

# ProCard Furniture & Equipment Purchases: Campus Deputy Building Official (CDBO) Process Using CSUBUY

Before CSUBuy was implemented, any Furniture or Equipment purchases whether through a requisition or ProCard required an CDBO review processed through an email to [CampusDeputyBuildingOfficial@csulb.edu](mailto:CampusDeputyBuildingOfficial@csulb.edu).

When making an furniture or equipment purchase in CSUBUY, an Goods and Services form is required to be completed. This form include all the necessary questions related to purchasing furniture or equipment and will be reviewed by the Campus Deputy Building Official and Environmental Heath & Safety.

Since CSUBuy includes its own Furiture and Equipment forms within the requisition process, **Procurement Services have decided that the CSUBuy Goods and Services request form will be used for ProCard exception request purchases.**

This change is intended to eliminate confusion about which form to use and to prevent duplicating work. Therefore, ProCard users must now go into CSUBuy to complete the IT Hardware or IT Software form when making an IT purchase on their ProCard.

## Instructions:

ProCard user must receive approval through this process BEFORE making the Furniture or Equipment purchase.

ProCard user must also have a Shopper or Requester role in CSUBuy. If they do not, they must work with someone in their department who is a Shopper or Requester to follow these steps.

1. In CSUBuy, select the Goods and Services request form.
2. Select “Supplier Not Known” as the supplier for the request form.
3. Enter Equipment or Furniture in the “What type of goods or services are you requesting?” question.

The screenshot shows a section of the CSUBuy form titled "General Information". Below the title is a search bar with the text "What type of goods or services are you requesting?" and a magnifying glass icon. To the right of the search bar is a dropdown menu with "Equipment" selected. Below this is another identical search bar and dropdown menu, but with "Furniture" selected. A mouse cursor is visible over the second dropdown menu.

4. For Equipment purchases, you need to answer “Yes” to the “Does the equipment or its components require additional handling?” question.

5. Answer “No” to the “Have prior communications and/or arrangements been made with your campus Facilities and/or Capital Planning departments?” question.

Does the equipment or its components require additional handling? Examples:  Yes  No  
 Complex electrical wiring, items requiring specialize equipment for delivery, or any installation activities that alters or impacts the building.

Have prior communications and/or arrangements been made with your campus Facilities and/or Capital Planning departments?  Yes  No

6. Complete all of the remaining fields.

7. Then click on Add and go to Cart.

Below is an example of the Shopping Cart

**1 Item** Supplier must be "Supplier Not Known."

\*Supplier Not Known · 1 Item · 15,000.00 USD

^ SUPPLIER DETAILS CA State University Long Beach (LBXMP-1) : 401 Golden Shore, Long Beach, California 90802 United States

Contract no value

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
	Goods and Services Request <span style="float: right;">The name of Request Form that was filled out.</span>					
	Contract: <span style="float: right;">Select price or contract...</span>					

8. Change the Cart Name field to “ProCard Exception Review – [Cardholder Name]”.

Shopping Cart • Shopping Cart

Go to: [Favorites](#) | [Forms](#) Browse: [Suppliers](#) | [Categories](#) | [Contracts](#)

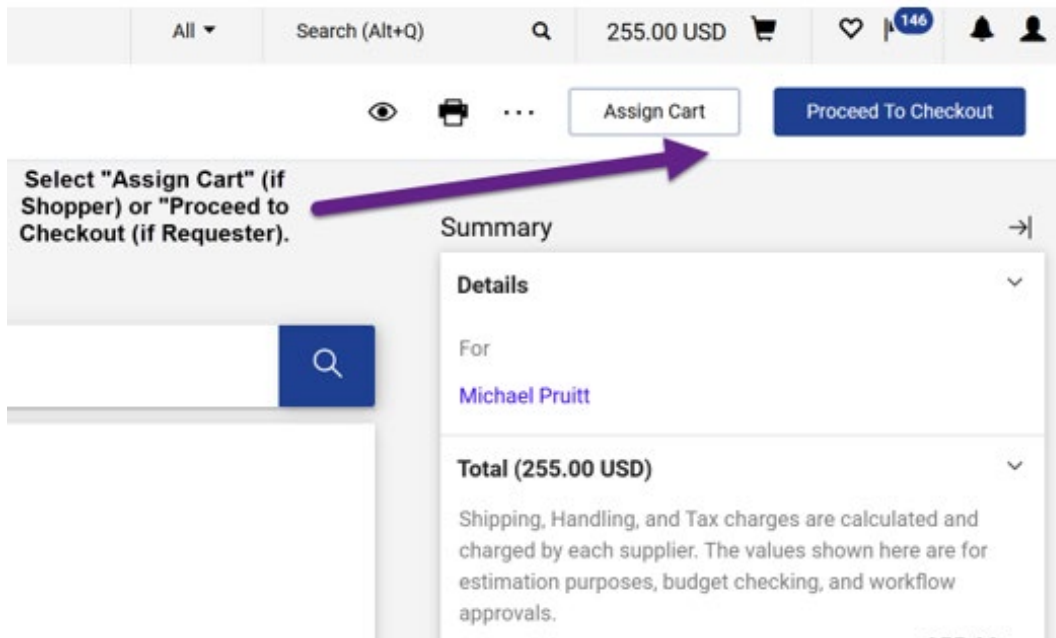
Simple Advanced

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

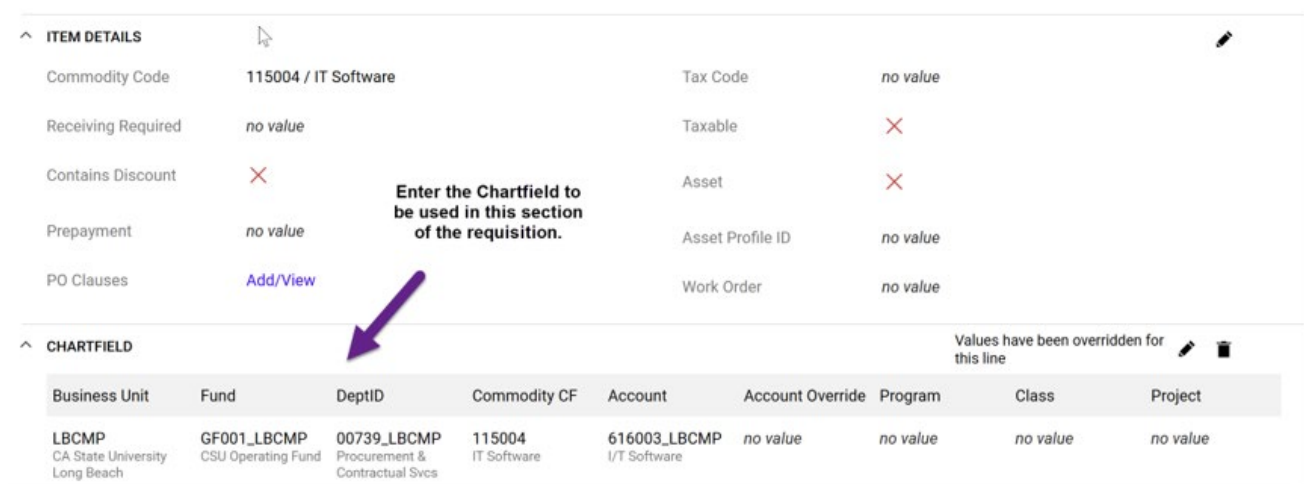
Cart Name  Enter ProCard Exception Review followed by the Cardholder Name in this box.

Deliver To Location

- If you have the Shopper Role, you will need to assign the cart to an individual with a Requestor role, otherwise you will select the “Proceed to Checkout” button.

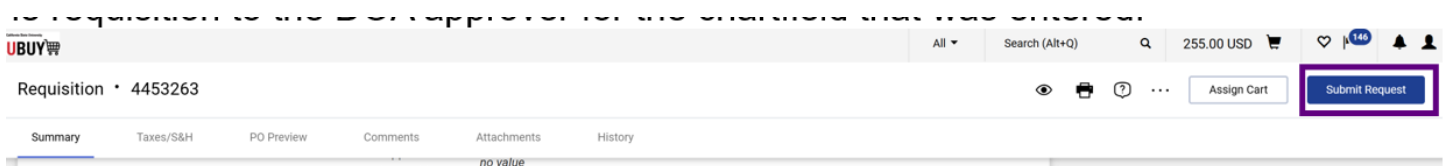


- Enter the chartfield information by clicking on the pencil icon



- Go to the Comments tab and enter the name of the software product/provider and attach a copy of the quote or order form to the CSUBuy Requisition.

- Click on Submit Request



This will send the “Requisition” into the requisition workflow, which includes the DOA Approver review and the CDBO Compliance Approver review.

13. Once the requisition has been reviewed by the DOA Approver and CDBO Compliance Approver, the request will come to Procurement. Procurement will “cancel” the requisition in CSUBUY and send the Shopper/Requester notification through the Comments section that the Furniture and/or Equipment purchase has been approved alerting the ProCard user that the purchase may be made.

14. ProCard user should attach the Comment email to the ProCard reconciliation as backup.

If the request is sent back to the Requester or Rejected by the DOA Approver or Compliance Approver, please contact Procurement for further direction.