart Assigned Notice ?	None
Receive PR and PO notifications for Carts Assigned to Me ?	None
Assigned Cart Processed Notification ?	None
Assigned Cart Deleted Notification ?	None

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

Orders Flyout: Use the Search Feature



Search

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

My Orders

- Items Assigned to Me

Searching

System Introduction

Searching

LESSON OBJECTIVES

- Locate requests and orders.
- Save a search.
- Configure Column Display on Search Screen



Introduction to Search

Searching and Advanced Search

The screenshot shows the CSUBUY search interface. At the top, there's a navigation bar with the CSUBUY logo, a search bar containing "Search (Alt+Q)", and a price indicator of "27,125.00 USD". Below this is a "Shop" header with "Shopping Home Page". The main search area is titled "Shop" and has tabs for "Simple" and "Advanced". The "Advanced" tab is selected, and it includes a "Go to:" menu with options like "Favorites", "Forms", "Non-Catalog Form", "Quick Order", "Browse: Suppliers", "Categories", and "Contracts". There's a dropdown menu for "Advanced Search" set to "Everything". Below this, there are sections for "Find Results That Have:" and "Other Options". The "Find Results That Have:" section includes input fields for "All of These Words", "Part Number (SKU)", "Commodity Code", "Supplier", and "Manufacturer Name". The "Other Options" section includes input fields for "Exact Phrase" and "Exclude Words", along with "Any of These Words". At the bottom right, there are "Search" and "Reset" buttons.

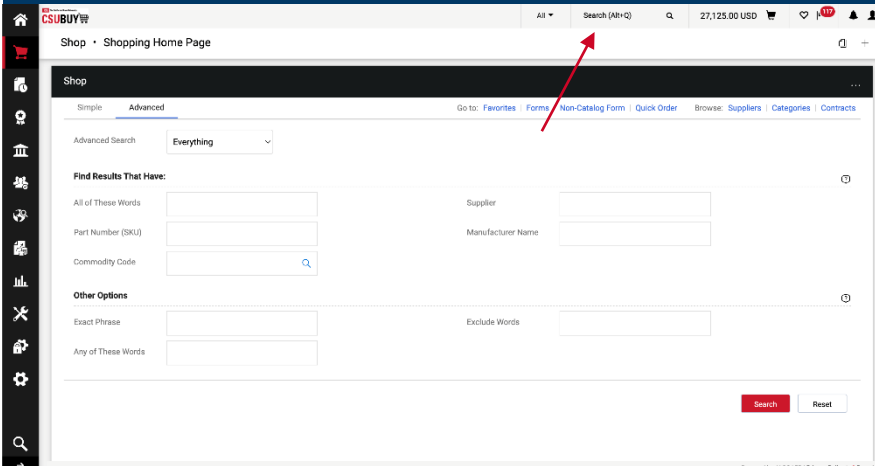
Saved Searches

The screenshot shows the "Manage Searches" interface. At the top, there's a navigation bar with the CSUBUY logo, a search bar containing "Search (Alt+Q)", and a price indicator of "0.00 USD". Below this is a "Manage Searches" header. There's an "Add New" button and links for "Expand All" and "Collapse All". The main content area is divided into two sections: "Personal" and "Shared". The "Personal" section has a sub-header "Personal" and the text "You have no personal searches." The "Shared" section has a sub-header "Shared" and the text "You have no shared searches." A blue informational box on the right side of the page contains the following text: "This 'saved searches' page is a filtered view of 'favorites.' The folders listed on the left contain document searches you have saved (listed under 'Personal') or document searches that are being shared with you (listed under 'Shared'). To add a document search to a folder, select the 'Save Search' button after performing a document search and follow the prompts. Use the top-level 'favorites' tab to manage (create, delete, move/copy, edit) the folders listed on the left." At the bottom right, there is a small footer that says "Powered by JAGGAER | Privacy Policy".

Search Options

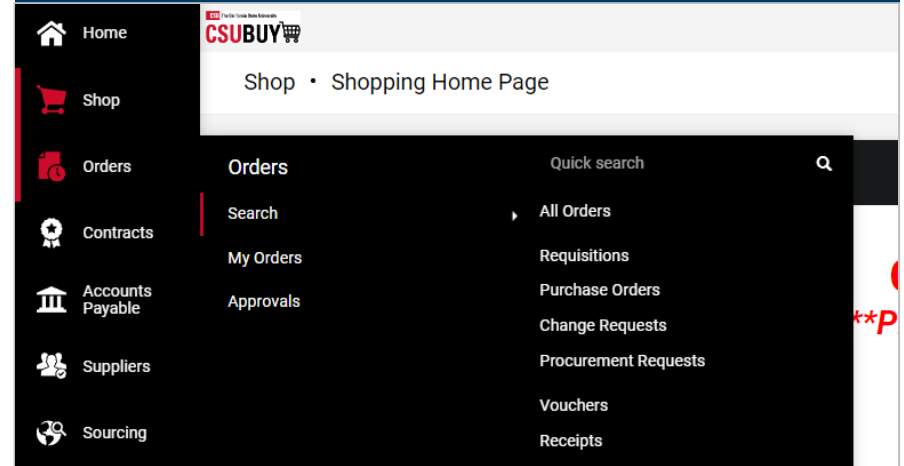
Global Search Field

Search specific documents and or suppliers



Module Fly-Out Searches

Search for documents in specific modules



How to Build Your Search

The screenshot shows the CSUBUY Search Purchase Orders interface. The page title is "Search Purchase Orders". The breadcrumb trail is "Orders > Search > Purchase Orders". The top navigation bar includes "All", "Search (Alt+Q)", "0.00 USD", and icons for cart, heart, flag, bell, and user. The main content area has a search bar with "Created Date: Last 90 days" and "Quick search" (highlighted with a red circle 3). The search results are displayed on "Page 1 of 31" with "1-20 of 616 Results". The table has columns: PO Number, Supplier, Created Date/Time, PO Status, Requisition Number, PO Owner, Shipment Status, Matching Status, and Total Amount. The table shows several rows of purchase orders, all with a "Completed" status. The left sidebar has "Quick Filters" and "My Searches" sections. The "Supplier" filter is expanded, showing "Quality Classroom Supplies" (112), "Initech" (68), "Chelsea's Construction Company" (45), "Bradford Telecommunications" (37), and "Acme Corporation" (32). The "PO Status" filter is also expanded, showing "Completed" (599) and "Pending" (17). The right sidebar has "Save As", "Pin Filters", and "Export All" options. The bottom right corner has a gear icon and "20 Per Page".

1 Supplier

2 Created Date: Last 90 days

3 Quick search

4 Add Filter

5 20 Per Page

6 Save As

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
240002479T	Initech	9/30/2024 10:47:01 PM	Completed	4125792	Laura Bennett	Sent To Supplier	No Matches	521.25 USD
240002478T	Initech	9/30/2024 10:45:00 PM	Completed	4125843	Laura Bennett	Sent To Supplier	No Matches	521.57 USD
240002477T	Initech	9/30/2024 10:41:42 PM	Completed	4125832	Laura Bennett	Sent To Supplier	No Matches	523.44 USD
240002476T	Initech	9/30/2024 10:39:06 PM	Completed	4125831	Laura Bennett	Sent To Supplier	No Matches	518.19 USD
240002475T	Initech	9/30/2024	Completed	4125830	Laura	Sent To	No	521.88 USD

Step 5: Configure Column Display

Reflects the columns defined for the current search. Customizations will apply to the lifetime of the current search unless the search is saved. Columns marked with an * are custom defined data elements

Type to Filter Available Columns...

- Account *
- Account Override *
- Accounting Date
- Amount-Only / Blanket PO *
- AP Status

PO Number	↑ ↓
Supplier	↑ ↓ 🗑
Created Date/Time	↑ ↓ 🗑
PO Status	↑ ↓ 🗑
Requisition Number	↑ ↓ 🗑

Pin Columns as my defaults

Apply Cancel

20 Per Page

Shipment Status	Matching Status	Total Amount
Sent To Supplier	No Matches	521.25 USD
Sent To Supplier	No Matches	521.57 USD
Sent To Supplier	No Matches	523.44 USD
Sent To Supplier	No Matches	518.19 USD
Sent To Supplier	No Matches	521.88 USD

Step 6: How to Save Your Search

rs

[Save As](#)
[Pin Filters](#)
[Export All](#)

Created Date: Last 90 days

Business Unit: Cal State Univ, ...

Page 1 of 15 1-20 of 283 Results 20 Per Page

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
2300000604	David's Doughnuts	4/28/2023 7:37:20 AM	Completed	3751913	Layla Betar-Makhoul	Sent To Supplier	No Matches	450.45 USD
2300000603	Acs Group	4/28/2023 7:37:04 AM	Completed	3751913	Layla Betar-Makhoul	Sent To Supplier	No Matches	18,478.42 USD
2300000595	Hewlett-Packard Company	4/27/2023 3:28:33 PM	Completed	3762860	Chris Jones - Chico	Sent To Supplier	No Matches	516.18 USD
2300000594	Acs Group	4/27/2023 3:25:32 PM	Completed	3757546	Lavla Betar-	Sent To Supplier	No Matches	375.00 USD

- Save As
- Manage Searches
- My Purchase Orders
- My Recent Approvals

Step 6: Save Your Search : Create Personal Folder

Save Search

Step 1: Details

Nickname ★

➤ Add Description

Step 2: Select Folder Destination

Add New **1**

- Personal
You have no personal searches.
- Shared
 - AP Reports
 - Buyer Pending Requisition
 - Campus Suppliers

Save Close

- 2** Top level personal folder
- Top level shared folder
- Subfolder of selected folder

Create Personal Folder

Name ★

Description

254 characters remaining

★ Required Save Changes Close

MODULE

2

Shopping

Lessons in This Module

- Chartfields
- Shop Using a Form
- Check Out

Chart Fields

Shopping

Chart Fields

LESSON OBJECTIVES

- Update chart fields to check out.



Chartfields

CSUBUY 48.75 USD

Requisition • 4129534

Summary Taxes/S&H PO Preview Comments Attachments History

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
1 BIC Round Stic Xtra Life Ballpoint Pens, Medium Point (1.0mm), Black, 60-Count Pack, Flexible Round Barrel For Writing Comfort, Perfect Teacher Appreciation Gifts	B0012YVGO W	EA	5.99	Qty: 1 EA	5.99

ITEM DETAILS

Manufacturer Name: BIC Contract: no value Taxable:

Manufacturer Part Number: GSM609-Blk Commodity Code: 170003 / General Supplies Asset:

Supplier Part Auxiliary ID: 146-9067020-8777947,1 Override Receiving Required: Asset Profile ID: no value

more info... Prepayment: no value

PO Clauses: Add/View

TAX CODE Values have been overridden for this line

Tax Code: SLC San Luis Obispo MC Sales Tax

CHARTFIELD Values have been overridden for this line

Business Unit	Fund	DeptID	Account	Account Override	Program	Class	Project
SLCMP Cal Poly, San Luis Obispo	69022_SLCMP M E Project Based Learning Lab	100300_SLCMP CAFES-Agr/Business	660003_SLCMP Supplies and Services	no value	no value	no value	no value

Summary Draft

Total (48.75 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	45.46
Sales Tax	3.29
Use Tax	0.00
Shipping	0.00
Handling	0.00
Total	48.75

What's next for my order?

Next Step: Wait for Validation 1

Approver: Approver (DO NOT DELETE), Workflow

Workflow

Draft Active Barbara Buyer

Start - Parallel Steps

Requisition Validation 1 Future

Wait for Validation 1 Future

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

Shop Using a Form

Shopping

Shop Using a Form

LESSON OBJECTIVES

- Access shopping forms.
- Determine when to use each shopping form.
- Submit shopping forms.



Available Forms

- Goods and Services Request
- Hospitality
- Independent Contractor
- IT Hardware
- IT Software
- Payment for Unauthorized Purchase

Check Out

Shopping

Check Out

LESSON OBJECTIVES

- Naming your cart.
- Adding an internal note.
- Proceeding to Checkout.
- Noting the approval workflow.
- Submitting Request.



Check Out & Submit Request

All
Search (Alt+Q)
48.75 USD
5

Requisition • 4129534

Assign Cart
Submit Request

Summary
Taxes/S&H
PO Preview
Comments
Attachments
History

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
1	BIC Round Stic Xtra Life Ballpoint Pens, Medium Point (1.0mm), Black, 60-Count Pack, Flexible Round Barrel For Writing Comfort, Perfect Teacher Appreciation Gifts	B0012YVGO W	EA	5.99	Qty: 1 EA 5.99

ITEM DETAILS

Manufacturer Name	BIC	Contract:	no value	Taxable	✓
Manufacturer Part Number	GSM609-Blk	Commodity Code	170003 / General Supplies	Asset	✗
Supplier Part Auxiliary ID	146-9067020-8777947,1	Override Receiving Required	✗	Asset Profile ID	no value
more info...		Prepayment	no value		
		PO Clauses	Add/View		

Draft

Total (48.75 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	45.46
Sales Tax	3.29
Use Tax	0.00
Shipping	0.00
Handling	0.00
	48.75

What's next for my order?

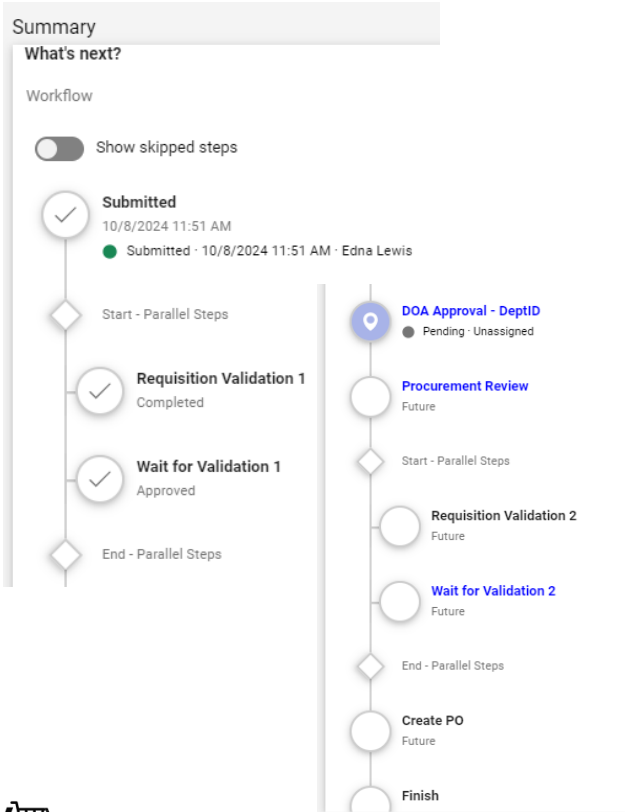
Next Step Wait for Validation 1

Approver Approver (DO NOT DELETE), Workflow

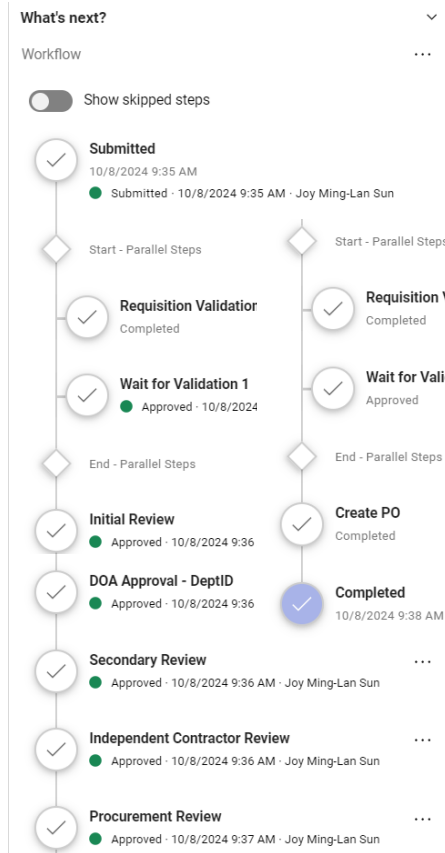
Workflow ...

Requisition Approval Workflow

In Workflow



Complete



Approvals

Lessons in This Module

- Requisition Approval Workflow
- Using Comments on Requisition
- Review Requisition
- Approval Actions

Requisition Approval Workflow

Requisition Approvals

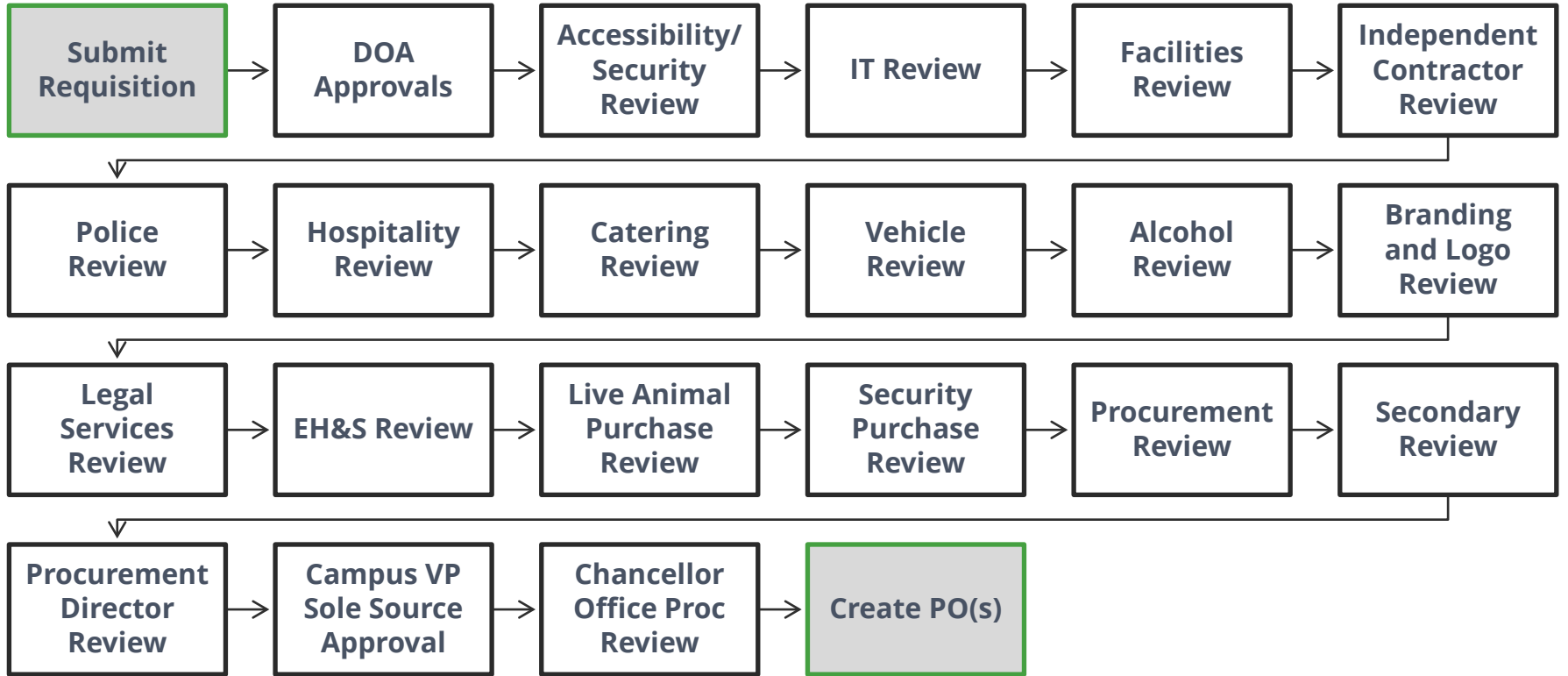
Approval Workflow

LESSON OBJECTIVES

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



Workflow Overview



Comment on a CSUBUY Transaction

Requisitions

Comment on a Requisition, PO, or Voucher

LESSON OBJECTIVES

- Apply comments to a requisition, PO, or voucher.



Comments on a Requisition

The screenshot shows the CSUBUY requisition page for requisition 3761916. The page has a top navigation bar with a home icon, CSUBUY logo, and search bar. Below the navigation bar, there are tabs for Summary, Taxes/S&H, Comments, Attachments, and History. The main content area is divided into three columns: General Information, Shipping Information, and Billing Information. A context menu is open over the 'Add Comment' option, which is highlighted with a red box. The menu items are: Copy to New Cart, Add Comment, Add Notes to History, View My Orders (Last 90 Days), Continue Shopping, View Carts, View Cart return message(s), and See configuration for this requisition. Two red arrows point from the word 'OR' to the 'Comments' tab and the 'Add Comment' option.

Requisition • 3761916

Summary Taxes/S&H Comments Attachments History

General Information ... **Shipping Information** ... **Billing Information**

General Information

Values vary by line.

Ship To

Contact: Melissa Taylor
940 West 1st Street
Chico, CA 95929
United States

Delivery Information

Deliver To Location: KNDL210_CHICO
Glenn Kendall Hall 210

Ship Via: Best Carrier-Best Way

Due Date: no value

Bill To

Accounts Payable
400 West 1st St.
Chico, CA 95929
United States

PO Details

Accounting Date: no value

PO Type: no value

Amount-Only / Blanket PO: ✗

Copy to New Cart
Add Comment
Add Notes to History
View My Orders (Last 90 Days)
Continue Shopping
View Carts
View Cart return message(s)
See configuration for this requisition

Create & Add a Comment

Records found: 0 Show comments for Requisition Requisition +

ADD COMMENT3 ✓ ✕

1 Adding text for comments on a requisition

959 characters remaining expand | clear

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | Add recipient

Terri L Kelly (Prepared by, Prepared for) <fbcfsprq@calstate.edu>

Attach file (optional)

Attachment Type File
 Link/URL

File Name

File

No comments have been added

Approval Actions

Approvals

Approval Actions

LESSON OBJECTIVES

- Locate your approval queue.
- Review a requisition.
- Approve, reject, and return a requisition.
- Add comments to a requisition.
- Forward a requisition.
- Assign substitute approvers.



Requisition Approval Actions

Approve a Requisition

Return to Shared Folder

Place Requisition on Hold

Return to Requisitioner

Forward Requisition

Reject Requisition

Add Ad-Hoc Approver

Assign Substitute

Approve a Requisition

CSUBUY

Requisition • 3758112

Approve/Complete Step

1 of 1 Results

Summary Taxes/S&H PO Preview Comments Attachments History

General

Values vary by line.

Shipping

Ship To

Contact: Layla Betar-Makhoul
940 West 1st Street
Chico, CA 95929
United States

Delivery Options

Ship Via Best Carrier-Best Way

Due Date *no value*

Deliver To **KNDL206_CHICO**
Location Glenn Kendall Hall 206

Billing Information

Bill To

Accounts Payable
400 West 1st St.
Chico, CA 95929
United States

PO Details

Accounting *no value*
Date

Reference ID *no value*

Amount-Only / Blanket PO **×**

Terms/FOB **×**

Total

Subtotal	6,895.00
Sales Tax	499.90
Use Tax	0.00
Total	7,394.90

What's next?

Workflow

- Approve
- Return to Shared Folder
- Place on Hold
- Return to Requisitioner
- Forward to ...
- Reject Requisition

Return to Shared Folder

The screenshot shows the CSUBUY requisition interface for requisition 3758112. The page is titled "Requisition • 3758112" and includes a navigation bar with tabs for Summary, Taxes/S&H, PO Preview, Comments, Attachments, and History. The "Summary" tab is active. The main content area is divided into three columns: General, Shipping, and Billing Information. The General column contains a note: "Values vary by line." The Shipping column includes "Ship To" (Contact: Layla Betar-Makhoul, 940 West 1st Street, Chico, CA 95929, United States) and "Delivery Options" (Ship Via: Best Carrier-Best Way, Due Date: no value, Deliver To: KNDL206_CHICO, Glenn Kendall Hall 206). The Billing Information column includes "Bill To" (Accounts Payable, 400 West 1st St., Chico, CA 95929, United States) and "PO Details" (Accounting Date: no value, Reference ID: no value, Amount-Only / Blanket PO: X, Terms/FOB: X). A dropdown menu is open over the "Approve/Complete Step" button, showing options: Approve, Return to Shared Folder (highlighted with a red box), Place on Hold, Return to Requisitioner, Forward to ..., and Reject Requisition. The right sidebar shows a summary table with a total of 7,394.90 and a "What's next?" section with a workflow icon.

Category	Item	Value
Total	Subtotal	6,895.00
	Sales Tax	499.90
	Use Tax	0.00
	Total	7,394.90

Place a Request on Hold

The screenshot shows the CSUBUY requisition interface for requisition 3758112. The 'Approve/Complete Step' button is highlighted in red, and its dropdown menu is open, with 'Place on Hold' selected and highlighted with a red box. The requisition details are as follows:

General	Shipping	Billing Information
<p>Values vary by line.</p>	<p>Ship To</p> <p>Contact: Layla Betar-Makhoul 940 West 1st Street Chico, CA 95929 United States</p> <p>Delivery Options</p> <p>Ship Via: Best Carrier-Best Way Due Date: no value Deliver To: KNDL206_CHICO Location: Glenn Kendall Hall 206</p>	<p>Bill To</p> <p>Accounts Payable 400 West 1st St. Chico, CA 95929 United States</p> <p>PO Details</p> <p>Accounting: no value Date: Reference ID: no value Amount-Only / Blanket PO: ✗ Terms/FOB: ✗</p>

Summary: 0.00 USD, 1 of 1 Results

Total: 7,394.90

What's next? Workflow

Return to Requisitioner

The screenshot shows the CSUBUY requisition interface for requisition 3758112. The top navigation bar includes the CSUBUY logo, a search bar, and a currency indicator of 0.00 USD. The main content area is divided into tabs: Summary, Taxes/S&H, PO Preview, Comments, Attachments, and History. The 'Summary' tab is active, displaying details for three sections: General, Shipping, and Billing Information. A dropdown menu is open over the 'Approve/Complete Step' button, with 'Return to Requisitioner' highlighted in a red box. Other options in the menu include 'Approve', 'Return to Shared Folder', 'Place on Hold', 'Forward to ...', and 'Reject Requisition'. The requisition details are as follows:

General	Shipping	Billing Information
<p>Values vary by line.</p>	<p>Ship To</p> <p>Contact: Layla Betar-Makhoul 940 West 1st Street Chico, CA 95929 United States</p> <p>Delivery Options</p> <p>Ship Via: Best Carrier-Best Way Due Date: no value Deliver To: KNDL206_CHICO Location: Glenn Kendall Hall 206</p>	<p>Bill To</p> <p>Accounts Payable 400 West 1st St. Chico, CA 95929 United States</p> <p>PO Details</p> <p>Accounting: no value Date: Reference ID: no value Amount-Only / Blanket PO: ✗ Terms/FOB: ✗</p>

Summary statistics on the right:

Total	
Subtotal	6,895.00
Sales Tax	499.90
Use Tax	0.00
Total	7,394.90

What's next? Workflow

Recommended approval action as it allows for the requisition to be modified and resubmitted back through requisition workflow.

Forward a Requisition

The screenshot displays the CSUBUY requisition management interface. At the top, the CSUBUY logo and navigation icons are visible. The main header shows the requisition number 3758112 and a search bar. A red button labeled 'Approve/Complete Step' has a dropdown menu open, with the 'Forward to ...' option highlighted in red. The requisition details are organized into several sections:

- General:** Values vary by line.
- Shipping:**
 - Ship To:** Contact: Layla Betar-Makhoul, 940 West 1st Street, Chico, CA 95929, United States.
 - Delivery Options:** Ship Via: Best Carrier-Best Way; Due Date: no value; Deliver To: KNDL206_CHICO, Glenn Kendall Hall 206.
- Billing Information:**
 - Bill To:** Accounts Payable, 400 West 1st St., Chico, CA 95929, United States.
 - PO Details:** Accounting: no value; Date: no value; Reference ID: no value; Amount-Only / Blanket PO: X; Terms/FOB: X.

On the right side, a summary table shows the following values:

Total	
Subtotal	6,895.00
Sales Tax	499.90
Use Tax	0.00
Total	7,394.90

Below the table, a 'What's next?' section shows a 'Workflow' icon.

Reject a Requisition

The screenshot displays the CSUBUY requisition management interface for requisition 3758112. The interface includes a top navigation bar with a search bar, currency (0.00 USD), and user profile. Below the navigation bar, the requisition details are shown in a tabbed view with 'Summary' selected. The 'Summary' tab contains three main sections: 'General', 'Shipping', and 'Billing Information'. The 'Shipping' section includes 'Ship To' (Contact: Layla Betar-Makhoul, 940 West 1st Street, Chico, CA 95929, United States) and 'Delivery Options' (Ship Via: Best Carrier-Best Way, Due Date: no value, Deliver To: KNDL206_CHICO, Location: Glenn Kendall Hall 206). The 'Billing Information' section includes 'Bill To' (Accounts Payable, 400 West 1st St., Chico, CA 95929, United States) and 'PO Details' (Accounting: no value, Date: no value, Reference ID: no value, Amount-Only / Blanket PO: X, Terms/FOB: X). A dropdown menu is open over the 'Approve/Complete Step' button, showing options: 'Approve', 'Return to Shared Folder', 'Place on Hold', 'Return to Requisitioner', 'Forward to ...', and 'Reject Requisition'. The 'Reject Requisition' option is highlighted with a red border. The right sidebar shows a summary of the requisition with a total of 7,394.90 and a 'What's next?' section with a workflow icon.

Section	Field	Value
Shipping	Ship To	Contact: Layla Betar-Makhoul 940 West 1st Street Chico, CA 95929 United States
	Delivery Options	Ship Via: Best Carrier-Best Way Due Date: no value Deliver To: KNDL206_CHICO Location: Glenn Kendall Hall 206
	Billing Information	Bill To: Accounts Payable 400 West 1st St. Chico, CA 95929 United States
Billing Information	PO Details	Accounting: no value Date: no value Reference ID: no value Amount-Only / Blanket PO: X Terms/FOB: X

Note: Reject should be used if the request should not proceed to purchase order. If only small modifications are needed recommend to Return to Requisitioner to allow for resubmission.

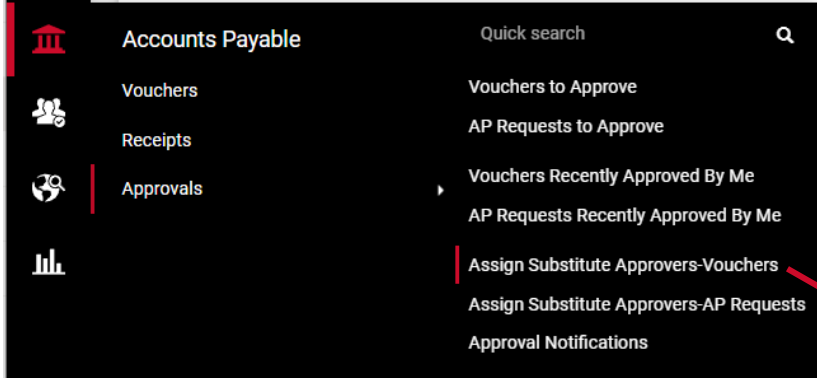
Add Ad-hoc Approver to Requisition Workflow

The screenshot displays the CSUBUY requisition workflow editor for requisition 4006091. The interface includes a top navigation bar with search and currency options, and a main content area with tabs for Summary, Taxes/S&H, PO Preview, Comments, Attachments, and History. A modal window titled "Ad-Hoc Approver" is open, allowing the user to configure a new workflow step. The modal contains the following fields:

- After:** Initial Review
- Step Name *:** Ad-hoc 1
- Ad-Hoc Approver *:** A search field with the placeholder "Type to filter..." and a magnifying glass icon.
- Comments:** A text area with a "1000 characters remaining" indicator.
- Buttons:** "Save" (red) and "Close" (grey).
- Legend:** A red asterisk indicates a required field.

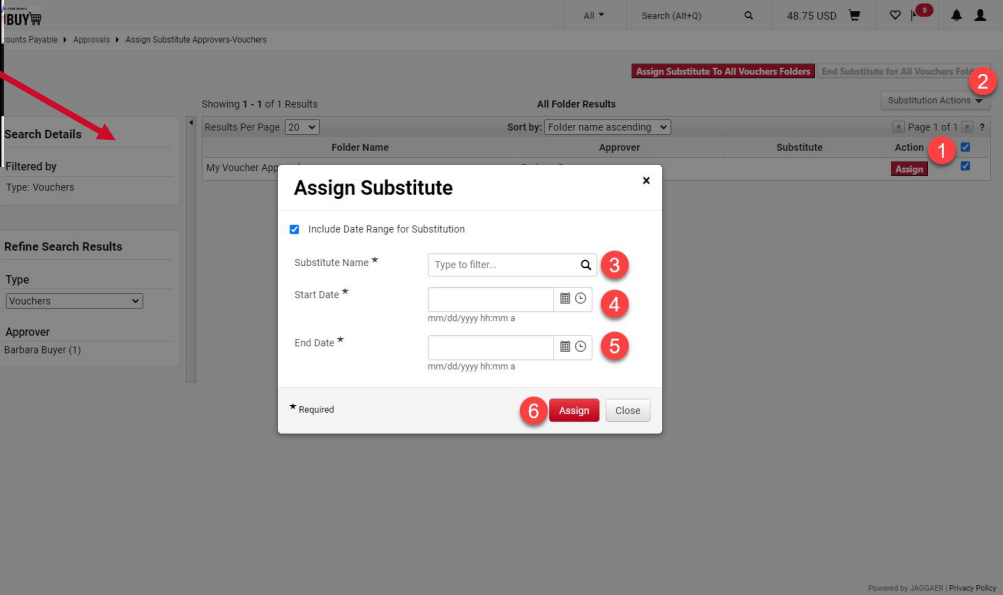
The background shows the requisition details, including "Other Participant Information" (Prepared by: Gisella Higgins, Buyer: no value) and a "Summary" sidebar on the right listing workflow steps such as "Submitted", "Initial Review", "DOA Approval - Catch-All", "Secondary Review", "OFAC Check", "Procurement Review", "OFAC Check 2", "Create PO", and "Finish". A red arrow points from the "Ad-Hoc Approver" field in the modal to the "Ad-Hoc Approver" dropdown menu in the background requisition form.

Assign a Substitute Approver




A dark navigation menu for the Accounts Payable section. It features a search bar at the top right and a list of menu items on the left. A red vertical bar highlights the 'Approvals' item. A red arrow points from the 'Assign Substitute Approvers-Vouchers' menu item to the 'Assign Substitute' dialog box in the main interface.

- Accounts Payable
- Vouchers
- Receipts
- Approvals
- Assign Substitute Approvers-Vouchers
- Assign Substitute Approvers-AP Requests
- Approval Notifications



The main interface displays the 'Assign Substitute' dialog box over a table of 'All Folder Results'. The dialog box has several numbered red circles (1-6) indicating key steps: 1. The 'Assign' button in the table's 'Action' column; 2. The 'Assign Substitute To All Vouchers Folders' button; 3. The 'Substitute Name' input field; 4. The 'Start Date' input field; 5. The 'End Date' input field; 6. The 'Assign' button in the dialog box. The background table has columns for 'Folder Name', 'Approver', 'Substitute', and 'Action'. The 'Approver' column shows 'Barbara Buyer (1)'. The 'Action' column has an 'Assign' button. The dialog box also includes a checkbox for 'Include Date Range for Substitution' and a 'Close' button.

Approval Queue


All ▾
Search (Alt+Q) 🔍
1,293.05 USD 🛒
🏠
📄
🔔
👤

Approvals

👁️ ?
Submit Date Newest First ▾

Requisitions 1
Purchase Order
Change Requests 1
Vouchers
Contracts
Sourcing Events Evaluation
Sourcing Events >

Your Selections ⏪

Date Range

All Dates ▾

View Approvals For

Melissa Taylor (20005207359) ▾

⚠️ You are reviewing "Requisitions" approvals for the approver Melissa Taylor (20005207359) - Remove from View Approvals for List

Total Results **1** Display **20 per folder** ▾

▾ **BLANK ASSET PROFILE ID - CHICO** 1

	REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIC
<input type="checkbox"/>	3761916	Acco Engineered Systems Inc	Not Assigned	4/26/2023 9:53 PM	Melissa Tε 🔗 👤

Requisition Name	2023-04-26 20005207359 01	Folders	11 Days in folder [Blank Asset Profile ID - Chico]
No. of line items	1		

Filters

^ SUPPLIER

Acco Engineered Systems

Review a Requisition

Add
comments

Put a
request
on hold

Approve,
return, or
reject

Review, Add a Comment, and Approve a Requisition

DEMO



1. Navigate to requisition approval queue.
2. Open a shared approval, select a requisition, and assign it to yourself.
3. Review requisition details.
4. Review the Form information.
5. Ask question in the Comments.
6. Show how to return or reject.
7. Show how to Forward the requisition to another approver.
8. Show how to Assign a substitute approver.

Reporting

Lessons in This Module

- Create reports using search functions.
- Voucher Payment Information

Search

Reports

Search

LESSON OBJECTIVES

- Locate a Requisition
- Locate a Purchase Order
- Locate a Voucher
- Voucher Pay Status
- Recycled Reporting



Find a Requisition

CSUBUY

All ▾

48.75 USD
 5

Orders ▸ Search ▸ Requisitions
Save As ▾ Pin Filters ▾ Export All ▾

Search Requisitions

Submitted Date: Last 90 days ▾ Quick search

1-14 of 14 Results 20 Per Page ▾

<input type="checkbox"/>	Requisition Number ▾	Supplier	Requisition Name	Requisition Status ▾	Prepared For	Submitted Date ▾	Total Amount ▾
<input type="checkbox"/>	4106344	Jackson Hardware Supply	PR 39 SMXMP	Pending	Lindsay Swensen	9/4/2024 4:14:16 PM	20,377.50 USD
<input type="checkbox"/>	4078843	QIAGEN, Inc	2024-07-30 tayres 01	Completed	Thomas Ayres	8/13/2024 6:55:28 AM	920.00 USD
<input type="checkbox"/>	4077934	500 Replication	2024-07-26 tayres 01	Completed	Thomas Ayres	7/26/2024 7:09:20 AM	50.00 USD
<input type="checkbox"/>	4068791	500 Replication	2024-07-16 tayres 01	Completed	Thomas Ayres	7/26/2024 6:50:03 AM	50.00 USD
<input type="checkbox"/>	4075555	A-TOWN AV	2024-07-24 rrequester 01	Completed	Rocky Requester	7/24/2024 10:05:20 AM	1,000.00 USD
<input type="checkbox"/>	4075112	BG Supplies	2024-07-24 cdott 02	Withdrawn	Chris Dott	7/24/2024 7:46:51 AM	0.00 USD
<input type="checkbox"/>	4075108	BG Supplies	2024-07-24 cdott 01	Completed	Chris Dott	7/24/2024 7:41:54 AM	804.38 USD
<input type="checkbox"/>	4072436	BG Supplies	2024-07-18 rrequester 01	Completed	Rocky Requester	7/23/2024 2:31:04 PM	804.38 USD
<input type="checkbox"/>	4073288	Staples	2024-07-19 cdott 01	Pending	Chris Dott	7/23/2024 8:27:10 AM	107.96 USD

Quick Filters
My Searches

Supplier ▾

- BG Supplies 7
- 500 Replication 2
- *Supplier Not Known 1
- A-TOWN AV 1
- Jackson Hardware Supply 1
- [See More](#) [Show More](#)

Requisition Status ▾

- Completed 11
- Pending 2
- Withdrawn 1
- [Show More](#)

Business Unit ▾

Powered by JAGGAER | Privacy Policy

Find a Purchase Order

All ▾

48.75 USD
 5

Orders ▸ Search ▸ Purchase Orders
Save As ▾ Pin Filters ▾ Export All ▾

Quick Filters My Searches

Supplier ▾

- BG Supplies 7
- 500 Replication 3
- *Supplier Not Known 1
- A-TOWN AV 1
- Bord A Petite Catering Inc 1
- See More Show More

PO Status ▾

- Completed 14
- Pending 1
- Show More

Business Unit ▾

- Cal Poly San Luis Obispo P2P (SLXMP) 13

Created Date: Last 90 days ▾ Add Filter ▾ Clear All Filters ?

1-15 of 15 Results 20 Per Page ▾

<input type="checkbox"/>	PO Number ▾	Supplier	Created Date/Time ▾	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount ▾
<input type="checkbox"/>	240002493T	Bord A Petite Catering Inc	10/3/2024 7:41:37 AM	Pending	3974916	Terri L Kelly	No Shipments	No Matches	500.00 USD
<input type="checkbox"/>	240002488T	BG Supplies	10/3/2024 7:38:27 AM	Completed	4075108	Chris Dott	Sent To Supplier	No Matches	804.38 USD
<input type="checkbox"/>	240002486T	BG Supplies	10/3/2024 7:37:43 AM	Completed	4022226	Gisella Higgins	Sent To Supplier	No Matches	287,430.00 USD
<input type="checkbox"/>	240002485T	Bentz Testing	10/3/2024 7:37:37 AM	Completed	4022981	Rocky Requester	Sent To Supplier	No Matches	8.00 USD
<input type="checkbox"/>	240002484T	500 Replication	10/3/2024 7:37:14 AM	Completed	4026153	Chris Dott	Sent To Supplier	No Matches	66.50 USD
<input type="checkbox"/>	240001886T	QIAGEN, Inc	8/13/2024 6:55:49 AM	Completed	4078843	Thomas Ayres	Sent To Supplier	No Matches	920.00 USD

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Find a Voucher

CSUBUY
Vouchers
Search (Alt+Q)
0.00 USD

Accounts Payable > Vouchers > Search For Vouchers
Save As
Pin Filters
Export All

Search Vouchers

My Drafts
Search

Quick Filters My Searches

Supplier

- Medline 11
- ADC Partners, LLC 5
- Thomas Scientific 4
- Staples 4
- Acis Group 4
- See More Show More

Voucher Status

- Complete 33
- Pending 24
- Show More

Voucher Type

- PO Voucher 54
- PO Credit Memo 3

Created Date: Last 90 days Quick search

Add Filter Clear All Filters

Page 1 of 3 1-20 of 57 Results 20 Per Page

<input type="checkbox"/>	Voucher Number	Supplier Voucher Number(s)	Supplier	PO Number	Voucher Status	Created Date/Time	Due Date	Discount Date	Discount Amount	Submitted Date	Voucher Source	Voucher Type	Pay Status
<input type="checkbox"/>	C0000222	V-012	Halogen Light Corp	2300000440	Pending	4/19/2023 12:28:21 PM	5/19/2023	-	0.00 USD	4/19/2023 12:35:09 PM	Manual	PO Voucher	In Process
<input type="checkbox"/>	C0000219	CASAM36656	Fastenal	2300000419	Pending	4/19/2023 11:35:56 AM	5/19/2023	-	0.00 USD	4/19/2023 11:35:56 AM	Electronic (Supplier System)	PO Voucher	In Process
<input type="checkbox"/>	C0000213	V-020	ADC Partners, LLC	2300000261	Pending	4/18/2023 11:43:07 AM	5/18/2023	-	0.00 USD	4/18/2023 12:04:56 PM	Manual	PO Voucher	In Process
<input type="checkbox"/>	C0000210	V-011	Halogen	2300000379	Pending	4/18/2023	5/18/2023	-	0.00 USD	4/18/2023	Manual	PO	In

Recycled Reporting

The screenshot shows the CSUBUY interface for searching purchase orders. The top navigation bar includes the CSUBUY logo, a search bar, and a cart icon showing 48.75 USD. The main content area is titled "Search Purchase Orders" and features a sidebar with filters for Supplier, PO Status, and Business Unit. The main table displays 1-15 of 15 results. A red callout box highlights the "Add Filter" button and lists recommended filters for identifying purchase orders with recycled products.

CSUBUY

Orders ▶ Search ▶ Purchase Orders

Search Purchase Orders

Save As Pin Filters Export All

Created Date: Last 90 days Quick search Add Filter Clear All Filters 20 Per Page

1-15 of 15 Results

PO Number	Supplier	Created	Status	Commodity Code	Amount
240002493T	Bord A Petite Catering Inc				00 USD
240002488T	BG Supplies				38 USD
240002486T	BG Supplies				00 USD
240002485T	Bentz Testing				00 USD
240002484T	500 Replication				50 USD
240001886T	QIAGEN, Inc	8/13/2024 6:55:49 AM	Completed	4078843	920.00 USD

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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

Filter Options and Export

Learn how to filter options and export.

DEMO



1. Navigate to **Search for Requisitions**.
2. Select **Add Filter**.
3. Select filters.
4. Select the box beside each requisition.
5. Select **Export All** or **Export Selected Rows**.
6. Complete **Title** and **Type**.
7. Select **Submit**.

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

Search for Payment Information

Learn how to search for payment information.

DEMO



- Search to review payment information on the voucher.
- View how a PO is linked to a voucher.

WRAP UP



System
Introduction



Shopping



Approvals



Reporting

SUPPORT

CSUBUY System Help

- Help button within the system

Support Resources

- Local CSU admin