CSULB CSUBUY USER GUIDE FOR END USERS

(FOR SHOPPER, REQUESTER, AND DOA APPROVER)

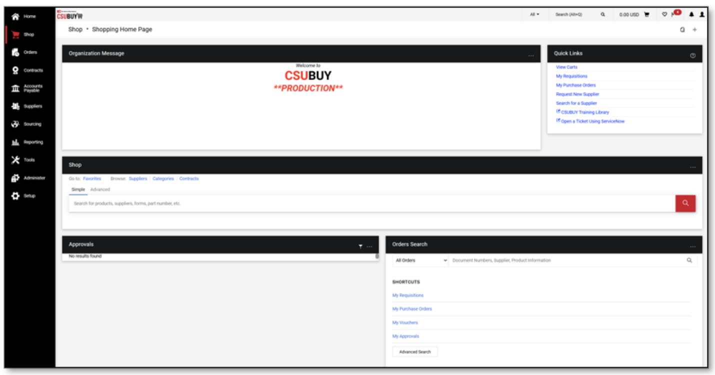
CONTENTS

INTRO: INTRODUCTION

1-WHAT IS CSUBUY?

CSUBUY is a system for purchasing and payment of goods and services.

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.



The California State University

CSUBUY

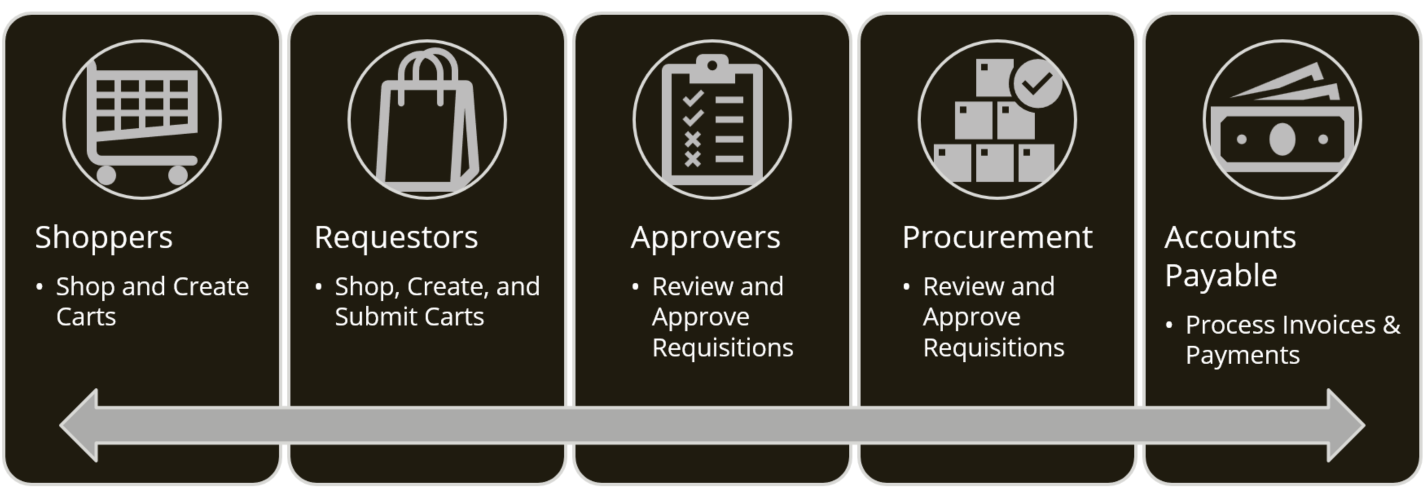
A COLLABORATIVE PROCURE TO PAY MARKETPLACE

In simple terms, we aim to make things easier, more efficient, and standardized.

2-WHO USES CSUBUY?

Anyone involved in the process of purchasing, invoicing and paying for goods and services are users of CSUBUY.

Below are the User Groups or Roles and what they do in CSUBUY:



The primary difference between a Shopper and Requester is that a Requester can submit a Shopping Cart to workflow turning the Cart into a Requisition. A Shopper does not have this ability. Therefore, the Shopper must assign or send their Cart to a Requester for it to be submitted to workflow. A Shopper is not required to enter chartfields. A Requester must ensure a chartfield is entered before submitting a Shopping Cart to workflow.

Shopper vs Requester Users

Shopper

- Can browse catalogs, PunchOuts, and forms to build shopping carts.
- Cannot submit requisitions for approval.
- Sends carts to a Requester for review and submission.
- Ideal for departmental users who identify needs but do not manage budgets.

Requester

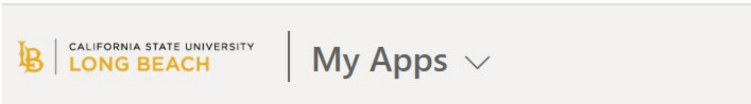
- Can shop for goods and services **and** submit requisitions for approval.
- Reviews and edits carts received from Shoppers.
- Responsible for entering chartfields, verifying funding, and ensuring compliance.
- Acts as the main point of contact for procurement processing.

Access to CSUBUY is obtained by being assigned a role in CSUBUY. Log into CSUBUY via the CSUBuy Procure to Pay (P2P) tile in CSULB Apps.

3-HOW TO ACCESS CSUBUY

To access CSUBUY, you must be assigned a CSUBUY Role by your management and/or your ASM. After receiving appropriate approvals, the CMS Team would then provide access.

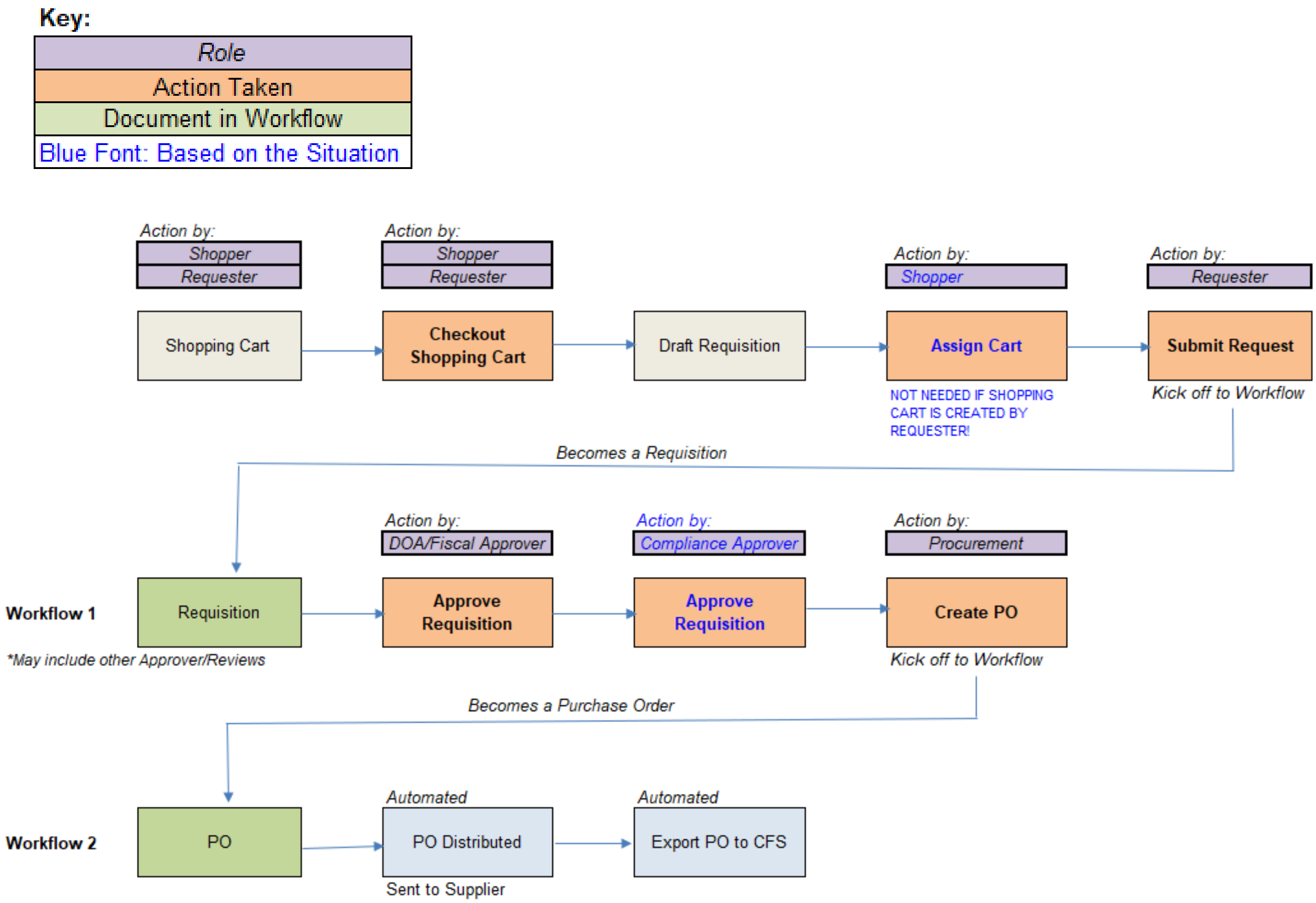
You could log in by going to CSULB Apps:



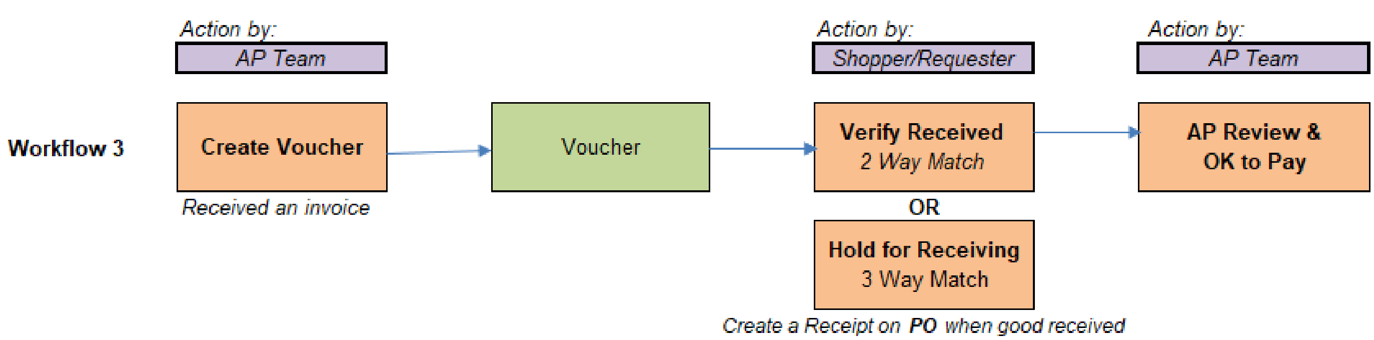
Make sure you select the tile with the shopping cart below and not the Test site or Marketplace site.

4-WORKFLOW: LIFECYCLE OF A PURCHASE

Once the Shopping Cart is submitted to Workflow by the Requester, the Shopping Cart becomes a Requisition and goes through approvals to become a PO. All three workflows are visible in CSUBUY.

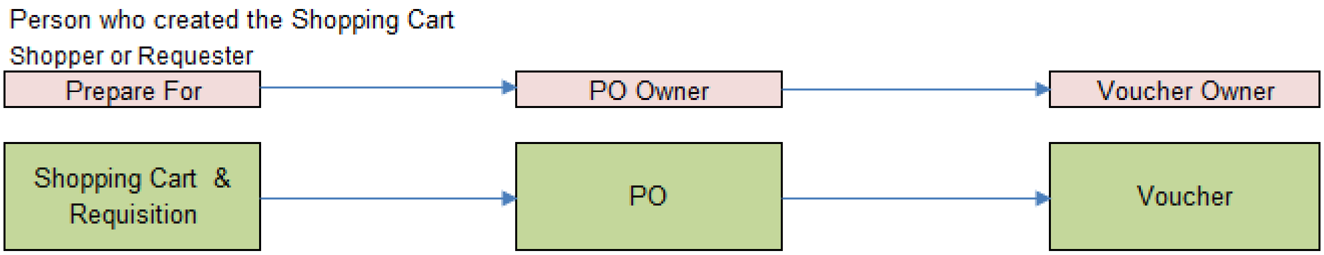


Finally, an invoice is received so that a voucher is created kicking off Workflow 3. Once verification of the receipt of goods or service has been completed, payment is made.



ONE PERSON BUT MULTIPLE IDENTITIES

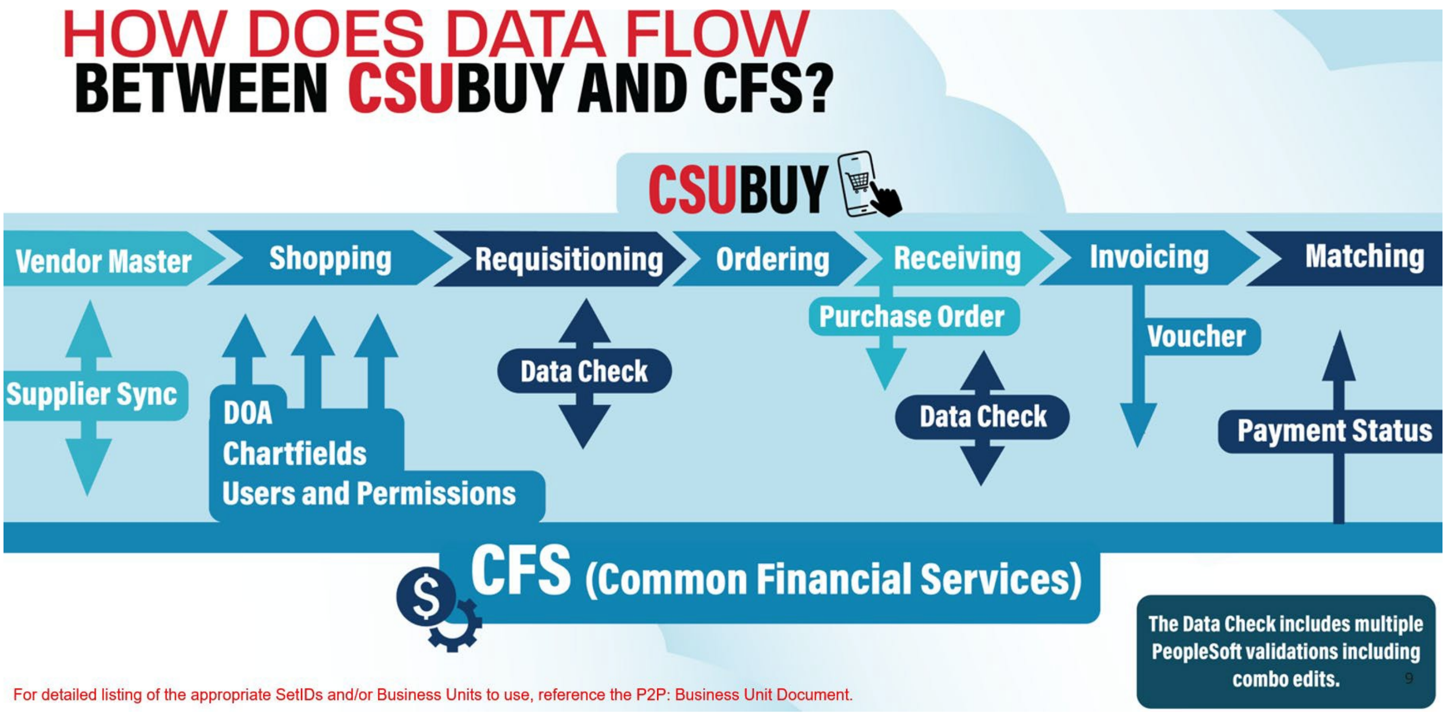
The person who created the Shopping Cart, either the Shopper or Requester, is also known as the person indicated as Prepare For who then becomes the PO Owner and Voucher Owner. Important Note: The Prepare For person is responsible for verifying the receipt of the good or service.



5-CFS AND CSUBUY

Some changes in process include the following:

1. Requisitions and Purchase Orders will no longer be made in CFS. Requisition do not carry over to CFS or Data Warehouse. However, CFS will still hold information on Purchase Orders.
2. Suppliers are set up in CSUBUY. However, CFS will hold information on Suppliers.



CHAPTER 1: PROFILE SETUP – PERSONAL, DEFAULTS, AND NOTIFICATIONS

1-PERSONA

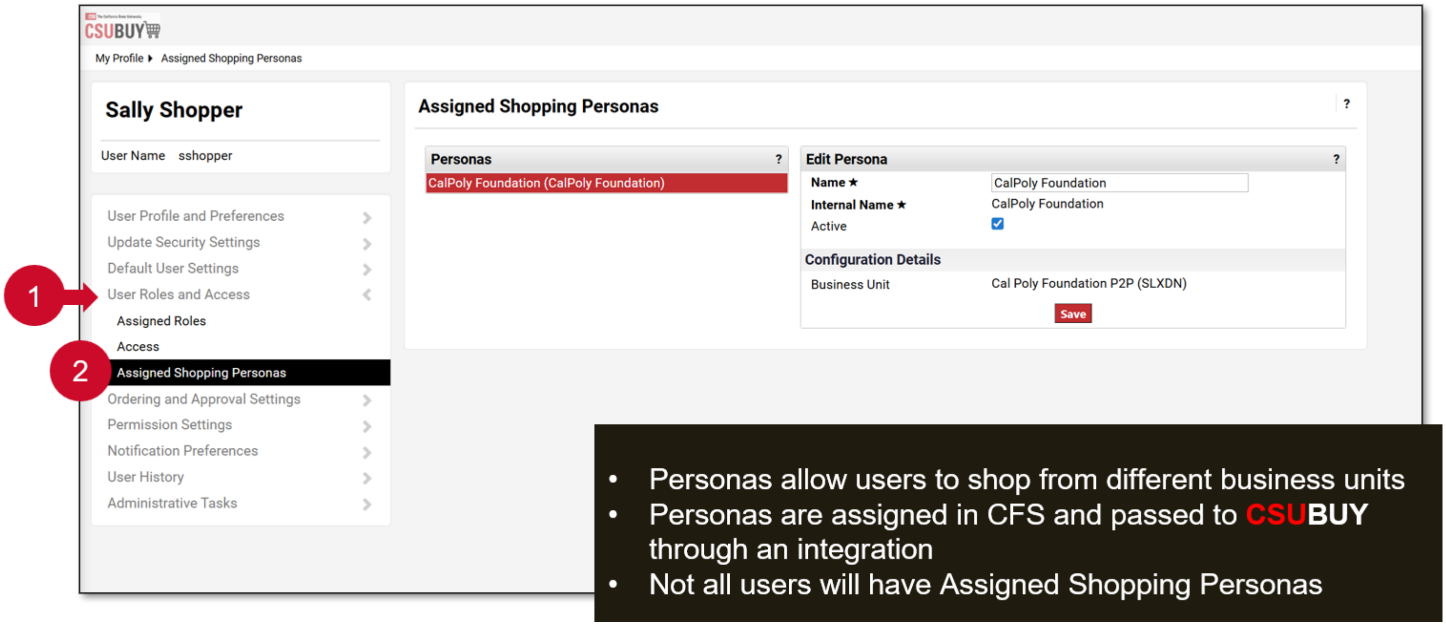
Before shopping, please ensure you are in the correct Persona

Your Profile includes a Persona setting. A Persona indicates the Business Unit from which you are shopping. CSULB has the following Persona available:

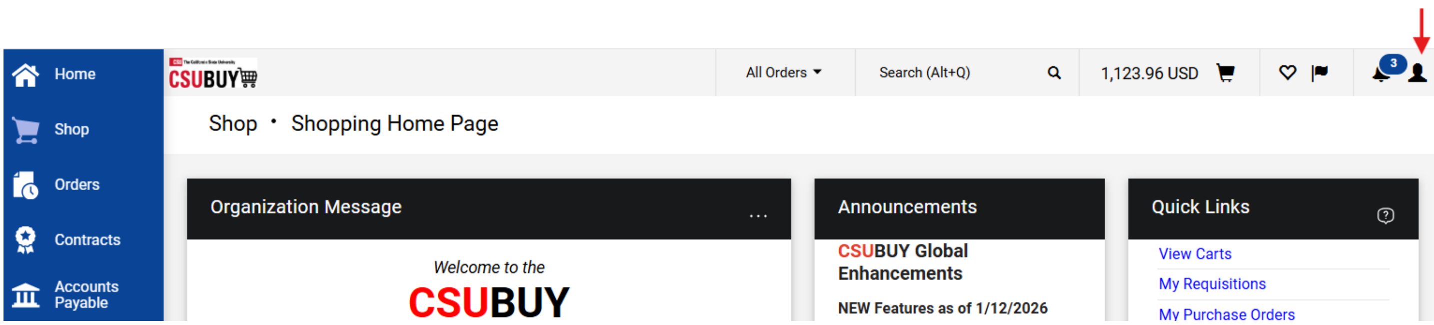
- LBXMP – CA State University Long Beach
- LBX49 – Long Beach State Foundation
- LBXDN – CSULB Research Foundation

If you shop for multiple Business Units, always ensure that you are in the correct Persona before shopping.

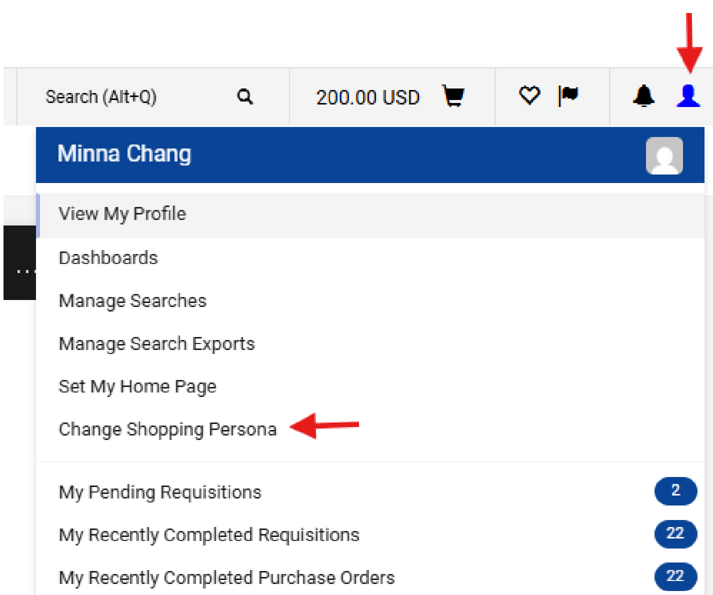
You may view your Persona in your Profile as shown below:



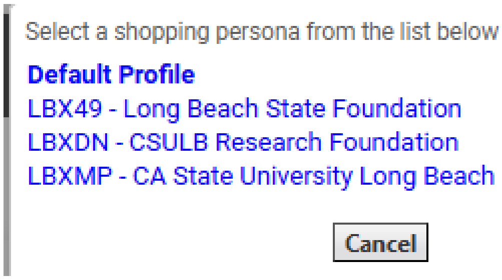
To navigate to this page simply click on your Profile Icon



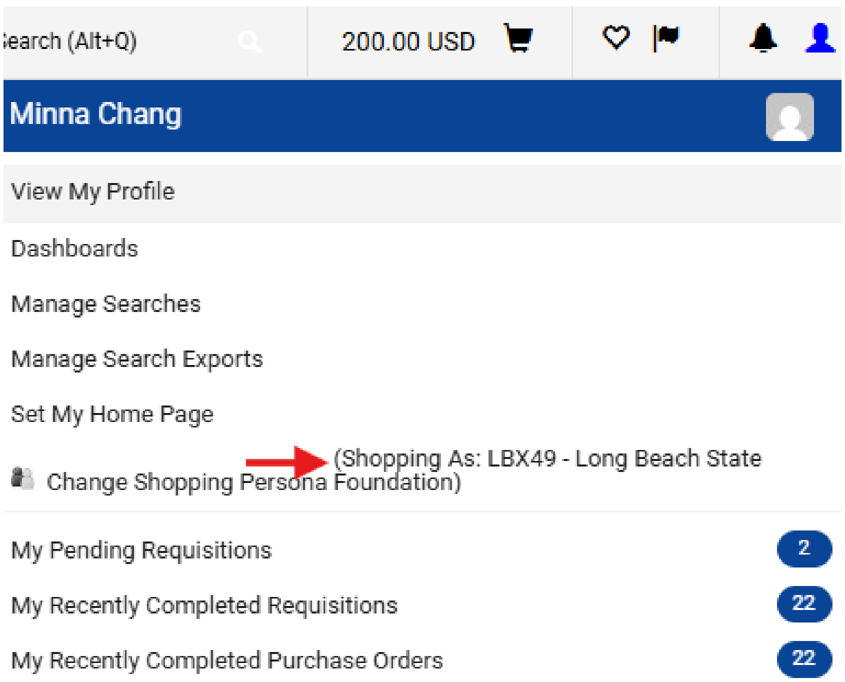
To change your Persona go to your **Profile** and select **Change Shopping Persona** as shown:



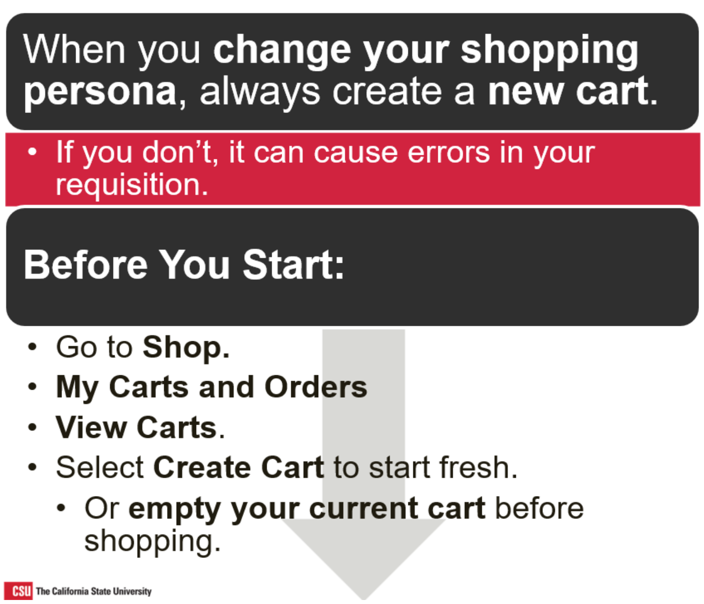
Then the following box pops up. Select the Persona you are purchasing for:

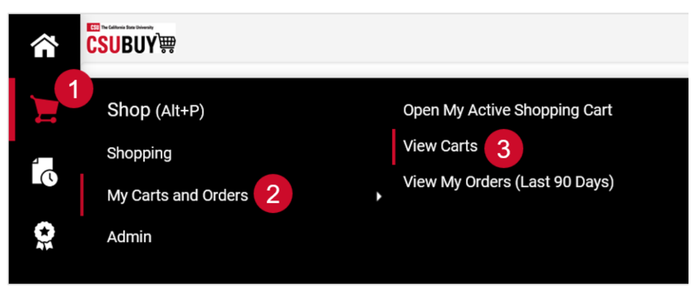


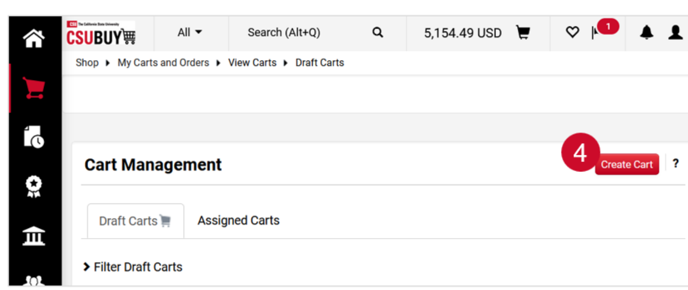
Once you make the selection, you will see the Persona appear as shown:



Important Note regarding Persona:



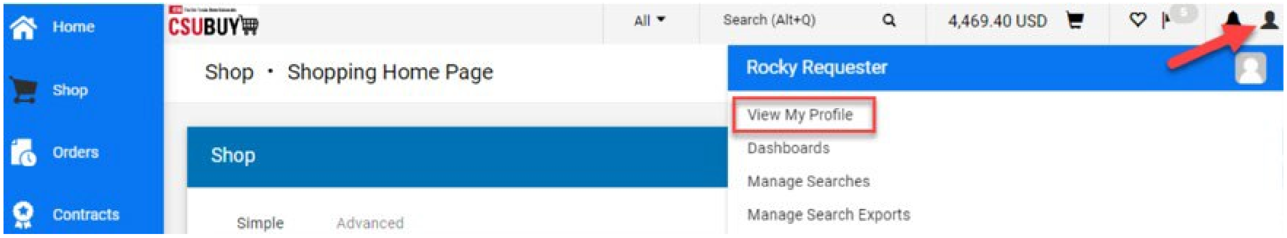




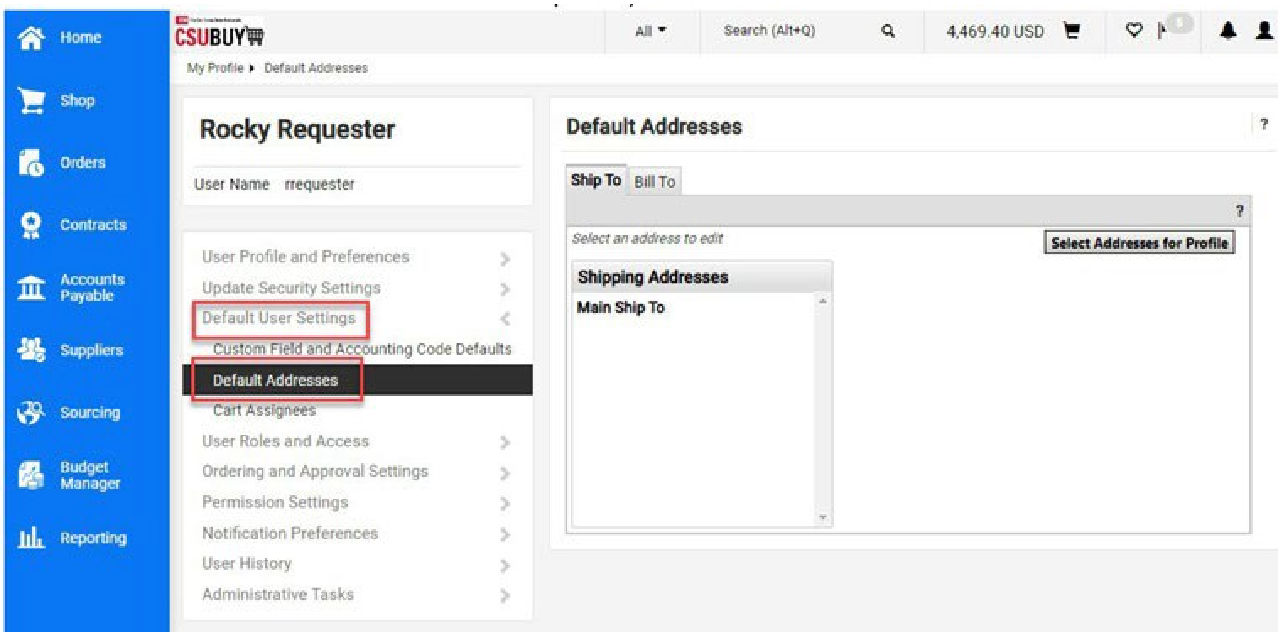
2-SHIP TO AND BILL TO ADDRESS DEFAULT SET UP

When you Checkout the shopping cart, you are required to select a Ship To and Bill To address. (FYI, the checkout action creates a Draft Requisition.) When setting a default, these addresses will automatically populate at Checkout. You also could change the addresses on the Draft Requisition, if needed.

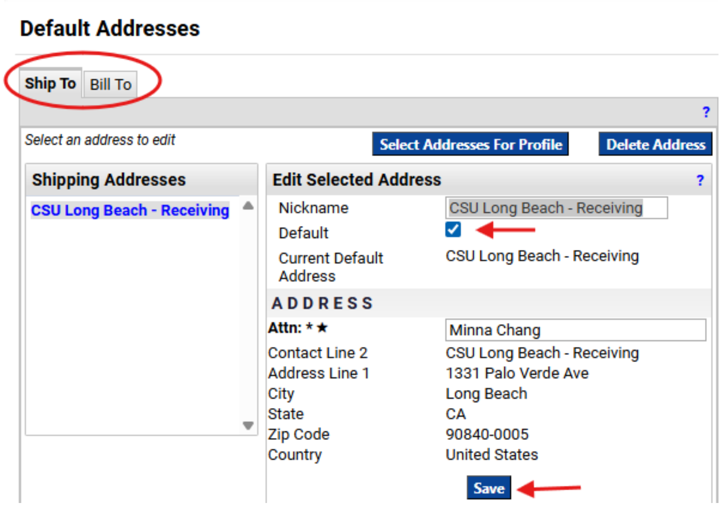
1. From the Shopping Home Page, click on User Profile icon.



2. Once you click on User Profile, the following appears. Navigate to Default User Setting: **Default Addresses**

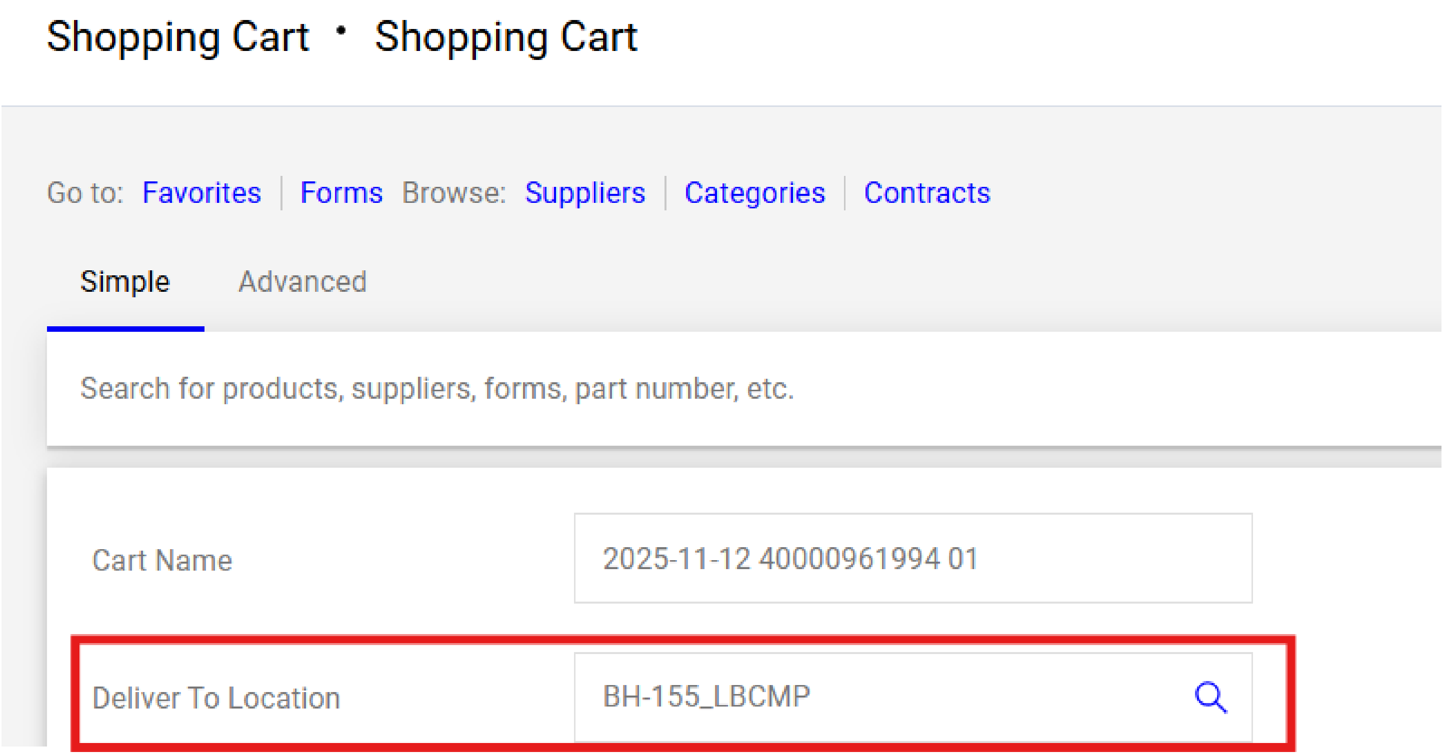


3. Select the **Ship To** tab or **the Bill To** tab as shown below.
4. Select the address you want as your default address
5. Click on the **Default** check off box
6. Click on **Save**



Deliver To Location found in the Shopping Cart specifies a building and room on campus. You may search by clicking on the magnifying glass.

There is no default available for Deliver To but in most cases, the Deliver to Location will populate based on what you used last.



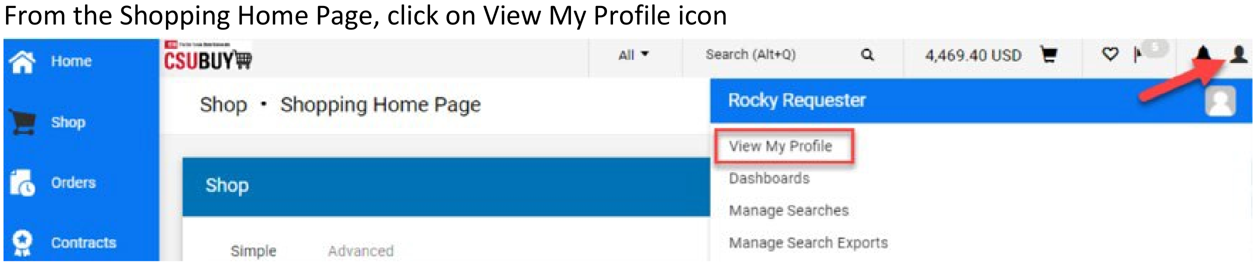
3-CART ASSIGNEES

A Shopper must assign their Shopping Cart to a Requester when they have completed shopping so that the Requester could submit the Shopping Cart to workflow.

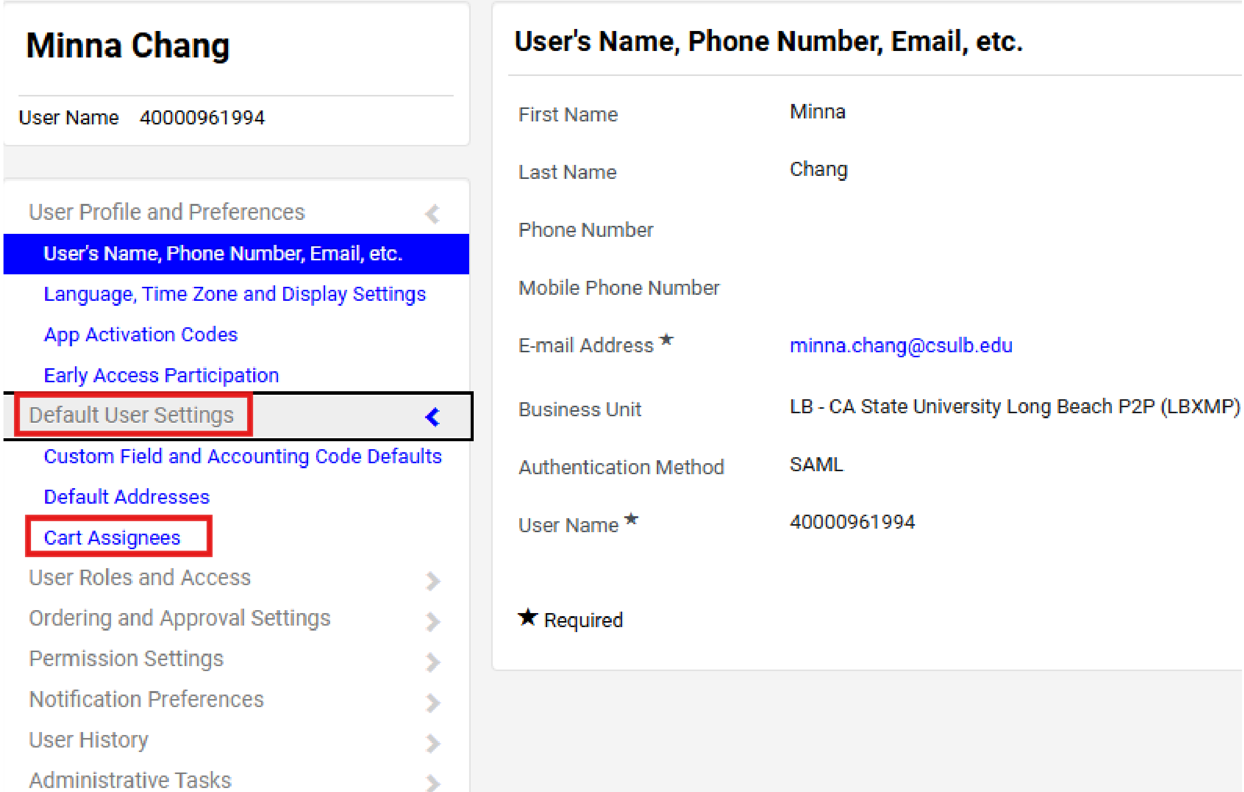
A Shopper or Requester may also assign a Shopping Cart to another Shopper or Requester. This is useful, for example, when the original Shopper/Requester plans to be out of the office and would like someone else to have access to the cart so they can complete the checkout when the purchase is ready.

To make it easier to find the person to assign the Shopping Cart, set up the Cart Assignees.

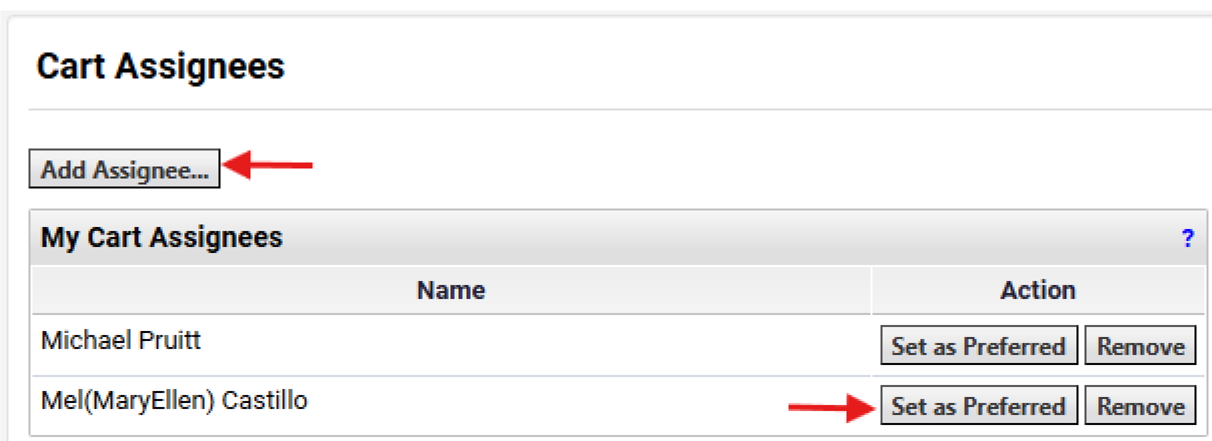
1. From the Shopping Home Page, click on View My Profile icon



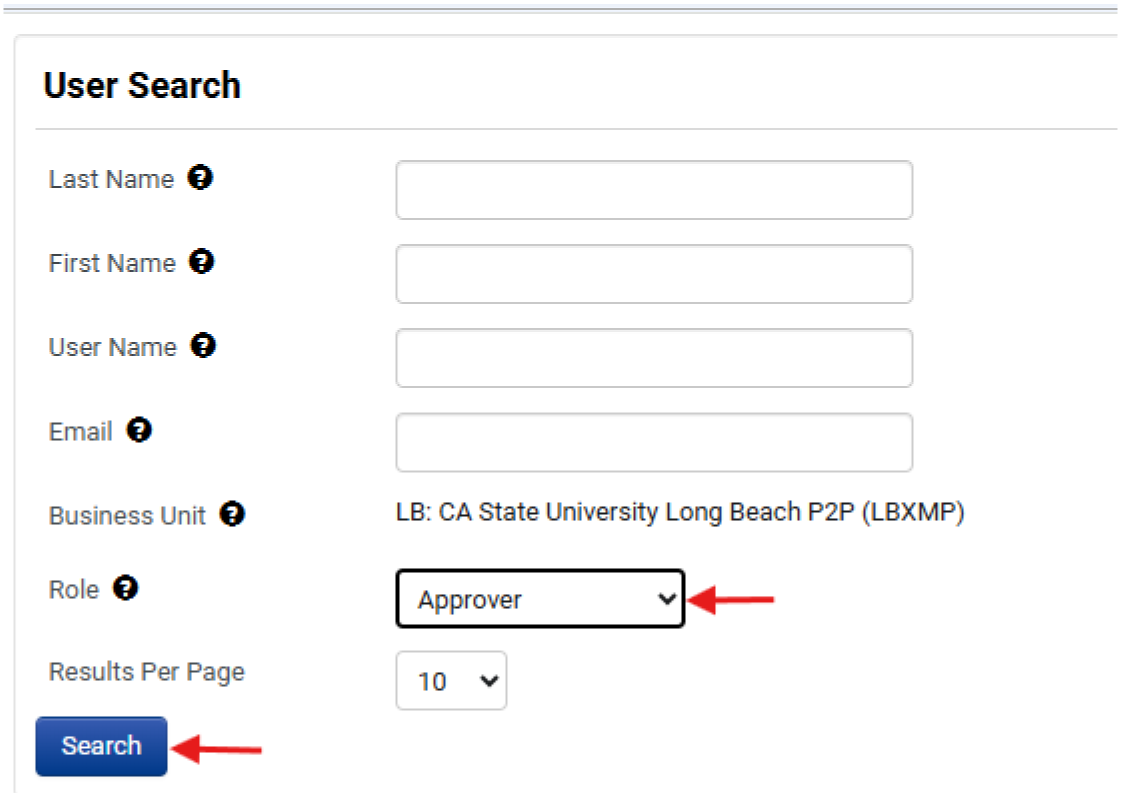
2. Navigate to Default User Setting: Cart Assignee



3. Click the Add Assignees box
4. A User Search box will pop up to enter a search criterion to locate the cart assignee, click Search.
5. Locate the user from the list and click the select link from the Action column.
6. To designate a preferred approver, click the Set as Preferred button to make the user the default approver for your orders



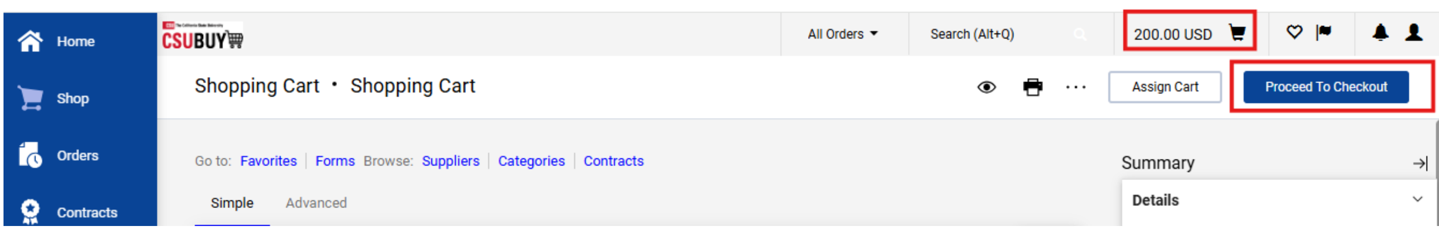
BONUS INFORMATION: To find a list of individuals in a role, select the role, such as Approver, and then select Search. You will see a list of all those in that role.



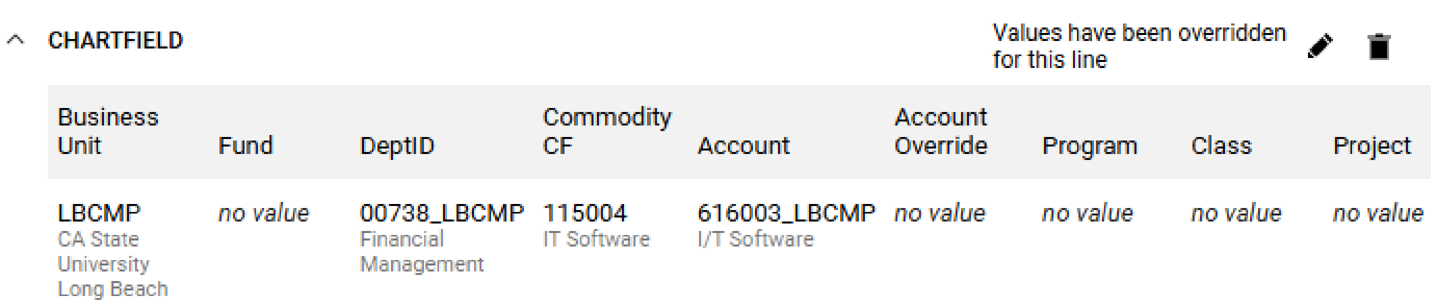
4-ACCOUNT CODE DEFAULTS & FAVORITES

DO NOT SET UP CODE DEFAULTS AND FAVORITES AT THIS TIME. THERE IS A SYSTEM ISSUE.

When you have items in the Shopping Cart and then click Proceed to Check out, you are required to enter the Chartfield. (Note the Shopping Cart is now a DRAFT Requisition.)



Snapshot of DRAFT Requisition: Chartfield Section


CHARTFIELD

Values have been overridden for this line

Business Unit	Fund	DeptID	Commodity CF	Account	Account Override	Program	Class	Project
LBCMP CA State University Long Beach	no value	00738_LBCMP Financial Management	115004 IT Software	616003_LBCMP I/T Software	no value	no value	no value	no value

By setting default or favorite Chartfield you use the most, the Chartfield section will be easier to complete. You are also able to update the Chartfield in your Draft Requisition, if needed.

Defaults vs Favorites

Default auto populates fields. Favorites provides a drop-down list for quick selection

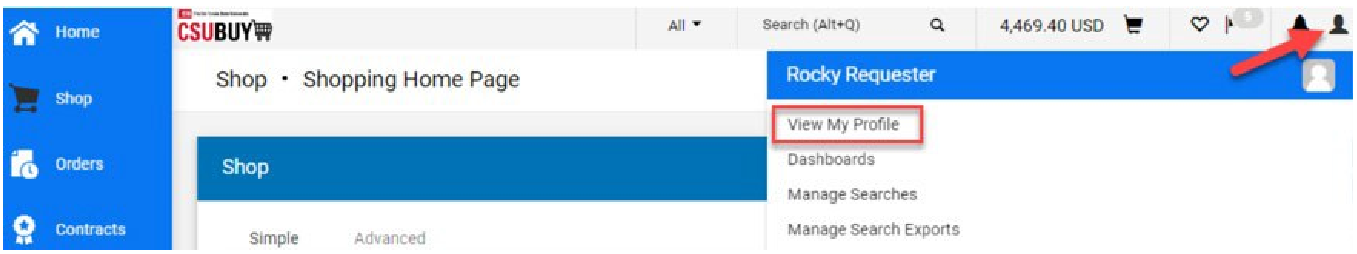
Defaults are preferred for users who consistently use the same Chartfield. Default will always populate regardless of the Business Unit/Persona you are shopping for. Therefore, we do not recommend setting Default Chartfield for those who shop for different Business Unit/Persona frequently.

Favorites are recommended for those who shop for different Business Units/Persona and/or uses various Chartfield.

Setting Default Chartfield

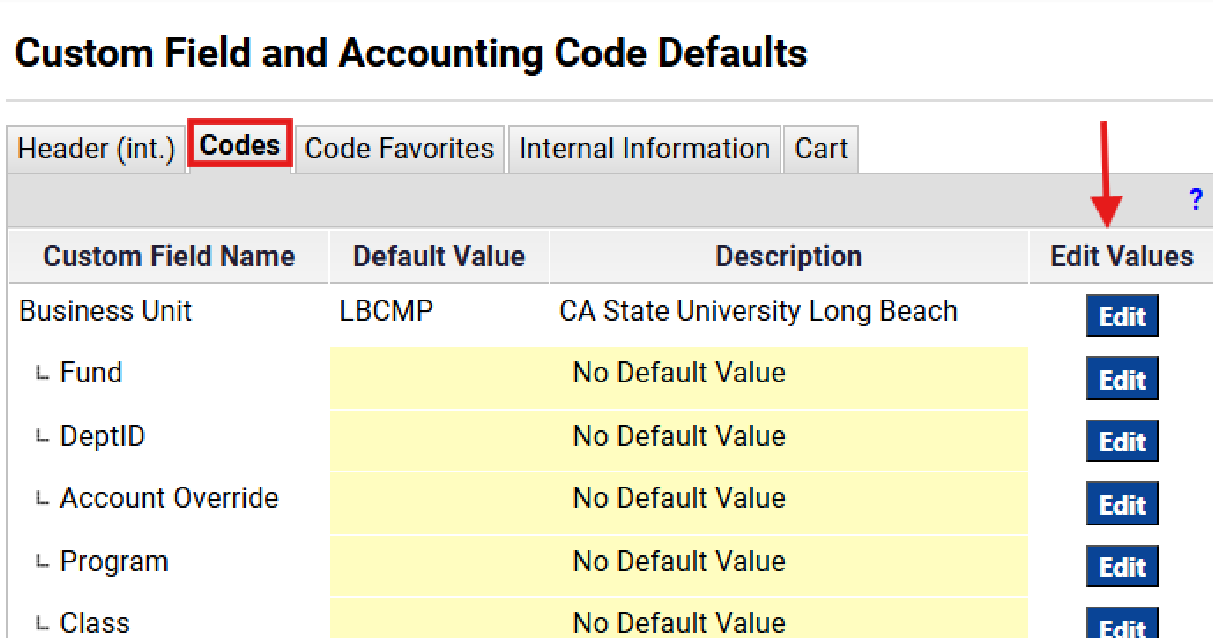
To set a default Chartfield:

1. From the Shopping Home Page, click on User Profile icon.

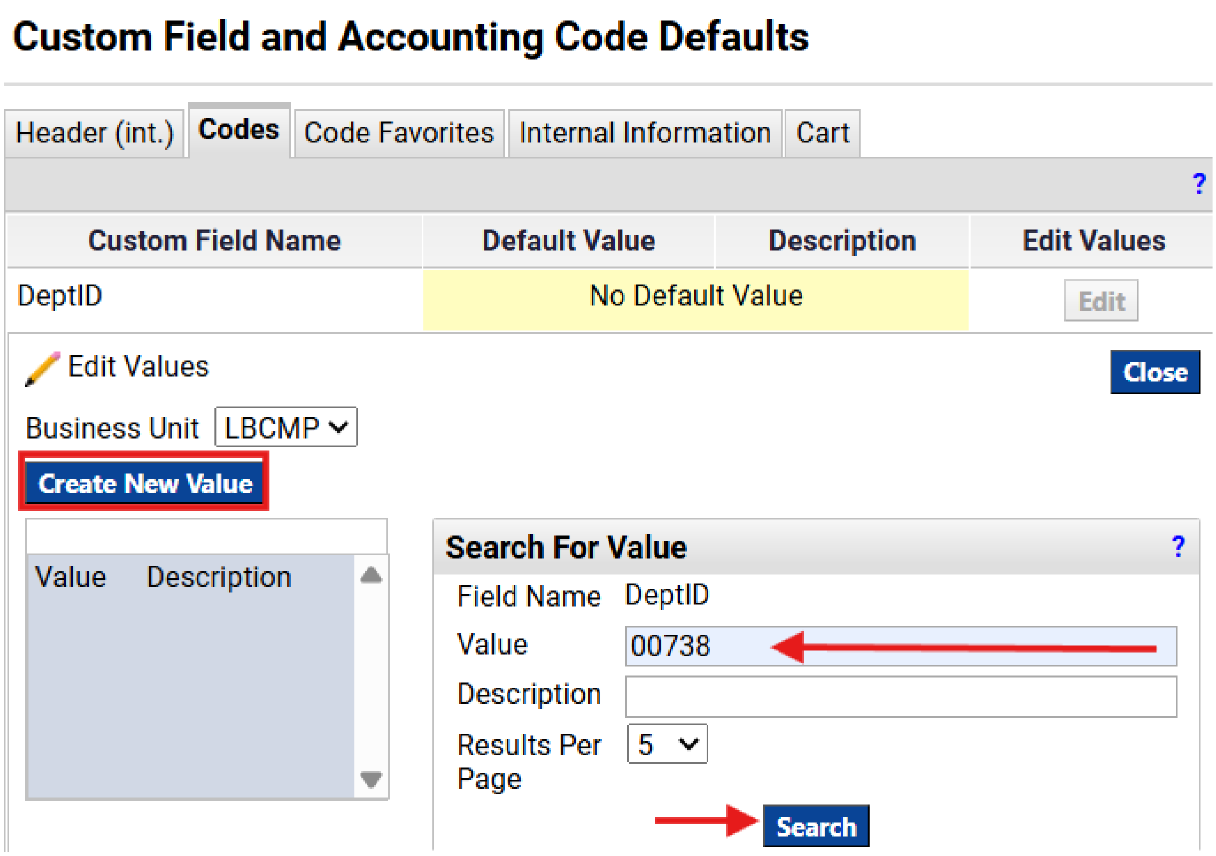


2. Once you click on User Profile, the following appears. Navigate to **Default User Setting: Custom Field and Accounting Code**.

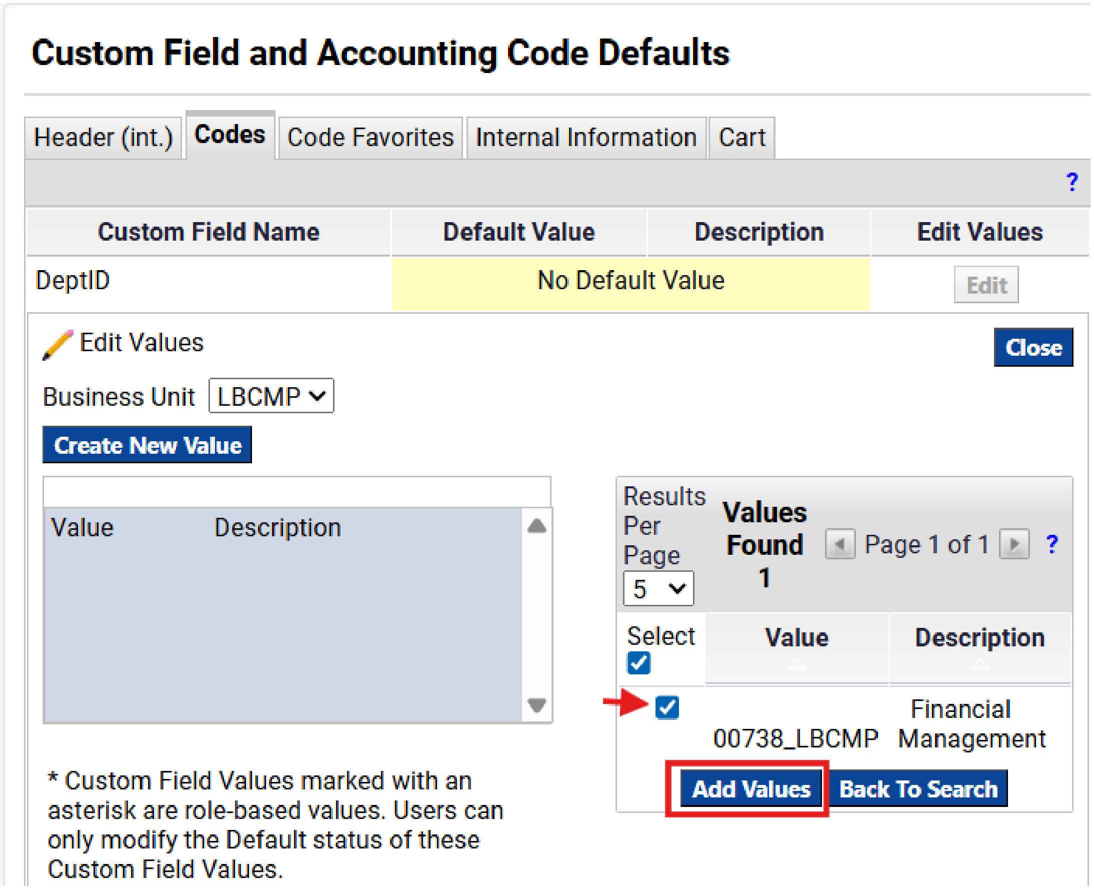
3. Then go to the **Code** tab.
4. Click on **Edit** for the Field Names to set a default.



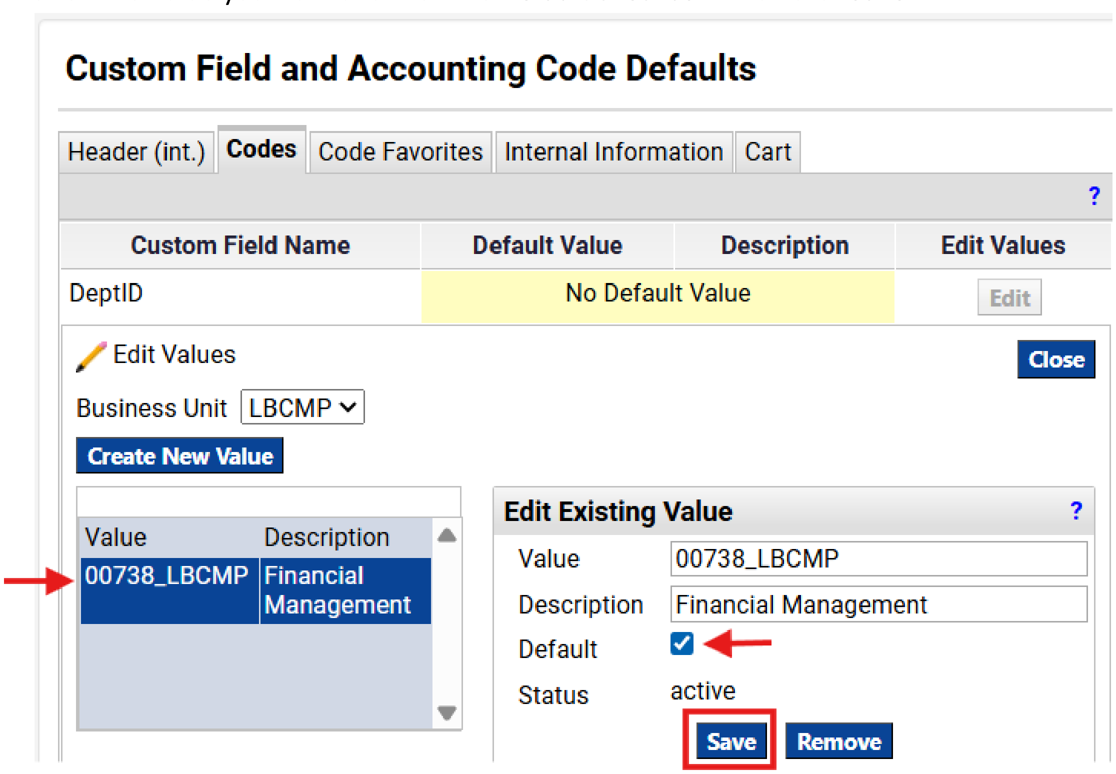
5. Click on **Create New Value** if you the value you need doesn't appear. You may use * as a wildcard.
6. Enter the value and hit **Search**.



7. Select the **check box** next to the Value you want and then click **Add Values**



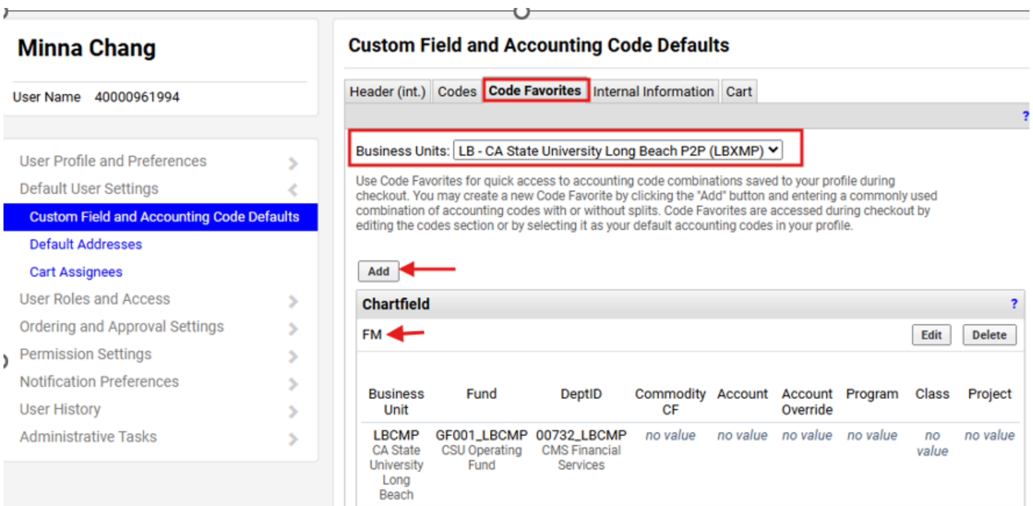
8. Click on the Value you want and then the **Default checkbox**. Then click **Save**.



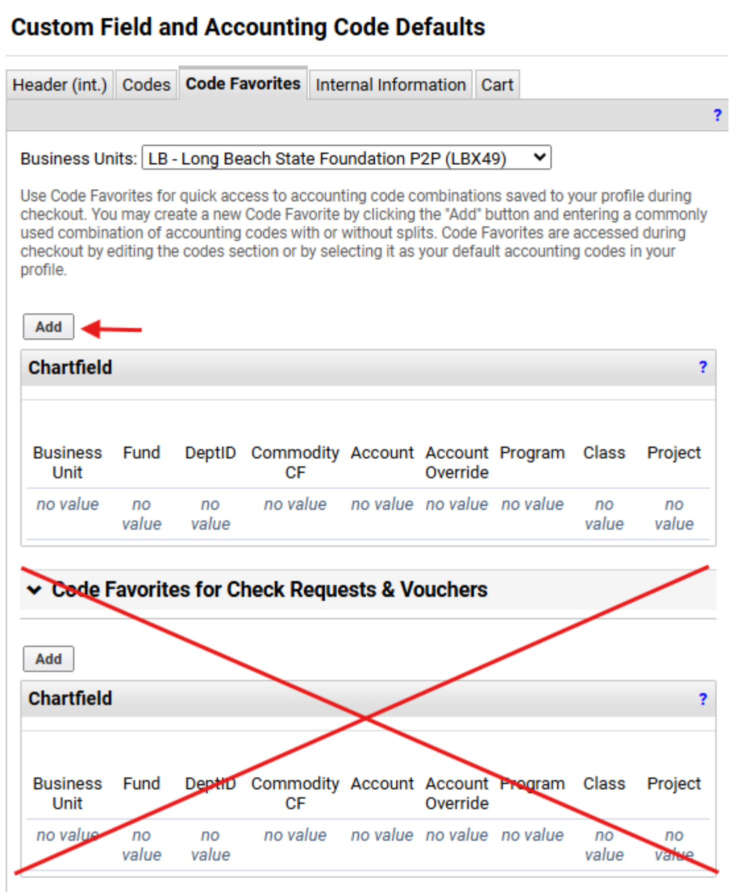
9. Then click **Close**.
10. Repeat process for each Chartfield you want to add a default.

<u>Setting Chartfield Favorites</u>

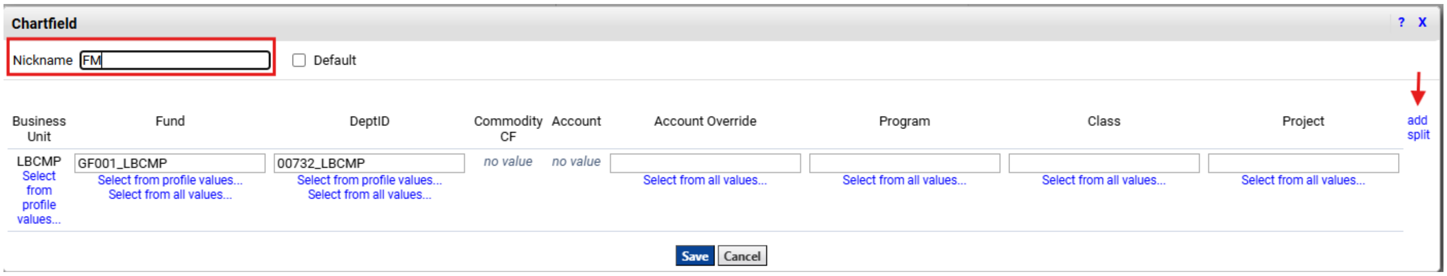
Code Favorites are tied to a Business Unit/Persona. Therefore, if you select Business Unit LBXMP as shown below, you must be shopping in the LBXMP Persona for this Code Favorite Chartfield to appear on the Draft Requisition.



Be careful to **Add** your Chartfield in the section on TOP for your Chartfield to appear on a Draft Requisition and NOT under Code Favorites for Check Requests & Vouchers.



When you Click on Add, you would then add a Nickname and enter the Chartfield string.

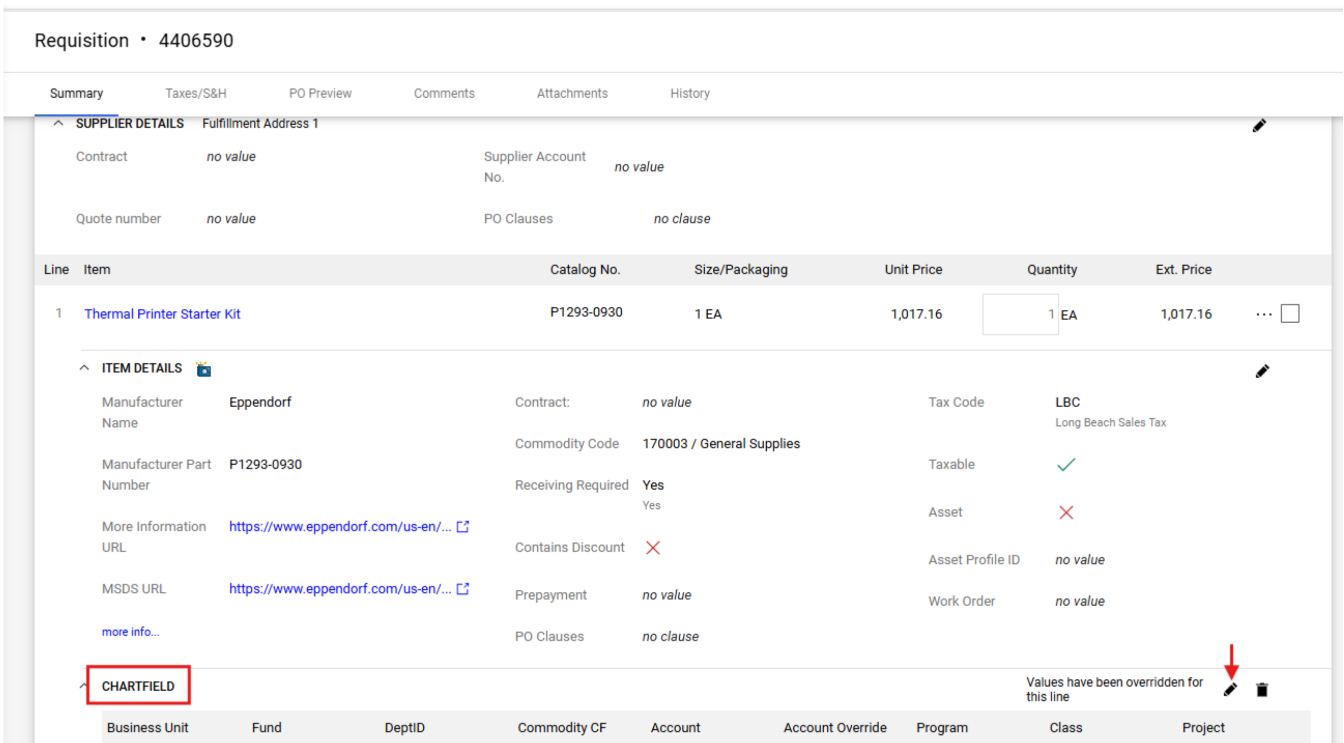


You may add additional Chartfield Code Favorites.

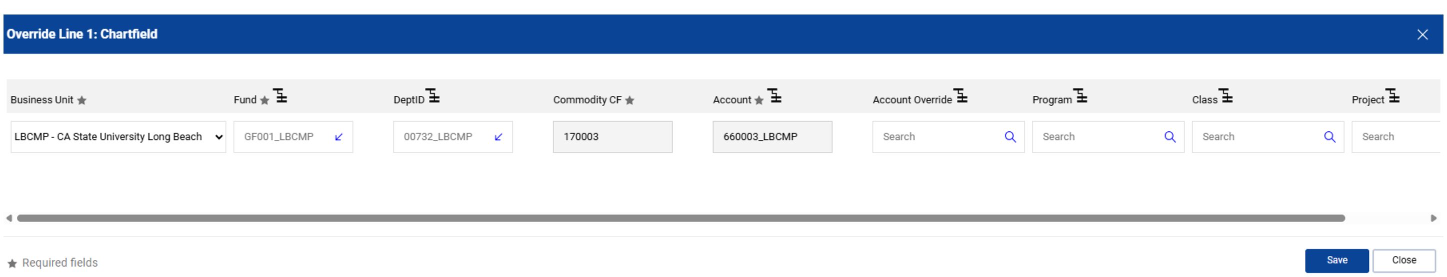
Repeat this process for other Business Units/Personas you shop for and would like a Chartfield Code Favorite.

Seeing your Chartfield Code Favorites in a Draft Requisition

When you Checkout the Shopping Cart, it becomes a Draft Requisition. You will then review the Chartfield and enter or adjust to the correct Chartfield by clicking on the pencil icon.

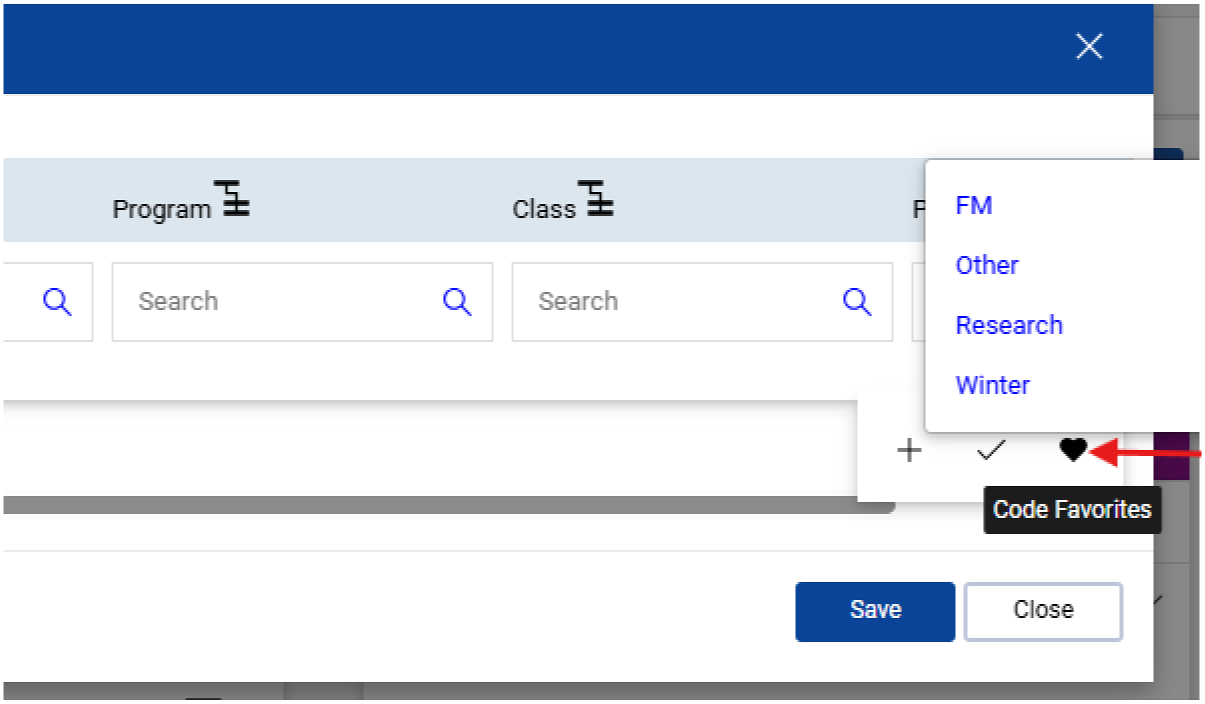


Then the Chartfield box pops up:



When hovering over the box you will notice the box on the lower right with the plus, check and heart.

When you click on the heart, you will see the Nickname of your Code Favorites. Selecting the Nickname and the Chartfield will populate.

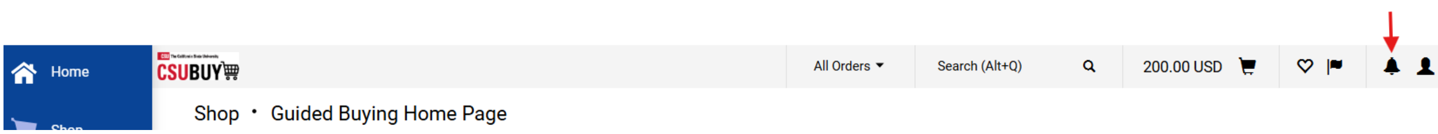


5-SETTING UP NOTIFICATION PREFERENCES

The recommendation is to keep the current default notifications EXCEPT for the Shopper/Requester should ensure Verify Receipt and Create a Receipt Notifications are ON. (See instructions below to turn ON Verify Receipt and Create a Receipt.)

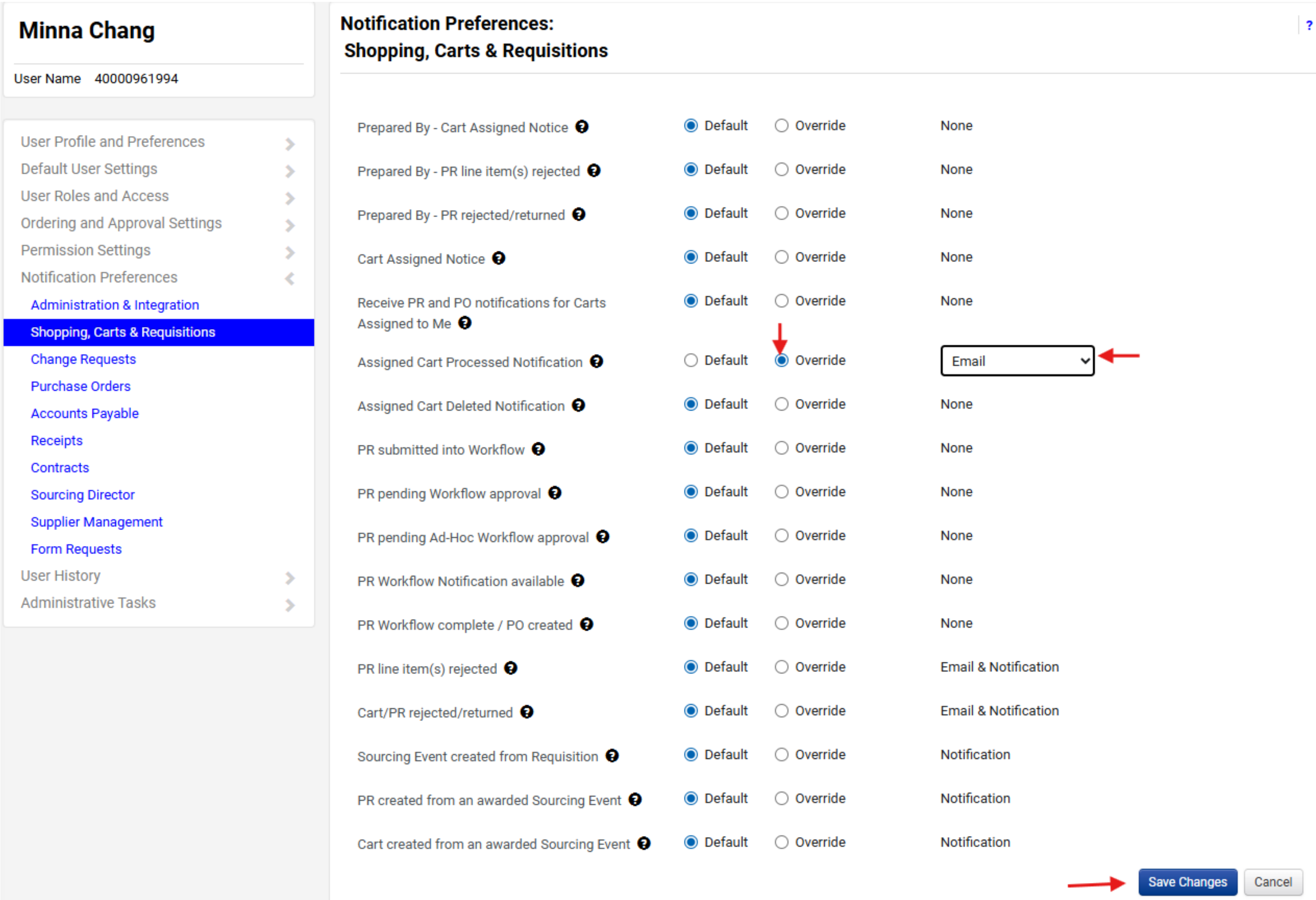
If you feel you are receiving too many notifications, please reach out to us to assist you in adjusting your notifications.

Notifications are available via email or within CSUBuy's Notifications "bell".



To adjust Notifications:

1. Click on View My Profile
2. Navigate to **Notification Preferences**
3. Select **Shopping, Carts & Requisitions**
   You may also select any of the other options shown below to set notifications.
4. Click on the blue **Edit Sections** at the right corner.
5. Click on **Override** on the field you want to update.
6. Select the type of notification you would like to receive in the dropdown
7. Click Save Changes.

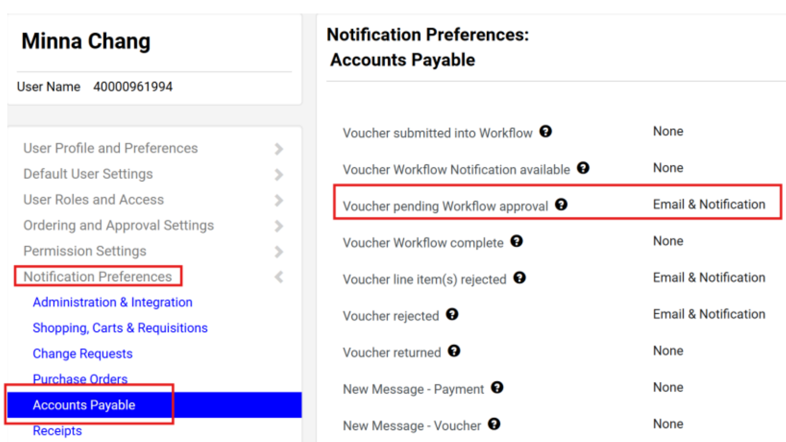


Notification Preferences for Shopper/Requester to Verify Receipt & Create a Receipt

The Shopper/Requester are required to Verify Receipt or Create a Receipt for every purchase indicating that the good or service has been received. Turning on notifications for these actions is a reminder and notification for the Shopper/Requester.

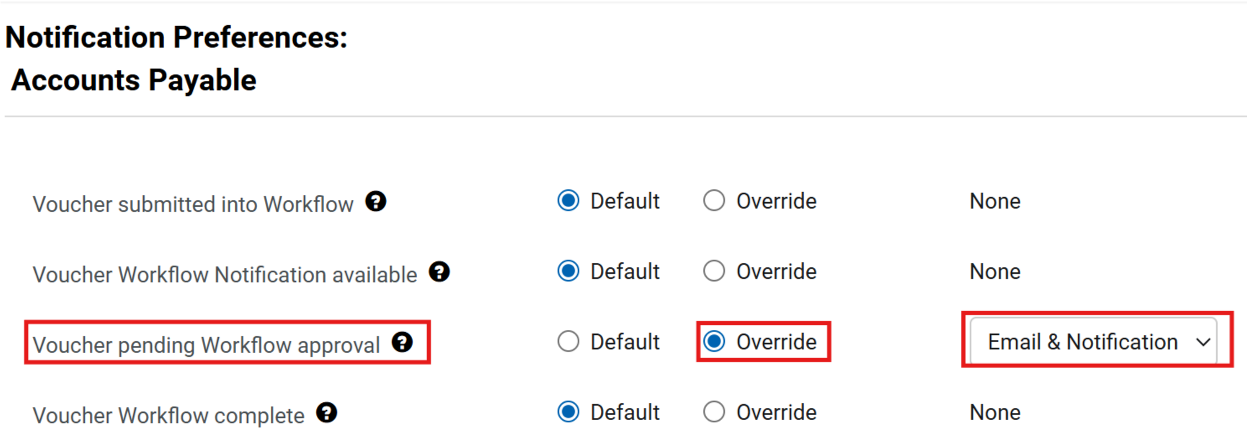
For **Verify Receipt**, the Shopper/Requester must turn on the following notification to receive an email as a reminder the action is needed.

Select Notification Preferences>Accounts Payable. Then click on Edit Section (pencil icon in the right corner).



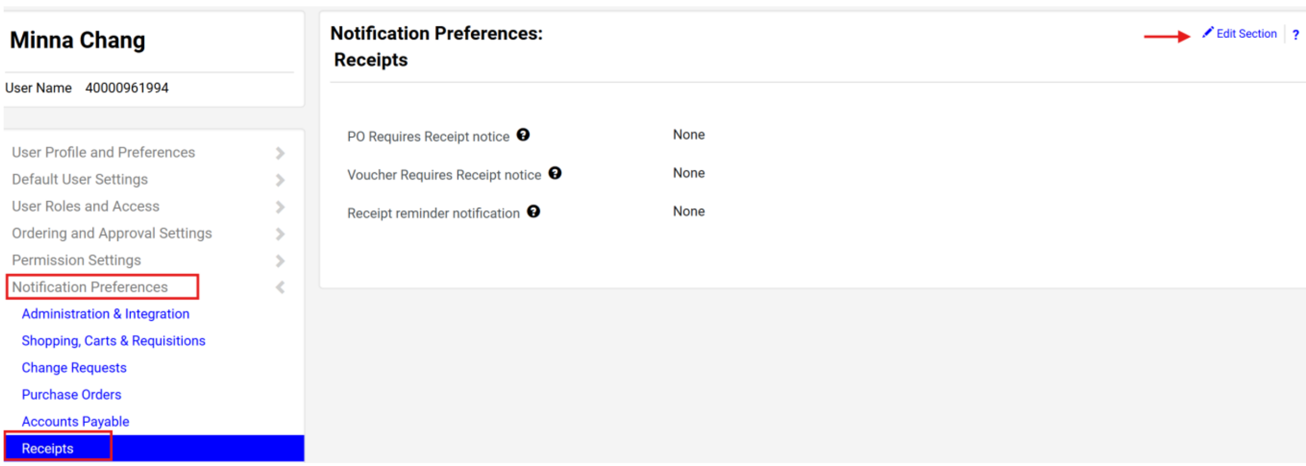
Select Override for Voucher Requires Receipt notice.

In the drop-down menu, select Email & Notification. Then click on Save Changes.



For **Create a Receipt**, the Shopper/Requester must turn on the following notification to receive an email as a reminder the action is needed.

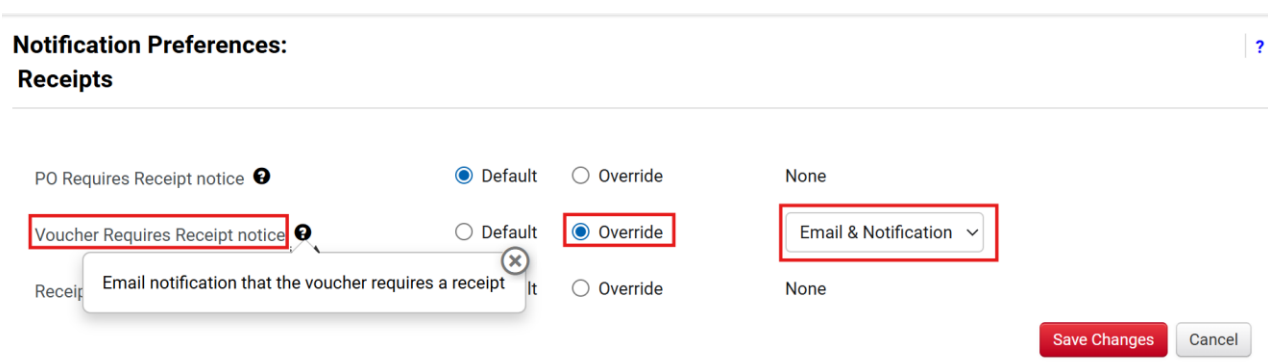
Select Notification Preferences>Receipts. Then click on Edit Section.



Select Override for Voucher Requires Receipt notice.

In the drop-down menu, select Email & Notification. Then click on Save Changes.

This will be a reminder in your email that when you receive the product, you must create a receipt.

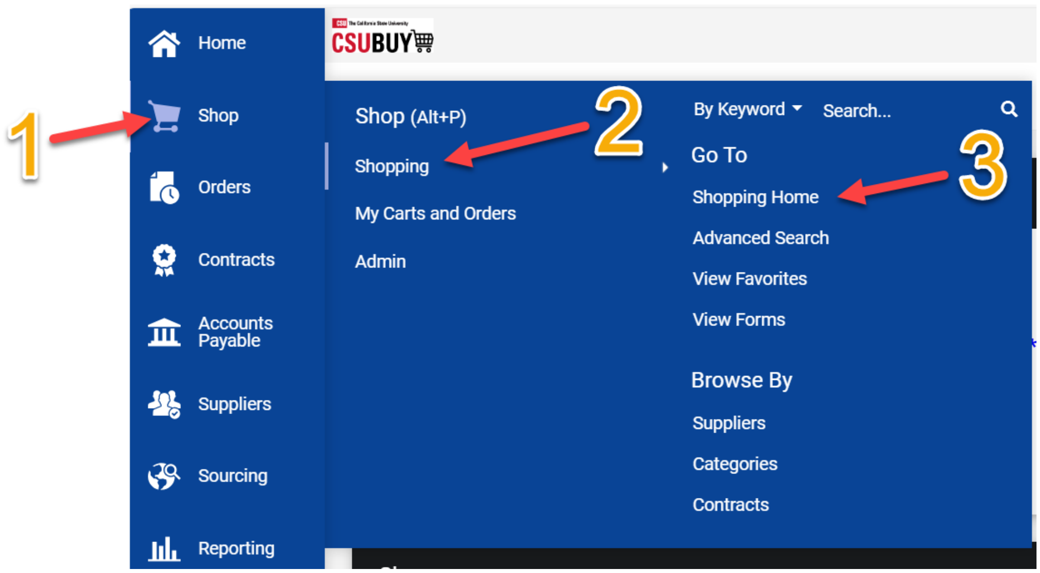


CHAPTER 2: SHOPPER/REQUESTER

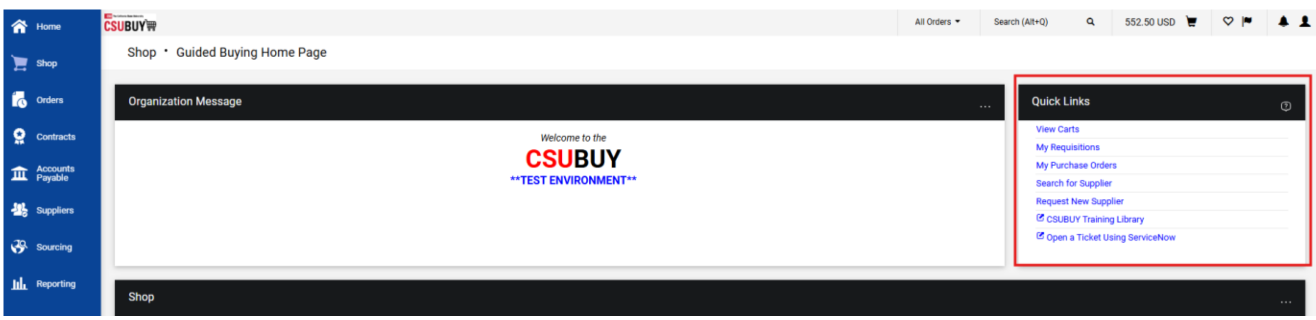
1-SHOPPING HOME PAGE NAVIGATION

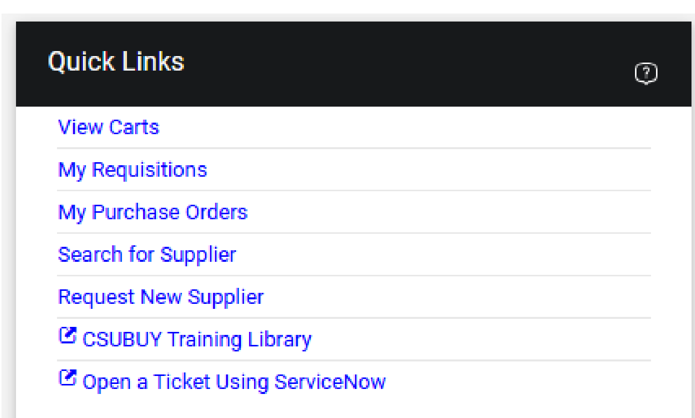
The CSUBUY Home Page differs depending on your role. A Shopper/Requester's Home Page will be the Shopping Home Page.

If you need to navigate to the Shopping Home Page, go to Shop > Shopping > Shopping Home



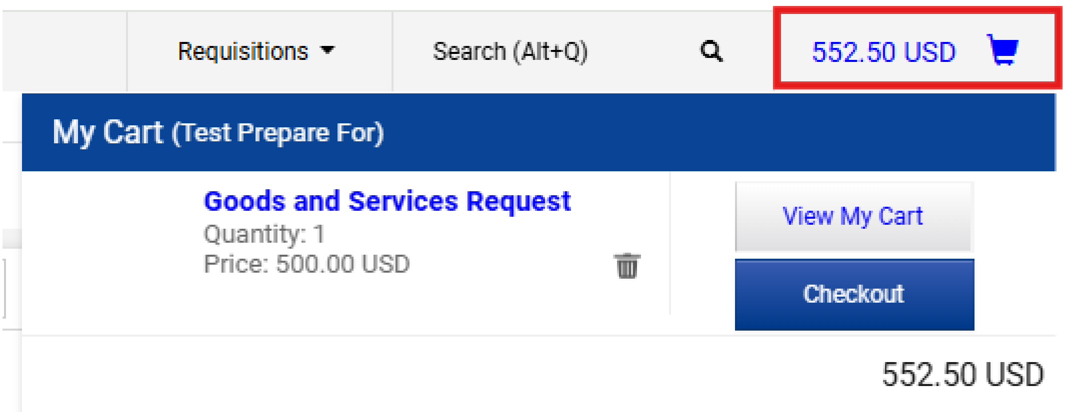
To the right, there is a Quick Links section. This provides links that could be described as "My Stuff" along with other useful links.



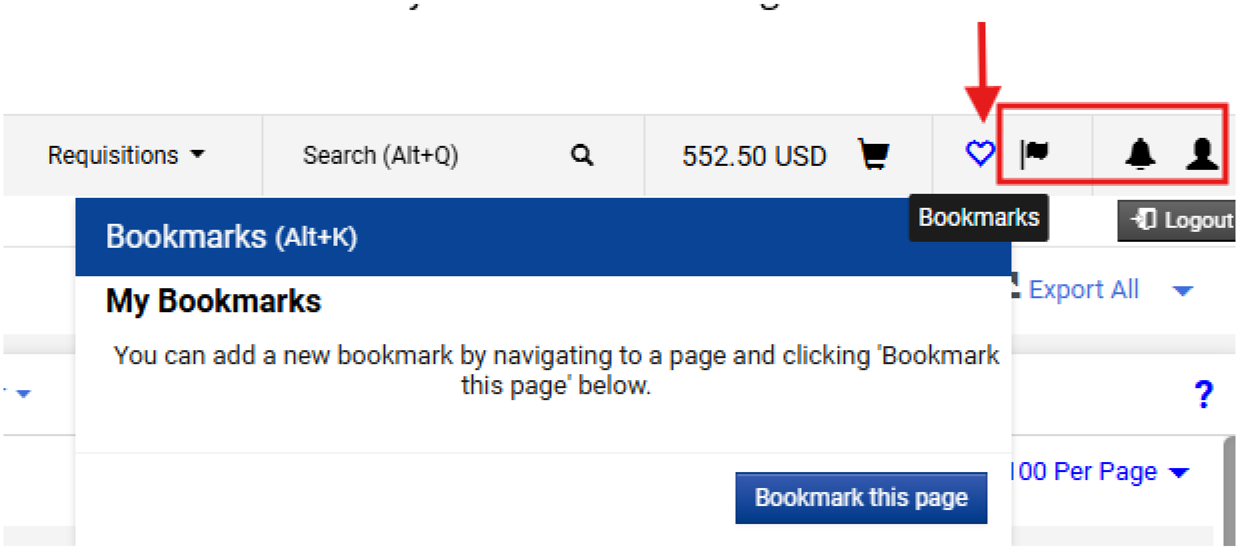


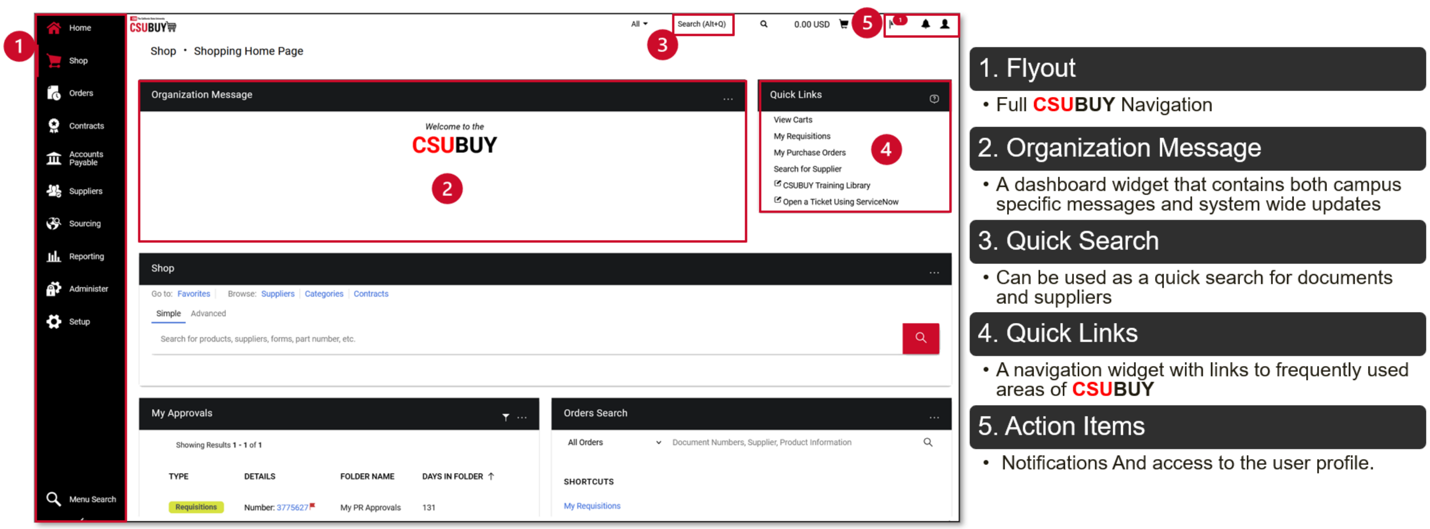
At the top right corner, you will notice the following icons and search bars. The drop down has selections similar to the flyouts. Select the type of document you are searching for and then enter a search criterion such as number, supplier, name, prepare for, etc.

Shopping Cart icon: where you can view your Shopping Carts.



- **Heart icon** to the right is your Bookmarked Pages.
- **Flag icon** has pending Action Items. A number will appear on the flag if there are pending items.
- **Bell icon** is the Notifications Page. A number will appear on the bell if there are unopened notifications.
- **Person icon** is your User Profile, where you can access your profile settings.





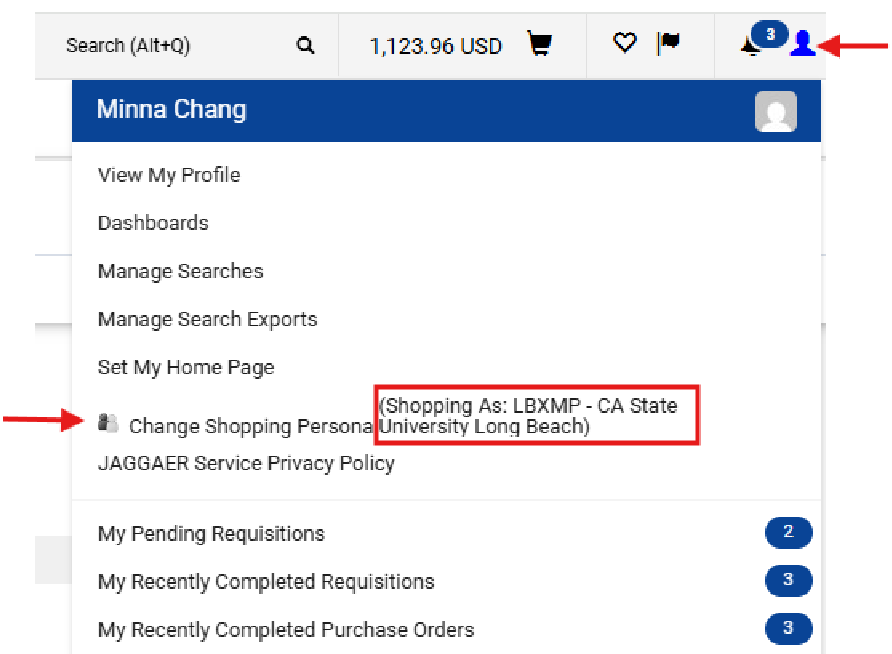
2-BEFORE SHOPPING: VERIFY PERSONA AND EMPTY SHOPPING CART

Verify Persona

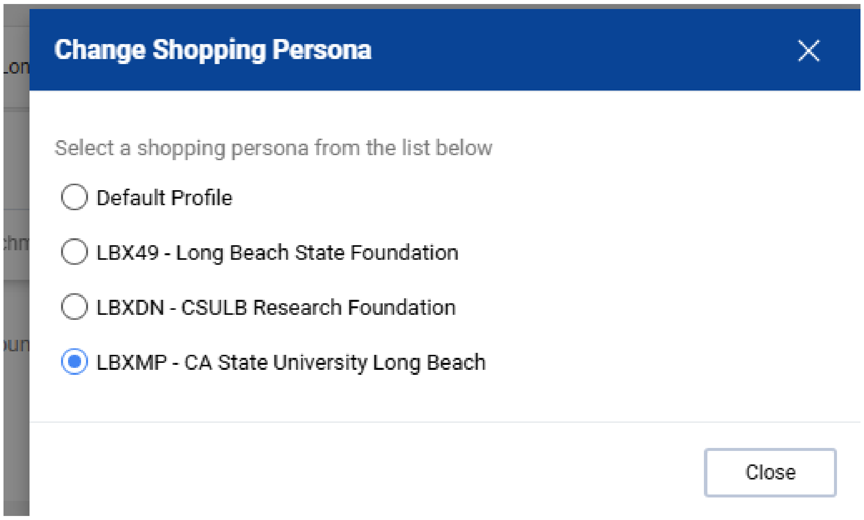
A Persona is similar to a Business Unit. Confirm that you are in the correct Persona for the entity you are shopping for.

Entity	**Persona**
CSULB Campus	LBXMP – CA State University Long Beach Persona
Research Foundation	LBXFD – CSULB Research Foundation
Long Beach State Foundation	LBX49 – Long Beach State Foundation

Verify that you are in the correct Business Unit in your User Profile.



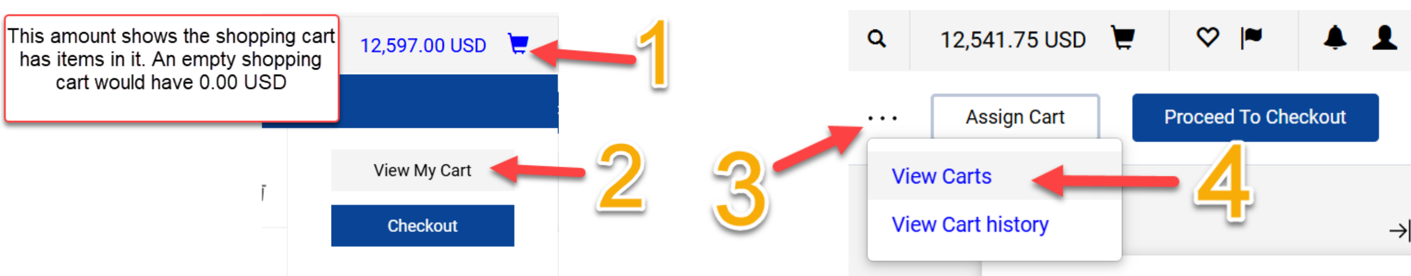
If you need to change the entity you are shopping for, click on Change Shopping Persona and select the correct Shopping Persona.

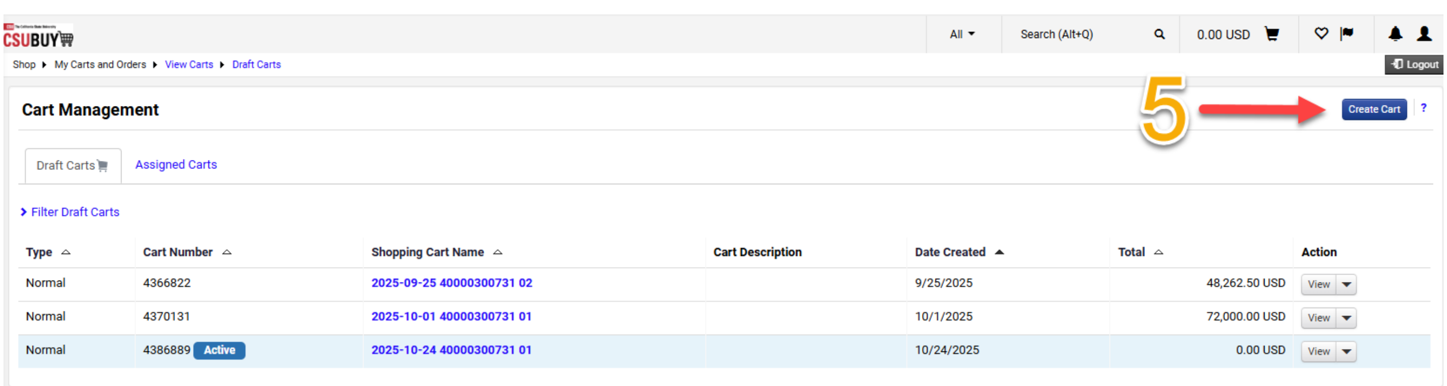


Confirm Your Shopping Cart is EMPTY

Your cart must be empty before you begin shopping.

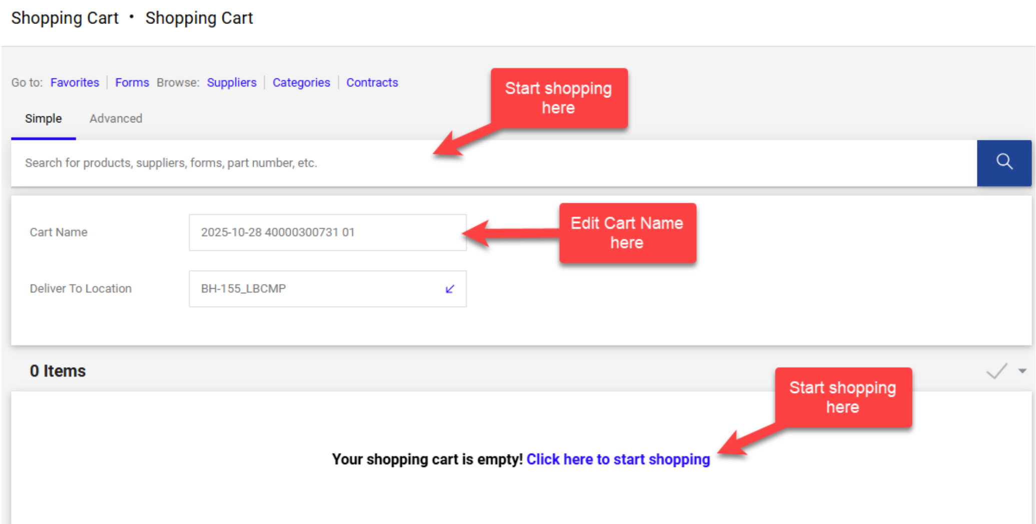
1. Click on the shopping cart icon in the top right corner
2. Select **View My Cart**. If the cart has items in it, you must save it as a draft to start a new shopping cart.
3. Click the 3 dots in the upper right corner
4. Select **View Carts**. Then select the Draft Carts tab
5. To the right of the page select **Create Cart**.





Now you have an empty cart and can start shopping!

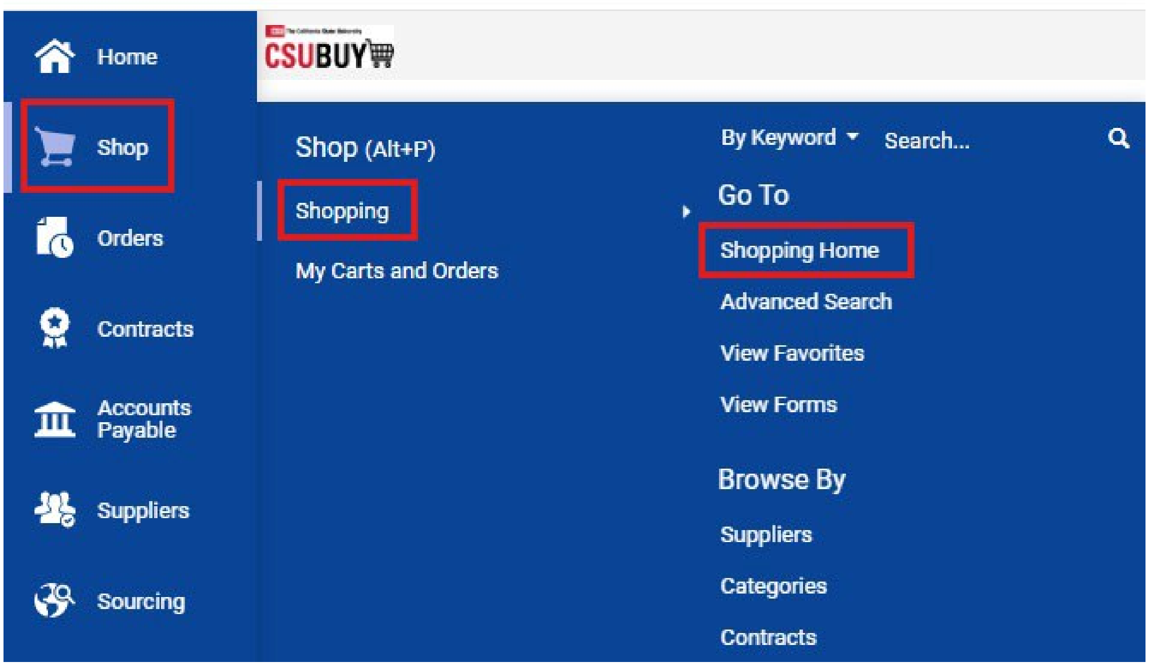
To see your drafted carts, go to Shop > My Carts and Orders > View Carts > Draft Carts.



3-PRODUCT SEARCH

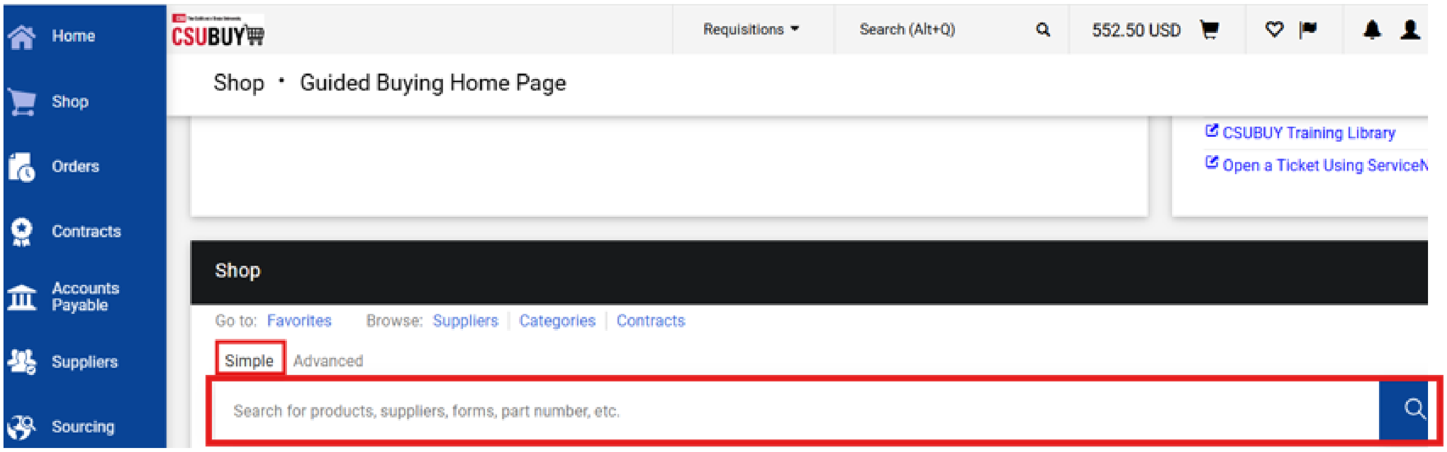
To begin shopping, you may start with a product search. This will provide products options and prices to compare. There are some Punchout Catalogs items (such as Amazon and Staples) that DO NOT appear when using the Product Search feature in CSUBUY. You must go to the Punchout Catalog and search in the catalog separately.

Navigate to the Shopping Home Page.

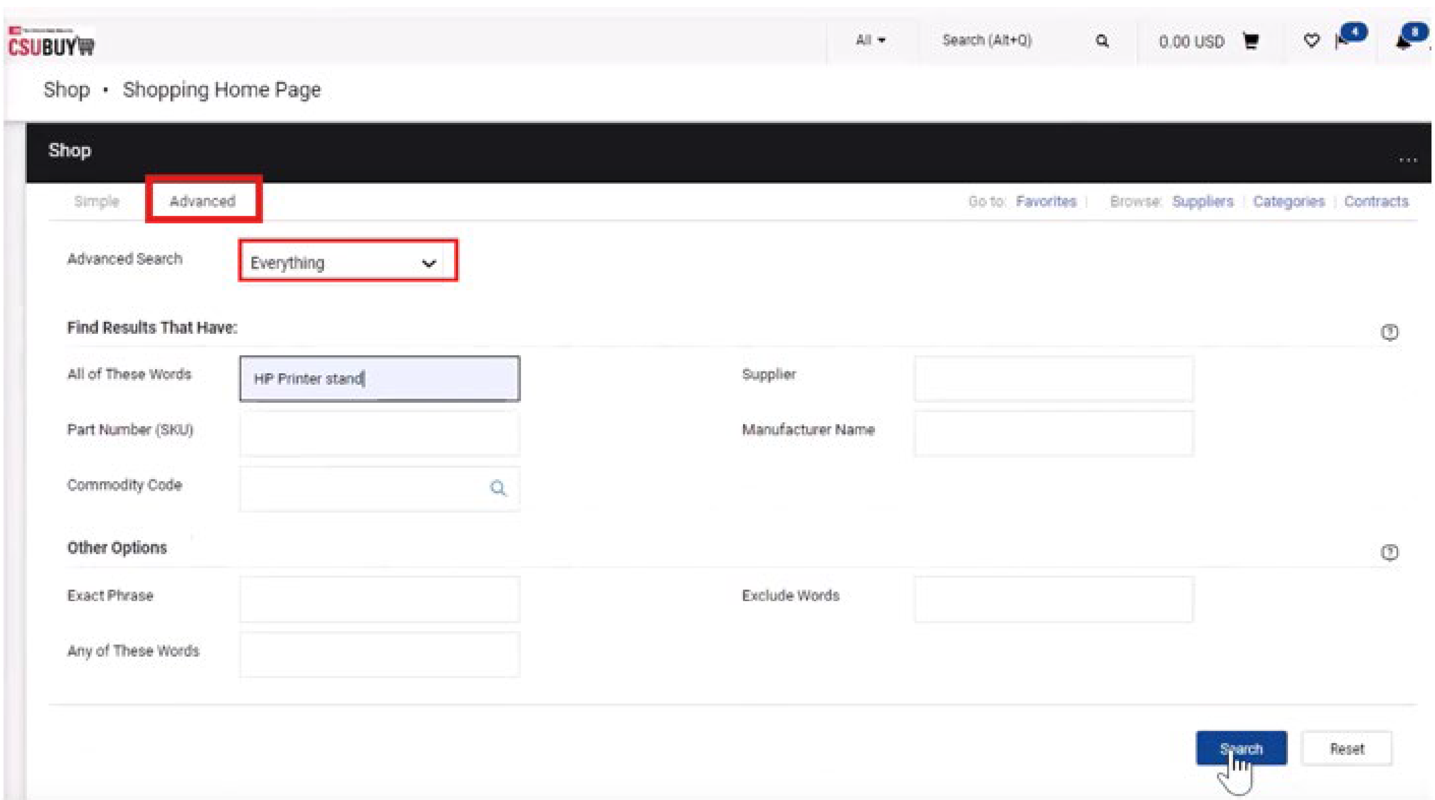


Simple and Advanced Product Search

Simple search is useful if you have minimal specific information and would like a general search for a product. Type the product in the search bar.



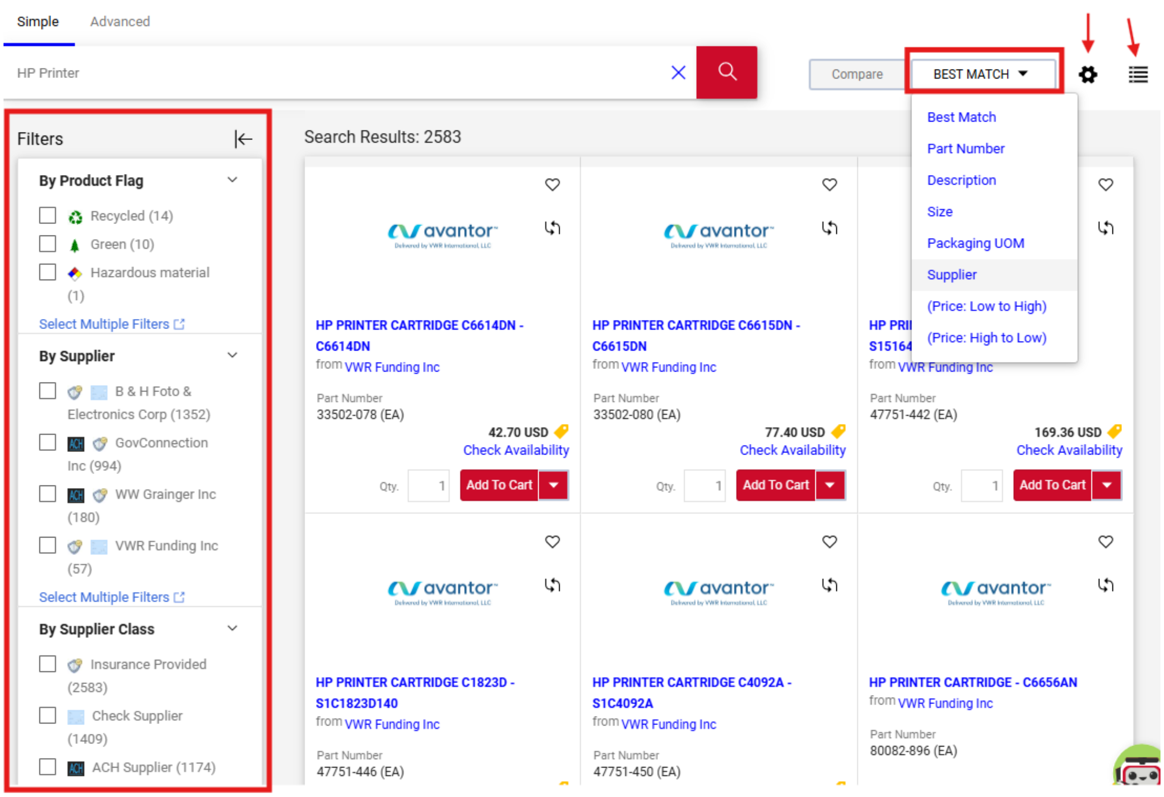
Advanced search is useful if you have information regarding a product and would like to narrow your search by adding search criteria. The drop-down menu allows you to search by a product type such as furniture.



Filtering Search Results

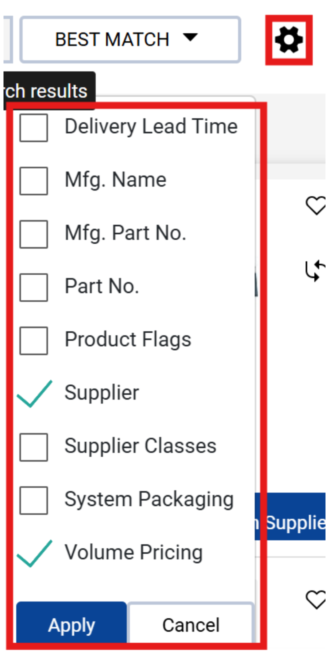
The Search Results appear as shown below.

- **Filters** – Seen on the left, allows you to narrow your search
- **Drop-down menu** – Allows you to sort the search results according to the criteria you select
- **List icon** – Allows you to select if you'd like to see the search result as tiles (shown below) or as a list.



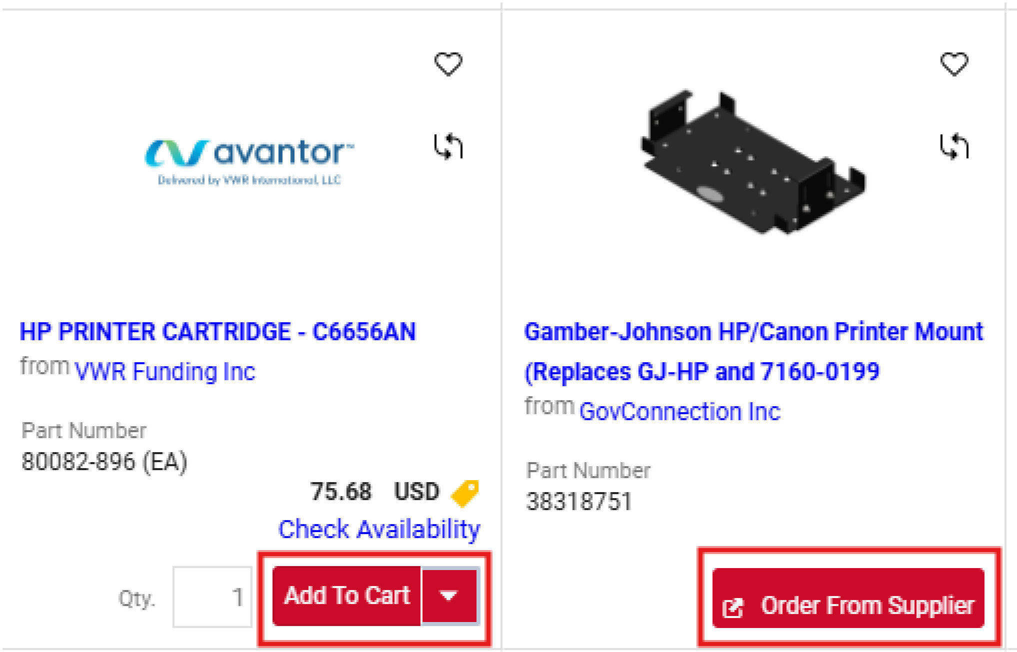
******Staples appeared in the test environment but not in production (live CSUBUY)*

Gear icon – Allows you to select what information you would like to see in the Product Search results.



Search Results & Ways to Add to Shopping Cart

The search results will provide three different ways the product is added to the Shopping Cart depending on the Supplier.



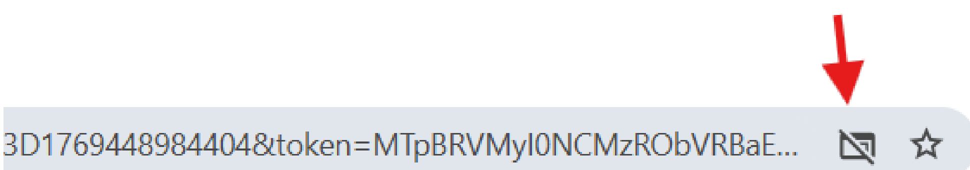
Order from Supplier – When clicking on the box, you will be punched out to the Supplier website. You would then search for the product and add it to the Supplier cart. Once you check out, you will then be punched into the CSUBUY with the item in your Shopping Cart. This type of Supplier is known as a Punchout Supplier. Punchout Suppliers also have a Punchout Catalog in CSUBUY. Punchout Catalog is covered in Section 4-Adding Items to a Shopping Cart: Punchout Catalog

Add to Cart – When clicking on the box, the item will be added to your Shopping Cart.

4-ADDING ITEMS TO A SHOPPING CART: USING PUNCHOUT CATALOGS

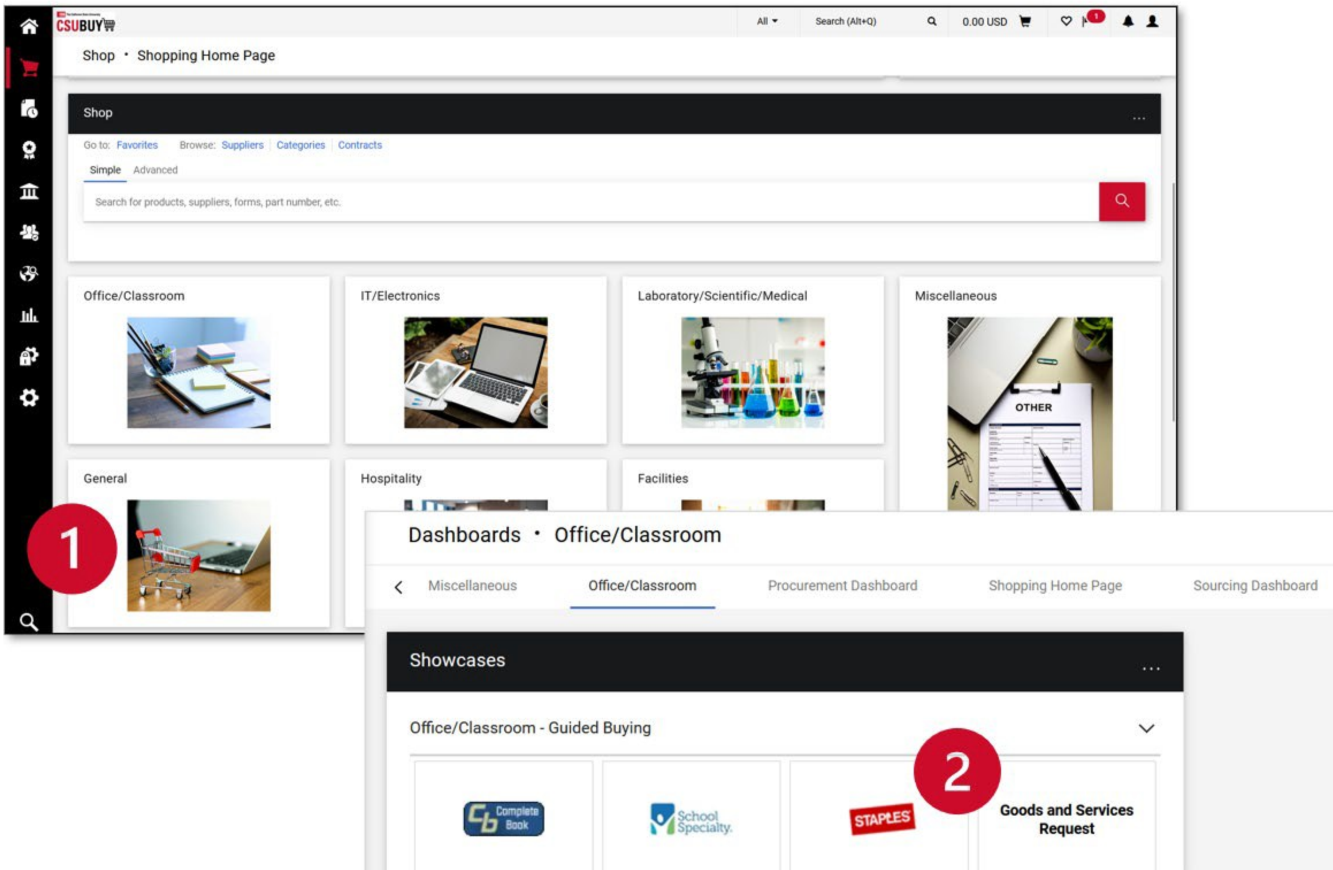
There are catalogs from different suppliers (PunchOut suppliers) such as Staples and Amazon, which you access by clicking on their tile found in the Shopping Home Page. When clicking on their tile, you will be "punched out" to their site and are then able to search for the product and add to the Shopping Cart.

BEFORE USING AMAZON PUNCHOUT, please see Chapter 6, Section 4-Amazon Accounts and Access.
Important Note: For the **Amazon** PunchOut Catalog, you must remove Pop-Up Blockers as seen below.



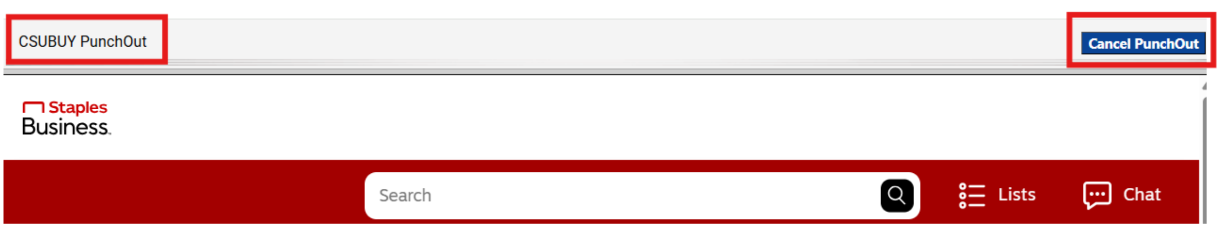
Click on the Pop-Up Blocker and then select Allow.

To shop using a PunchOut Catalog, go to the (1) Shopping Home Page and go to the (2) Showcase section to select from the PunchOut Catalog.



After selecting a supplier, you will be redirected or punched out to the supplier's website.

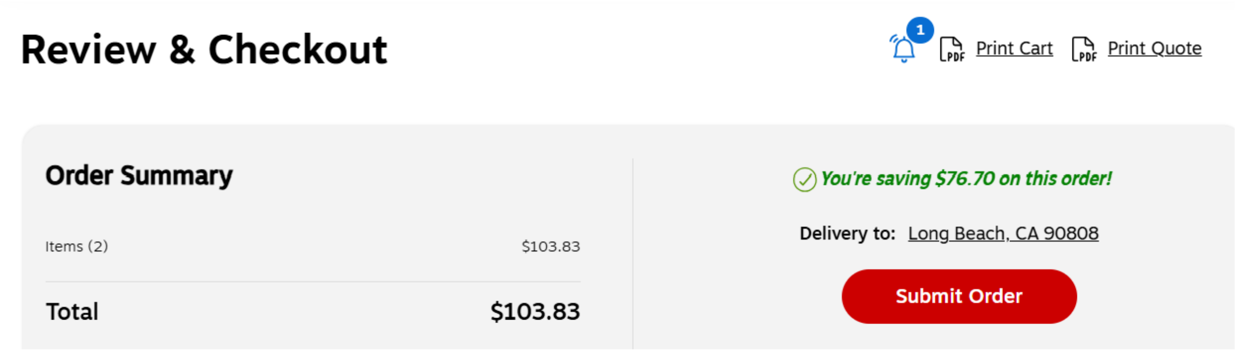
You will notice at the top of the site, you are in a CSUBUY PunchOut. You could click on Cancel PunchOut if you do not want to add any items to your cart and this will take you back to CSUBUY.



Here, you can search for the items and then click **Add to Cart**.

You will then have an opportunity to add more items or Review and Checkout. Make sure your order is correct as you will not be able to make adjustments to the order once you Submit Order.

At Checkout you would review and then submit the order.



You will then be punched back to CSUBUY with the item in your Shopping Cart. If you realize you need to adjust the order, you may delete the line item in your Shopping Cart and then go back to the Supplier Punch Out and select the correct item and add it to your Shopping Cart. (See Section 7-Shopping Cart Fields & Shopping Cart Management for instructions on deleting a line item.)

Note that each Supplier's site will be slightly different but the processes of submitting an order and being punched back to CSUBUY is the same.

5-ADDING ITEMS TO A SHOPPING CART: USING FORMS

When you are unable to locate the Product from the PunchOut/Catalog Supplier, you would need to use a Form. Depending on the item you are purchasing, you would use one of the following Forms:

Goods and Services Request

- Goods – Other
- Services – other
- Classroom or Laboratory Supplies
- Equipment
- Furniture
- Marketing or Branded Items
- Transportation Charters
- Legal Services
- Drone
- Vehicles

Facilities and Construction Request

- Utilize this form to initiate Facilities or Public Works Project

Hospitality Request

- Award or Service Recognition
- Farewell Event
- Venue
- Catering
- Morale Function

- Entertainment Services
- Participation Incentive
- Farewell Award
- Promotional Items
- Other

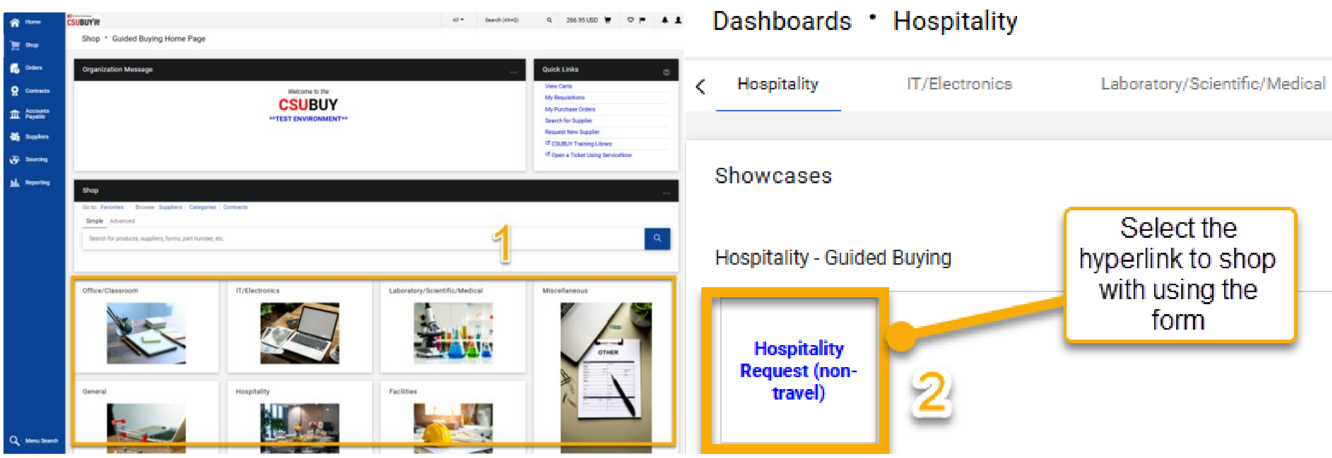
Independent Contractor Request
Utilize this form to initiate a request for services provided by an individual who is self-employed, guest speaker or guest lecturer.

IT Hardware Request
Utilize this form to initiate a request for IT Hardware and Accessories.

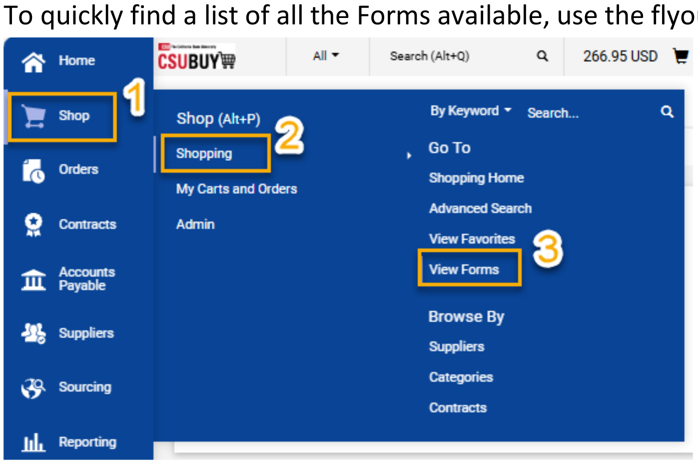
IT Software Request
Utilize this form to initiate a request for IT Software or Cloud Services. 33

Finding the Form

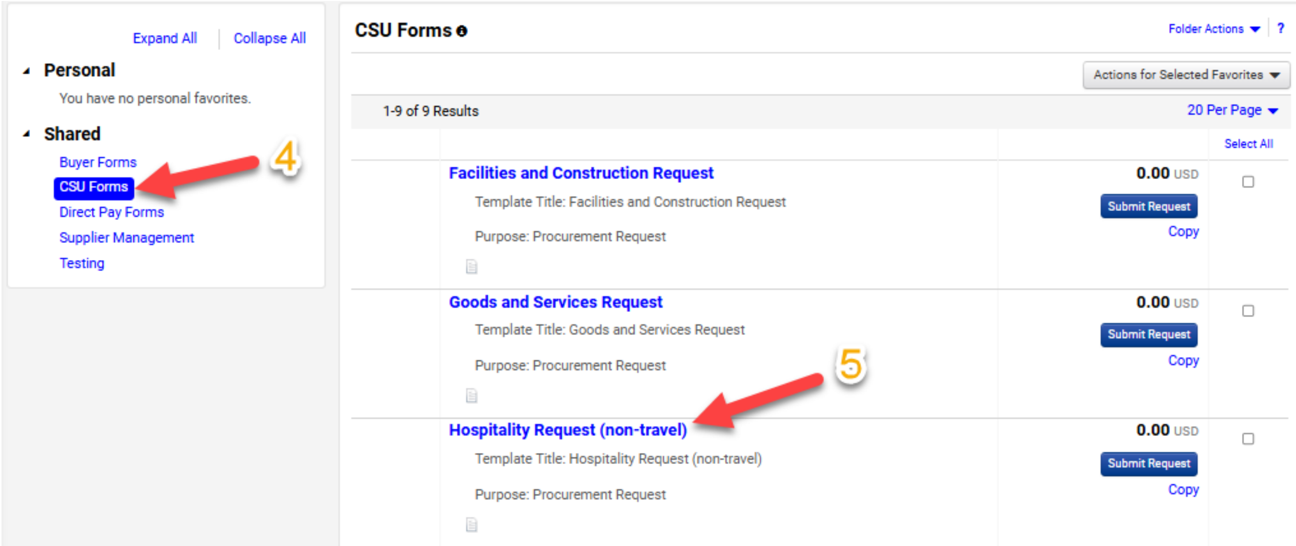
1. Go to the Shopping (1) Home Page and in the (2) Showcase section, select the Category of your product. Then go to the Form as shown.



2. To quickly find a list of all the Forms available, use the flyouts and select View Forms.

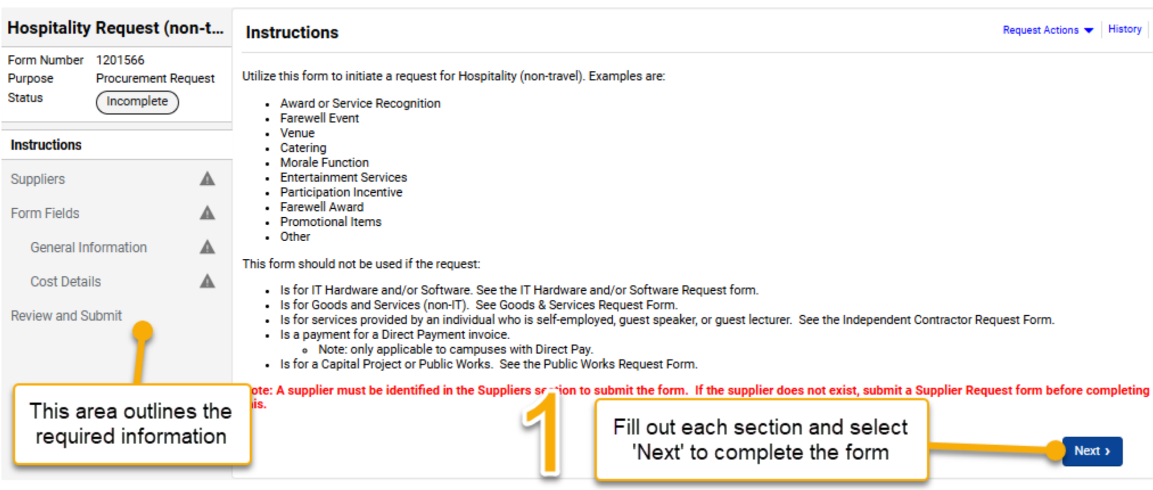


You will then see the Forms available. Either click on the blue hyperlink or click on Submit Request.

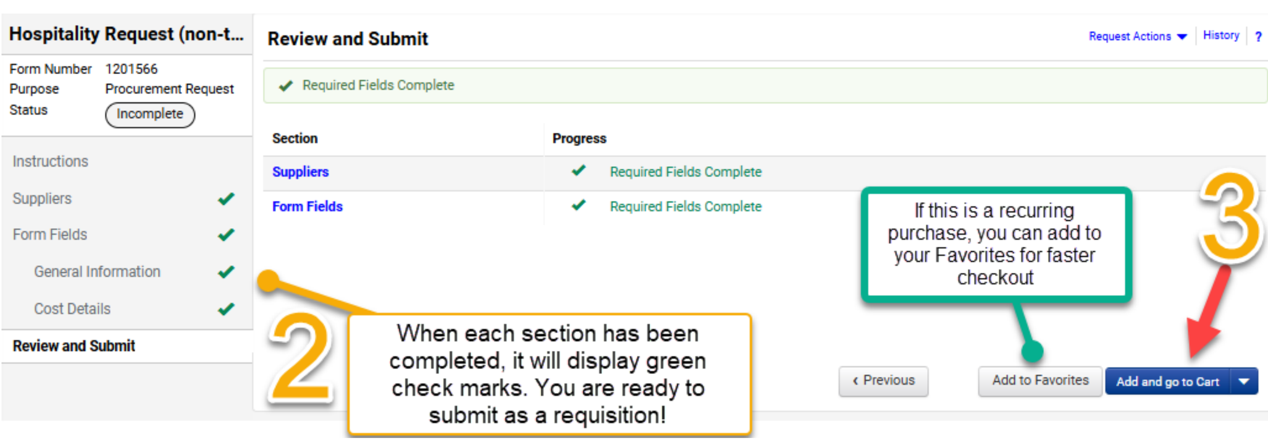


Completing the Form

The Form will open, and you will see instructions on how to complete the Form as shown below.



Follow through the workflow, entering all necessary information. As you follow the prompt, you will have the opportunity to enter the Supplier, Item and additional information about the product you would like to purchase.



Supplier

You may Search for Registered Suppliers and select the Supplier you would like to purchase from. If you are unable to locate the Supplier, the Supplier is not active for CSULB business units to shop from. See Section 14-Suppliers for additional information regarding steps to take to add the Supplier.

Add Lines to the Shopping Cart Order a Form

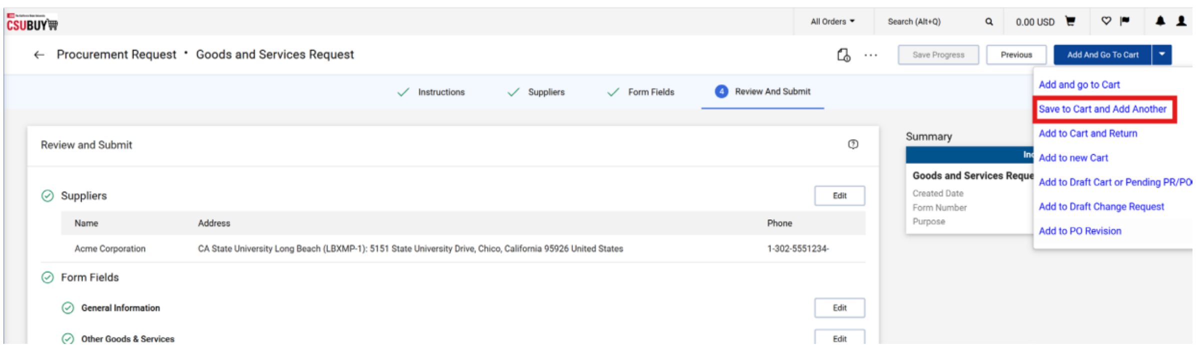
Important note: All lines must include a separate Form, but they must be the SAME Form. In other words, you cannot have a Goods and Services Form and an IT Hardware Form in the same Shopping Cart. No mixing forms in the Shopping Cart.

There are three ways to add a line to the Shopping Cart when using Forms.

<u>When Your First Form/Item is not yet Added to the Shopping Cart and You Want to Use the Same Filled Out Form for Another Item:</u>

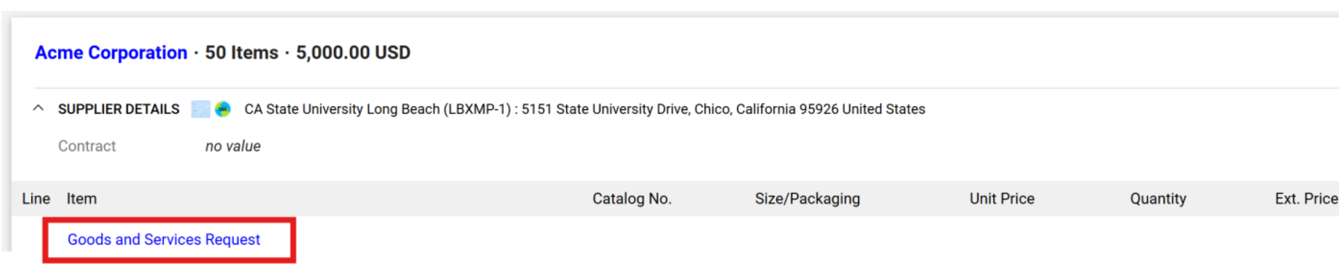
When you are still in the Form select **Save to Cart and Add Another**

This will take you through the form you are currently utilizing, allowing you to change fields such as items, price, quantity, commodity codes, etc.

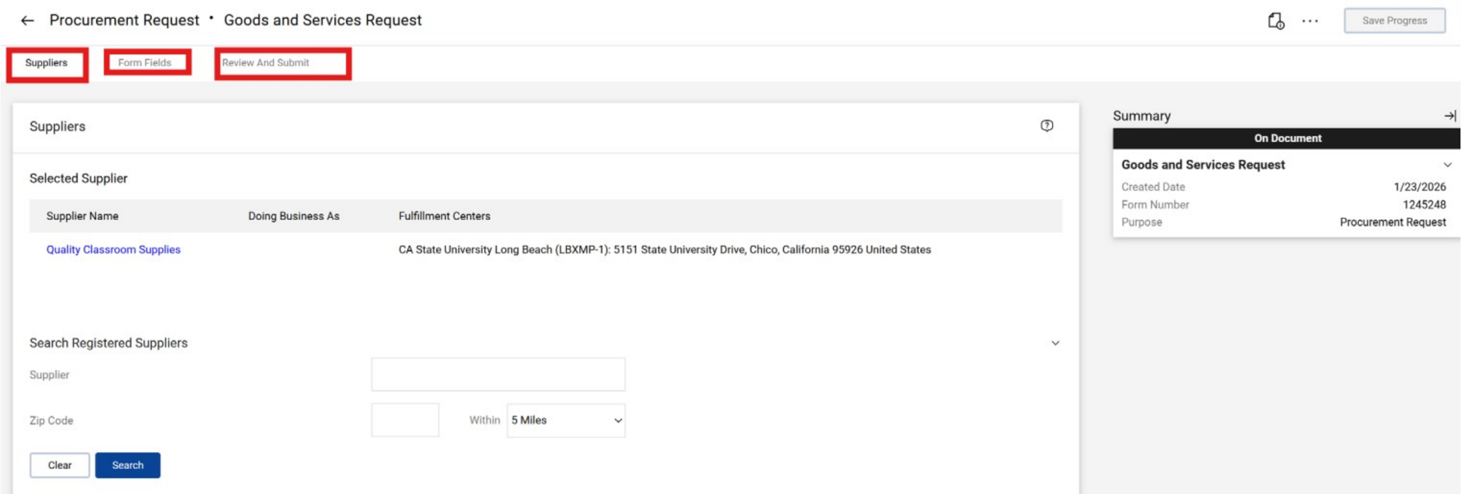


<u>When your First Form/Item is Already in the Shopping Cart and You want to Use the Same Filled Out Form for Adding Another Item:</u>

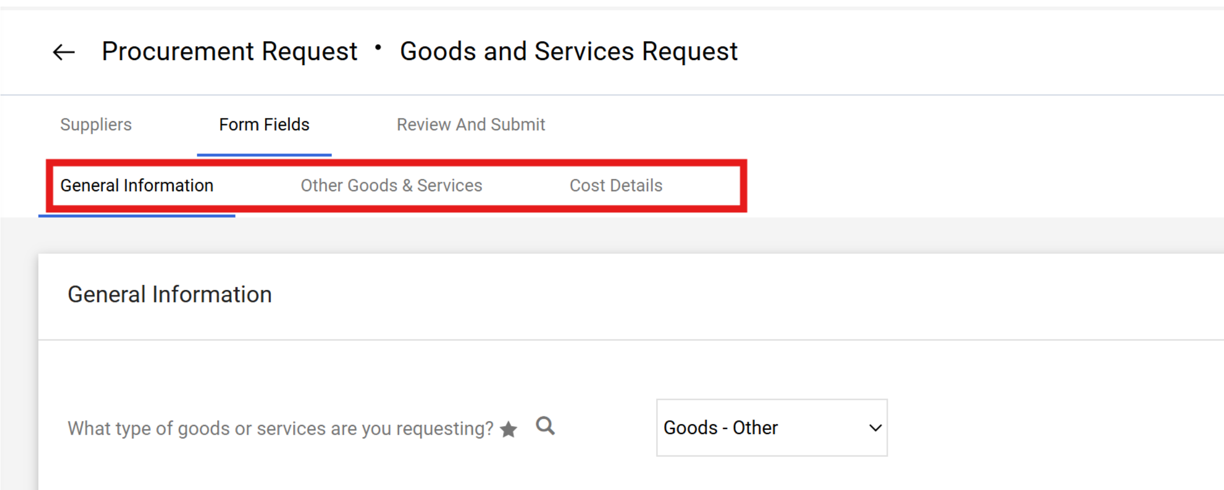
Click on the Form under Item in your Cart.



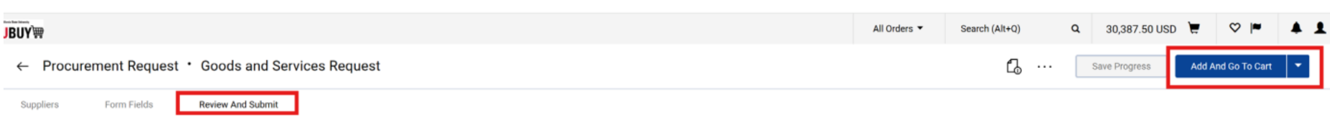
Make updates as needed by clicking on each of the tab below.



Make sure you review each tab under Form Fields and edit as needed:

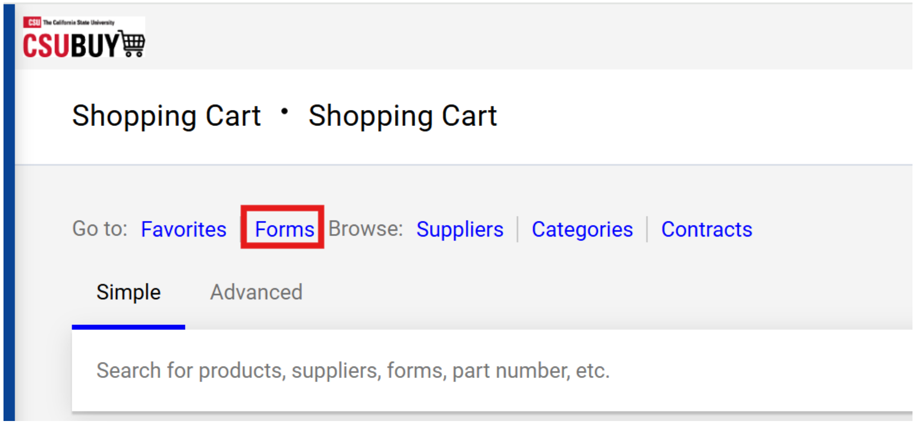


As a final step, click on **Review and Submit** and then **Add And Go to Cart**.



<u>When your First Form/Item is Already in the Shopping Cart and You want to Start with a BLANK Form</u>

From the Shopping Cart, select Forms and make sure you select the same exact Form as the one already in your Shopping Cart. For example, if you have an IT Hardware Form, you must select the IT Hardware Form. If you need to use a different Form, please start with a new empty Shopping Cart.

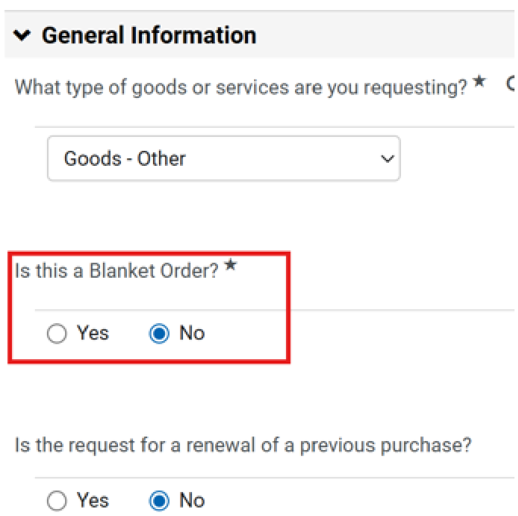


Then proceed to complete it and Add to your Cart.

Note on Blanket PO

When completing a Form in the General Information section, indicate if the purchase is related to a Blanket PO. A Blanket PO is a Purchase Order for goods or services with multiple payments not based on quantities being delivered.

- By indicating YES, the entire PO remains open until the total dollar amount has been fully vouchered.
- Each line on an Amount-Only/Blanket PO should have a quantity of ONE using the Unit of Measure (UOM) each or lot. The entire PO must be by quantity or by amount, it cannot contain a mix of both line types.



Multi-Year PO
This should never be selected for our campus.

Once the Form is complete, a line is created in the Shopping Cart with the Form. You may add additional Forms in the same Shopping Cart as long as it is the same Form. Do not mix Forms in the Shopping Cart.

6-ADDITIONAL FORMS

There are additional Forms available that are not used to purchase a product:

- Payment for Unauthorized Purchase

- Request to Close PO
- Supplier Extension or Re-Invite

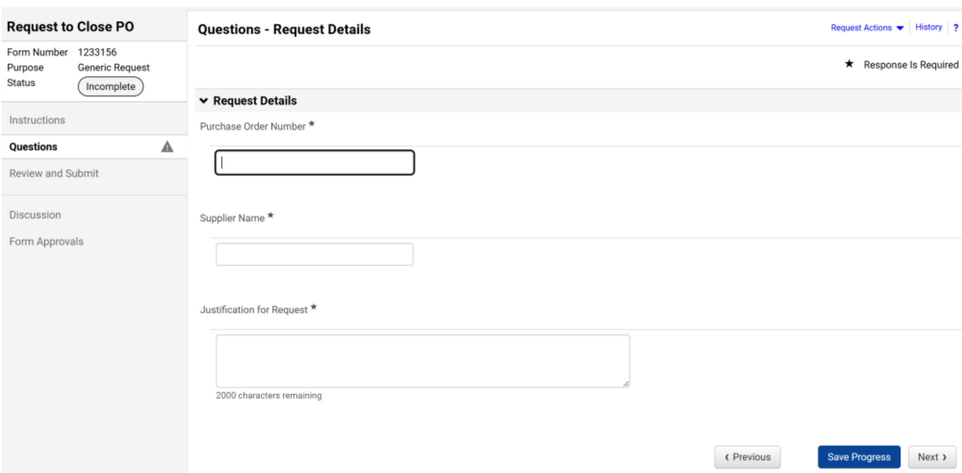
Payment for Unauthorized Purchase
A purchase that does not require a PO. Example include:

- Academic Recruitment Commission/Fee
- Attorney Fee
- Freight / Postage / Shipping
- Legal Settlement
- Local & Federal Government Payment
- Medical Service Payment
- Memberships
- Official/Referee Payment
- Permit / License (non-IT)
- Royalty Payment
- Subscription/Publication (non-IT)
- Utilities

When opening the form, follow the prompts and submit the form.

Request to Close PO
A PO may need to be manually closed if the order is complete, but the system still shows an open status due.

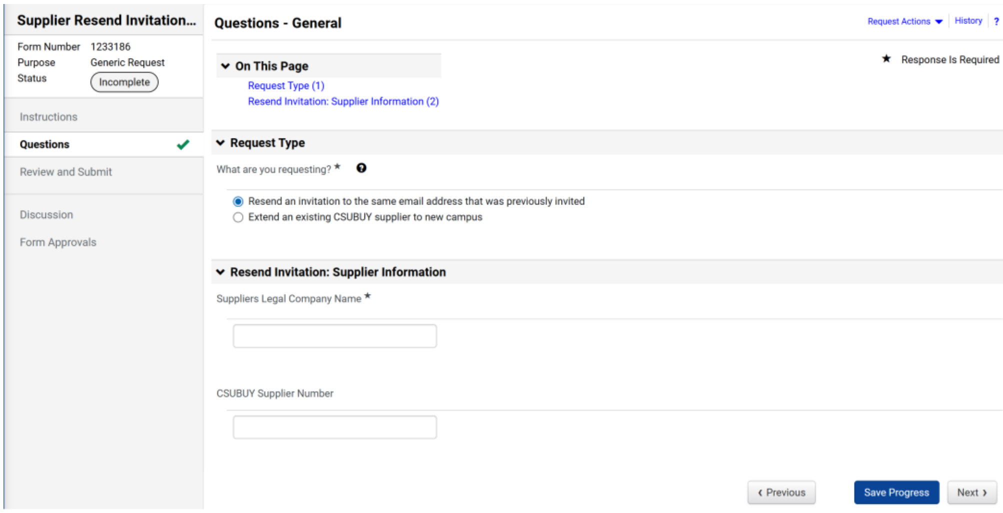
When opening the Form, complete the fields click Next and on the next screen click Submit.



Supplier Extension or Re-Invite

A supplier extension or re-invitation may be necessary when a supplier needs to be added to a different business unit or when reactivating a supplier who is currently inactive in the system. Please see Section 14-Supplier for detailed information.

When opening the form, select the correct option and answer the questions on the Form.
Then click **Next** and on the next screen click **Submit**.



7-SHOPPING CART FIELDS & SHOPPING CART MANAGEMENT

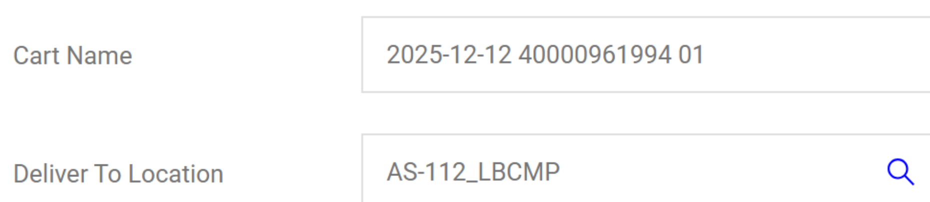
This section will provide guidance on the following:

- Description of fields in a Shopping Cart
- Creating a new Shopping Cart
- View Draft Shopping Carts
- Deleting a Shopping Cart
- Copy a Shopping Cart
- Other Actions in a Shopping Cart (including removing an item)

Shopping Cart Fields

The first section includes **Cart Name** where you may edit the Shopping Cart name.

Add the **Deliver To Location** which is the **Campus building and room number** you would like your product delivered. **DO NOT** enter **CSULB Receiving** since this is the Ship To location. You may search for available places using the magnifying glass icon.



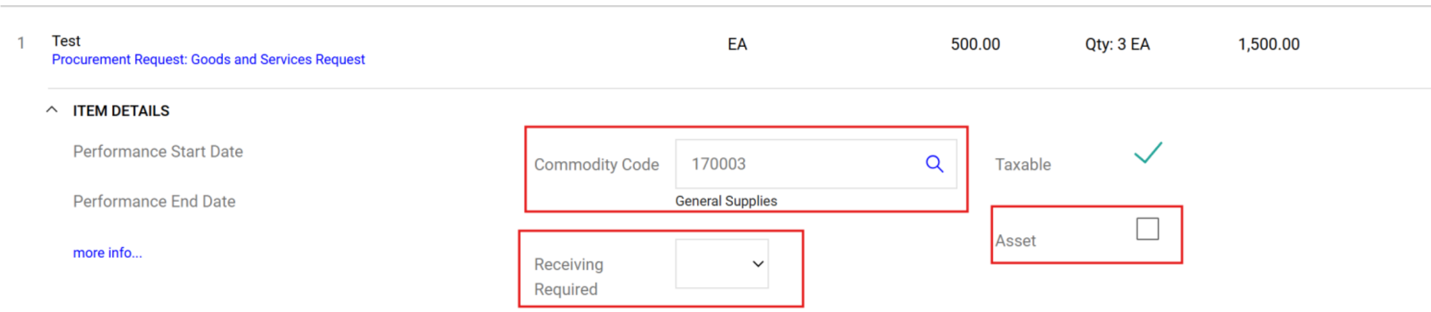
The next sections provide Supplier Details and the Line Items for the Products in your Shopping Cart.

In the Shopping Cart, you may:

1. Confirm the **Commodity Code** and adjust, if needed. The Commodity Code is automatically entered based on the Supplier. The Supplier is assigned a Commodity Code. However, the Commodity Code may need to be adjusted. **THIS IS THE ONLY PLACE YOU MAY ADJUST THE COMMODITY CODE**. If a Shopper is assigning the Cart to a Requester, the Requester can return to the cart by clicking on the shopping cart and then selecting

"View My Cart". Then the Requester can update the Commodity Code. Please see Chapter 6-Section 1 for a list of Commodity Codes and Section 12 for more information on Commodity Codes.

2. Do not adjust **Receiving Required**. This is automatically checked based on commodity code and will trigger the requirement to Create a Receipt for when you receive the product or service.
3. Indicate if the product is an **Asset** that should be capitalized (must be at least $5,000). This will also trigger the requirement to Create a Receipt when you receive the product.

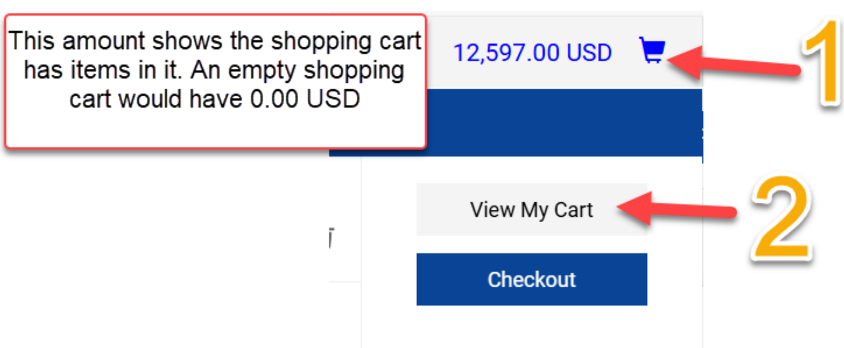


Creating a New Shopping Cart

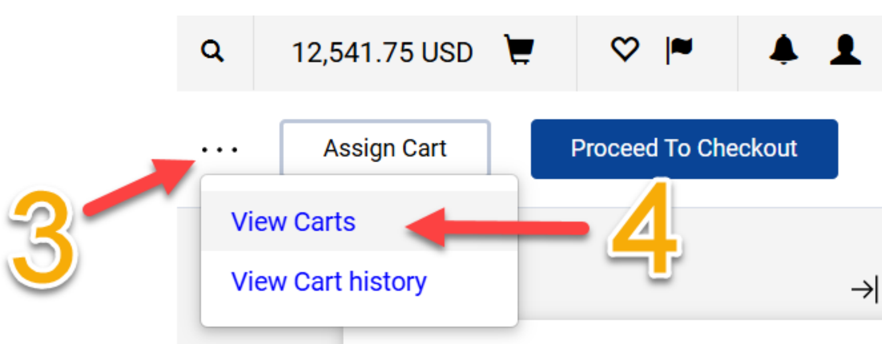
You may save your current Shopping Cart with items in it as a draft and create a new Shopping Cart by following these instructions:

Click on the shopping cart icon in the top right corner and select **View My Cart**.

This takes you inside your shopping cart.

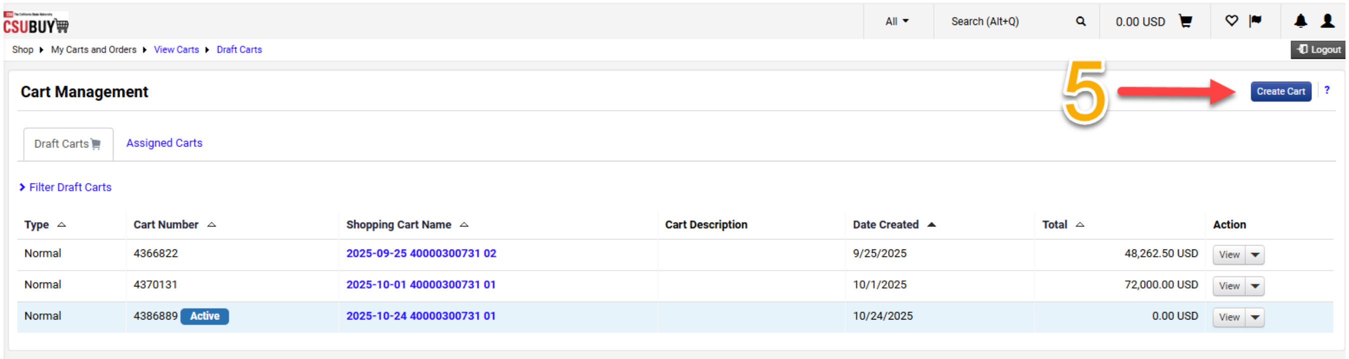


Click the 3 dots in the upper right corner and select **View Carts**



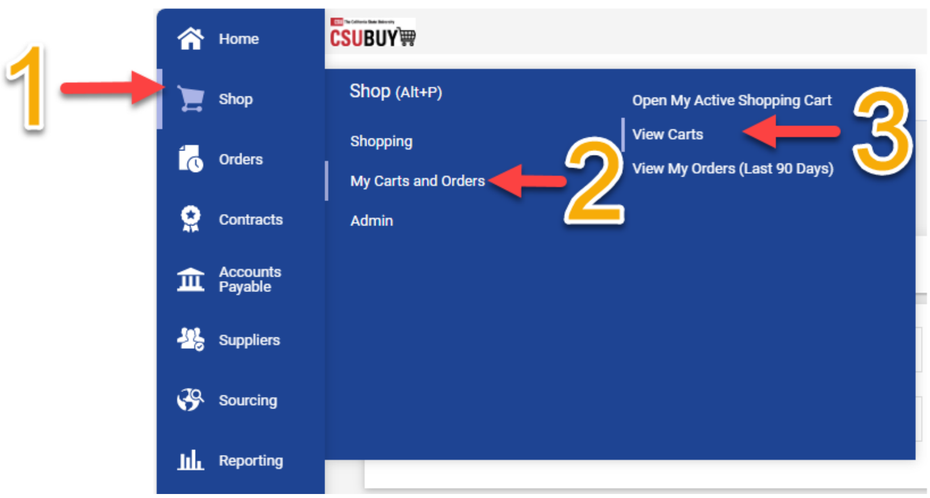
This takes you to the Cart Management screen with all the Draft Carts. The Cart Number is actually your DRAFT Requisition number.

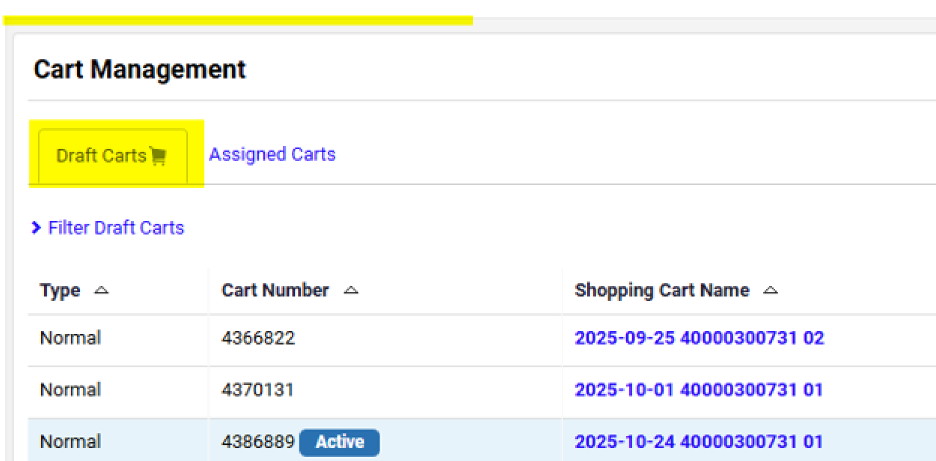
Click on **Create Cart**



Viewing Draft Carts

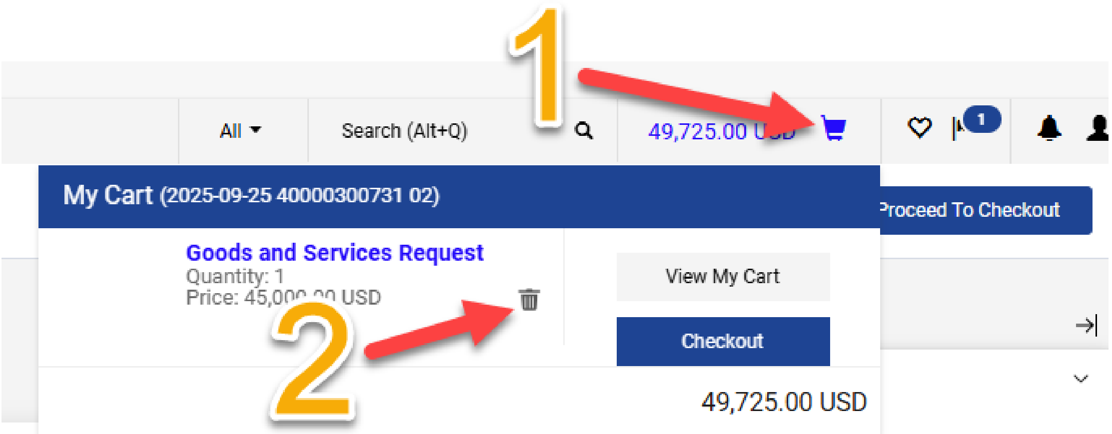
To see your draft carts, go to Shop > My Carts and Orders > View Carts > Draft Carts.



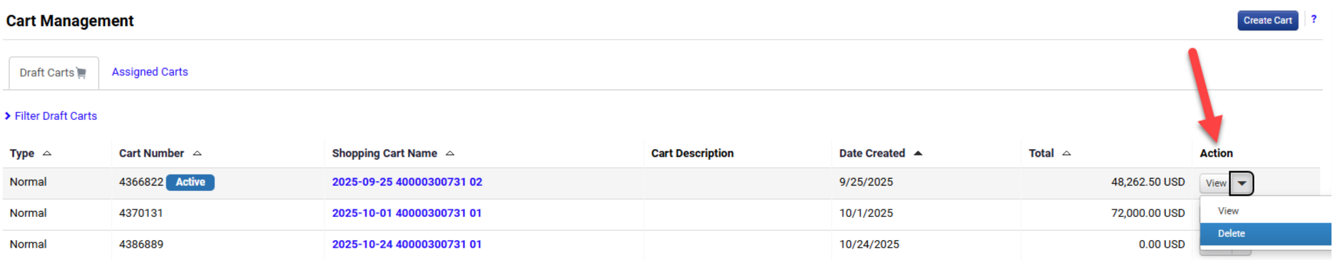


Delete a Shopping Cart

The Active Cart Number indicates the Shopping Cart you are currently in. To delete a Shopping cart you are currently in, select the cart icon, then the trash icon to delete. Note, this action deletes the item; therefore, if you have more than one item, you must delete them all.



Alternatively, from your Cart Management page, in the Draft Carts tab, select the dropdown from the Action column and select **Delete**.

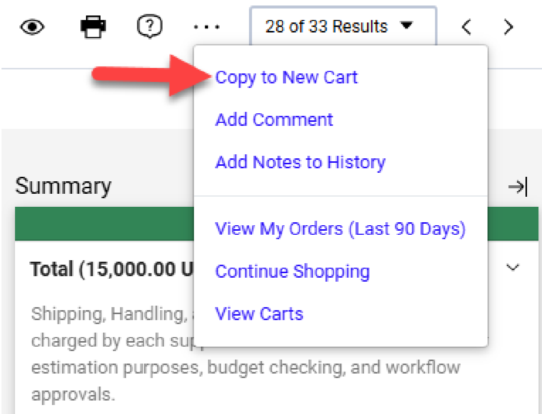


Copy to a Shopping Cart
(For Forms ONLY; not for PunchOut Orders)

You may copy a previous order to a new Shopping Cart. This is helpful if you have items that you purchase frequently. You could save a draft of the Shopping Cart for future purchases and/or repurchase the previous order. Go to **My Requisitions** as shown below.

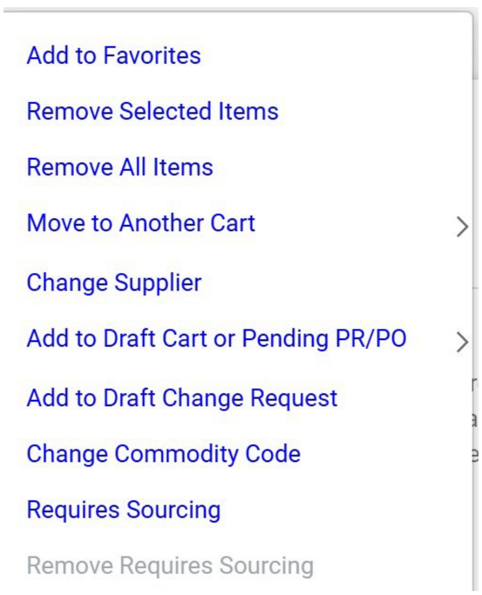
Select the requisition number with the items you would like to repurchase.

In the upper right corner of the requisition, select **Copy to New Cart**. This will create a new cart with the same items you have previously purchased.

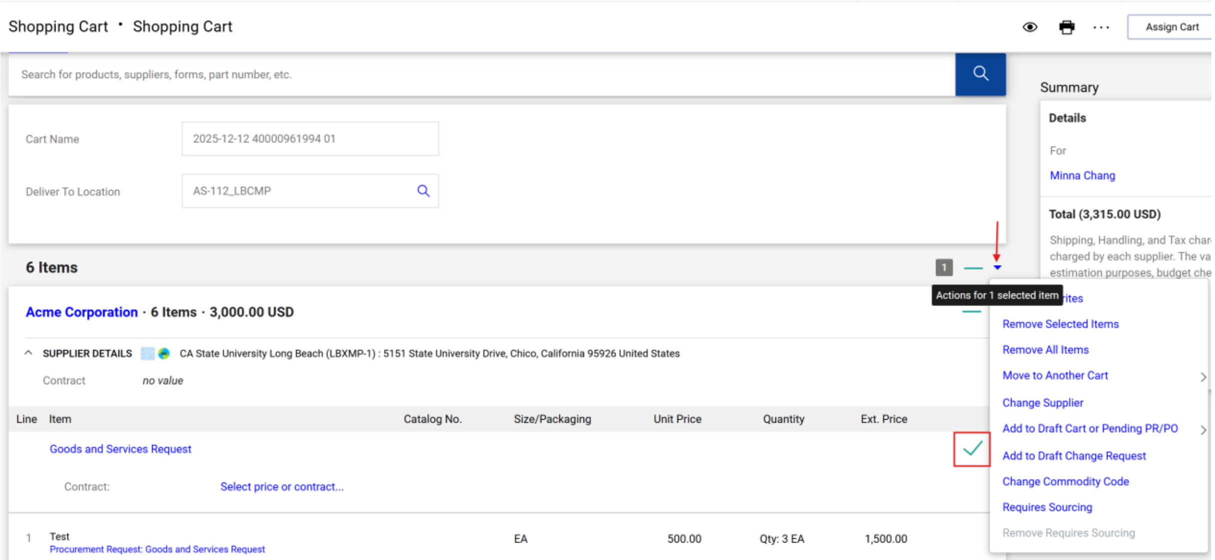


Actions in a Shopping Cart

You have the ability to perform the following actions in the Shopping Cart.

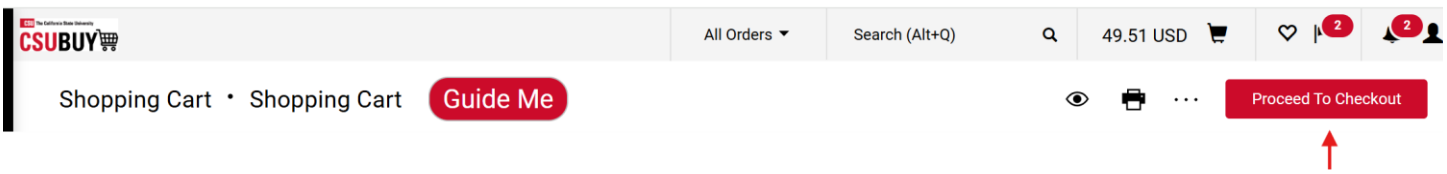


By clicking on the arrow, the actions become available. You may select one, more than one or all items in the Shopping Cart in which the action will apply. The selected items are indicated by the green check mark. In this example only one item in the Shopping Cart was selected.



8-PROCEED TO CHECKOUT & DRAFT REQUISITION OVERVIEW

Once your Shopping Cart is complete, you will click on **Proceed to Checkout**.

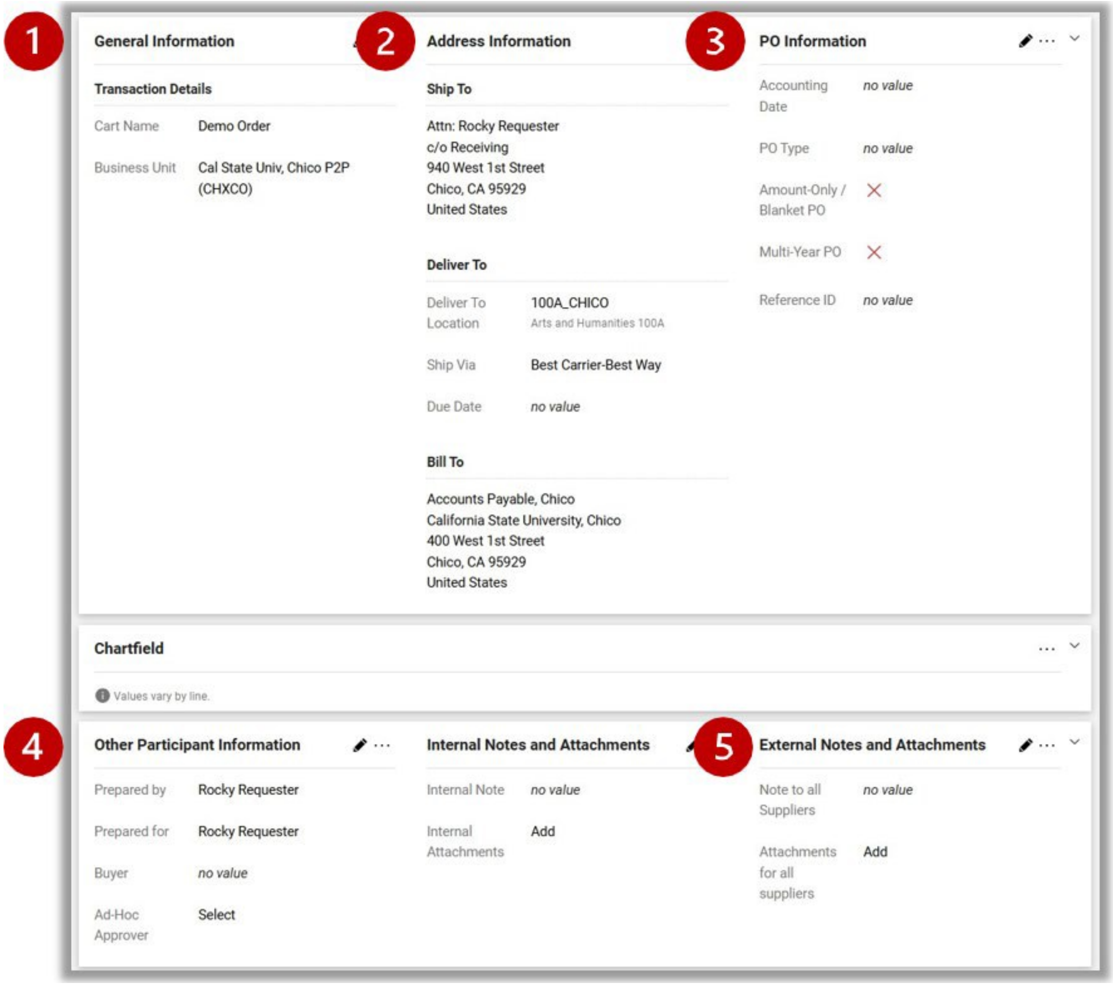


This action will create a DRAFT Requisition with a number. Please keep in mind, at this stage this is a DRAFT Requisition. It is not considered a Requisition until it is submitted to workflow by the Requester.

You may also click on the cart icon and go back to the Shopping Cart stage. The following is the Summary tab.

Reviewing the Summary of the DRAFT Requisition

There are important elements in the Summary of the DRAFT Requisition to be reviewed. Updates may be made by clicking on the pencil icon, which indicates a field that can be edited.



1. **Cart Name / Business Unit**
2. **Ship To / Deliver To / Bill To**
3. **PO Information**

   Amount-Only/Blanket PO

   - Purchase Order for goods or services with multiple payments not based on quantities being delivered. By indicating YES, the entire PO remains open until the total dollar amount has been fully vouchered.
   - Each line on an Amount-Only/Blanket PO should have a quantity of ONE using the Unit of Measure (UOM) each or lot. The entire PO must be by quantity or by amount, it cannot contain a mix of both line types.

Multi-Year PO

This should never be selected for our campus.

4. **Other Participant Information**

   <u>Prepare By:</u> The user that submitted the cart into workflow which is the Requester.

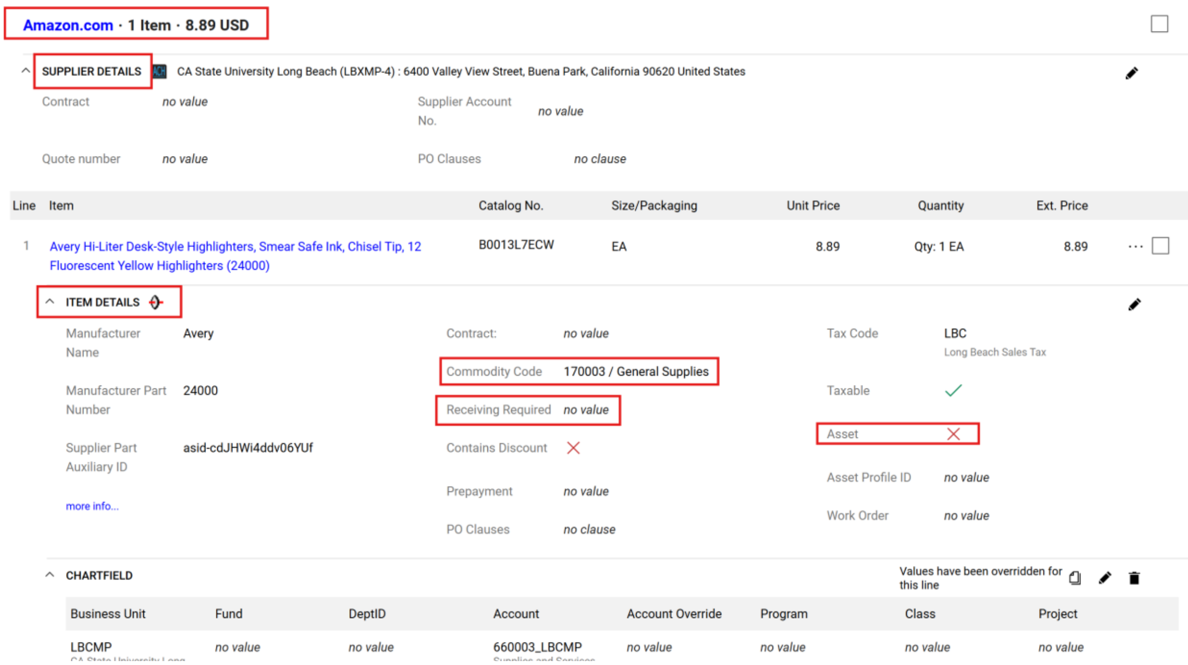
   <u>Prepare For:</u> The user that created the cart, which is either the Shopper or Requester. They are also the PO Owner, Voucher Owner and the user responsible for Verify Receipt or Create a Receipt when the product or service is received.
5. **Notes and Attachments**

   You may add a note to the Draft Requisition as well as attach a file or link. Notes and Attachments are useful to let others know additional information regarding the order.

Internal: These are only visible to all users that are internal, within the CSU
External: These are visible to both external and internal users. External users would be suppliers.

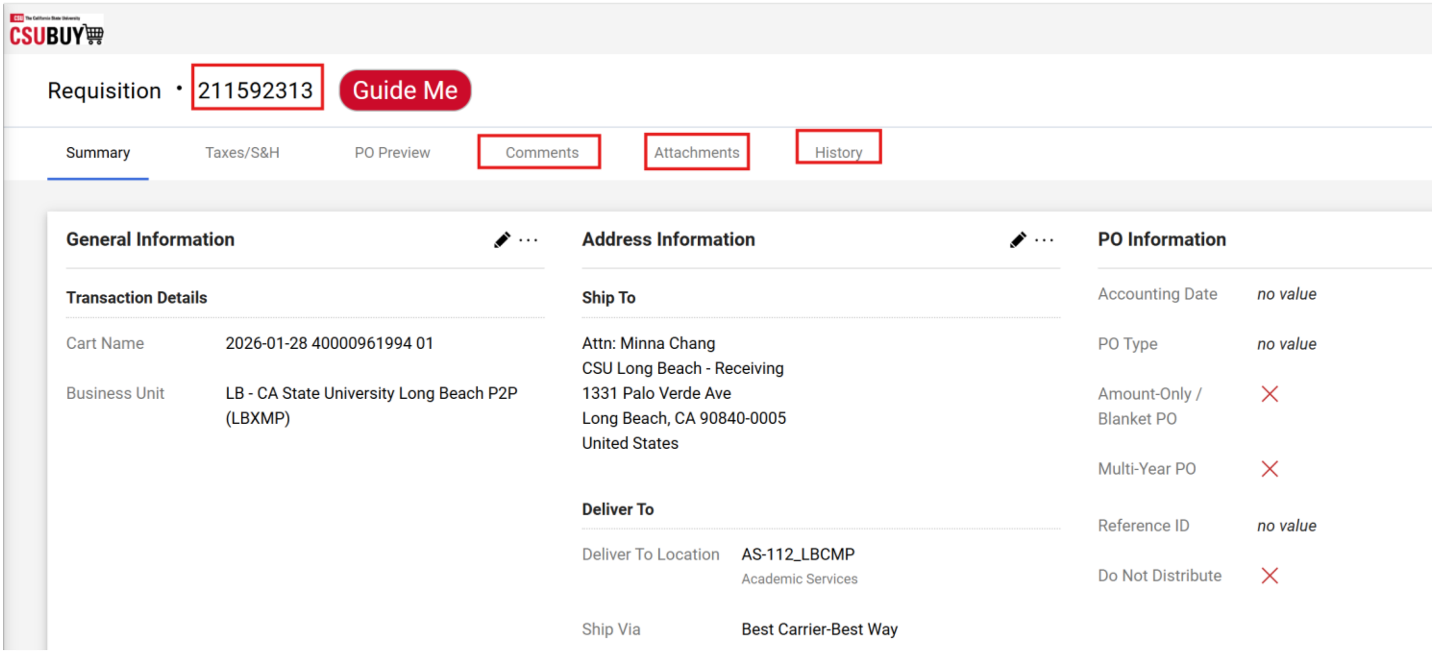
Supplier Details and Item Details

The next section includes information on the Supplier and the Item purchased.



1. **Supplier Detail**
2. **Item Detail**
   Performance Start/End Date (if available): Please include these dates if you are receiving a service
   Commodity Code: Ensure the correct commodity code is entered. The commodity code will then create a default account entry. See Section 12 regarding Commodity Codes and Chapter 6, Section 1-List of Commodity Codes to Account Codes
   Receiving Required: Leave this as blank. Receiving Required will be triggered based on the Commodity Code for the item being purchased.
   Asset: Please mark YES if you know the item is an asset that will be capitalized, typically assets over $5,000.
3. **Chartfield**
   Shoppers may complete the Chartfields but are not required. They may assign the cart to the Requester to complete the Chartfields.
   Requesters are required to complete the Chartfields before submitting the Requisition to workflow.
   See Section 9-Draft Requisition: Chartfields

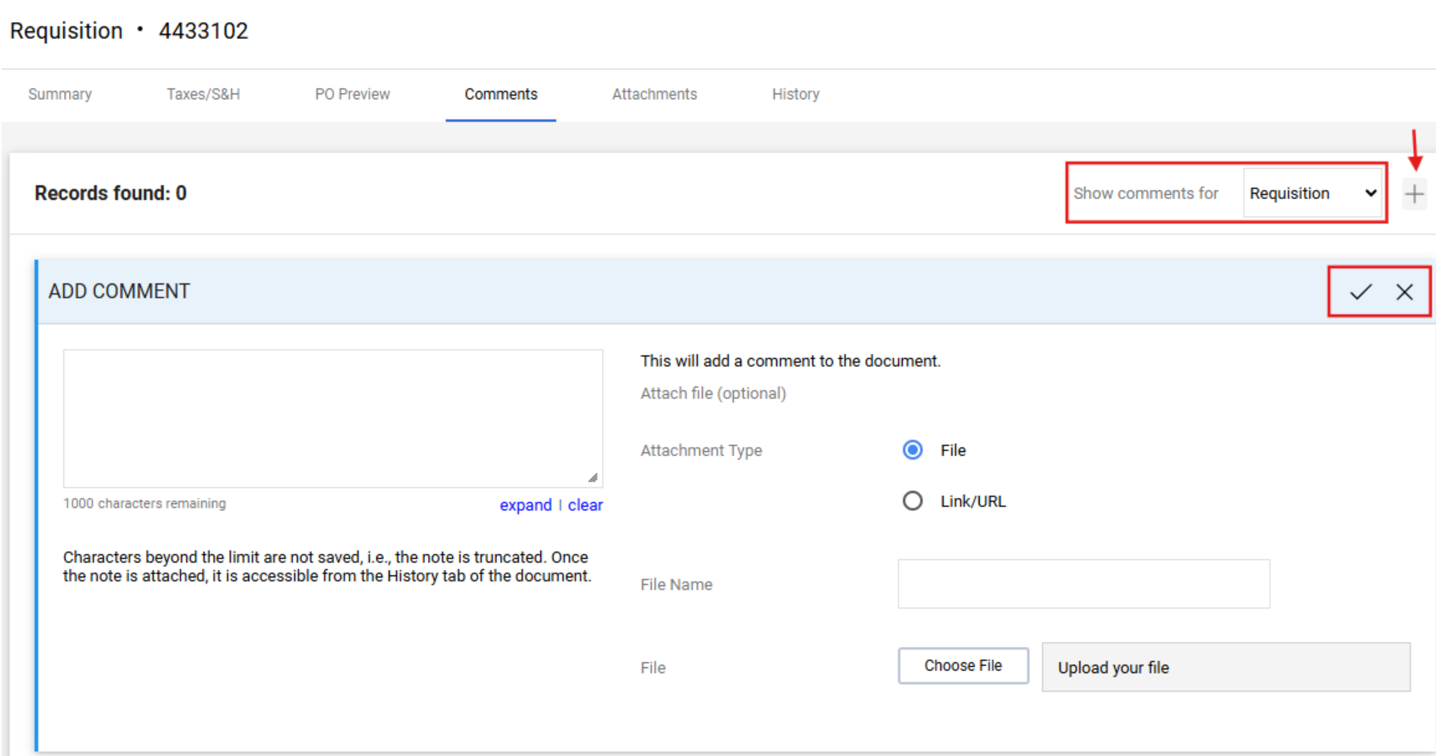
Comment, Attachments, and History



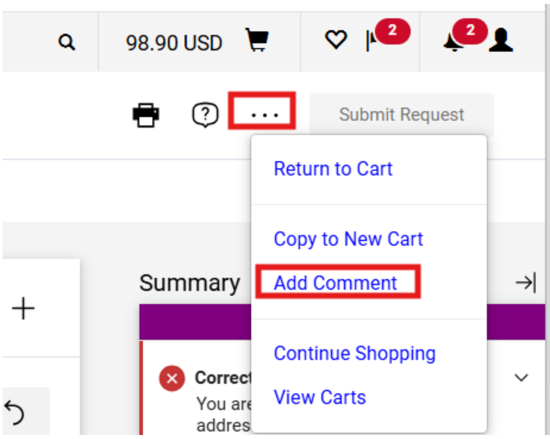
Comment Tab

Allows you to enter Comments as well as Attachments that may be helpful to the Reviewer or Approver. You may select from the drop-down menu if you would like your comment and attachment to appear on the Requisition, Purchase Order, Voucher, Receipt or ALL of these documents for this order.

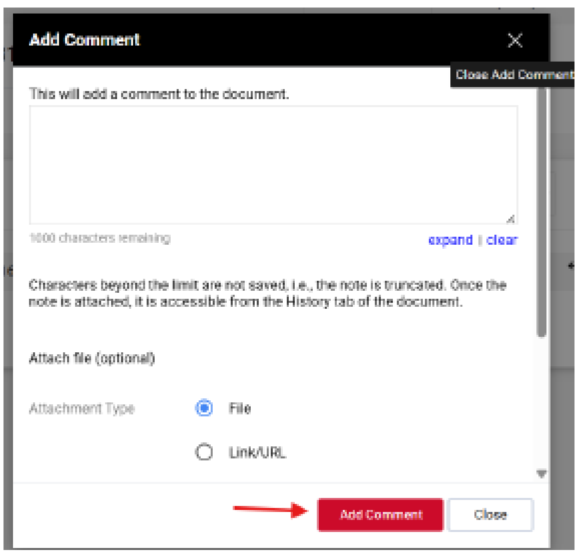
When the box below appears, type your comment. **Once you click on the check mark, you cannot edit or delete it.** Click the **X** if you decide you do not want to add a comment. You may also add an attachment or link.



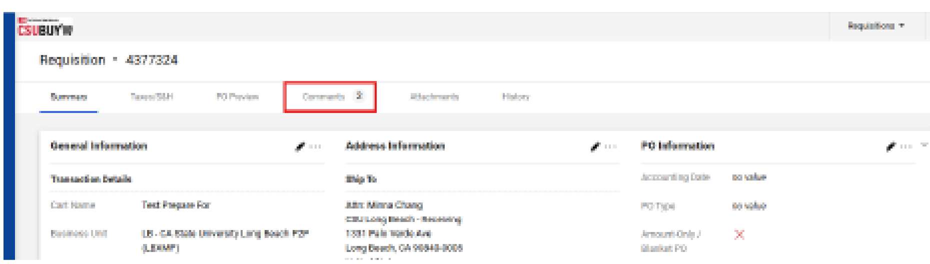
You may also add a comment by clicking on the three dots and selecting Add Comment



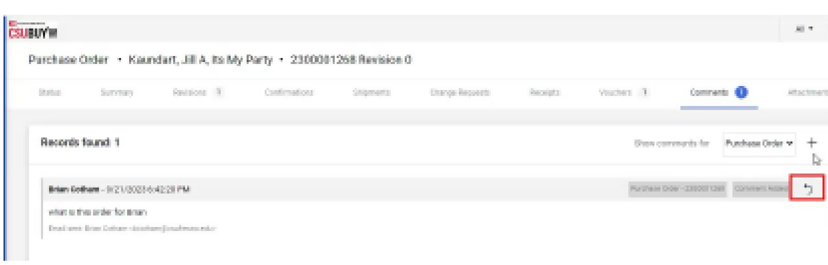
The pop-up will appear where you may type your comment. You also have the option to add an attachment.



When a comment is added, it is indicated as shown below:



A user can reply to a comment by clicking on the arrow as shown below:

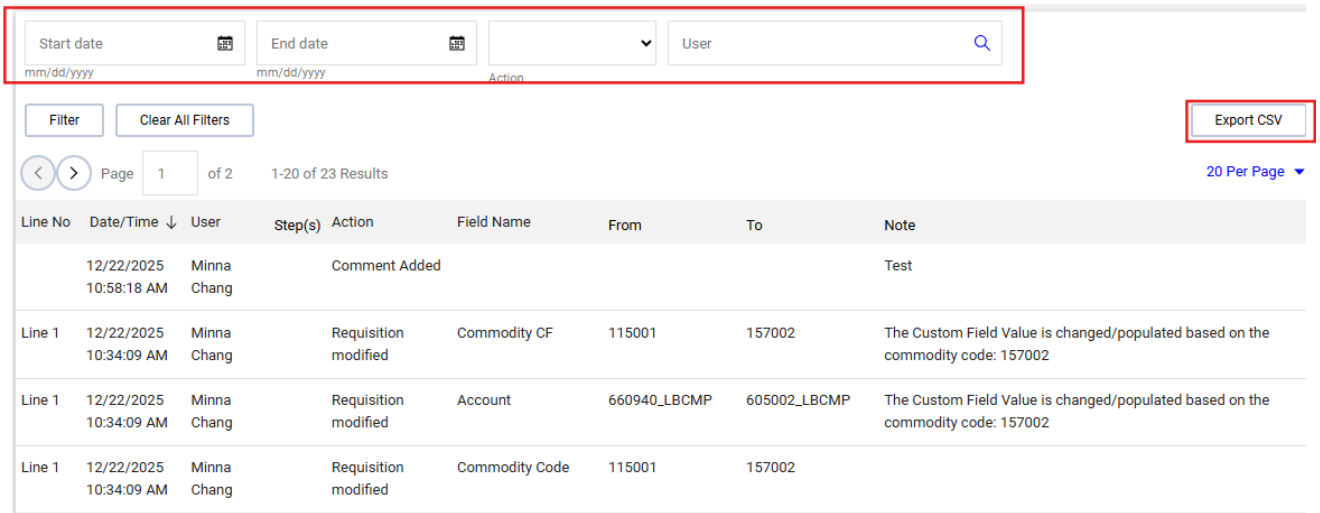


Attachments Tab

You may add an internal or external attachment here. Internal attachment are only viewed by CSU users and external attachments cane be viewed by those outside the CSU such as Suppliers.

History Tab

This allows you to see all the changes made to the document, who made the change and the day/time of the change. This is extremely helpful for troubleshooting any issues.



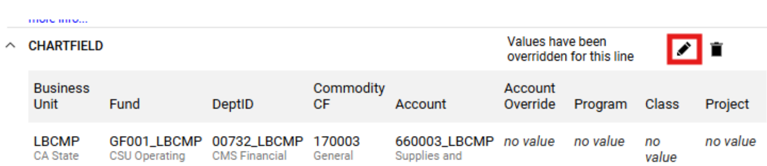
9-DRAFT REQUISITION: CHARTFIELDS

Chartfields for each item must be entered before the Requester submits the Requisition to workflow.
<u>Shoppers</u> may complete the Chartfields but are not required. They may assign the cart to the Requester to complete the Chartfields.
<u>Requesters</u> are required to complete the Chartfields before submitting the Requisition to workflow.

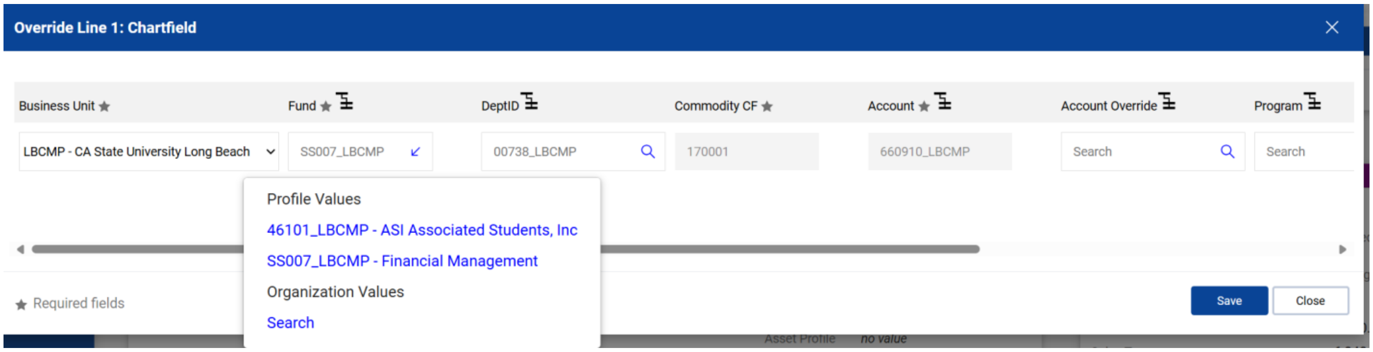
Enter Chartfields

The values in the chartfield will be automatically populated if you set up your Code Defaults. (See Chapter1 Profile Set Up, Section 4 Setting Account Code Defaults) The Account is populated automatically based on the Commodity Code.

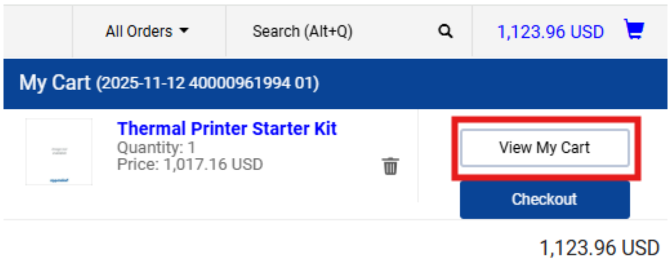
The chartfield can also be edited by clicking on the pencil icon.



You may edit the Business Unit, Fund, and Department ID. The Commodity Code and Account is automatically populated. **If the auto populated Account is not correct, you may override the Account by entering the updated Account in the Account Override field**. (Please note, an Account Override entry will trigger an Accounting Review to be added to the workflow.) You may also add a Program, Class, and Project ID in the fields.

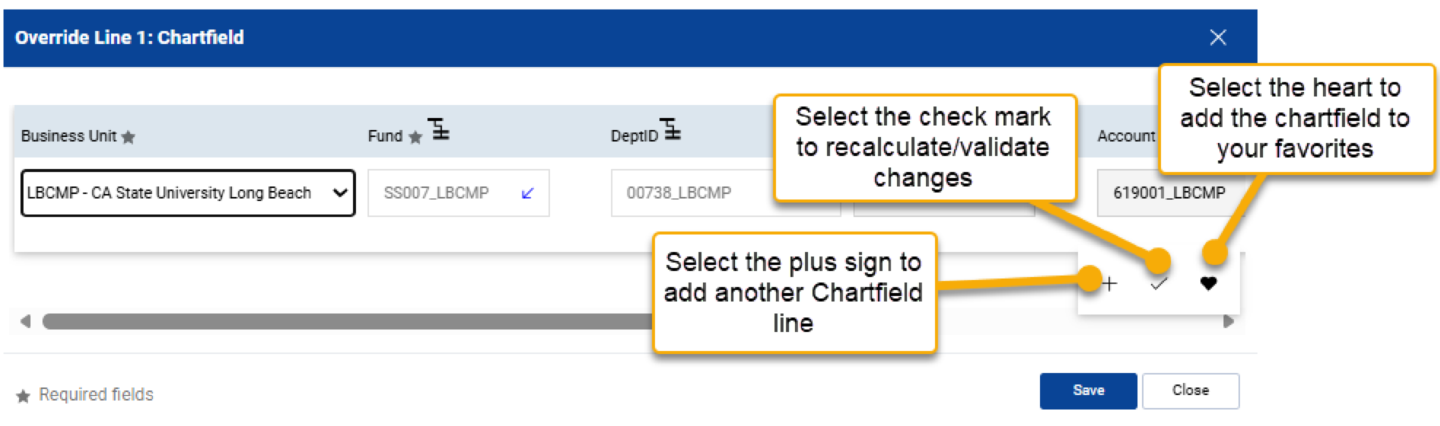


Commodity Code could only be edited in the Shopping Cart by View My Cart. Edit and then Proceed to Check Out again.

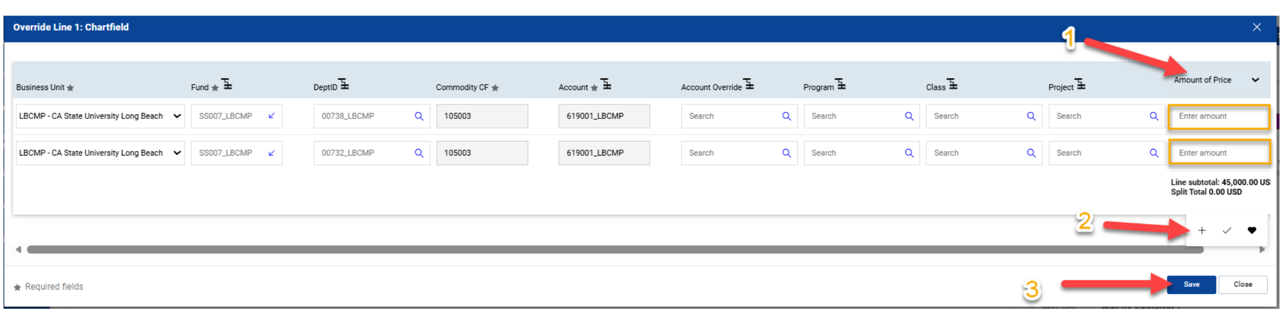


Split Chartfields

If the item should be charged to separate funds or departments, select the plus sign in the bottom right corner of the Chartfield Override line and insert the information.

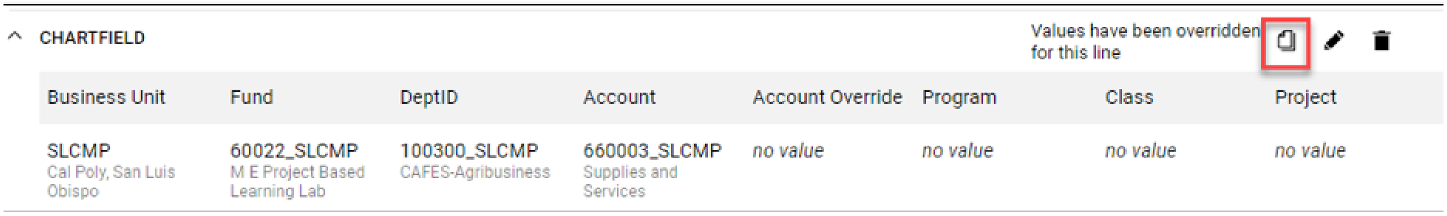


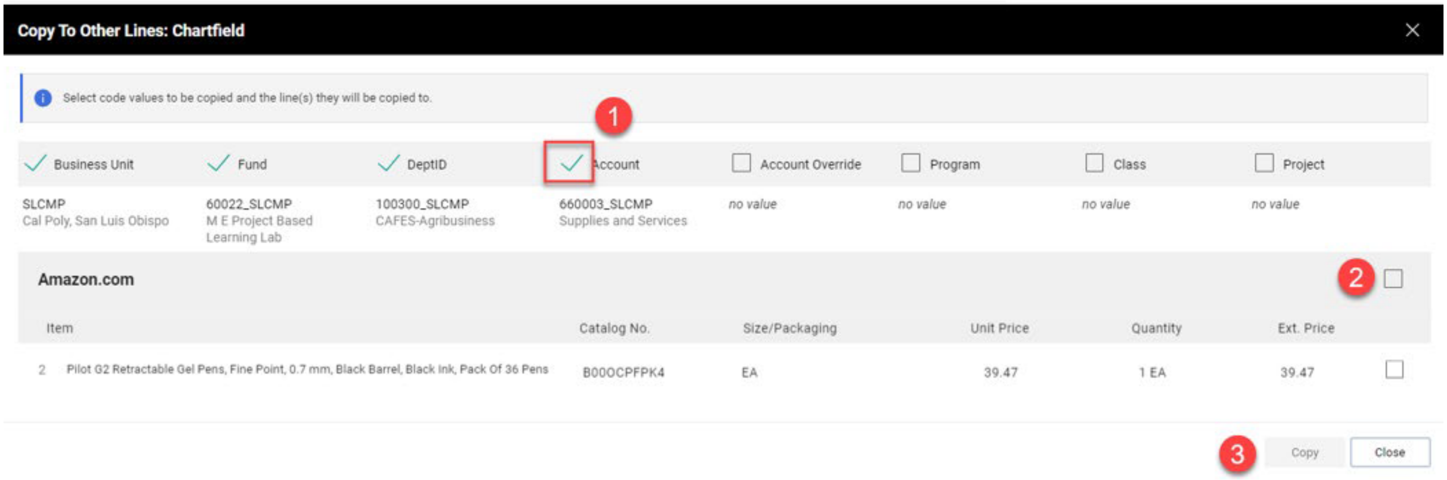
After adding a new line, enter the chartfields in the field. Scroll to the last column and select the dropdown and select how the split should be made. Confirm the split amounts for payment and **Save**.



Copying Chartfields to Lines

Chartfields can be copied from the header to individual lines.





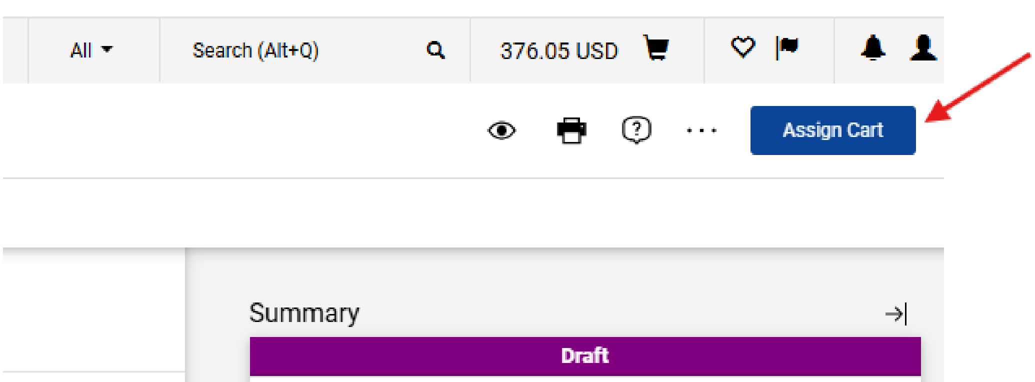
10-ASSIGN CART & SUBMIT REQUEST

Once the DRAFT Requisition has been completed, the next step:

- For a **Shopper**, they would **Assign Cart** to the Requester, who would then review and **Submit Request**
- For a **Requester**, they would directly **Submit Request**

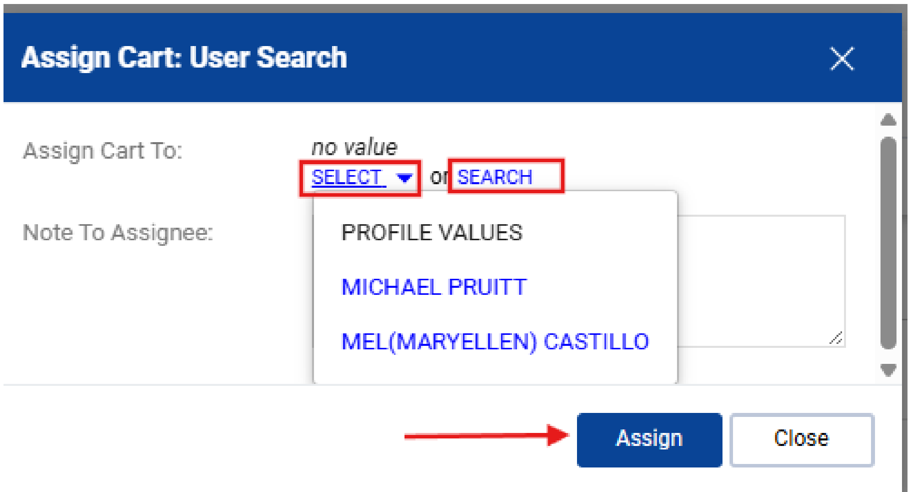
Submit Request kicks off the Requisition (no longer a draft) to workflow with the Requisition going to the DOA Approver for review and approval.

Assign Cart if you are a Shopper.



You will then be able to select a Requester. If you set up a list of Requesters in your default setting, the individual will appear when clicking on **SELECT**. Or you could click on **SEARCH** to find a Requester. You may also write a **Note To Assignee** in the field if there is any information you would like to communicate to the Requester.

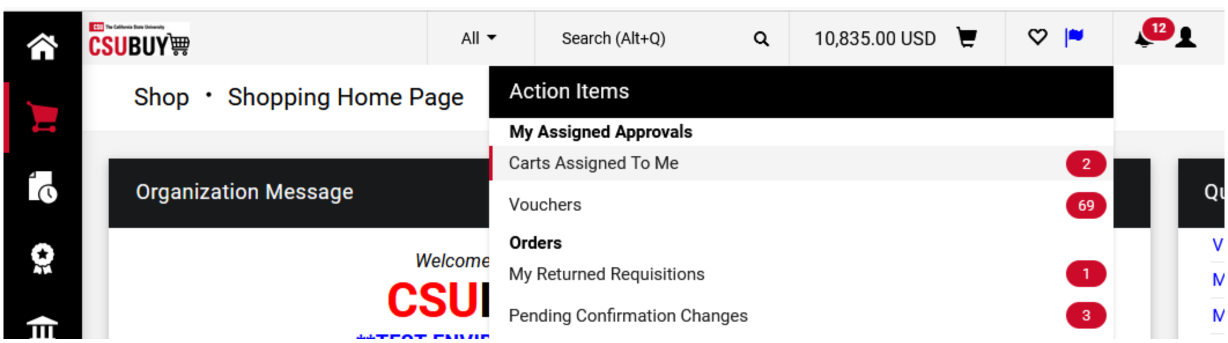
Then click on **Assign**.



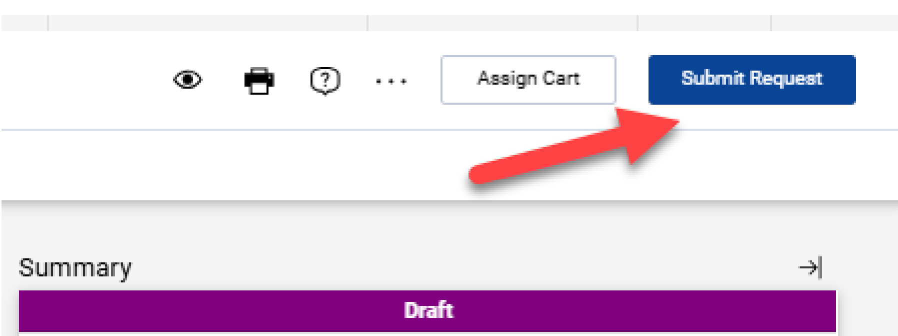
Receiving Cart from a Shopper & Submit Request

The Requester would receive a notification by email or within CSUBUY notification bell icon indicating there is a DRAFT Requisition to review.

In CSUBUY, the Requester can go to the flag icon and click on **Cart Assigned to Me**

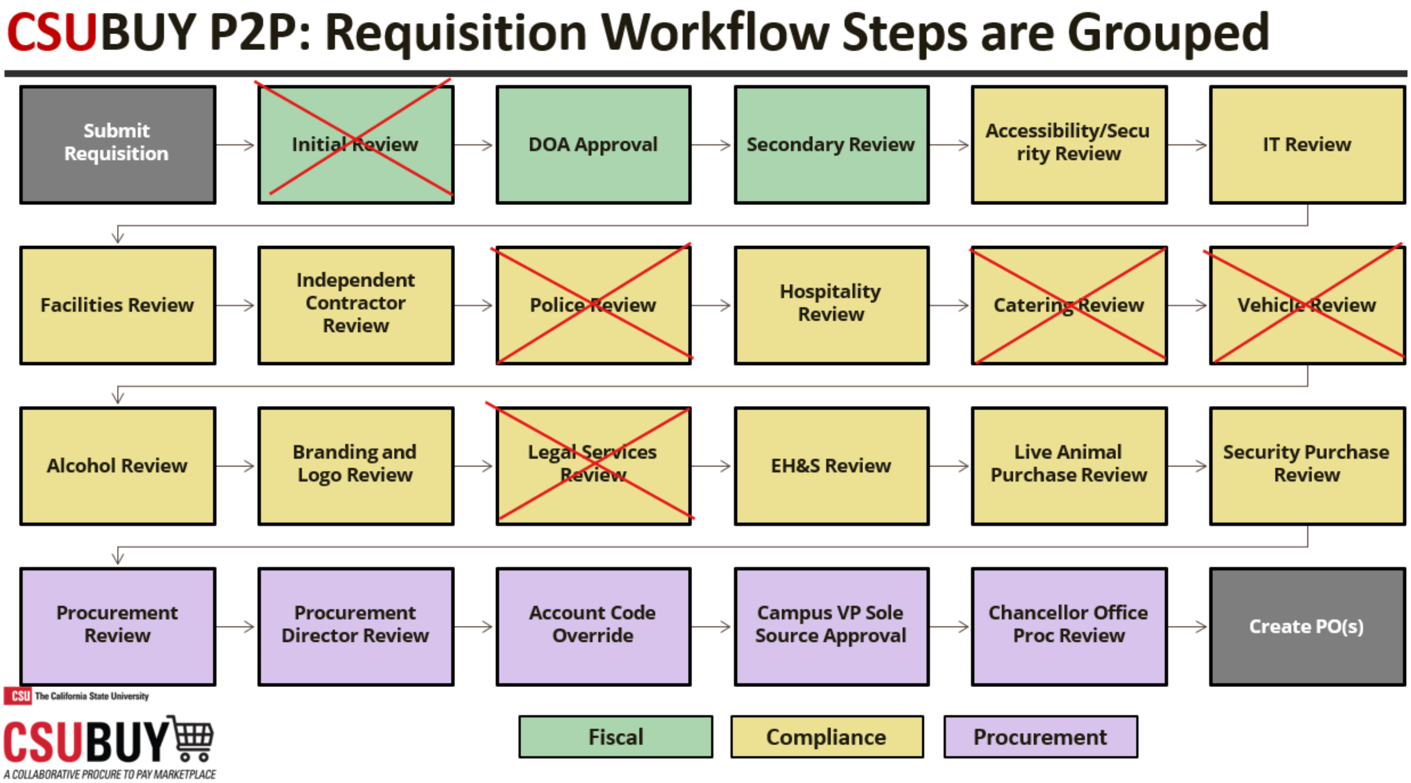


The Requester would then review the DRAFT Requisition. The Requester has the ability to edit any field with the pencil icon. The Requester may adjust the commodity code only by selecting “View My Cart”. Once making the correction, the Requester could Proceed to Checkout. The Requester would then **Submit Request**.



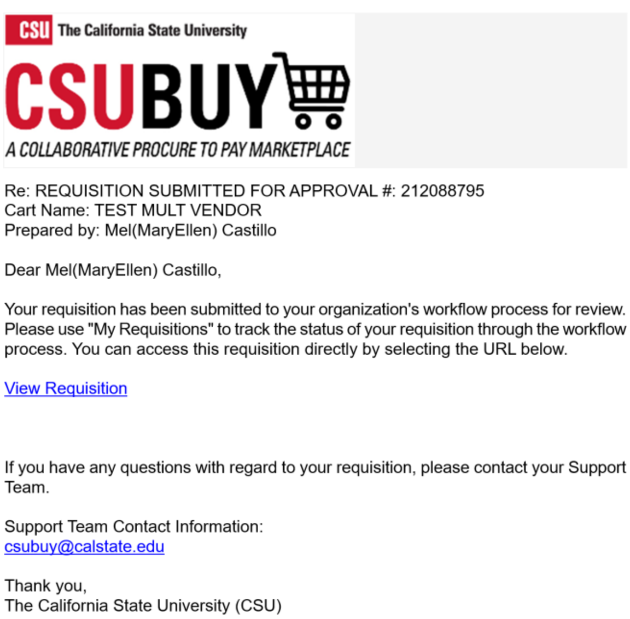
11-REQUISITION WORKFLOW

This is an overview of all the possible reviews available in CSUBUY once the Requisition is in Workflow. Not all purchases will require each review. It depends on the product purchased. Note: CSULB does not have all Review.



Requester Notification Email: Requisition Submitted to Workflow

Once the Requester submits the requisition, the Requester will receive the following email notifying the Requisition was submitted and then that a PO will generated.



CSU The California State University

CSUBUY

A COLLABORATIVE PROCURE TO PAY MARKETPLACE

Re: REQUISITION SUBMITTED FOR APPROVAL #: 212088795
Cart Name: TEST MULT VENDOR
Prepared by: Mel(MaryEllen) Castillo

Dear Mel(MaryEllen) Castillo,

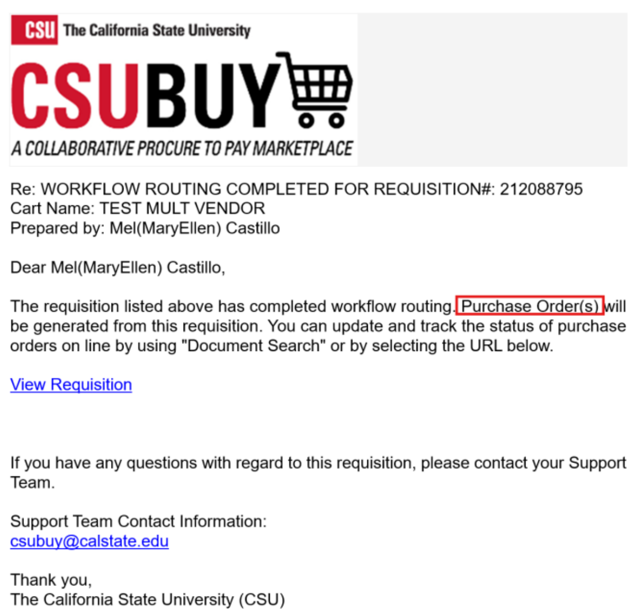
Your requisition has been submitted to your organization's workflow process for review. Please use "My Requisitions" to track the status of your requisition through the workflow process. You can access this requisition directly by selecting the URL below.

View Requisition

If you have any questions with regard to your requisition, please contact your Support Team.

Support Team Contact Information:
csubuy@calstate.edu

Thank you,
The California State University (CSU)



CSU The California State University

CSUBUY

A COLLABORATIVE PROCURE TO PAY MARKETPLACE

Re: WORKFLOW ROUTING COMPLETED FOR REQUISITION#: 212088795
Cart Name: TEST MULT VENDOR
Prepared by: Mel(MaryEllen) Castillo

Dear Mel(MaryEllen) Castillo,

The requisition listed above has completed workflow routing. Purchase Order(s) will be generated from this requisition. You can update and track the status of purchase orders on line by using "Document Search" or by selecting the URL below.

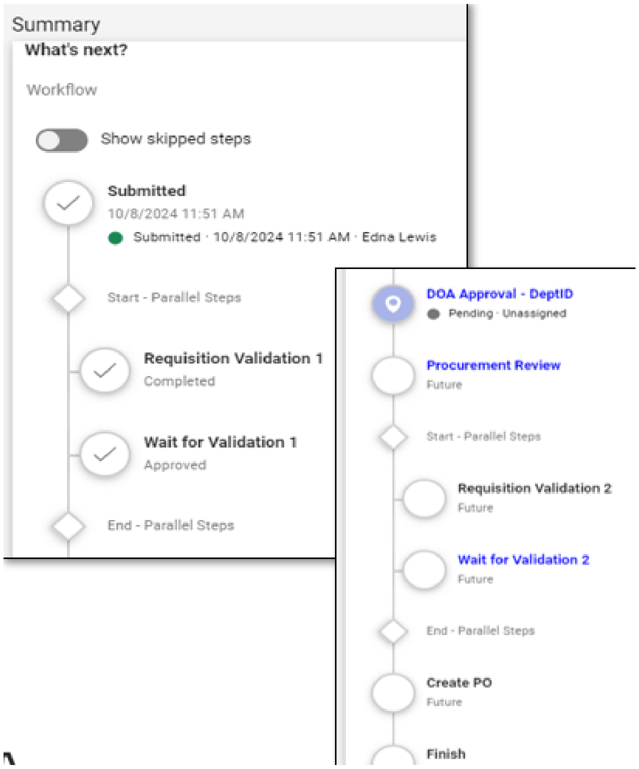
View Requisition

If you have any questions with regard to this requisition, please contact your Support Team.

Support Team Contact Information:
csubuy@calstate.edu

Thank you,
The California State University (CSU)

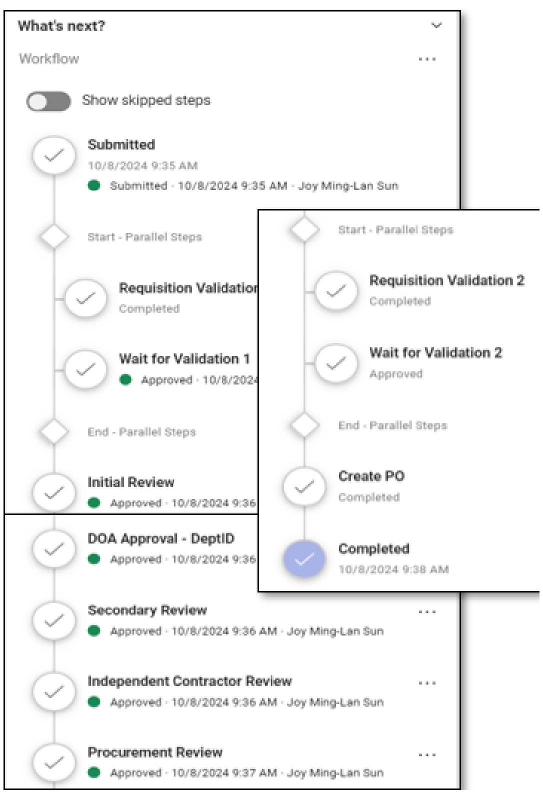
Workflow in CSUBUY: Pending at DOA Approval



Workflow in CSUBUY: Completed

The following show the Requisition through PO Created.

At this point, the PO is distributed to the Supplier.



Bypass DOA Approver

If the Requester is also the DOA Approver (Level 5) for the chartfield, any orders below $5,000 will auto-approve, bypassing the DOA Approver workflow.

Bypass Procurement Review

The following are circumstances when a Procurement Review is bypassed due to low dollar and low risk.
Low Risk Commodity Codes are ONLY: 145009, 145010, 145011, 145012, 170001, 170002, 170003, 170004

Low Dollar/Low Risk Criteria

All three criteria must be met to bypass Procurement Review:

- Requisitions <$5,000
- Punchout or catalog items
- Low Risk Commodities
  - Lab/Scientific Supplies
  - Medical Supplies
  - Office Supplies
  - Photography Supplies
  - Custodial Supplies
  - Facilities Supplies
  - Housing Supplies
  - Industrial Supplies

Concept Examples

Low Dollar/Low Risk Examples

- Staples punchout order for paper with total of $2,800
- Fisher punchout order for beakers with total of $4,999

non-Low Dollar/Low Risk Examples

- Staples punchout order paper with total of $5,002
- Staples punchout order for computer printer with total of $1,000
- Staples G&S Form order for furniture with total of $500

12-COMMODITY CODES & COMPLIANCE REVIEW/CREATE A RECEIPT

Commodity Code Triggers

There are certain goods and services that require additional compliance reviews. The compliance review is triggered by the Commodity Code. Therefore, it is important to ensure the correct Commodity Code is entered in the Shopping Cart/Draft Requisition so that the appropriate review is done.

In addition, the Commodity Code triggers whether a Receipt (a confirmation the good is received) is required.

The list provides the Commodity Code that triggers the Compliance Review and requirement to Create a Receipt for the good.

Commodity Code	Commodity Code - Description	Compliance Review	Receiving Type	Account Code	LB Account Description
100004	Group II Capital Assets		Create Receipt	607009	Group II Equipment - Cap Projt
105002	Equipment		Create Receipt	619001	Other Equipment
105003	Vehicles	Vehicle Review	Create Receipt	619001	Other Equipment
105004	Farm Equipment		Create Receipt	619001	Other Equipment
115002	IT Hardware	IT Review	Create Receipt	616002	I/T Hardware
115003	IT Hardware Maintenance	IT Review		616801	I/T Hardware Maintenance
115004	IT Software	IT Review & Accessibiliy/Security Review		616003	I/T Software
115005	IT Software Maintenance	IT Review & Accessibiliy/Security Review		616003	I/T Software
140004	Vehicle Lease/Rental Services	Vehicle Review		660937	Vehicle Lease
145007	Vehicle Maint/Repair Services	Vehicle Review		660932	Motor Vehicle Expense
145008	Chemical Supplies	EH&S Review		660003	Supplies and Services
150003	Works of Art		Create Receipt	660003	Supplies and Services
150006	Controlled Substances	EH&S Review	Create Receipt	660003	Supplies and Services
150007	Furniture	Facilities Review		619804	Furniture
150019	Weapons	Safety & Security Review	Create Receipt	619001	Other Equipment
160002	Legal Services	Legal Services		613803	Legal Services
160007	HazMat/Chemical Services	EH&S Review		605006	Hazardous Waste
160009	Safety/Security Services	Safety & Security Review		660003	Supplies and Services
170006	HazMat/Chemical Supplies	EH&S Review		605006	Hazardous Waste
170007	Safety/Security Supplies	Safety & Security Review		660003	Supplies and Services
180002	Library Books (Library Only)		Create Receipt	608001	Library Books (Lbry use only)
180003	Library Serials (Library Only)		Create Receipt	608003	Library Serials/Periodicals
180004	Library Periodicals (Library Only)		Create Receipt	608004	Periodicals
700004	Legal Settlement	Legal Services Review		660090	Expenses-Other

In most cases, the good that requires a Compliance Review will typically be purchased using a Form. The Form includes information that satisfies the Compliance Review. However, if a product is purchased from a Punchout, the Compliance Reviewer may reach out to you for more information.

13-VERIFY RECEIPT OR CREATE RECEIPT

Once the Purchase Order is distributed to the Supplier/Vendor and the goods are received, the **Prepare For/Voucher Owner/PO Owner** (typically, the same person) must either **Verify Receipt** of the good or service or **Create a Receipt** for the good in CSUBUY.

2-Way Match

Receipt NOT Required.

PO Owner Approval (Verify Goods Received)

- The PO Owner approves the voucher **IF**:
  - It is NOT an Asset Item
  - It is NOT a High-Risk Commodity (below)
  - It is NOT identified as “Receiving Required”

3-Way Match

Receipt Required.

Receipt Requirement

- A receipt is required **IF** the item falls into any of these categories:
  - Asset Item
  - High-Risk Commodity (below)
  - Identified as “Receiving Required”
- Hold for Receiving will remain at 30 days

High Risk Commodities

100004 Group II Capital Assets	105002 Equipment	105003 Vehicles	105004 Farm Equipment
115002 IT Hardware	150003 Works of Art	150006 Controlled Substances	150019 Weapons
180002 Library Books (Library Only)	180003 Library Serials (Library Only)	180004 Library Periodicals (Library Only)	

Important Note: The **Prepare For** person is usually the Shopper or Requester, that is, the person who created the Shopping Cart. In CSUBUY, the person who creates the Shopping Cart is the default Prepare For person. The Requester has the ability to edit this field and change the Prepare For to another person but only another Shopper or Requester role should be selected. The **Prepare For** person is also the **PO Owner** and the **Voucher Owner**.

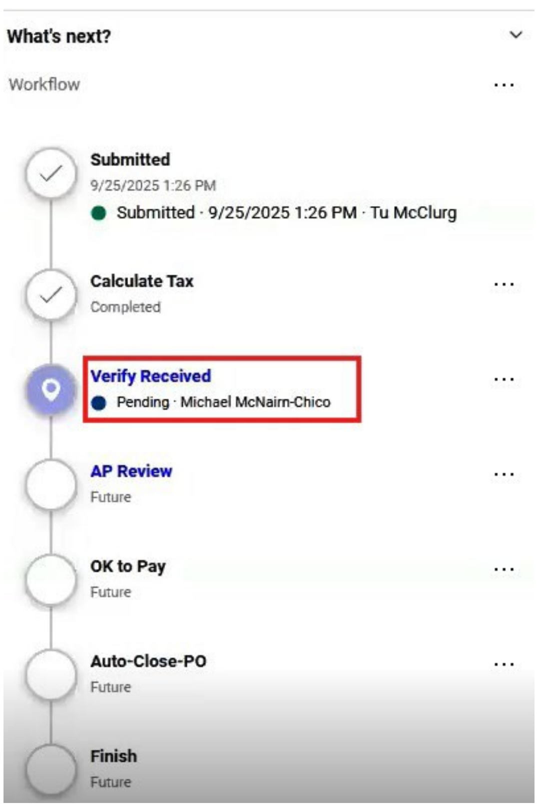
Verify Receipt

Verify Receipt is part of the Voucher Workflow and is a means for AP to know the good or service was received and therefore it is a confirmation that the vendor/supplier could be paid. AP initiates the Voucher Workflow process by submitting an invoice from the supplier/vendor for the good. (Note, in some cases, an Auto Invoice is created without AP for certain types of POs.)

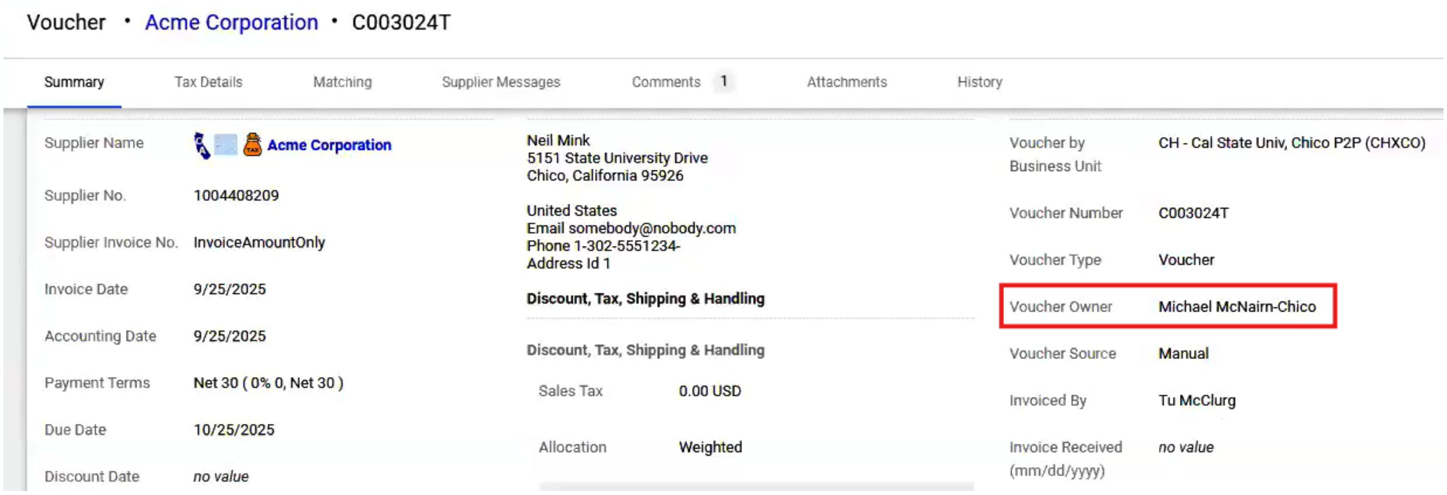
Verify Receipt is required for a good or service that requires a 2-way match.

The Voucher Owner, usually the Shopper/Requester (or Prepare For person) will receive a notification that a Voucher needs their Verify Receipt approval. If you are not receiving notifications, please go to your profile and turn Receipt notifications on. You may identify the Voucher that needs your receipt approved by going to Quick Links on the Home Page and click on My Vouchers.

As seen in the Workflow, the Voucher Owner is responsible to Verify Receipt confirming the good or service was received.

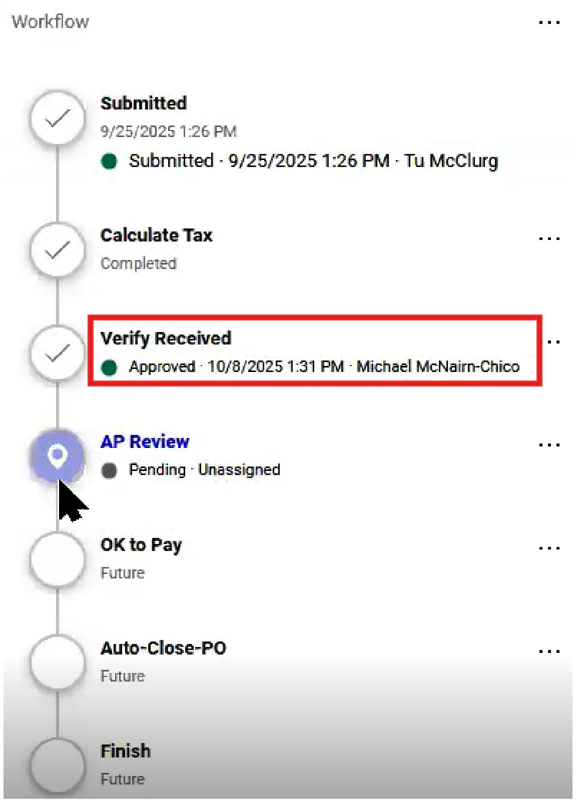


The Voucher Owner would open the Voucher.



The Voucher Owner would then click on Approve/Complete Step button in the Voucher as shown below:

When returning to the Voucher, the Workflow shows the Verify Received is approved:

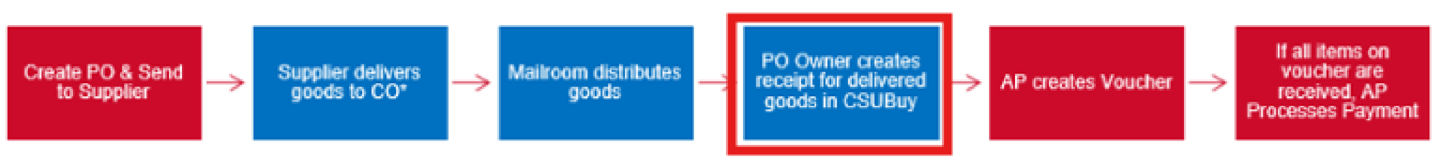


Create a Receipt

The Create a Receipt action is needed for certain goods and is considered a 3 Way Match.

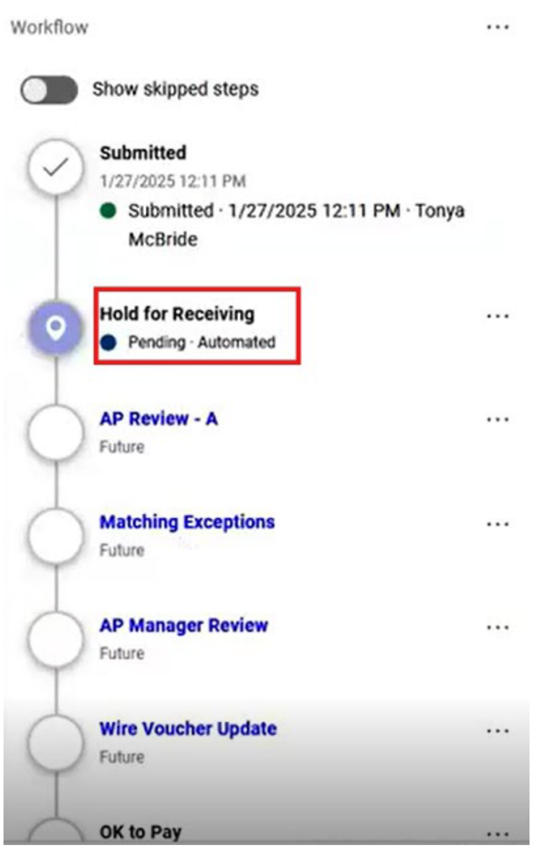
Create a Receipt action is taken when the good is received. Note that you can Create a Receipt even if the Voucher Workflow process has not been kicked off. This is because the Create a Receipt occurs in the Purchase Order and not the Voucher. However, the Voucher Workflow identifies whether the Receipt was created or not.

Below shows the process in which the PO Owner creates the receipt before the Voucher is created.



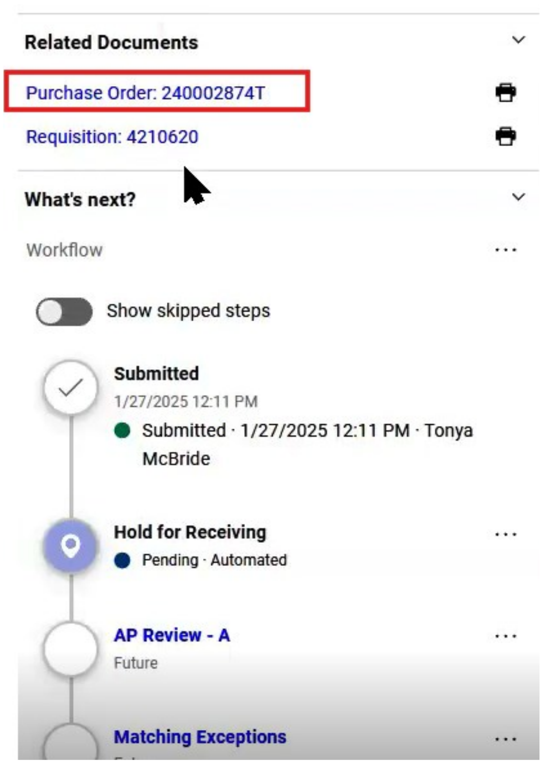
When creating a receipt, you may create a quantity receipt entering the number of items received or a cost receipt entering the cost of the service. Cost receipts are only for Amount-Only/Blanket PO. An example would be a PO for 100 hours of legal services in which the cost of the service would be entered in the receipt.

Examples of goods that require a Create a Receipt action are equipment, furniture, gasoline, etc. These goods have a commodity code that triggers the Hold for Receiving in the Voucher Workflow. Please see Section 12 – Commodity Code and Compliance Review for a list of all Commodity Codes that require a Receipt.

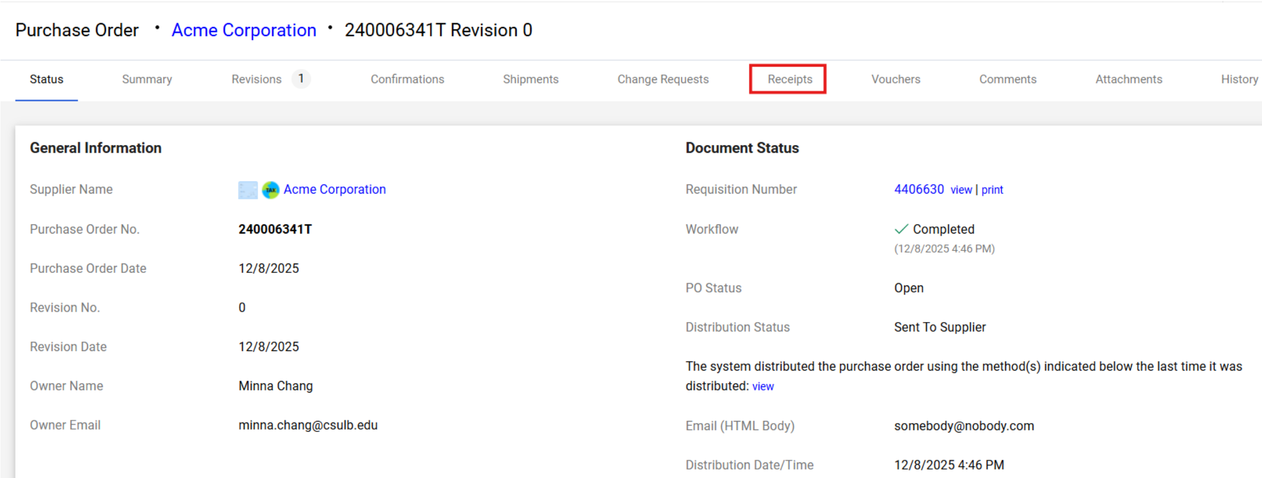


The Prepare For/Voucher Owner/PO Owner should create a receipt when the good is received. 63

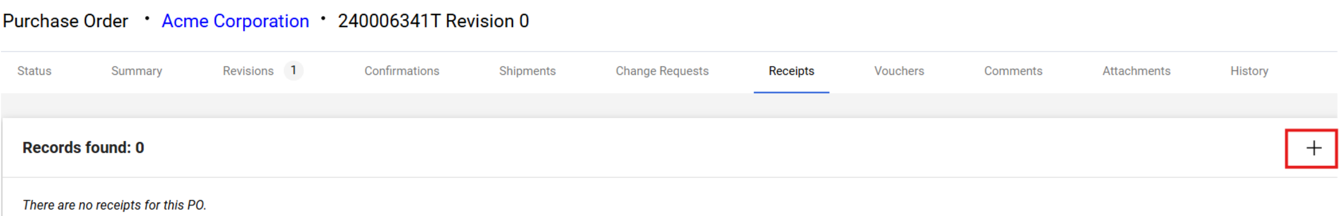
In order to Create a Receipt, go to the Purchase Order. If you are in the Voucher Workflow, you could also find the Purchase Order under Related Documents:



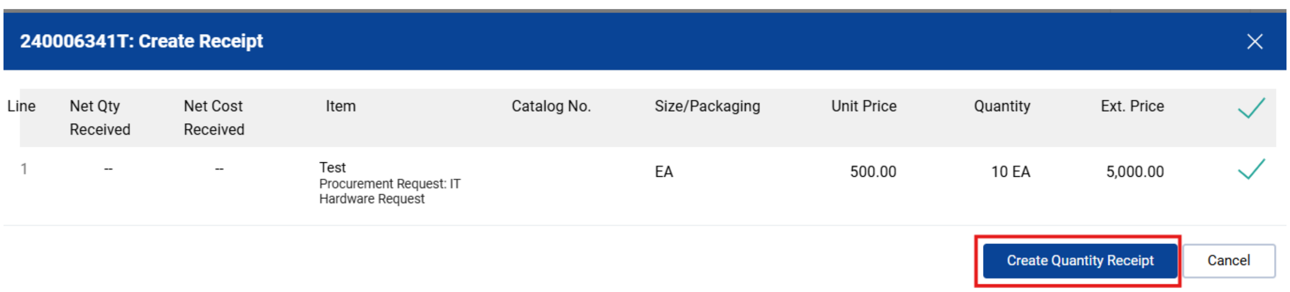
In the Purchase Order, go to **Receipts**.



Then click on the **PLUS** sign:

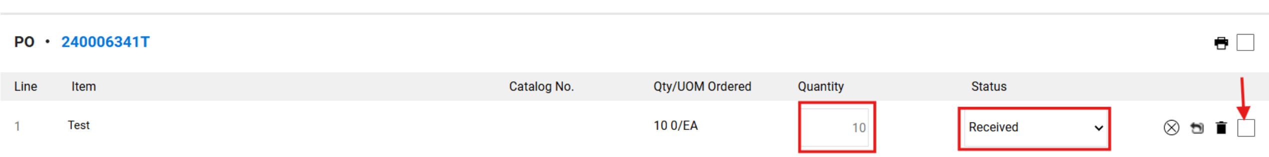


The following box will pop up. Click on **Create Quantity Receipt** or a Cost Receipt may come up for Amount-Only/Blanket PO.



Then the receipt document will appear. Enter information as needed in the document.

Go to the following section and confirm quantity and status and click on the check box as shown below:



There is the option for Received, Returned, Cancelled

Then click on **Complete**:

The confirmation box then appears:

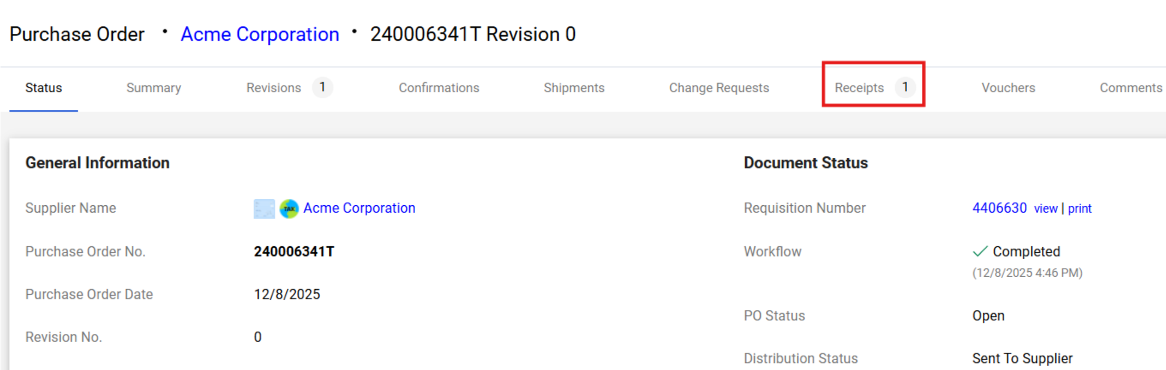
If the good needs to be **Returned**, communicate and coordinate the return directly with the supplier.

- **Things to keep in mind:**

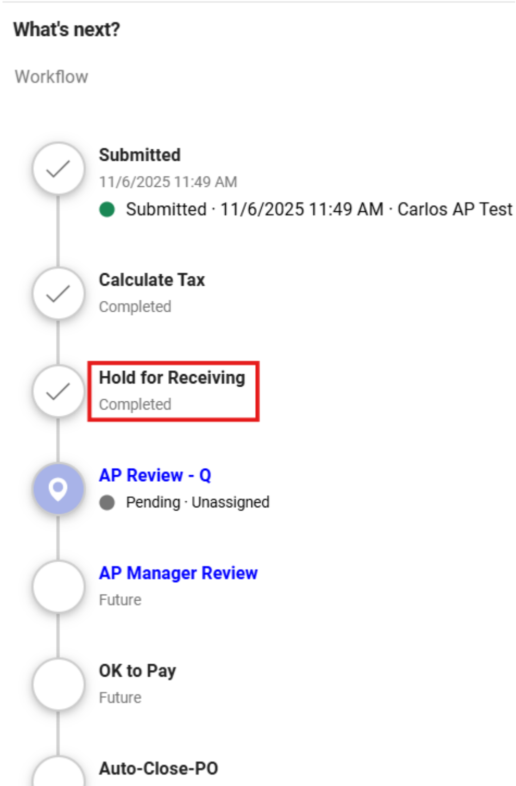
1. Reason for return:
   - Didn't want it
   - Ordered the wrong thing
   - Supplier shipping the wrong item
   - Broken/arrived damaged
2. Shipping
   - Ship back the item
   - No need to ship back
   - Enter Receipts/Returns to match method of return
3. Billing
   - Replaced at no charge
   - Credited, then rebilled
4. Enter comments on PO to communicate: AP, Procurement, Shipping & Receiving and Requester
5. Each supplier handles returns a little differently

If the Order was cancelled, please select **Cancel** in the Receipt.

You will notice that there is a Receipt in the PO (note in this example, there is no Voucher created yet).



If there is a Voucher, when going back to the Voucher Workflow, the Hold for Receiving is completed.



NOTE:

Create a Receipt is always done by a person who has a **Receiving Role.** **ALL Shoppers and Requesters have been given the Receiving Role** at CSULB so that it is the Shoppers and Requester's responsibility to Create a Receipt when the good is received.

A 3-Way PO will remain in "Hold for Receiving" for 30 days in AP Voucher workflow. After 30 days the Voucher will move to AP Review automatically.

A 2-Way PO will stay in "Verify Received" in AP Voucher workflow indefinitely.

14-SUPPLIERS

To do business with and make purchases from a New or Existing Supplier in **CSUBUY**, they must be registered, approved, and extended to CSULB Campus and one of its **Business Units: LBXMP, LBXDN, LBX49**.

If an approved Supplier exists in **CSUBUY** although **not** active for shopping with any of our Campus Business Units, an "**Invitation Extension**" is required.

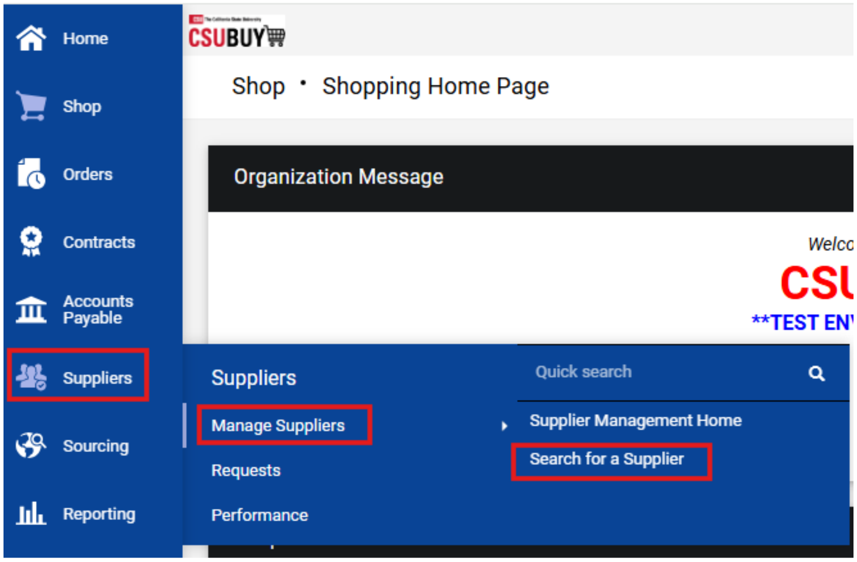
To determine if a Supplier is **extended** to Cal State Long Beach or a specific Business Unit:

1. Identify if a Supplier is Approved and Active in **CSUBUY**
2. Identify if a Supplier is Active for CSULB Campus and its Business Units

Search for a Supplier

Navigate to the Suppliers Flyout.

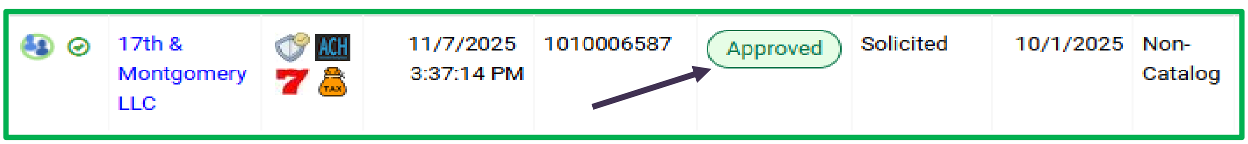
Select: **Suppliers > Manage Suppliers > Search for a Supplier**



Set Search Filters as follows. **Relationship: In Network** and **Status: All**.

Enter the Supplier name in the Quick Search Field.

A List of '**In Network'** Suppliers will appear displaying their **current registration status**.



Registration Status: **"Invited"** indicates the Supplier has **not started** the onboarding process. **"In Progress"** indicates the Supplier has not completed the onboarding process.

The following illustrates the definition for each Registration **Status**.

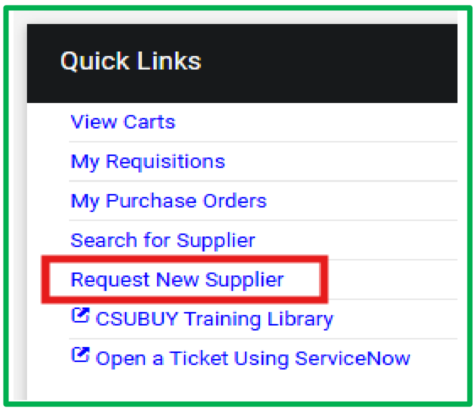
Registration Status	Definition
None	Loaded, not invited
Invited	Registration invitation sent to supplier
In Progress	Supplier has created a login and may or may not have started registration
Profile Complete	Supplier has submitted registration
Approved	Supplier profile has been approved through registration workflow
Status:	**Definition**
Enabled for Procurement	Active for Shopping
Not Enabled for Procurement	Inactive for Shopping
CSUBUY Network Relationship	
In Network	Search results should be limited to "In Network"

Tips:

1. Do **NOT** resend an invitation to a Supplier with a status that still reads "**In Progress**". (Instead, follow up directly with the Supplier).
2. Resend an invitation to a **different email address IF**:
   a. **Requested by** the Supplier
   b. **AND** status is still listed as "**Invited**"
3. If a Supplier has registration questions or concerns beyond the scope of the Campus Supplier Team, they should email: csubuy-suppliersupport@calstate.edu for additional support.
4. If they cannot access their profile and/or have forgotten their login credentials and need to reset their password, they should contact: Jaggaer Support

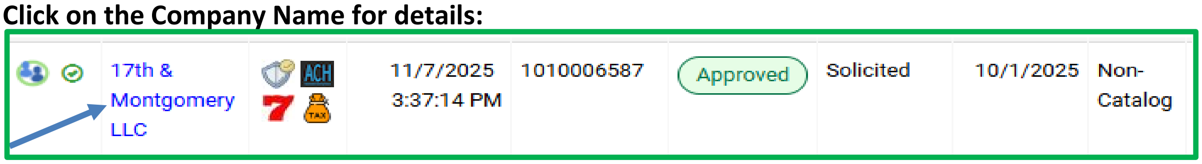
Supplier Not Listed - Request a New Supplier:

Complete a "**Request a New Supplier**" **Form** when a Supplier does **not** exist in **CSUBUY**. Navigate to the Shopping Home Page. Select: **Suppliers > Requests > Request New Supplier**. Or click on the **Quick Link** located at the top right of Shopping Home Page:



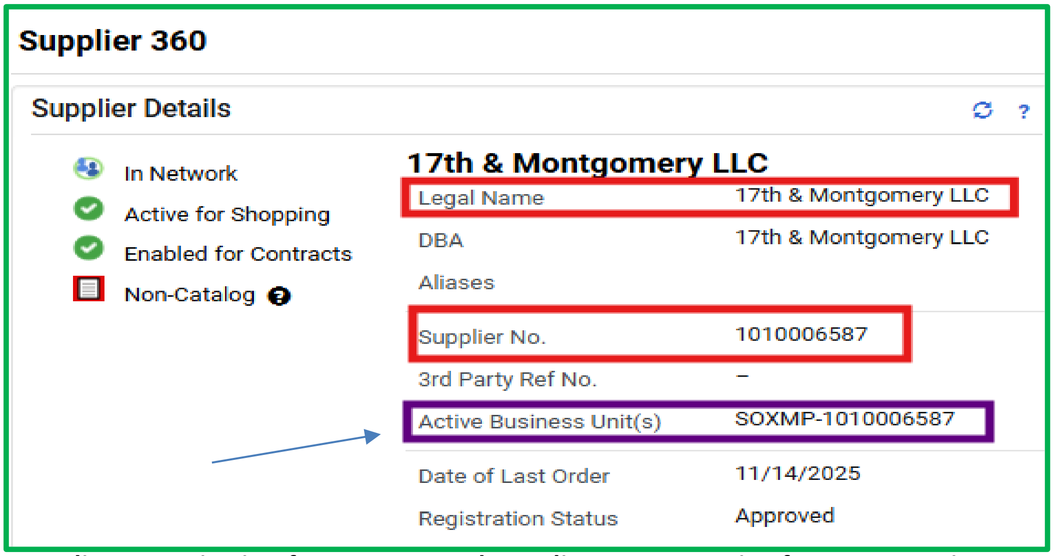
Supplier Approved but Not Active for CSULB Business Unit(s) - Extend Invitation to Supplier:

Confirm if they are Active for Cal State Long Beach Business Units **Before** proceeding.
Click on the Company Name for details:



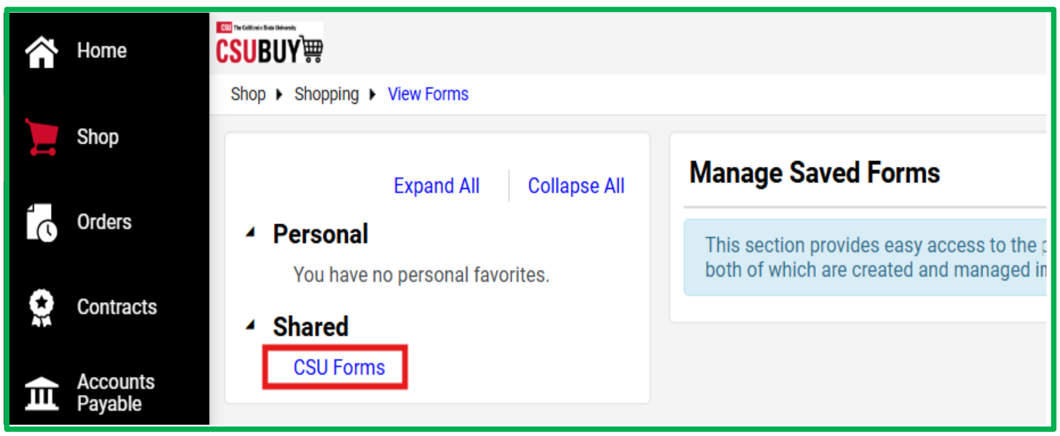
To determine if a Supplier is active for **Business Units LBXMP, LBXDN, and/or LBX49:**
Supplier 360 - Click on the **Active Business Unit(s) Hyperlink**. All Business Units associated with such Supplier will appear.
The example demonstrated below lists only a single **Business Unit (SOXMP)**.
To add **LBXMP**, please note the following information as it is required to complete the extension invitation:

Legal Name and **Supplier Number**



Extending an Invitation for an Approved Supplier Not Yet Active for CSULB Business Units:

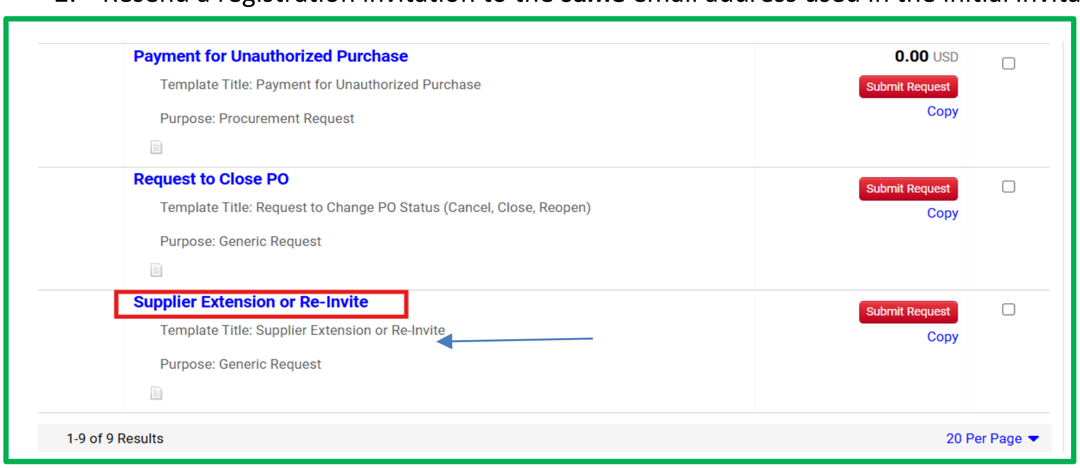
Navigate to the Flyout and select: **Shop > Shopping > View Forms**
Select **CSU Forms**.



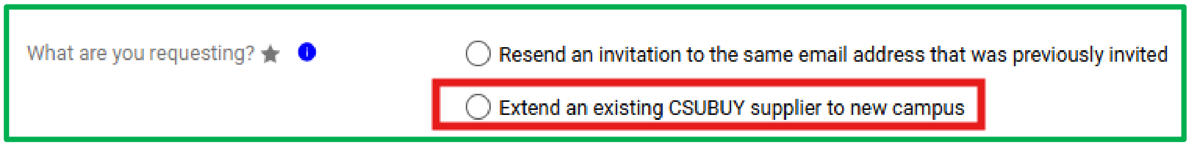
Select **Supplier Extension or Re-Invite**

Use this Form to:

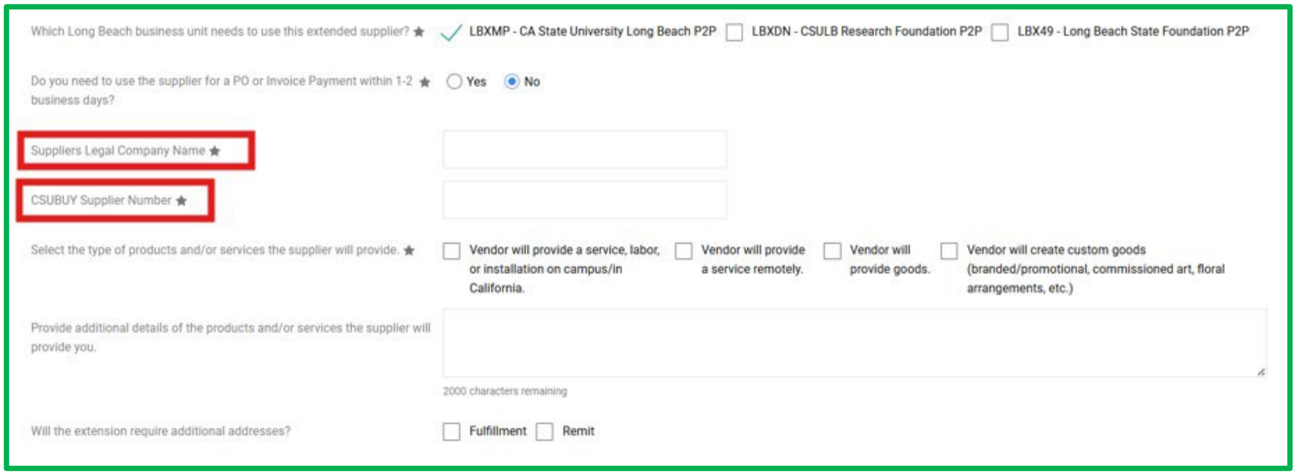
1. Extend a Business Unit for an Approved Supplier.
2. Resend a registration invitation to the **same** email address used in the initial invitation.



Select the following option:

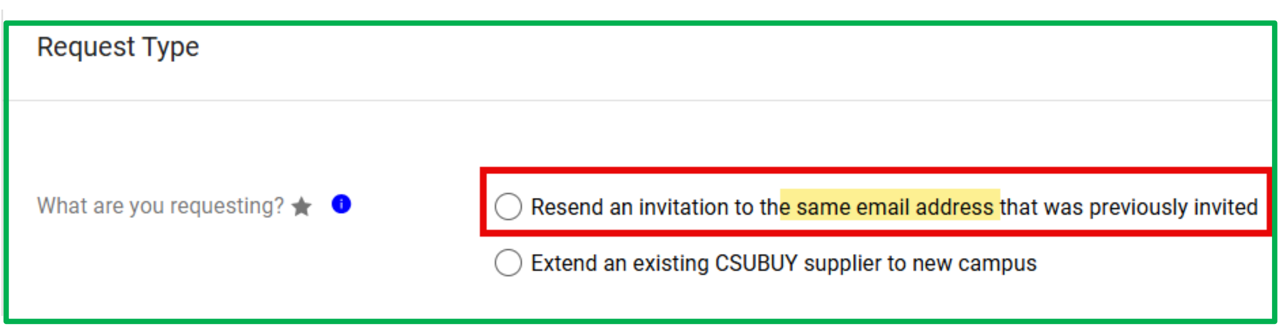


Enter the noted **Legal Name** and **CSUBUY Supplier Number** and answer the remaining questions. Submit.
Required Fields are designated with a **Star ***

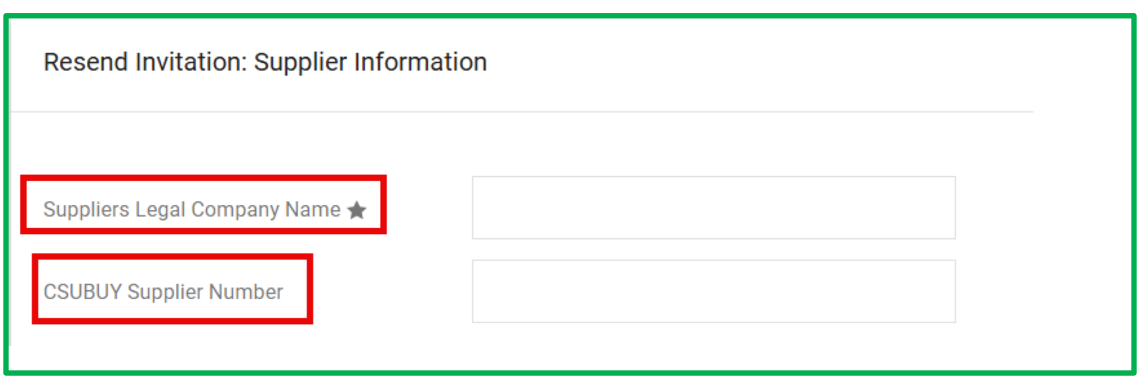


Fulfillment: Purchase Order Delivery Address
Remit: Check Remittance Address

To Resend a registration invitation to the **same** email address, select the following option:

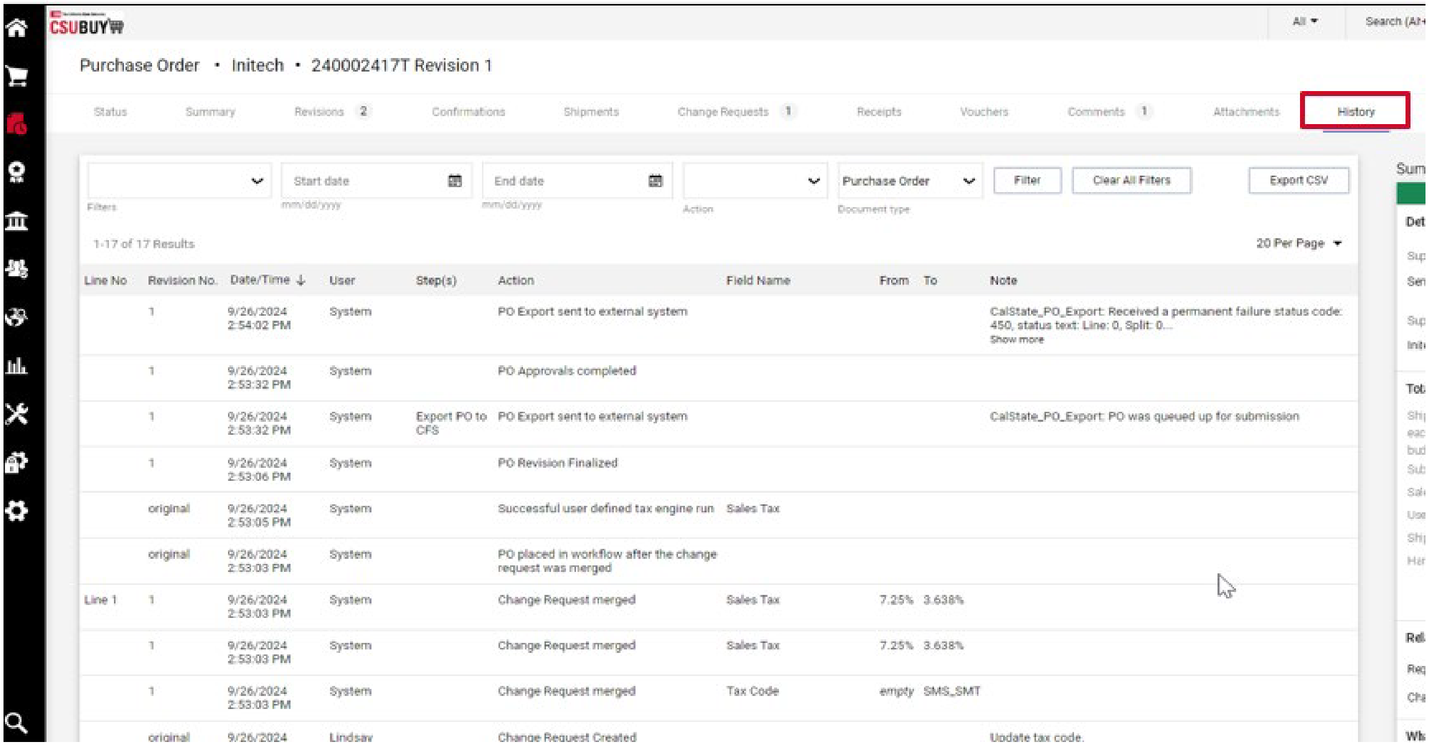


Enter the noted **Legal Name** and **CSUBUY Supplier Number**. Submit.

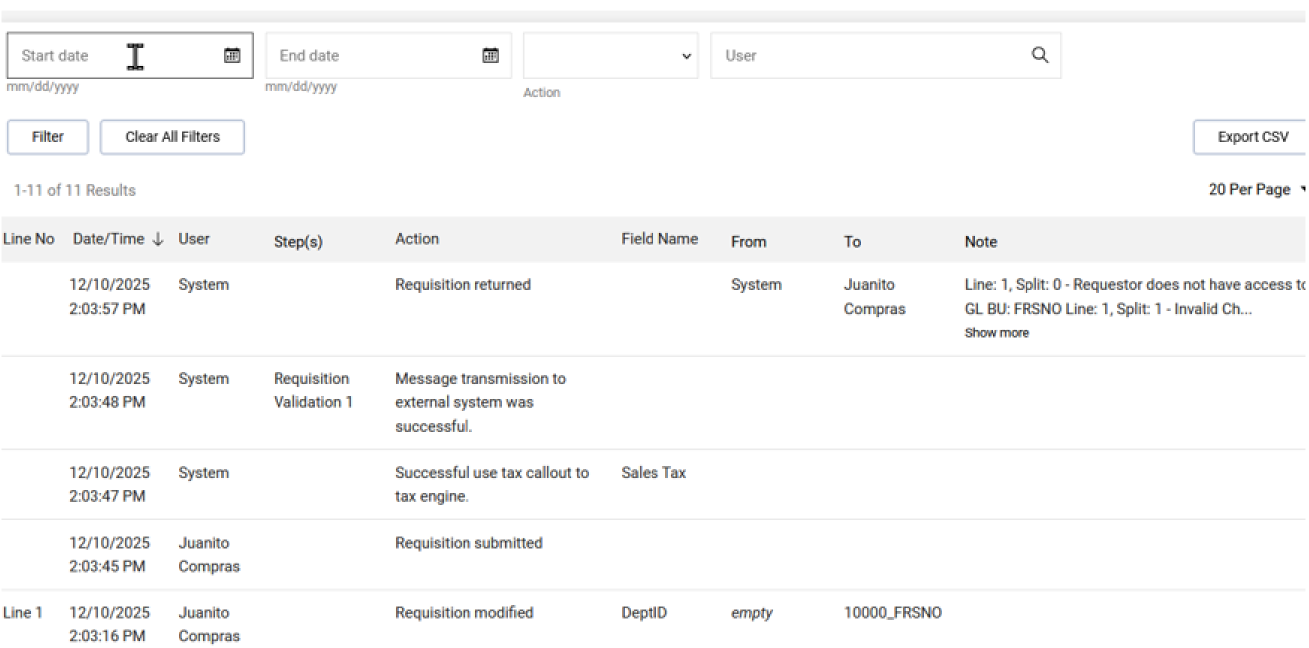


15-HISTORY AND RESOLVING RETURNED REQUISITION

The History tab provides a detailed log of all actions and events related to the Requisition/Purchase Order.



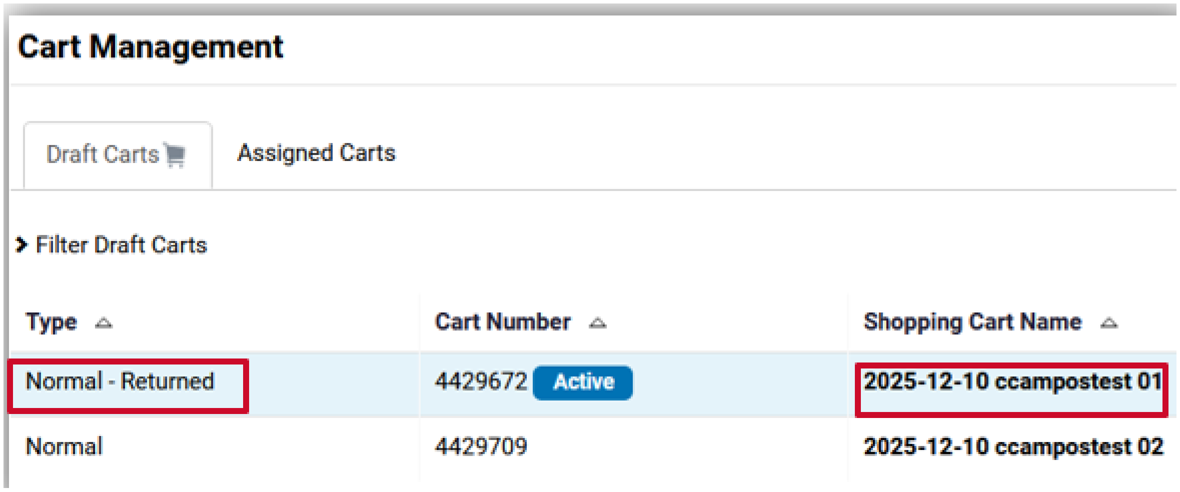
Information includes Date/Time stamp, User, Action and Notes along with the ability to export the information. You could then make the corrections in the draft cart and resubmit.



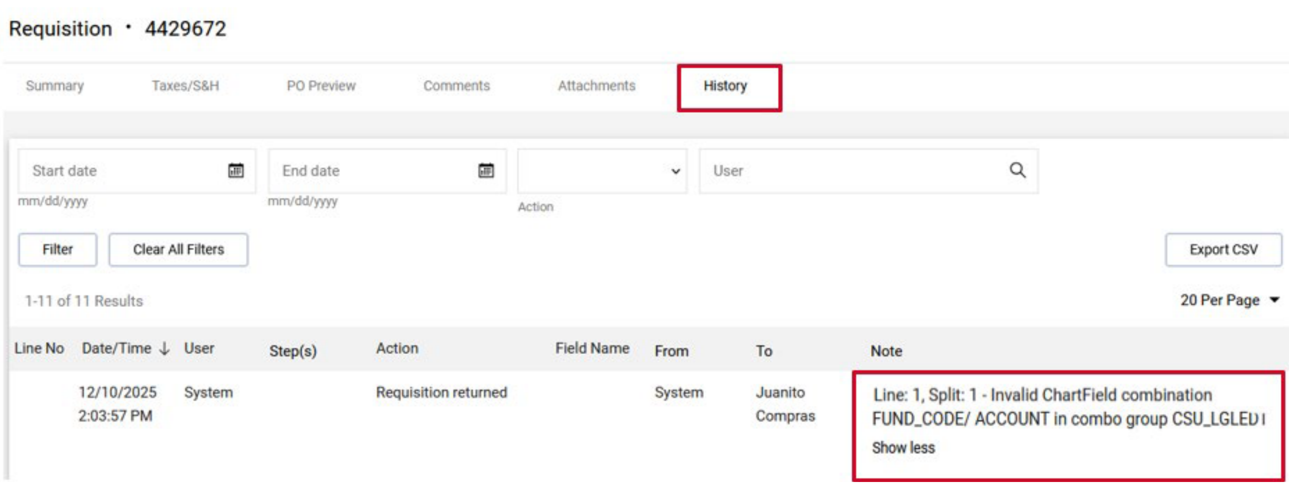
Resolve a Returned Requisition

The History tab is useful to resolve a returned requisition that has been kicked back by CFS.

A returned requisition is located in your draft carts. You will also receive an email indicating that the requisition was returned.



When opening the draft cart for the returned requisition, see the History tab. In the Note, you will see the reason why the requisition was returned.



You could then make the correction in the draft cart and resubmit.

CHAPTER 3: MAKING CHANGES BY SHOPPER/REQUESTER

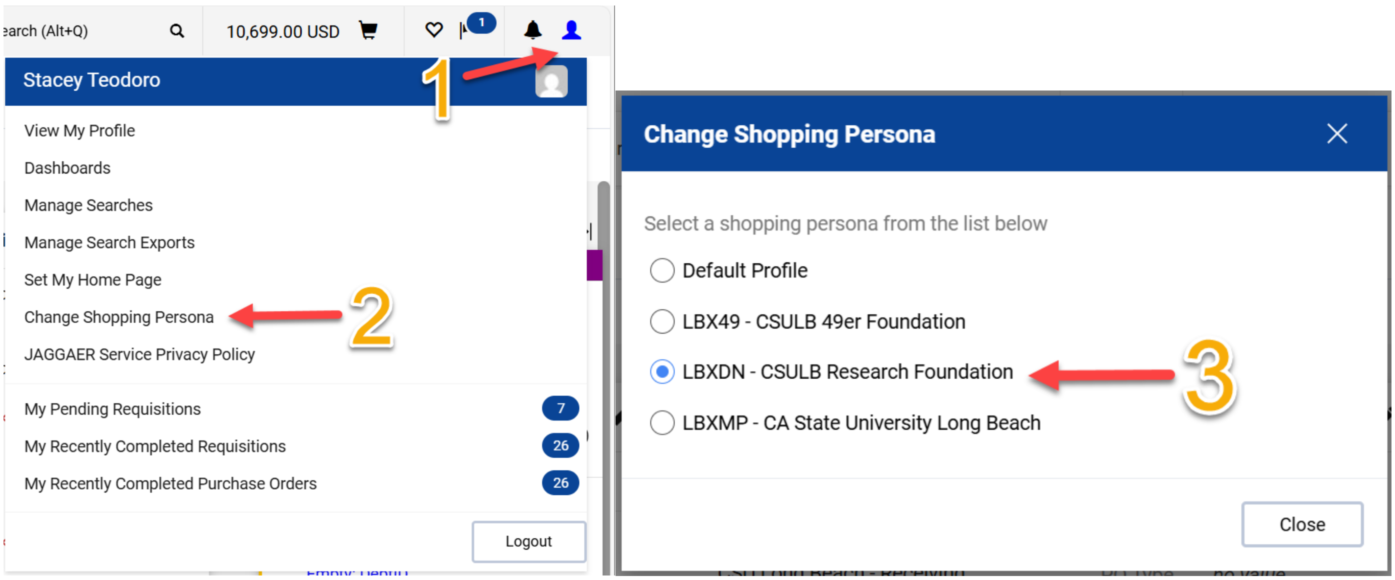
1-CHANGING PERSONAS IN A SHOPPING CART

Your Profile includes a Persona setting. A Persona indicates the Business Unit from which you are purchasing . CSULB has the following Persona available:

- LBXMP – CA State University Long Beach
- LBX49 – Long Beach State Foundation
- LBXDN – CSULB Research Foundation

If you are shopping and realize you are not in the correct business unit, you may change Personas before checking out your cart.

In your shopping cart, or in the draft requisition, select the Profile User Icon.
Select **Change Shopping Persona**. Select the correct shopping persona.



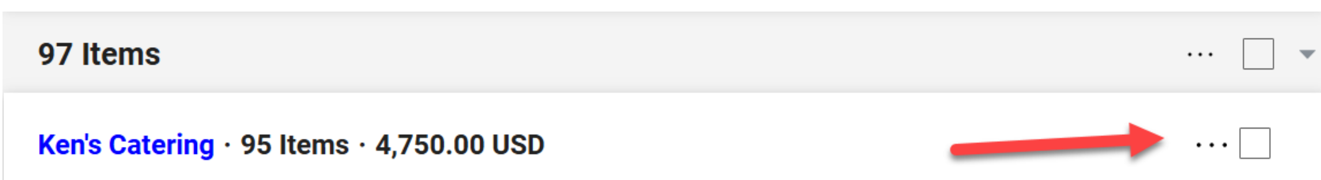
The Workflow of the draft requisition may notify you of issues that need to be addressed, such as changing the billing address or funds. Update all necessary information and submit or assign the draft requisition as normal. You can verify your persona by clicking the User Icon again.

2-SHOPPING CART (DRAFT REQUISITION) CHANGES

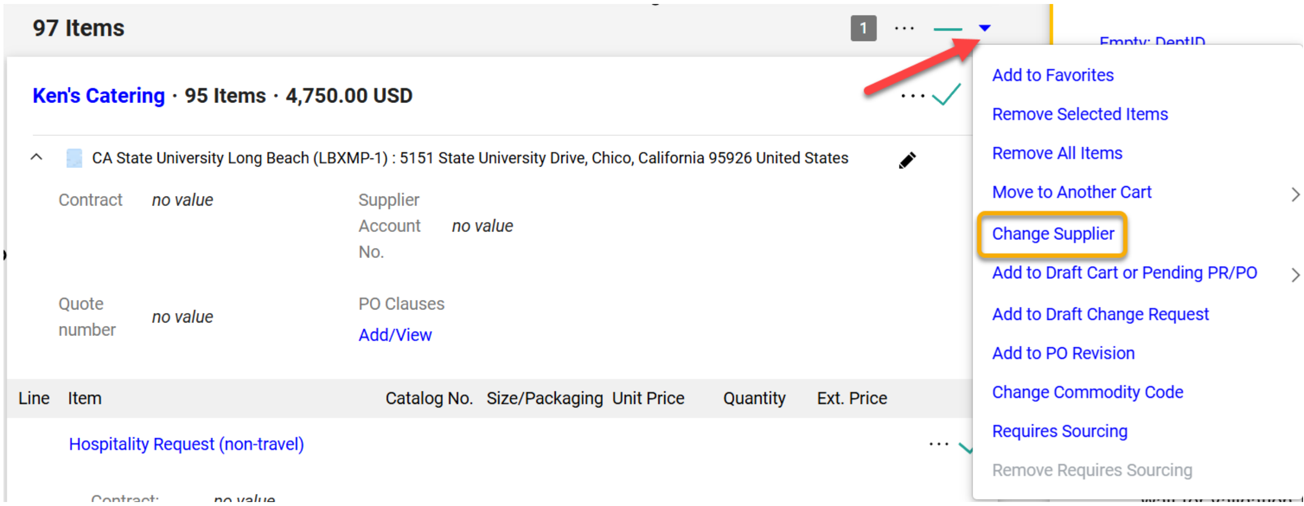
Before you submit your shopping cart, you can make changes in the shopping cart (draft requisition) such as changing the supplier, removing items, changing the quantity, and moving items to another cart.

Changing a Supplier

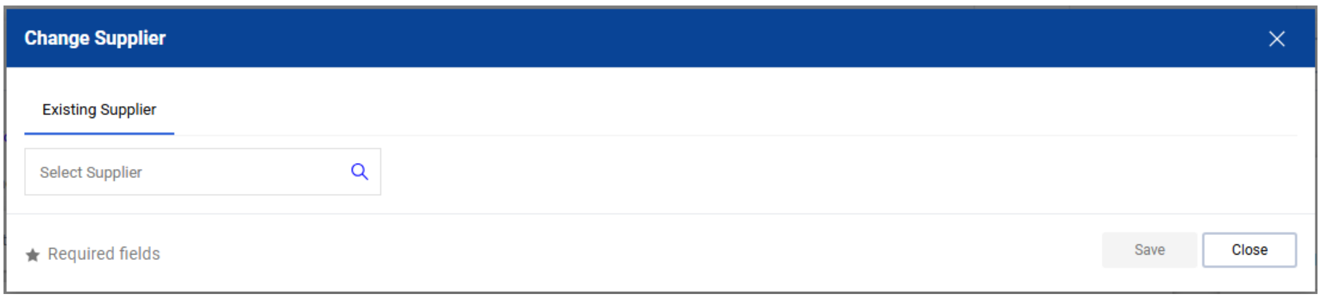
If you prefer to shop with a different supplier, you can change suppliers even after you have items in your cart. From the Draft Requisition page, select the check box next to the supplier's name.



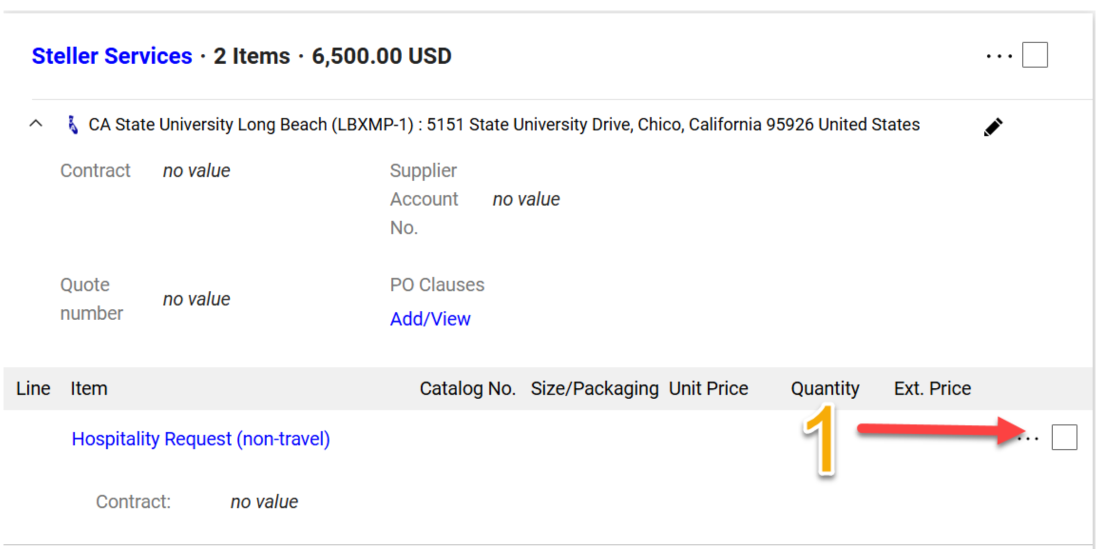
Select the dropdown carrot next to the checkbox and select, **Change Supplier**



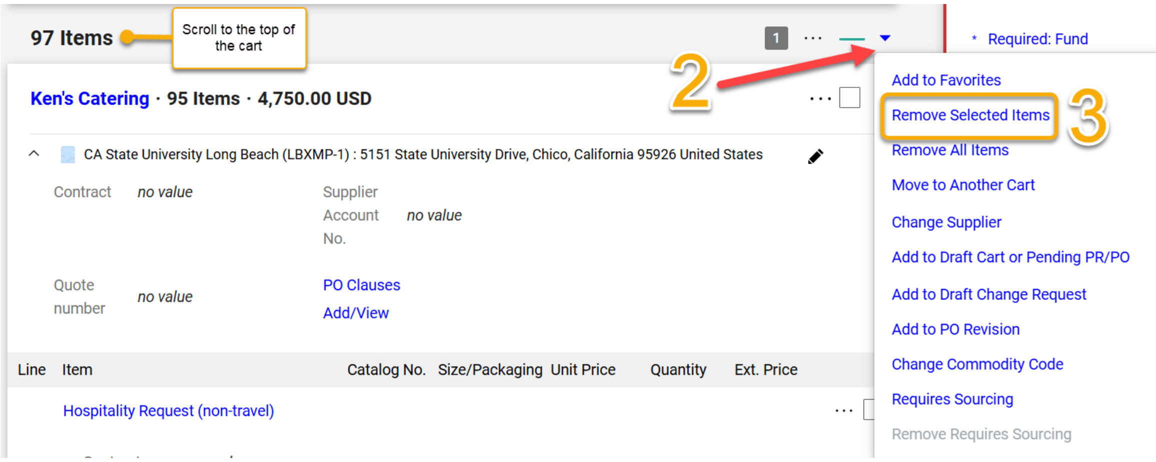
Search for a supplier in the search bar and select a new supplier.
Keep in mind that selecting a new supplier may change products and costs.



Removing Line Items from the Shopping Cart (Draft Requisition)
From your draft requisition, before assigning your cart or submitting the request, scroll down to the item you want to remove. Select the checkbox of the item you want to remove.



Scroll to the top where the total amount of items in your cart is listed.
Select the dropdown carrot. Click **Remove Selected Items**.

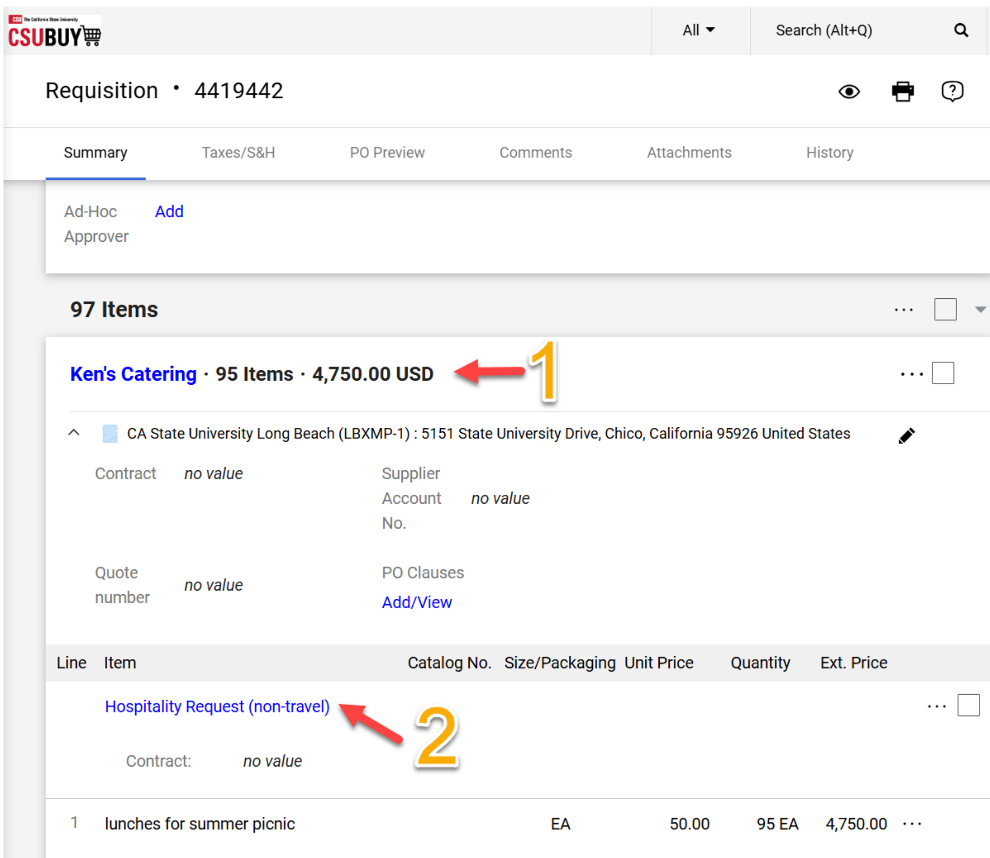


Your cart will be updated to show that you removed items from your cart.

Changing Quantities in the Shopping Cart (Draft Requisition)

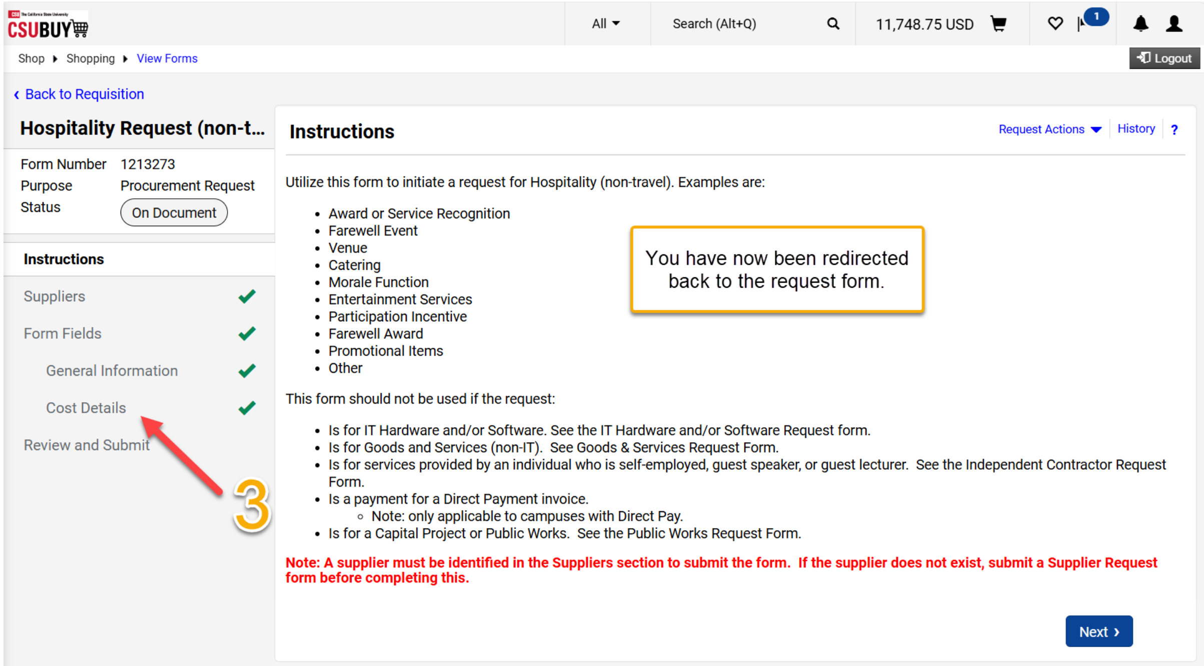
From your draft requisition go to the line item to change.

Select the Hyperlinked form.

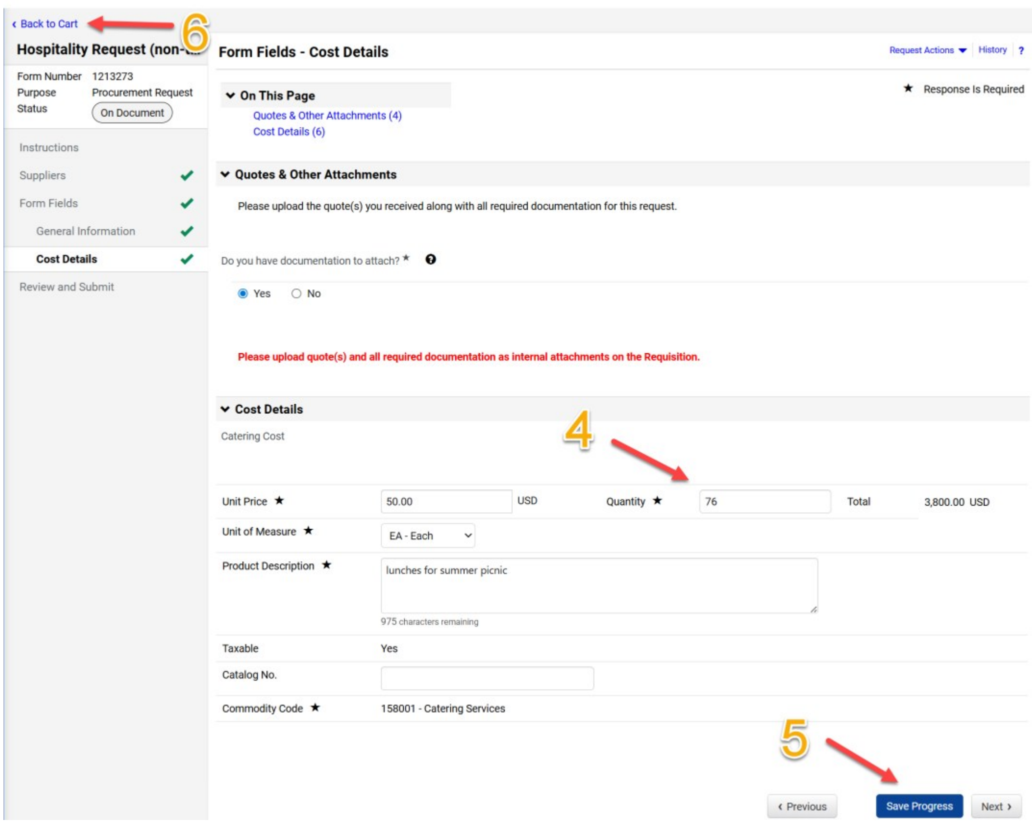


This will redirect you to the Request Form.

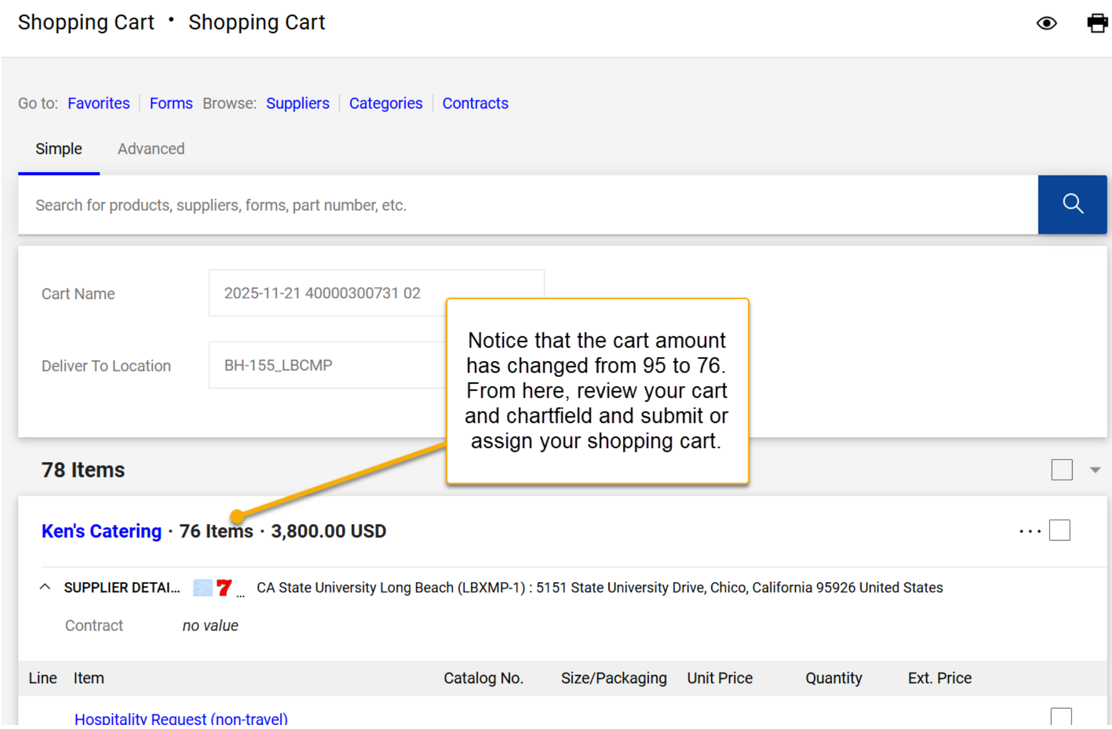
Select the 'Cost Details' tab to the left and adjust the amount you intend to purchase.



Review (4), save progress (5), and select **Back to Cart**(6).

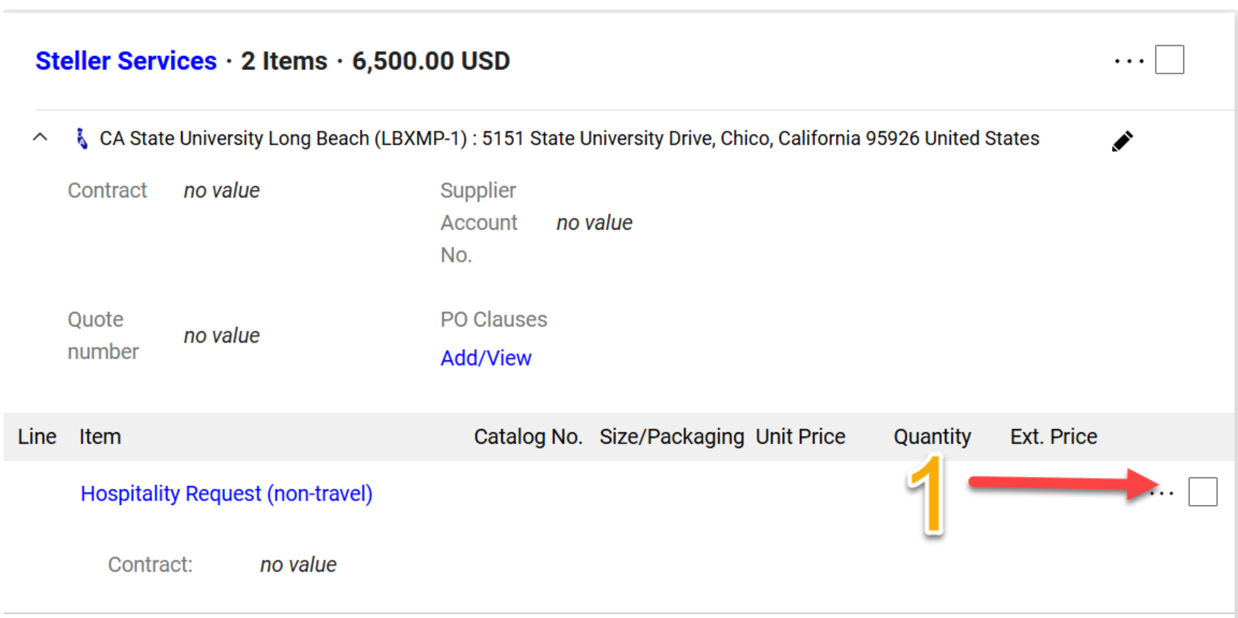


Your cart will update with the new amount of items.

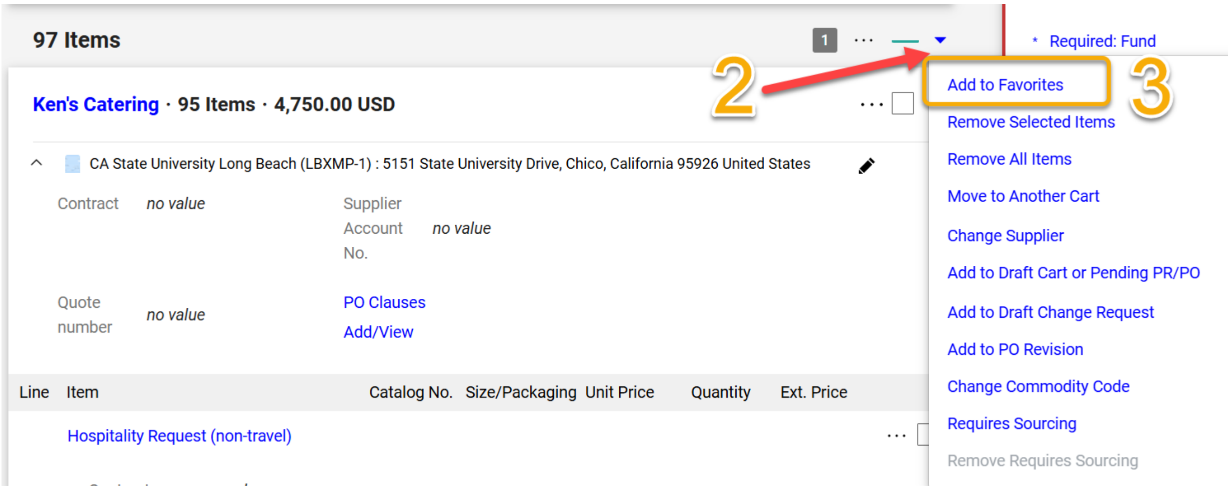


Add to Favorites

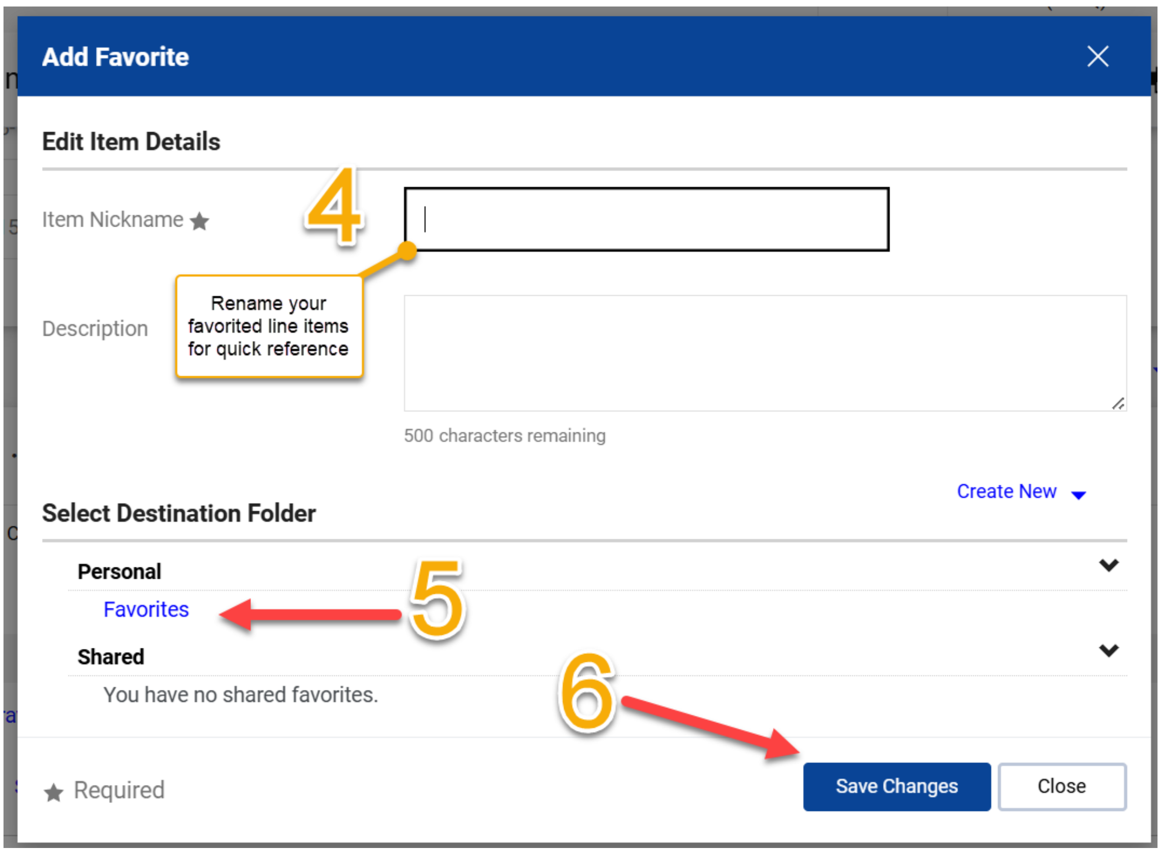
Before assigning your cart or submitting the request, scroll down to the items you want to Favorite and select the checkbox.



Scroll to the top where the total amount of items in your cart is listed and select the dropdown carrot. Click **Add to Favorites**.

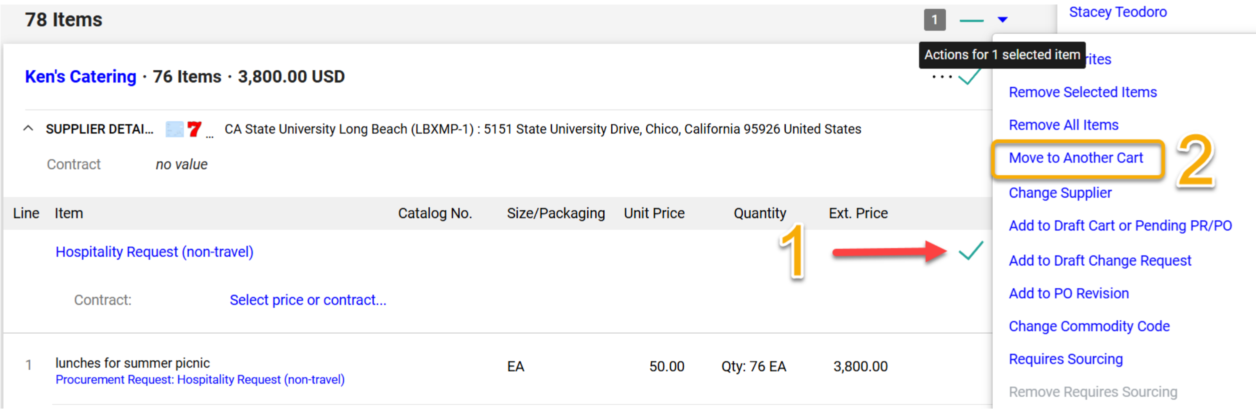


A pop up will appear where you can edit the Nickname and location of the save items.
Select **Save Changes**.

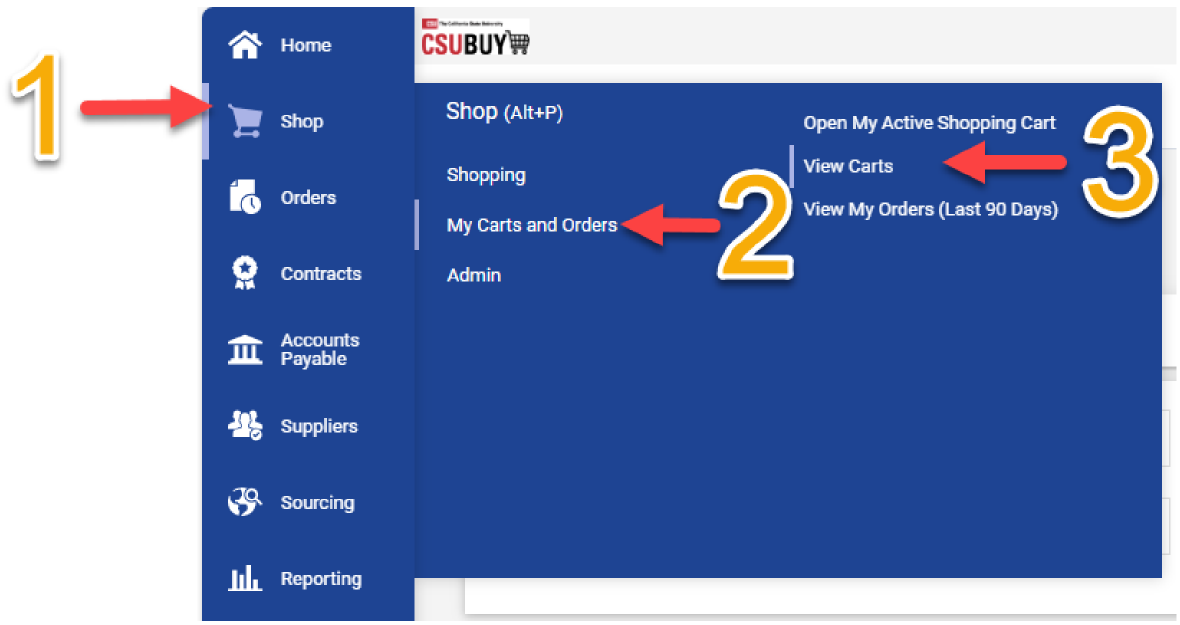


Move to Another Cart
If you would like to move a line item to another cart to make a separate purchase, select the check box next to the supplier's name.

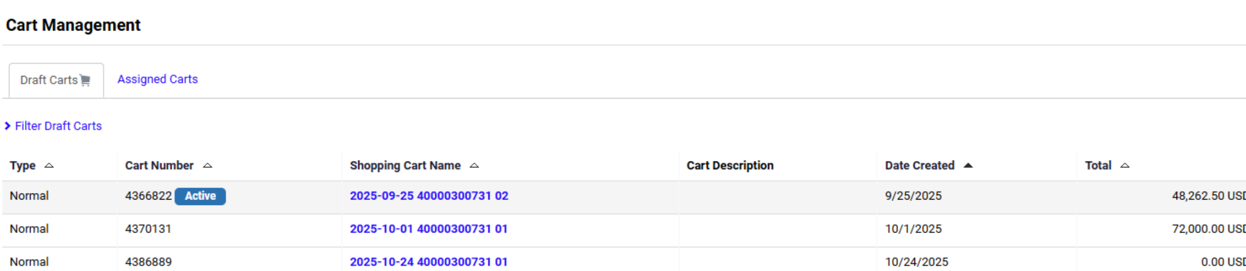
From the dropdown carrot next to the checkbox and select **Move to Another Cart**.
You can move to an existing draft cart or to a new cart entirely.



You can view all your Draft Carts from the 'Shop' flyout



Select 'My Carts and Orders' > 'View Carts' > Draft Carts'



Cart Management

Draft Carts | Assigned Carts

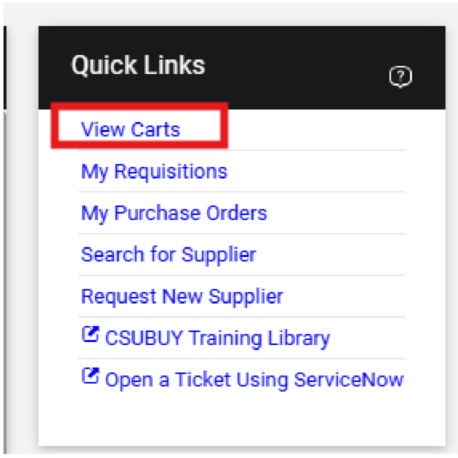
Filter Draft Carts

Type	Cart Number	Shopping Cart Name	Cart Description	Date Created	Total
Normal	4366822 Active	2025-09-25 40000300731 02		9/25/2025	48,262.50 USD
Normal	4370131	2025-10-01 40000300731 01		10/1/2025	72,000.00 USD
Normal	4386889	2025-10-24 40000300731 01		10/24/2025	0.00 USD

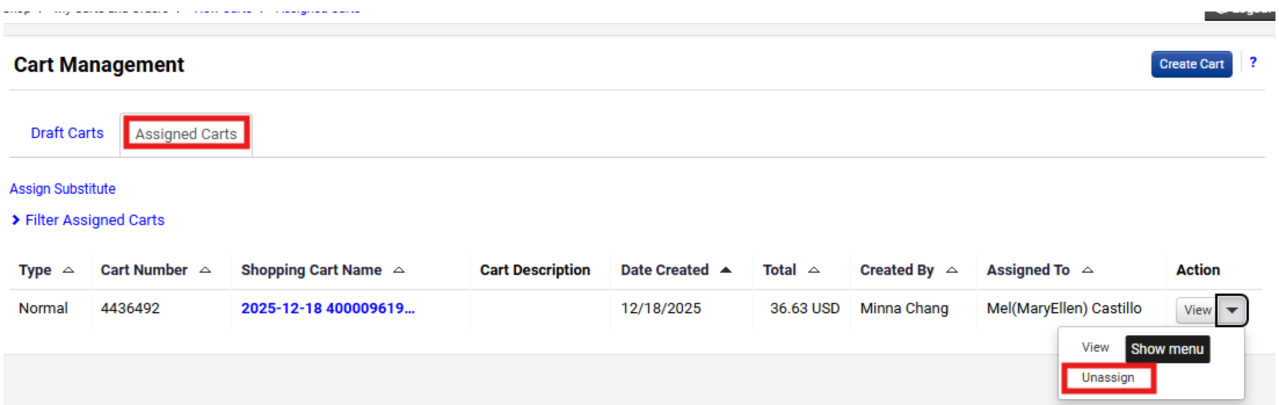
3-MAKING CHANGES AFTER SHOPPING CART IS ASSIGNED OR SUBMITTED

If a Shopper has already assigned the Shopping Cart to a Requester or a Requester submitted the Shopping Cart to workflow, there are options available to make adjustment to your order. You must first identify where your order is in the workflow process.

1. If you are a Shopper, review your Assigned Carts list to see if your order is still an Assigned Cart. On the Shopping Home Page, in the Quick Links section, select View Carts.

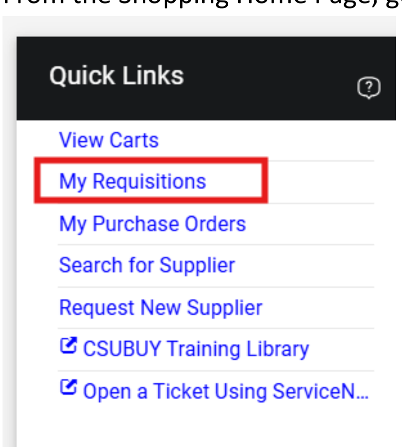


Click on the Assigned Carts tab. If you see the Shopping Cart you would like to make change in, then select Unassign. This will then revert back to a Shopping Cart in which you could make changes.



2. If a Shopper is unable to see the order in the Assigned Carts tab, the Requester has already submitted the Shopping Cart to workflow. The order is now a Requisition. To make changes to the order, you must first locate the Requisition.

From the Shopping Home Page, go to the Quick Links and select My Requisitions.



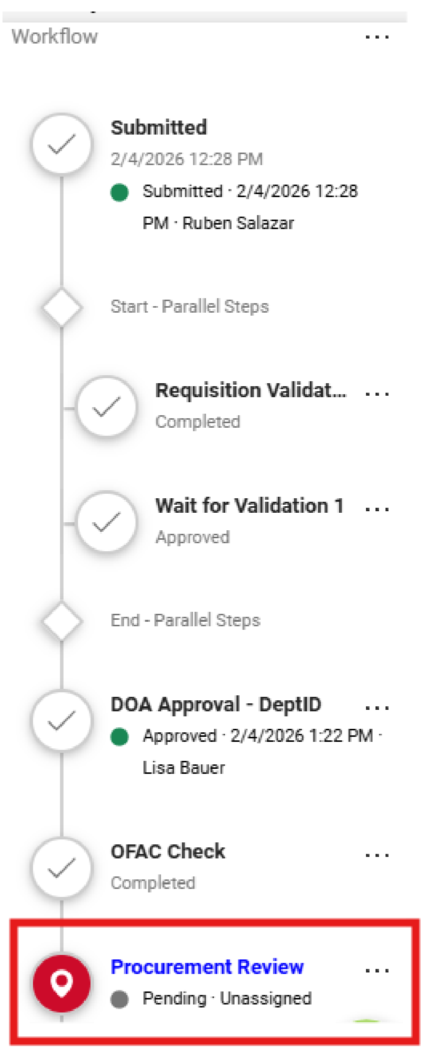
From the list, identify the Requisition in which you would like to make changes and click on the blue hyperlink.

Prepared For: Chang, Minna

1-3 of 3 Results

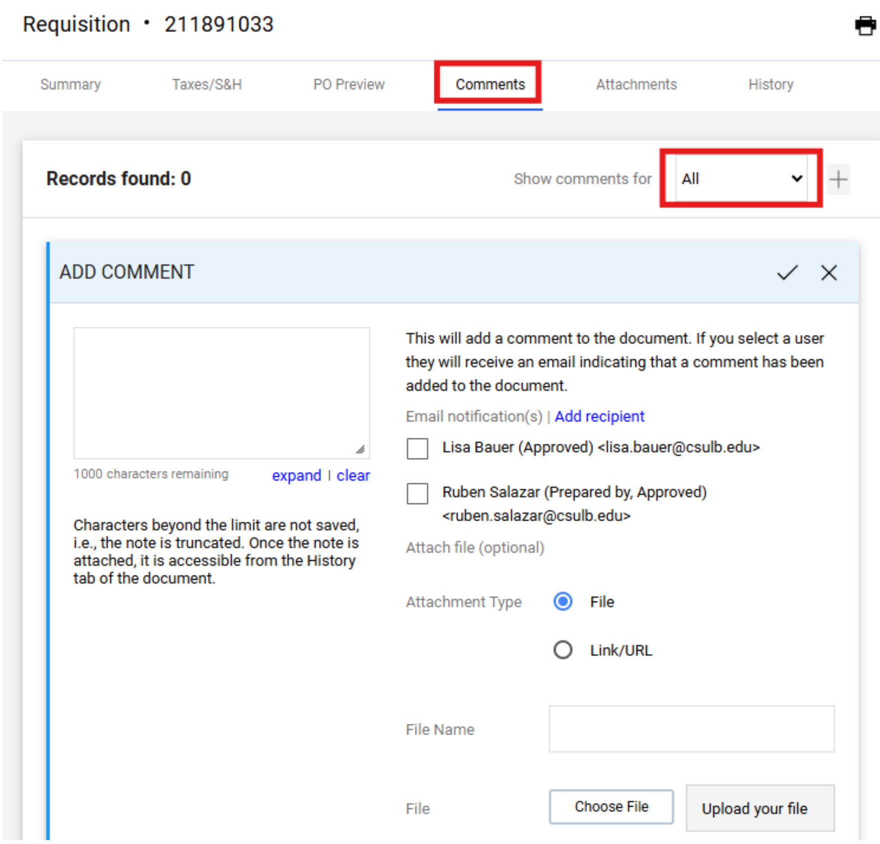
Requisition Number	Supplier	Requisition Name	Requisition Status	Prepared For
4377324	Acme Corporation	Test for Receiving Required Checked Off	Completed	Minna Chang
4406630	Acme Corporation	IT Hardware Commodity Code-Test Receiving Role	Completed	Minna Chang
4419441	Acme Corporation	Test for Verify Receipt for Shopper	Completed	Minna Chang

When you open the Requisition, you will be able to see where it is in the workflow process. In the example below, the Requisition is at Procurement Review.



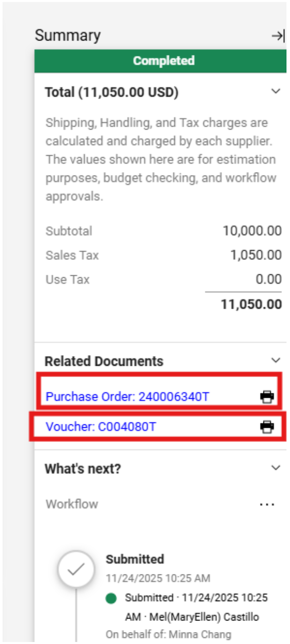
At this stage of the process, your only course of action is to add/send a comment informing of the need to make a change in the order. Please send the comment to the Requester, Approver and the Procurement Reviewer (if not unassigned) to inform all of the need for the correction in the order. If unassigned, Procurement will be able to read the comment during review. Procurement will determine the best course of action to make the needed change. They may also send the Requisition back to the Approver and/or Requester form them to make the needed change.

If the Requisition is with the DOA Approver, add a comment to be sent to the Requester and DOA Approver informing them of the need to make a change to the order. The DOA Approver could then send the Requisition back to the Requester to make the change.



3. When you open the Requisition and see that the workflow is complete, your order now has a PO and/or Voucher. If your order only has a PO, you may request a change in the PO (see next Section for instruction). If your order has a Voucher, you may no longer make any changes. The order has been fulfilled.

   On the Requisition, you could see the related documents and click on the blue hyperlink to open the document. In this example, because there is a Voucher for the order, no change can be made to the order.



4-CHANGE REQUEST ON A PO FOR CHARTFIELD AND ITEMS

This section will focus on a Change Request for adjusting the following

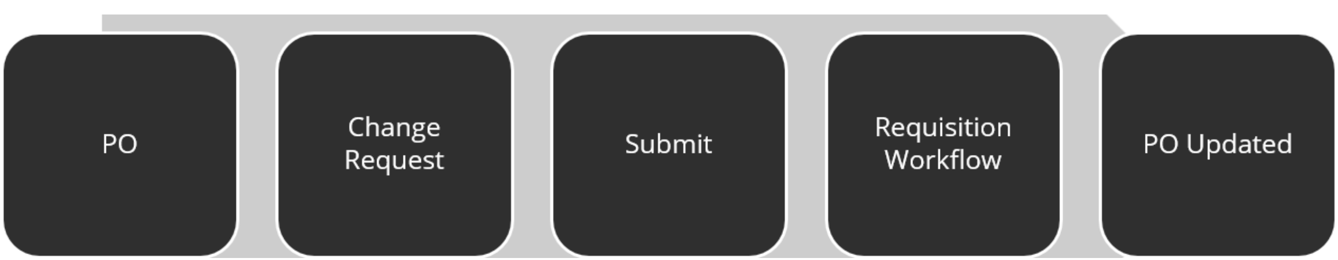
1. 1.Chartfield
2. 2.Dollar, Quantity, Product Description of Items on a PO

A Change Request (formally known as a Purchase Order Amendment – POA) allows the Prepare For person, typically the Requester (who is also the PO Owner) to make changes to an order that has already completed workflow and is now a PO.

A change to the PO can be made only when the PO is NOT in a closed status.

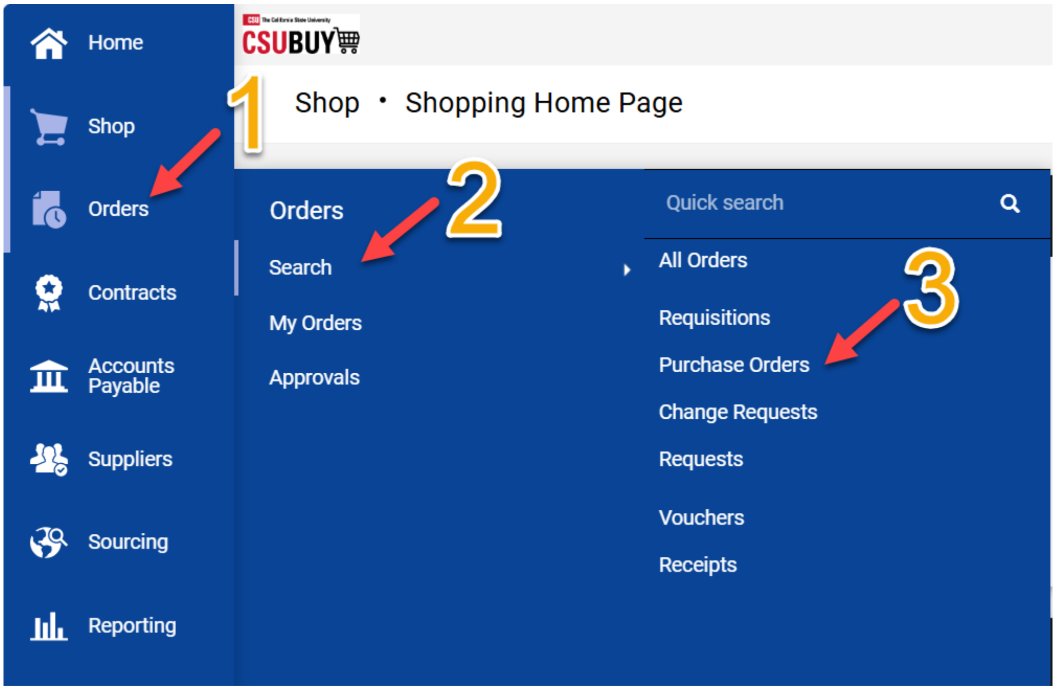
A Change Request CANNOT be made for Punchout Supplier Purchase Orders.

The Change Request updates a Purchase Order by resubmitting it through the requisition approval workflow for review and approval before the revised PO is finalized. Important Note, that a Change Request cannot be made on a PO that has a voucher, payment or receipt; therefore, it is important to check the status of the PO first.



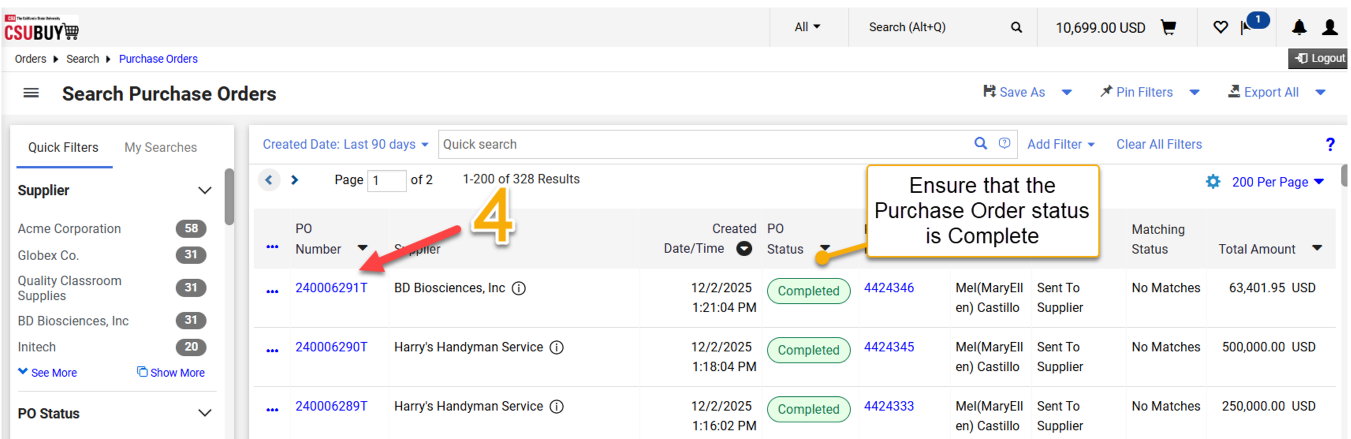
A Change ORDER is only done by Buyers and is different from a Change Request because it does not go through the requisition approval workflow process for the change.

From the flyout, select Orders>Search>Purchase Orders

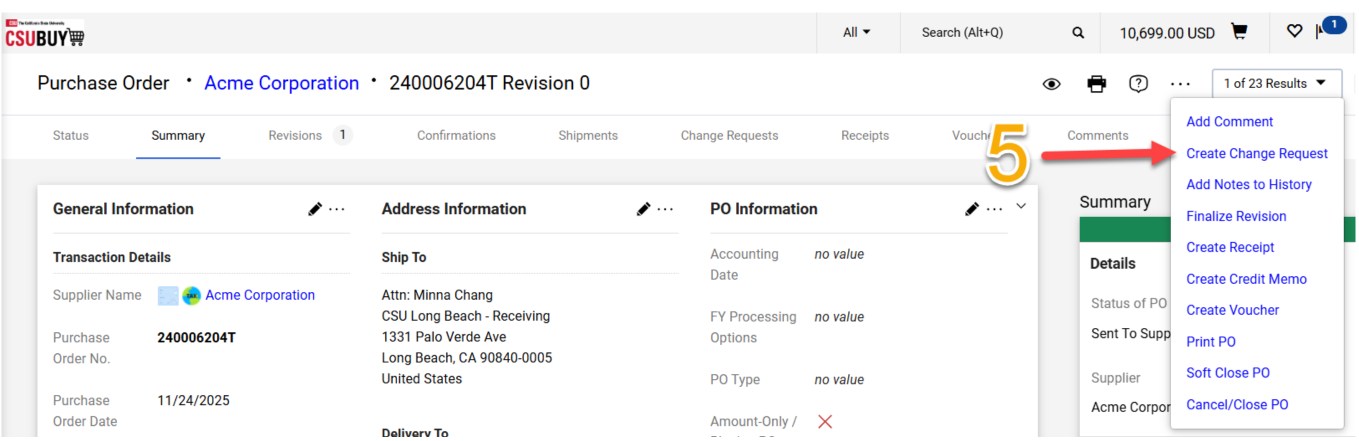


Search for the Purchase Order and select the PO that needs a Change Request.

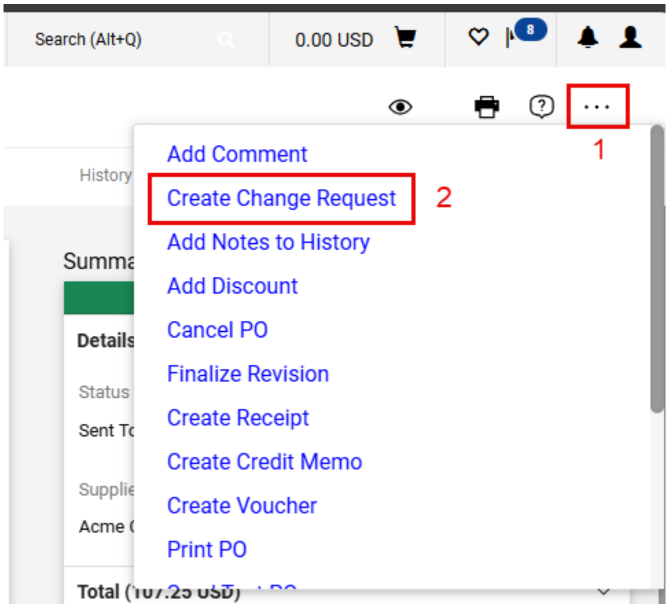
Verify that the Purchase Order's status is Completed. If it is pending, request the Buyer to return the requisition.



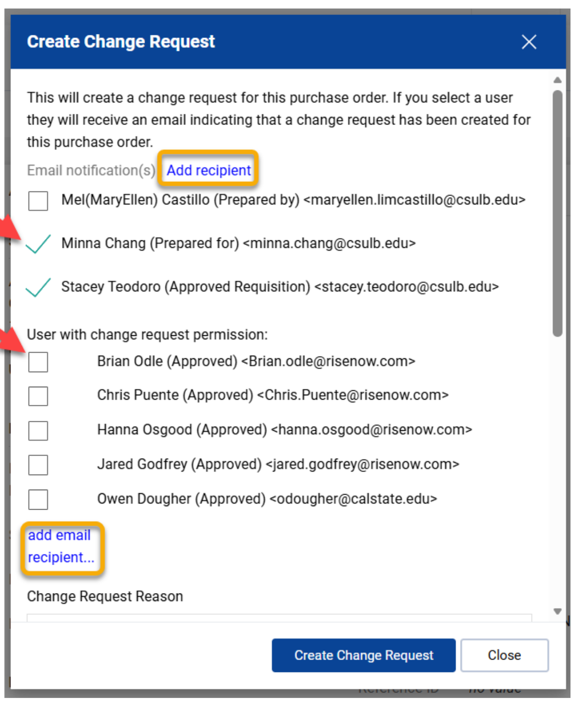
After finding the Purchase Order, click the three dots to the rights and select 'Create Change Request' from the list.



Here is a closer view of 5

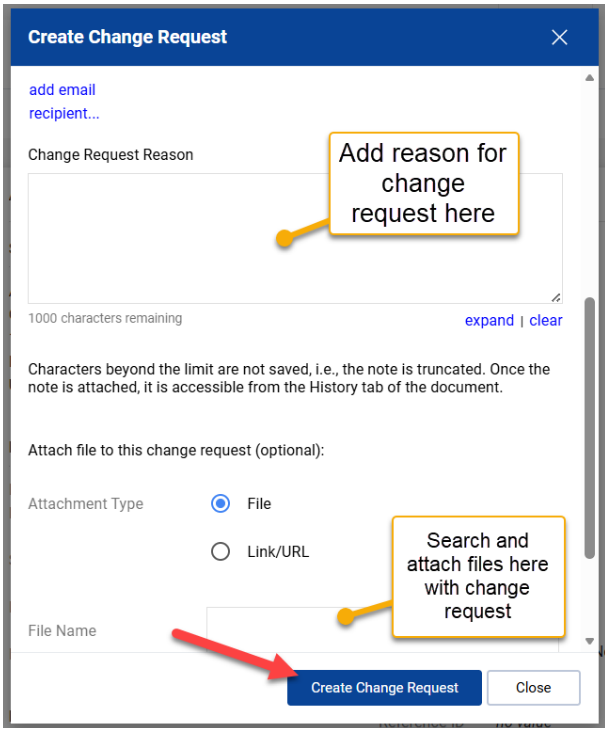


The below pop-up will appear for the change request. Select the users that you want to notify. If the recipient is not listed, click **Add recipient** to add them. Note: it is suggested (not required) that you select your approver(s) as a recipient so they know a change request will be coming for approval. It is not necessary to add the Buyer.

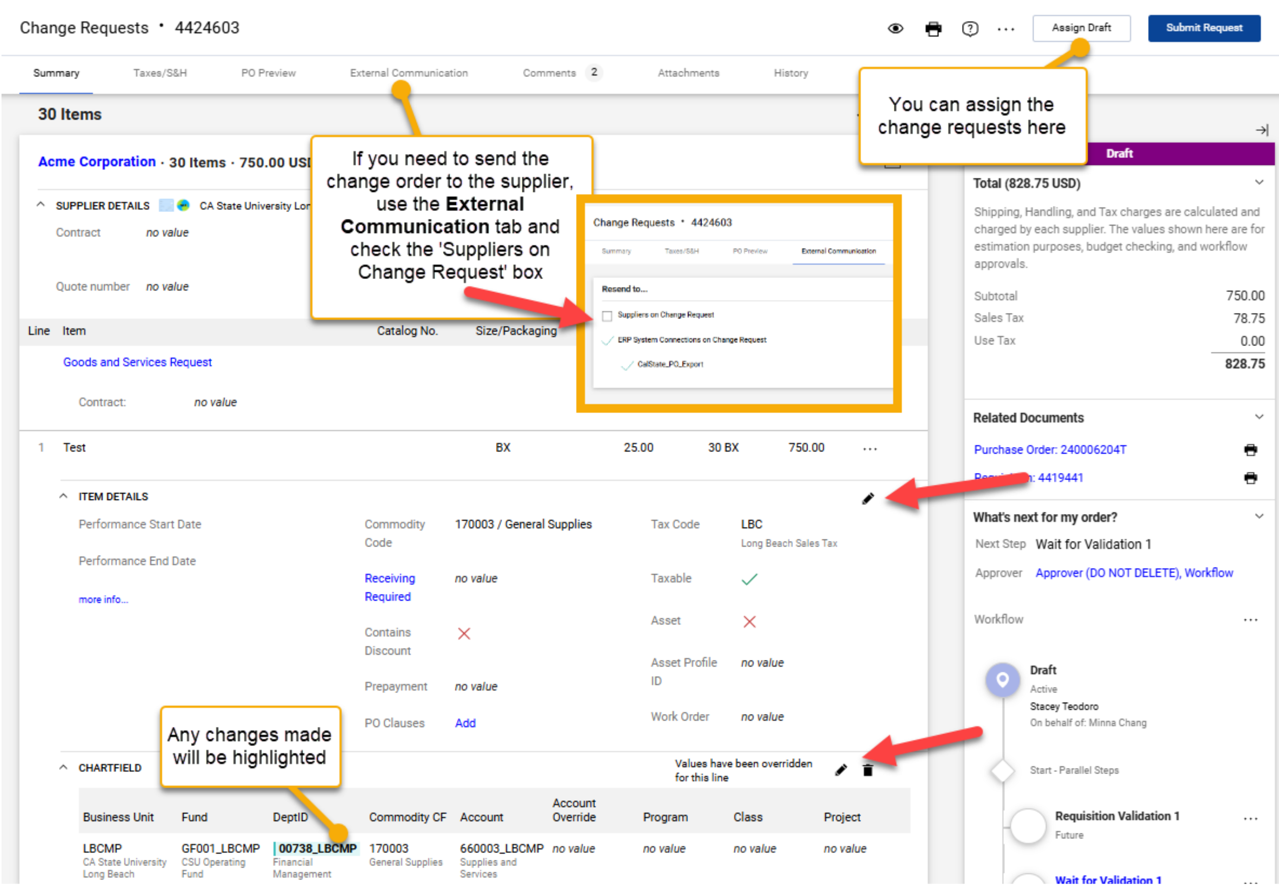


Scroll down to type in the reason for the change request and any necessary documents that need to be attached. Be very specific about what changes you are requesting to the Requisition/PO and attach supporting documents for the change.

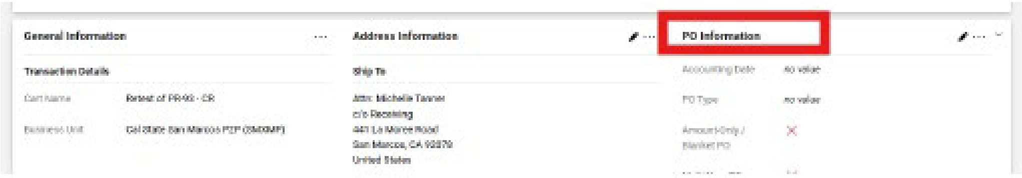
Click Create **Change Request**



You will now be redirected to a draft requisition. Use the pencil icon on the right side of each section to make changes and save.

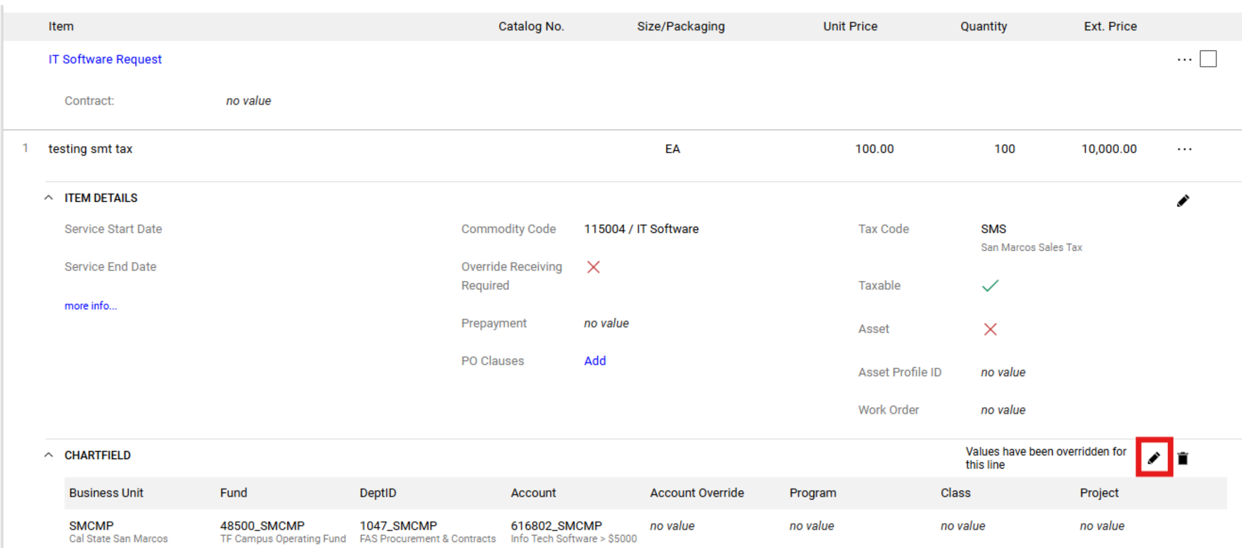


Note: if your original requisition was submitted during a different Accounting Period (month), and the G/L for that month is closed, you will need to remove the Accounting Date, or your Change Request will be returned by the system. To remove the Accounting Date, click the pencil under PO Information so that you may edit the Accounting Date.

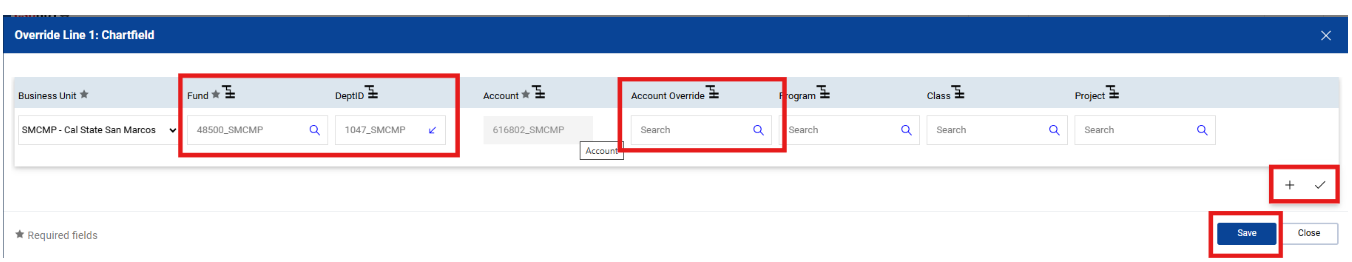


Chartfield Changes

To make changes to the chartfield, scroll down to the chartfield lines and click the pencil to edit.

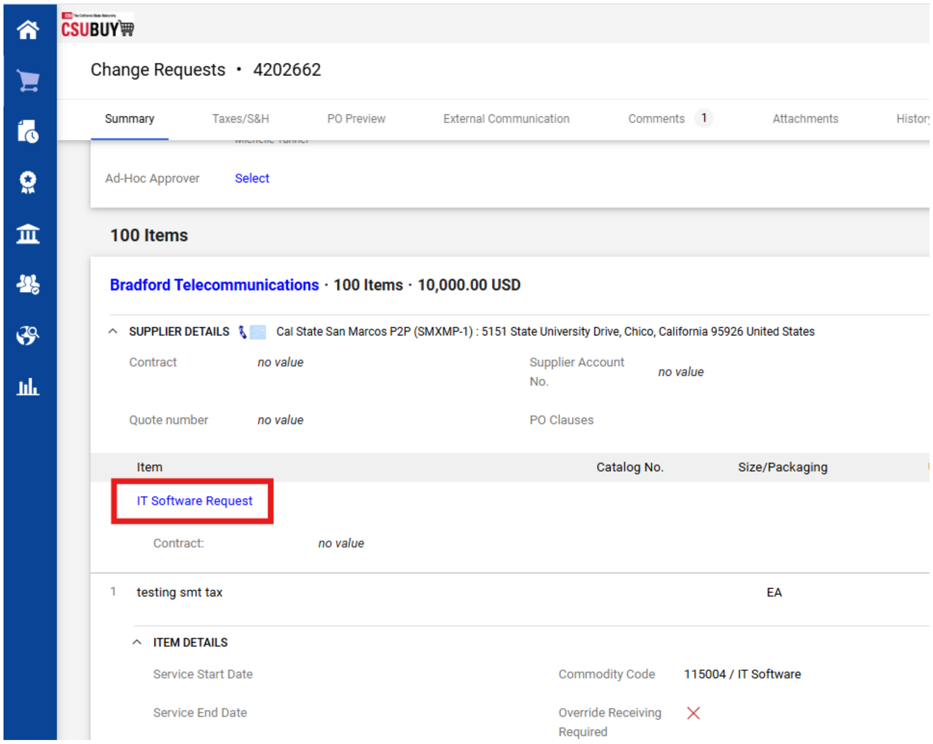


You can change the Fund, Dept ID, add an Account Code Override, or split the fund (+). Once you have made the changes, click on the checkmark to validate then click Save.

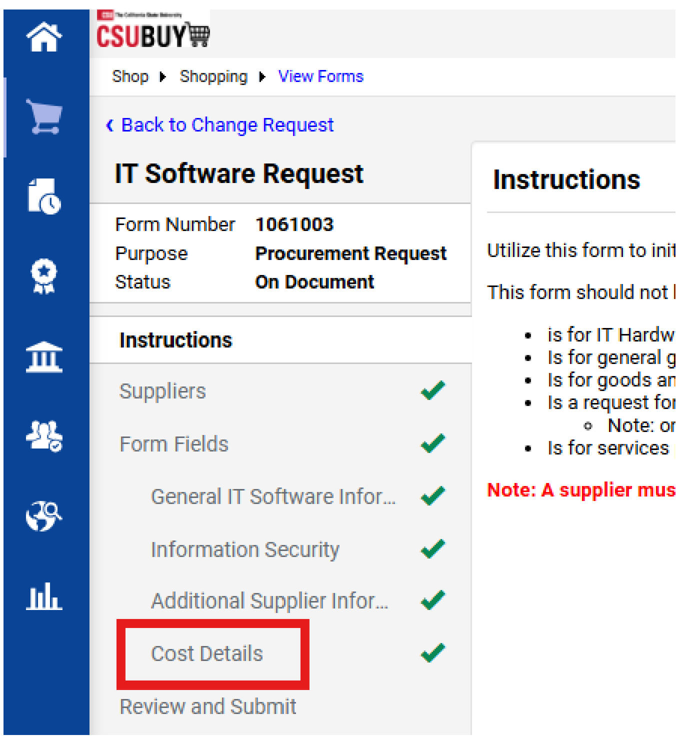


Item Changes

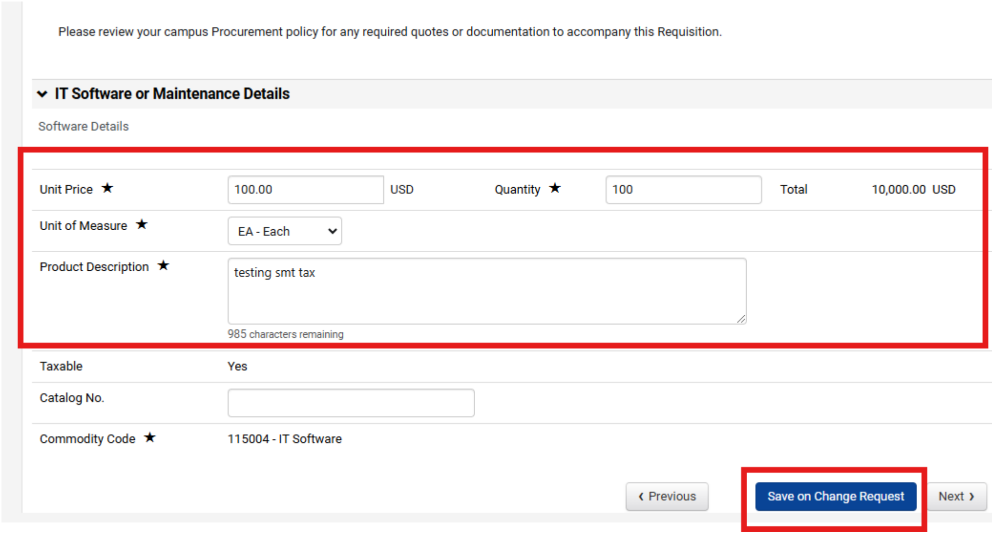
To make changes to the dollar amount, quantity, product description, and other line changes, click on the form name.



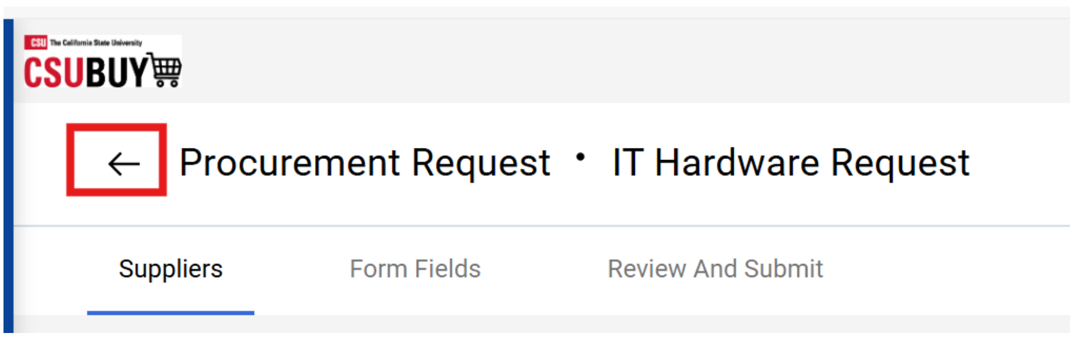
Click on **Cost Details** to get to the cost information.



Make edits to the Cost Details as applicable then click **Save on Change Request**.



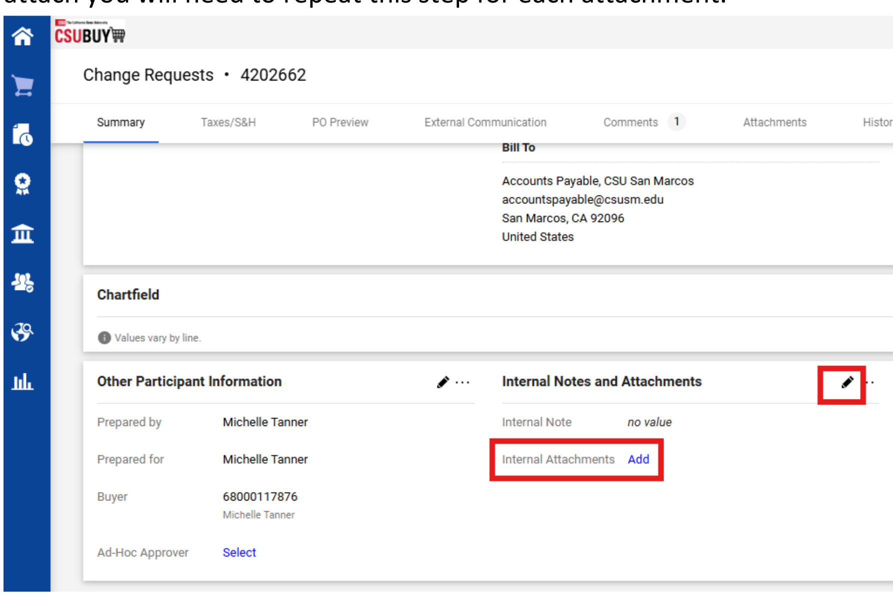
Click **Back Arrow** to get out of the form and to your shopping cart.



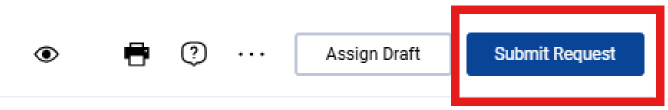
Change Request Process Completion

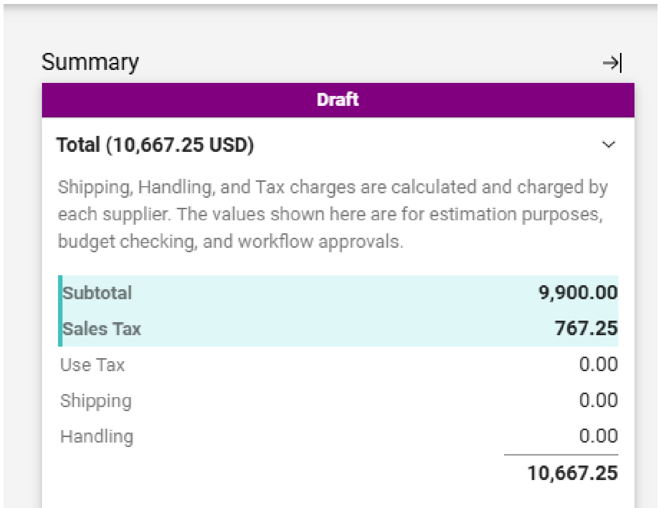
All Change Requests require an Internal Note or an Attachments.

- To add Internal Notes, click the pencil, add your notes, then click Save.
- To add an Attachment, click Add, add your attachments, then click Save. Note: If you have multiple files to attach you will need to repeat this step for each attachment.

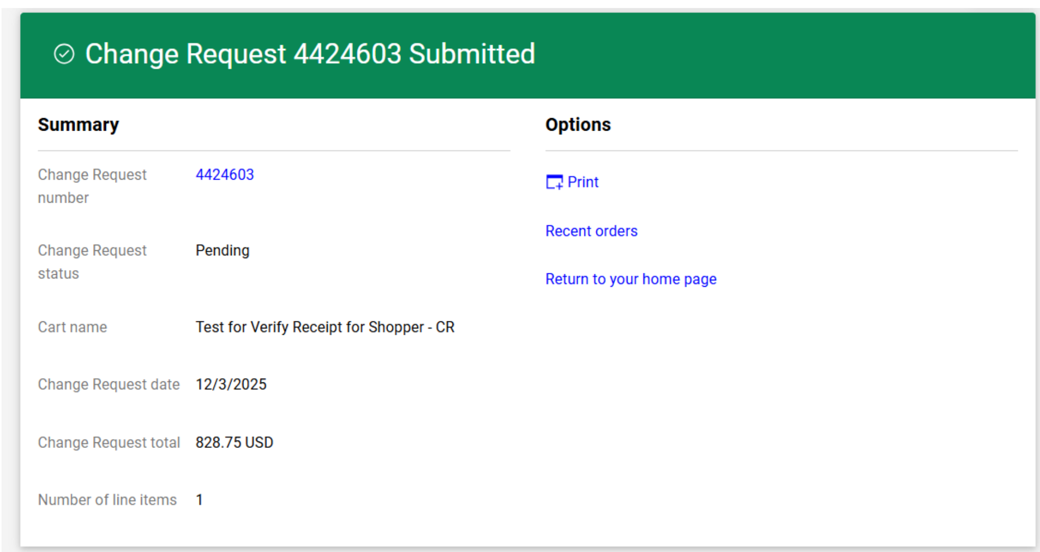


Once all changes are made, click **Submit Request**. Once the Change Request is submitted, it will be routed through the original workflow again.





You will receive a notification that the Change Request has been submitted, and the Purchase Order owner will be notified of the changes.



5-ADDING AND REMOVING A LINE ON A PO

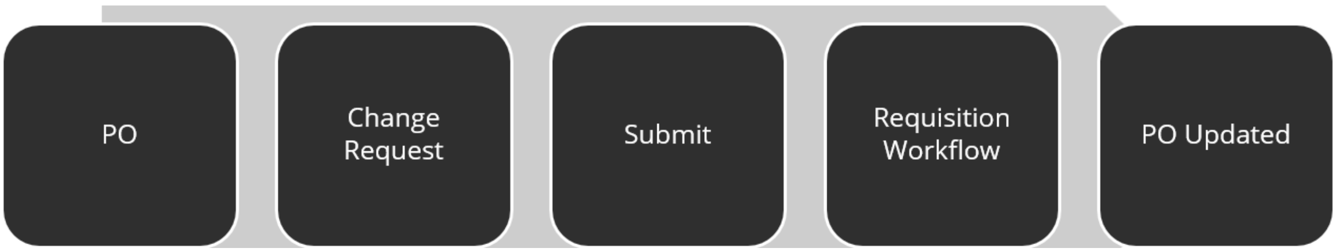
This section will focus on a Change Request adding and deleting a line on a PO. This means you are adding or removing items from the PO. The item to be added must have the **same Supplier** and the **same Form** as the other items on the PO. Please consider putting in another requisition instead as it may be easier that following this process.

A Change Request (formally known as a Purchase Order Amendment – POA) allows the Prepare For person, typically the Requester (who is also the PO Owner) to make changes to an order that has already completed workflow and is now a PO.

A change to the PO can be made only when the PO is NOT in closed status.

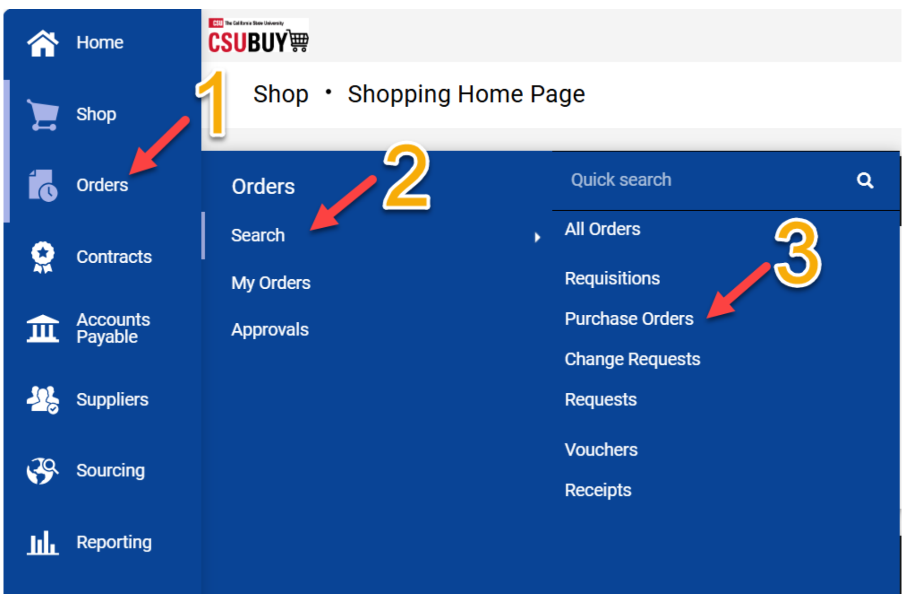
A Change Request CANNOT be made for Punchout Supplier Purchase Orders.

The Change Request updates a Purchase Order by resubmitting the order through the requisition approval workflow for review and approval before the revised PO is finalized. It brings the order back to a draft requisition. Important Note, that a Change Request cannot be made on a PO that has a voucher, payment or receipt; therefore, it is important to check the status of the PO first.

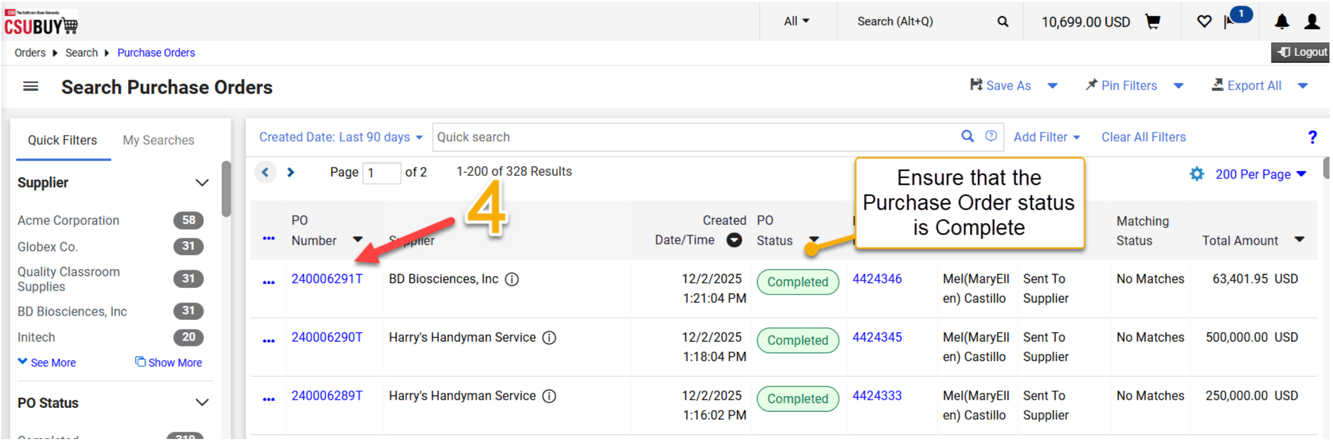


A Change ORDER is only done by Buyers and is different from a Change Request because it does not go through the requisition approval workflow process for the change.

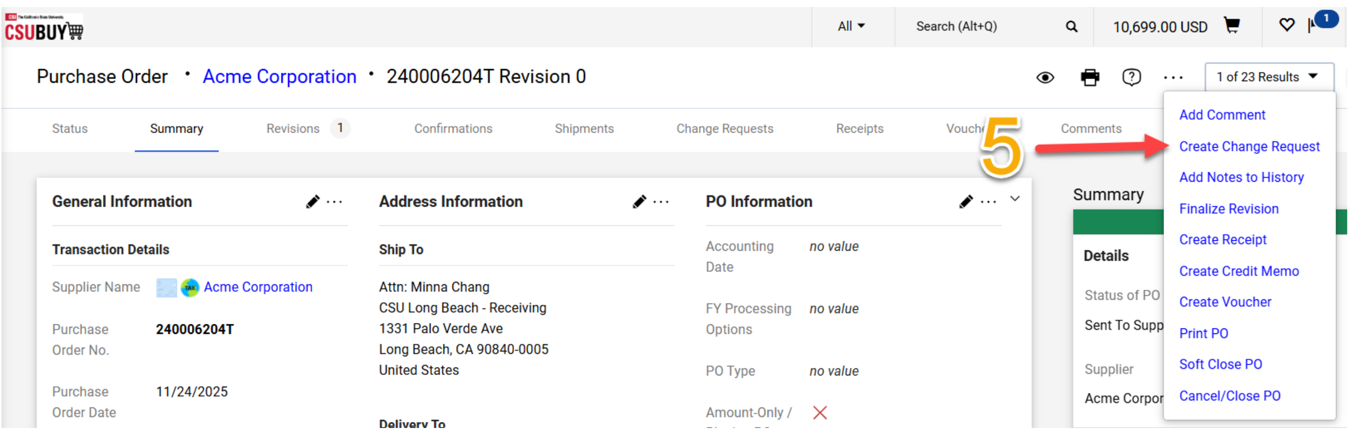
To make a Change Request, first locate the Purchase Order.
From the flyout, select Orders>Search>Purchase Orders



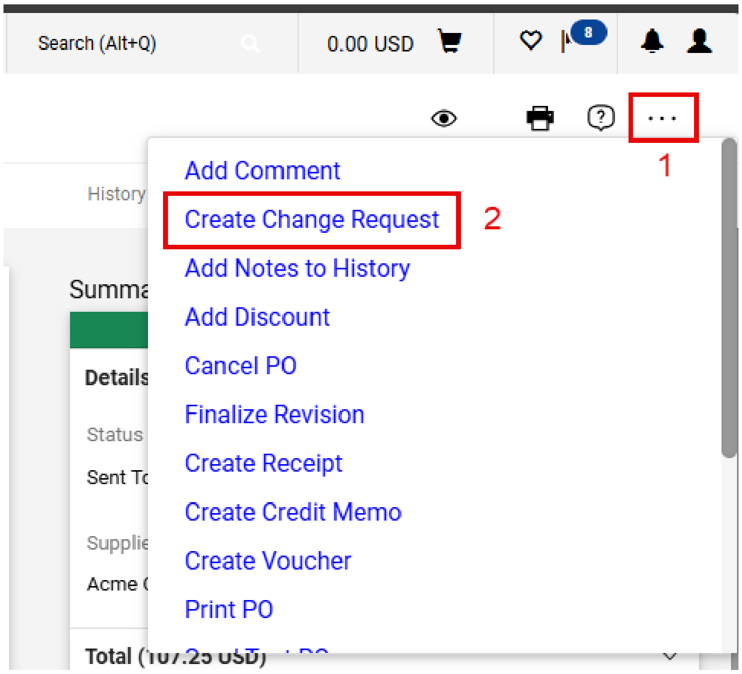
Search for the Purchase Order and select the PO that needs a Change Request.
Verify that the Purchase Order's status is Completed. If the Purchase Order is pending, you may request the Buyer return the requisition to you.



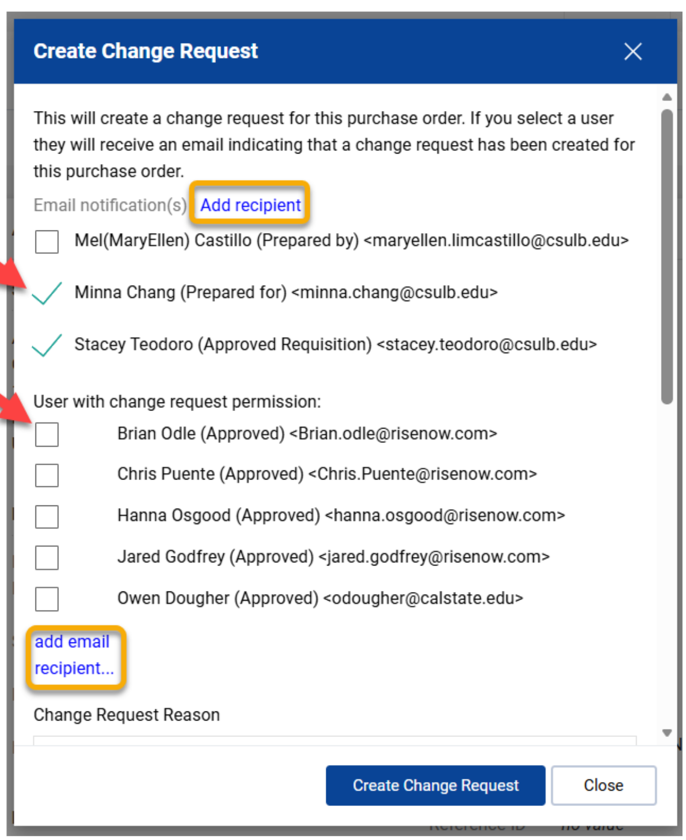
After finding the Purchase Order, click the three dots to the rights and select **Create Change Request** from the list.



Here is a closer view of 5

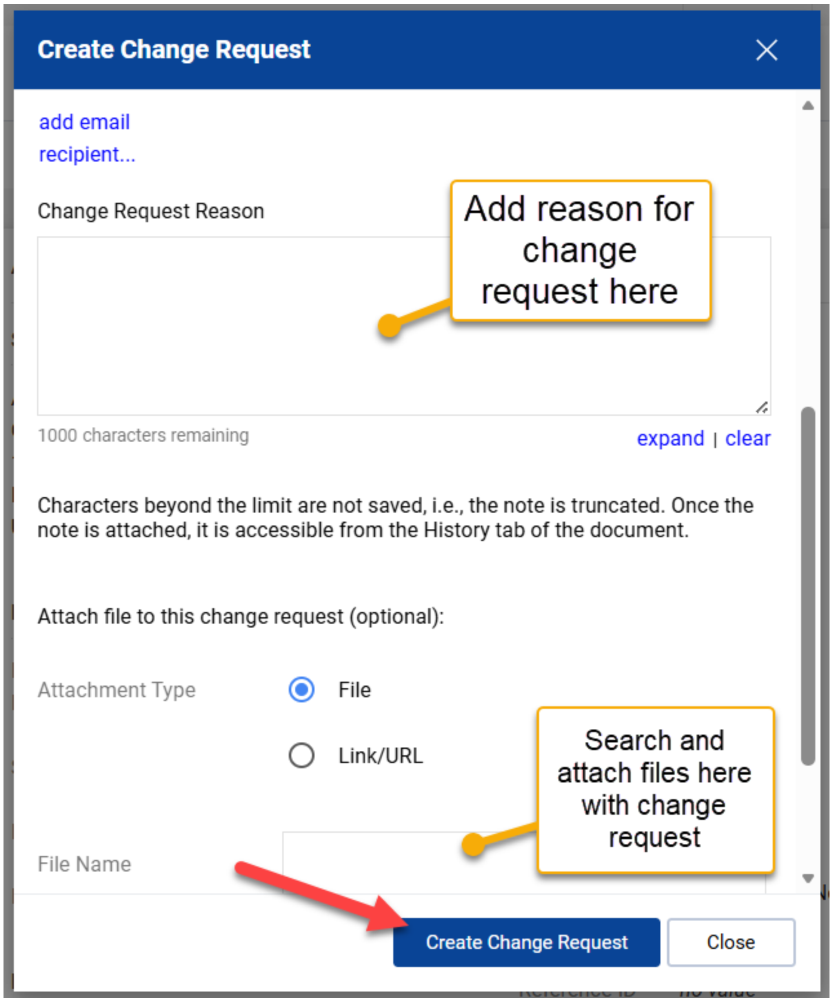


The below pop-up will appear for the change request. Select the users that you want to notify. If the recipient is not listed, click **Add recipient** to add them. Note: it is suggested (not required) that you select your approver(s) as a recipient so they know a change request will be coming for approval. It is not necessary to add the Buyer.

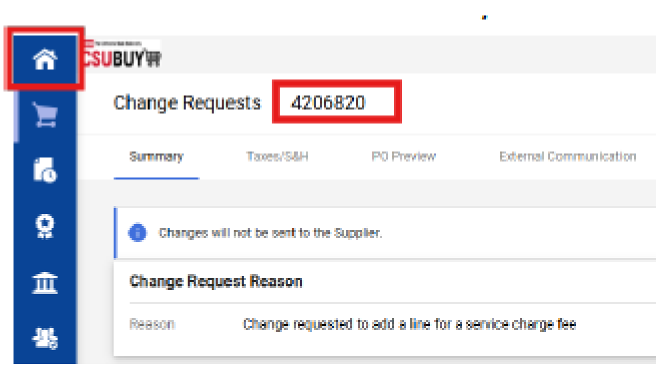


Scroll down to type in the reason for the change request and any necessary documents that need to be attached. Be very specific about what changes you are making to the Requisition/PO and attach supporting documents for the change.

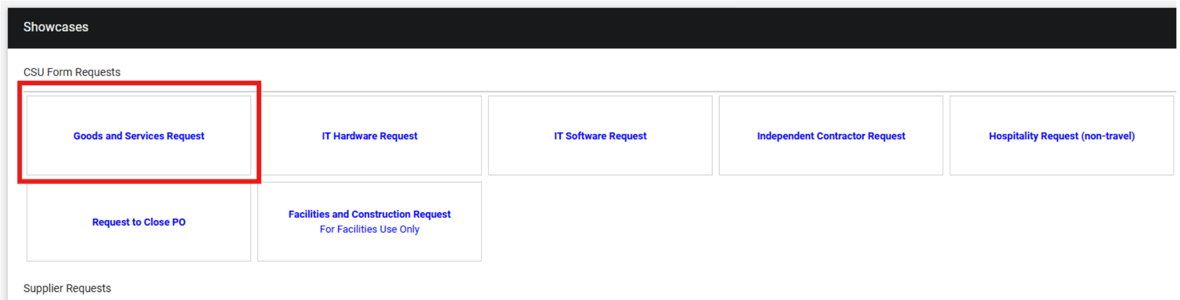
Click **Create Change Request**



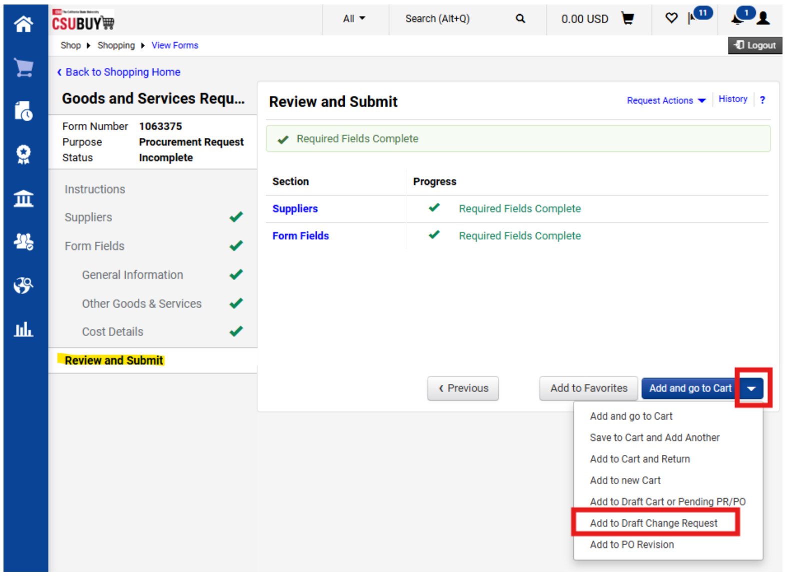
Make sure you note the Change Request number since you will need it in a later step. Then click on the Home icon in the flyout to return to the Shopping Home Page.



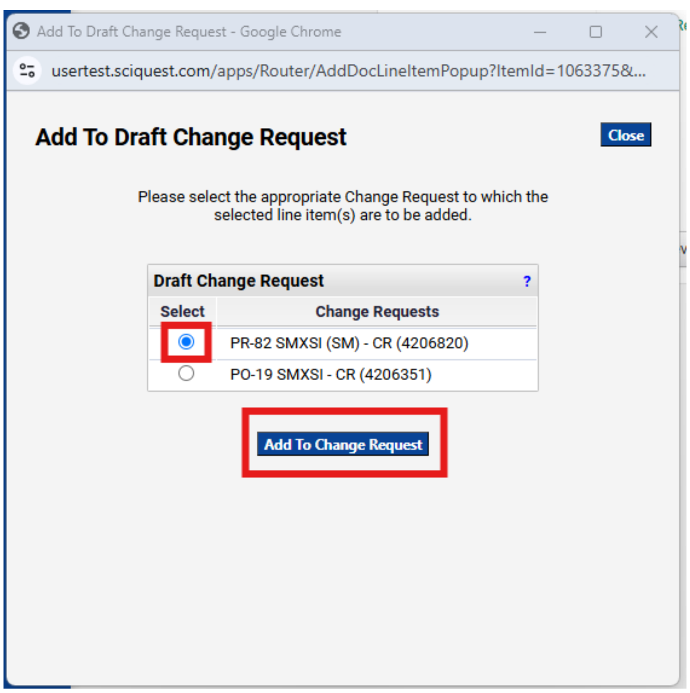
Find the Form for the item you are adding. Again, the Form must be the same Form as the other items on the PO. If it is not, you will receive an error message.



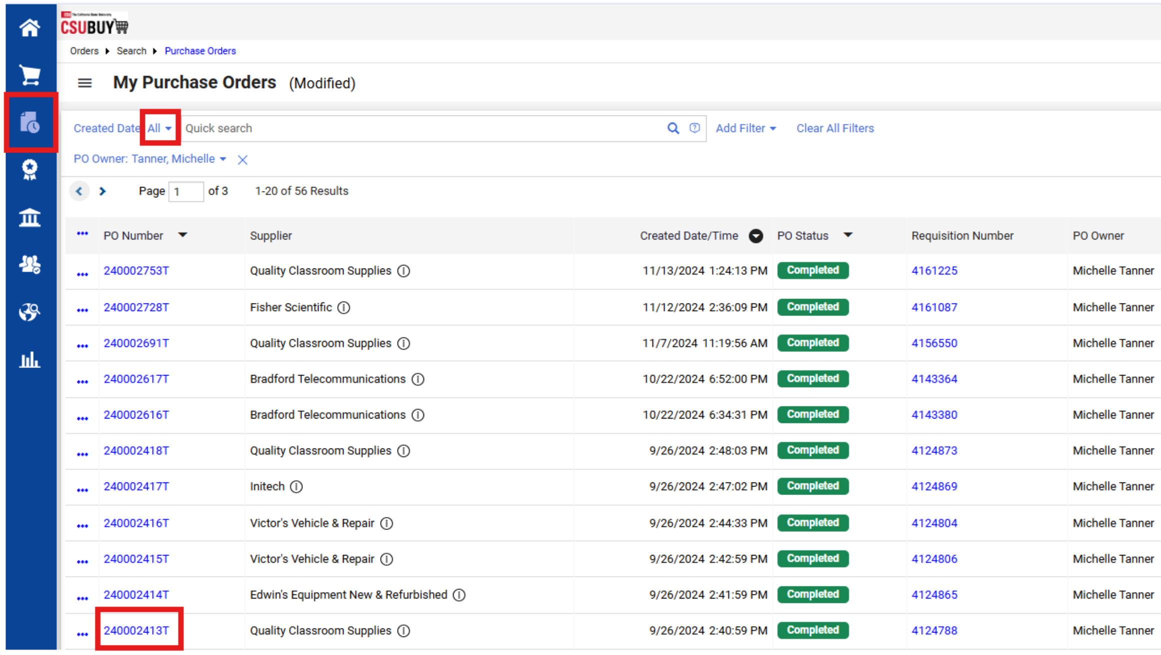
Complete the form fields. Once on the **Review and Submit** page of the Form, click on the drop down and select **Add to go to Cart** and then select **Add to Draft Change Request**.



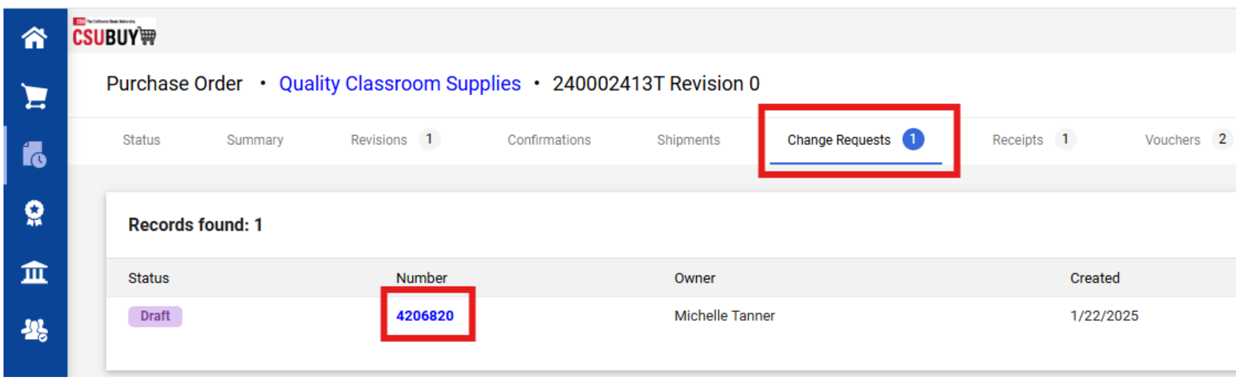
A list of your change requests in Draft status with the same supplier as the item to be added is displayed. Select the correct change request and click Add to Change Request.



Now, return to the Purchase Order you initiated the Change Request for and open it.



Go to the Change Request tab and open the Change Request.

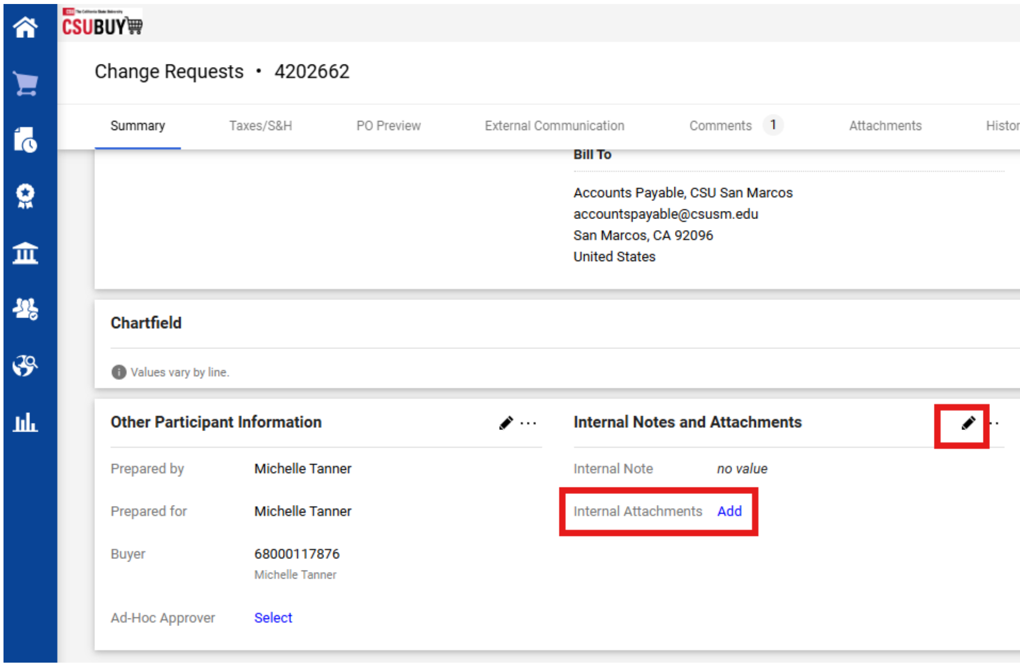


Review the newly added line and details to confirm or edit, as needed.

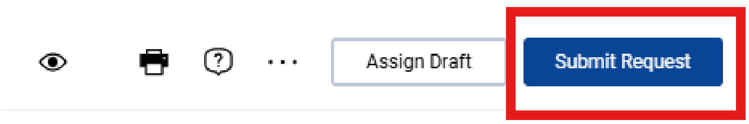
Note: if your original requisition was submitted during a different Accounting Period (month), and the G/L for that month is closed, you will need to update the Accounting Date or your Change Request will be returned by the system. To update the Accounting Date, click the pencil under PO Information

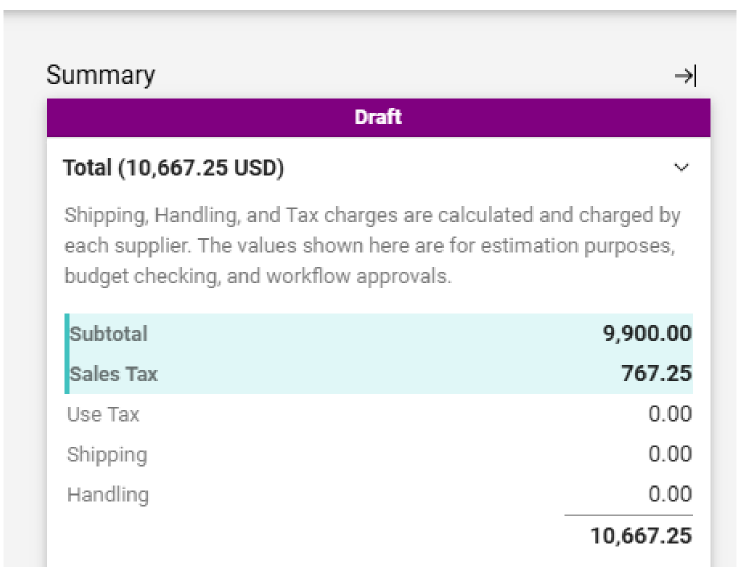
All Change Requests require an Internal Note or Attachment.

To add an Attachment, click Add, add your attachments, then click Save. If you have multiple files to attach you will need to repeat this step for each attachment.



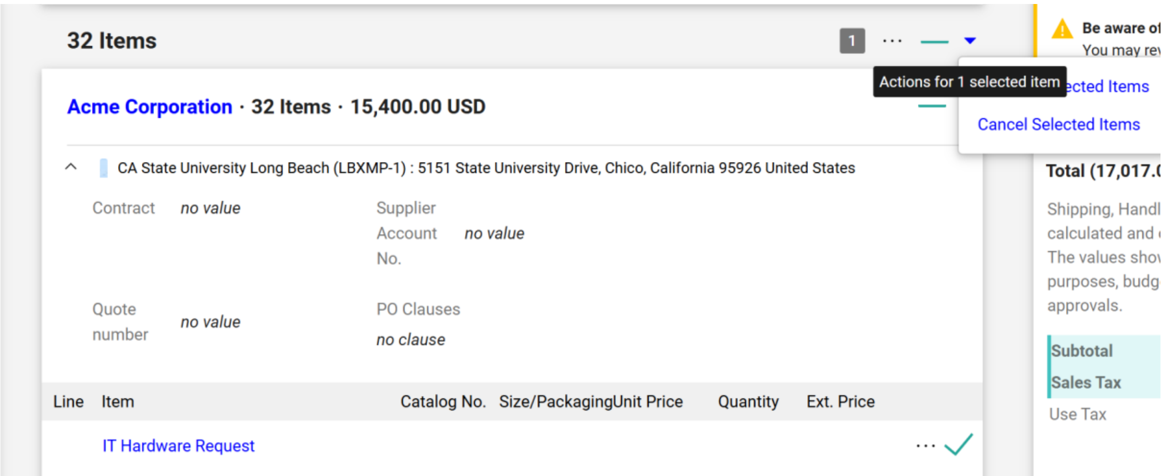
Click Submit Request. Once the Change Request is submitted, it will be routed through the original workflow again. You may search the Change Request Number to see where it is in workflow.

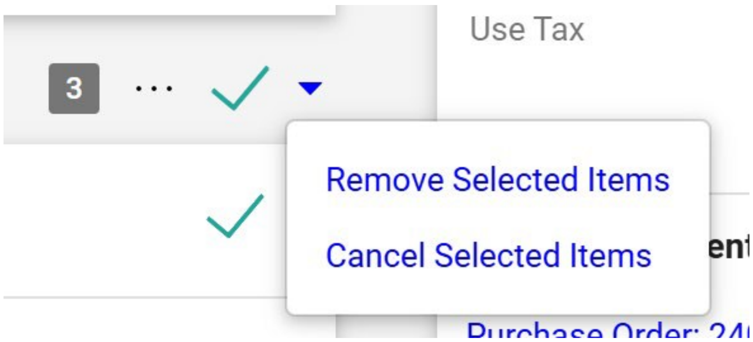




Removing a Line from a Purchase Order

Once you selected Create Change Request, you may navigate to the line or item you would like to remove.



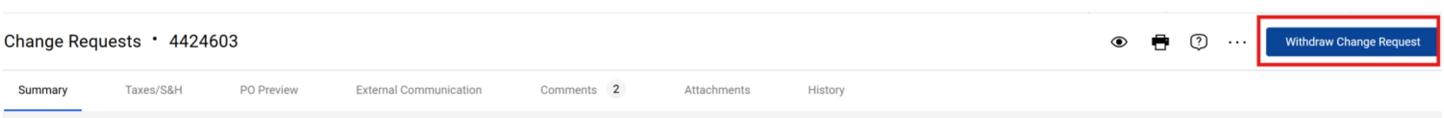


"Remove" is deleting the line from the change request and can only be done on a line that was added on a change request. You cannot remove a line on the original PO. You can cancel the line.

"Cancel" is leaving the line on the PO, but marking it as cancelled. Select this if you no longer wish to purchase the item from the original PO.

Withdraw Change Request

After submitting the Change Request, you may navigate back to the Change Request and select Withdraw Change Request. If this option is not available, it means the Change Request was approved. See the History tab to confirm.

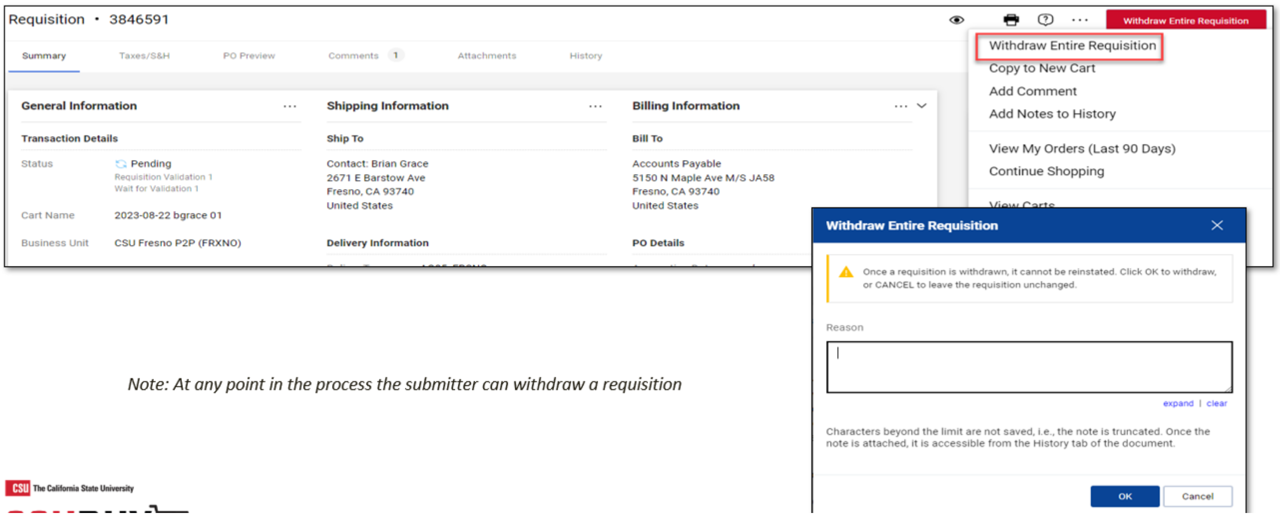


6-WITHDRAW A REQUISITION

A Requisition in workflow could be cancelled and prevented from progressing. However, once it becomes a PO it can no longer be withdrawn.

Once withdrawn, you cannot resubmit that order, but you may copy the items to a new cart and resubmit the order.

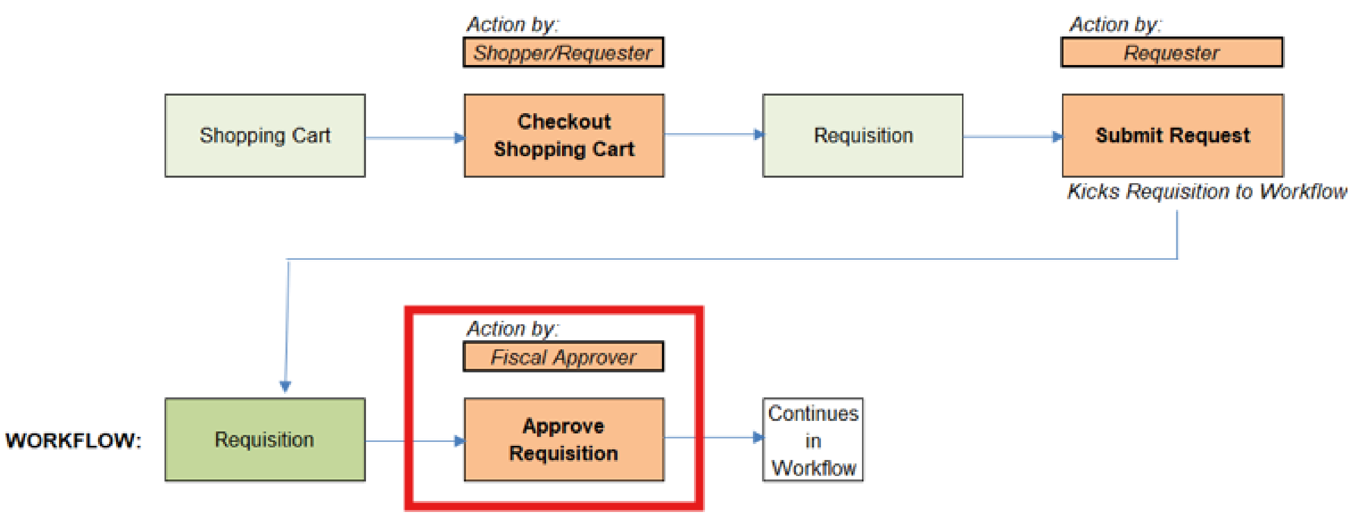
Go to the Requisition and select **Withdraw Entire Requisition**.



CHAPTER 4: DOA APPROVER

1-APPROVAL WORKFLOW FOR REQUISITION

The DOA Approver is notified of a Requisition to be reviewed. When the Requisition is approved, it will continue to the next step in the Workflow.

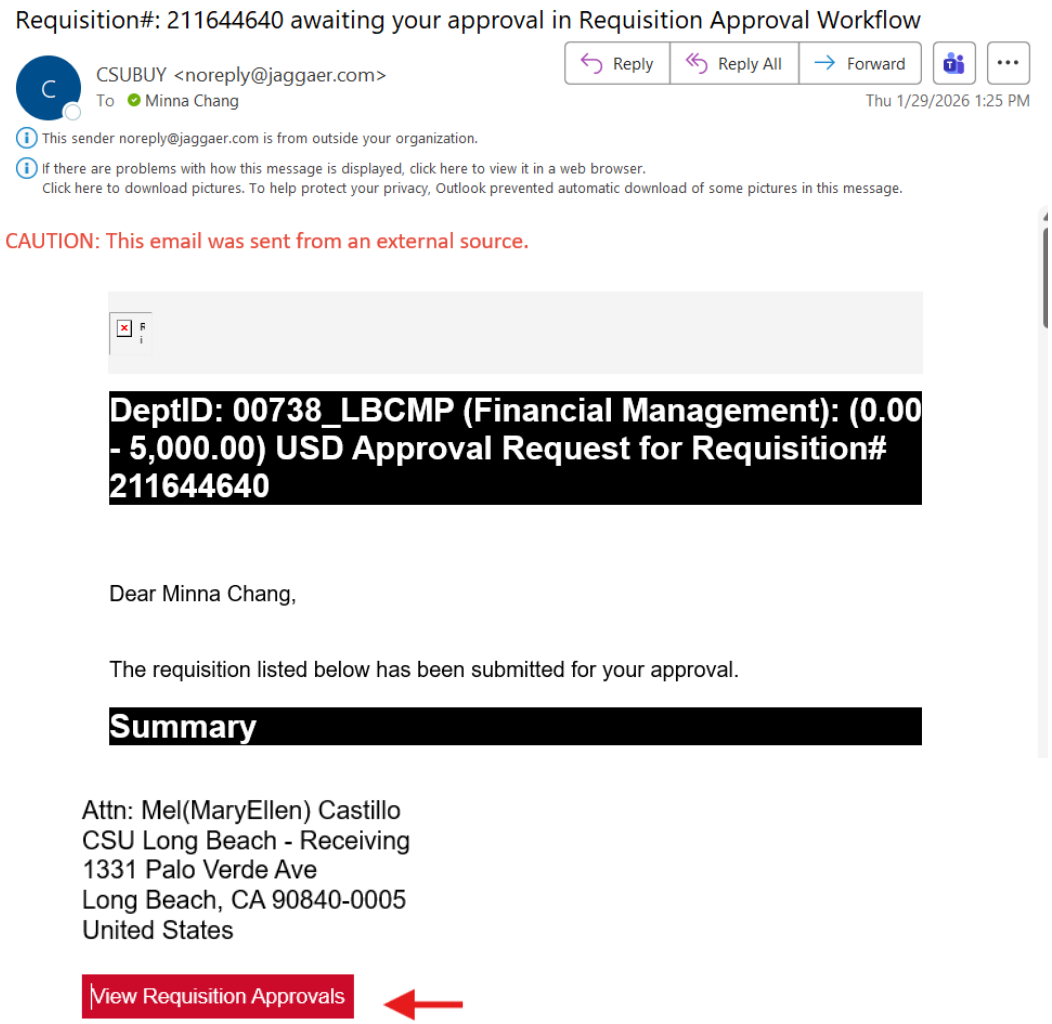


2-LOCATE REQUISITIONS AND ASSIGN FOR YOUR APPROVAL

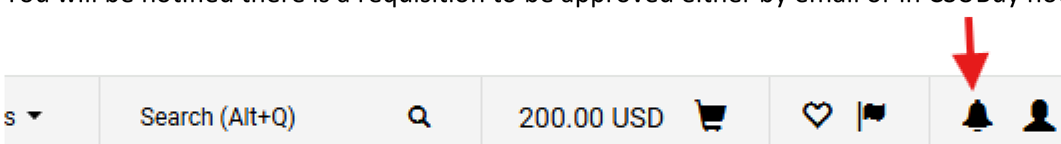
As a DOA Approver, you are designated to approve purchases in CSUBuy based on your DOA level for specific Fund(s) and Department ID(s). The requisition dollar amount determines the DOA level the approver is required to be in.

There are several ways to be notified of and locate a requisition you may approve. Keep in mind that a requisition may have multiple DOA Approvers; however, only one DOA Approver is required to approve the requisition. Please note that once you locate a requisition to be approved, you must first assign the requisition to yourself before you are able to approve the requisition.

1. **Email**
   If you set up your notifications to receive an email if a requisition needs your approval, you will receive an email from CSUBUY. Scroll down and click on View Requisition Approval, which will take you to a list of requisitions you may approve.

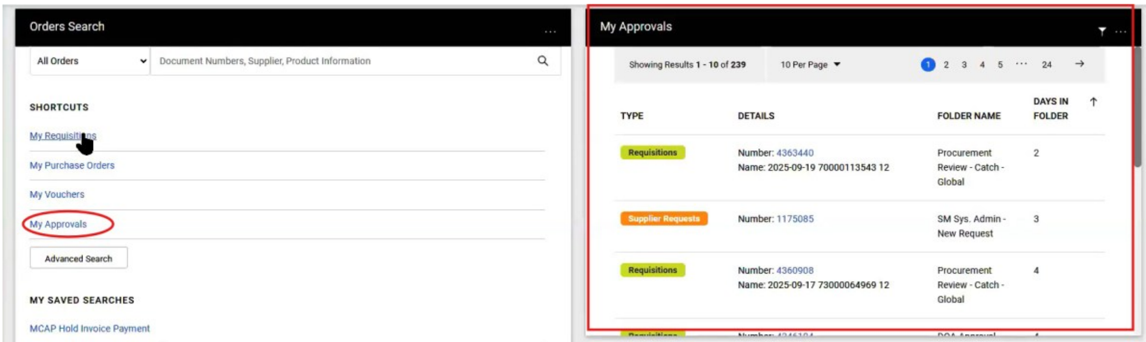


2. **Notifications**
   You will be notified there is a requisition to be approved either by email or in CSUBuy notification bell alert.



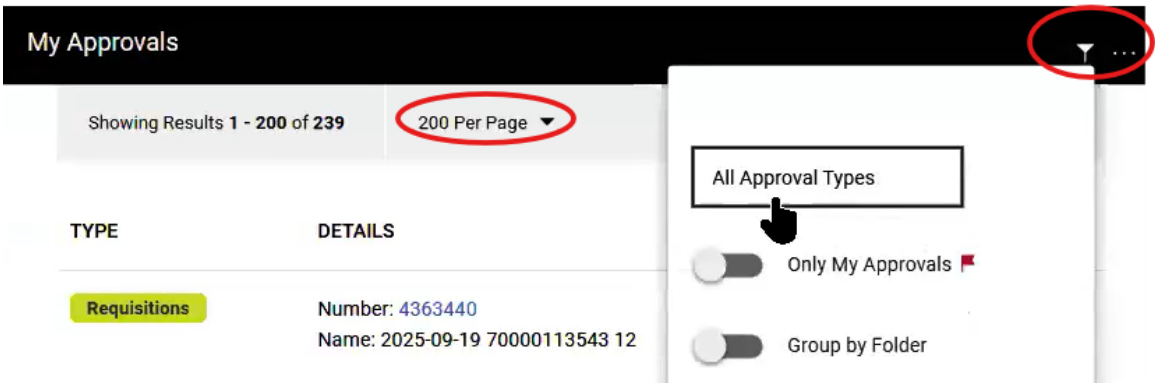
3. **Home Page: My Approvals**

Requisitions to be approved appear on the Home Page in two areas as highlighted below:



In My Approvals, adjust the number of documents to view per page and use the filter.

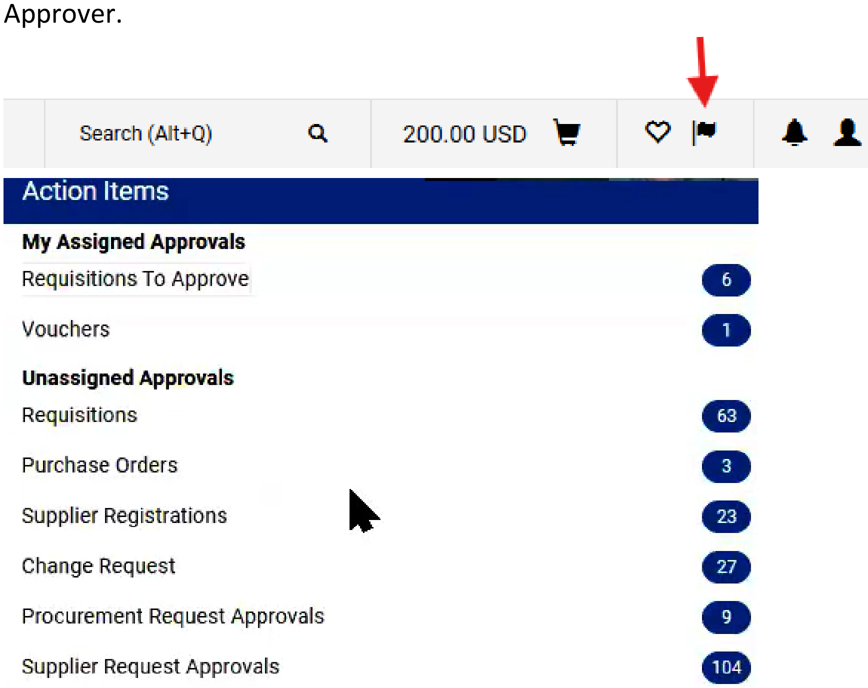
(See the Section **on Filtering My Approvals on Home Page** for more details.)



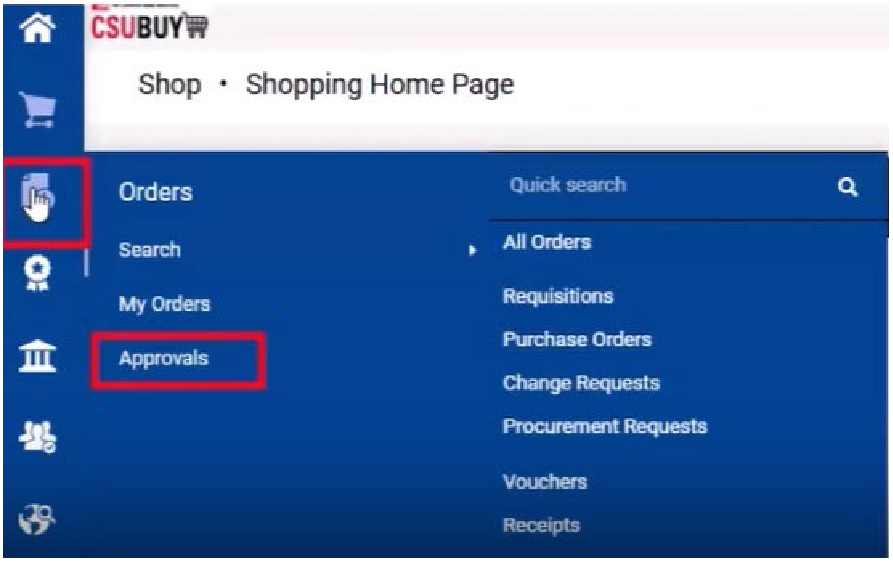
4. **Home Page: Action Item Flag**

Click on the Flag on the Home Page to locate requisitions to approve.

Once you click there, you will see Action Items split between My Assigned Approvals, which are requisition assigned to you and Unassigned Approvals, which are requisitions that have not yet been assigned to an Approver.



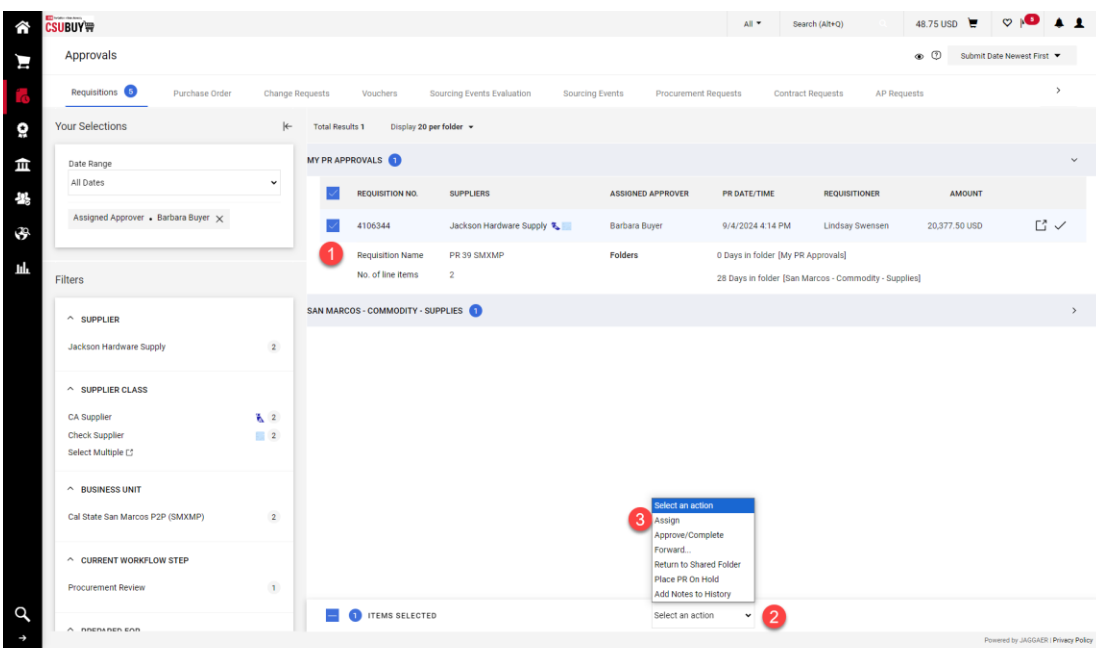
5. **Search**
   You may search for Requisition to be approved by selecting from the Home Page flyout: Orders>Approvals>Requisition to Approve

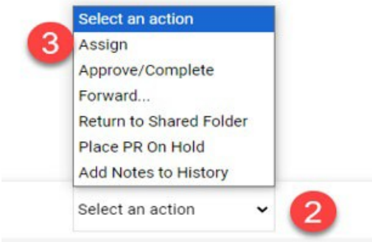


Assigning Yourself a Requisition:

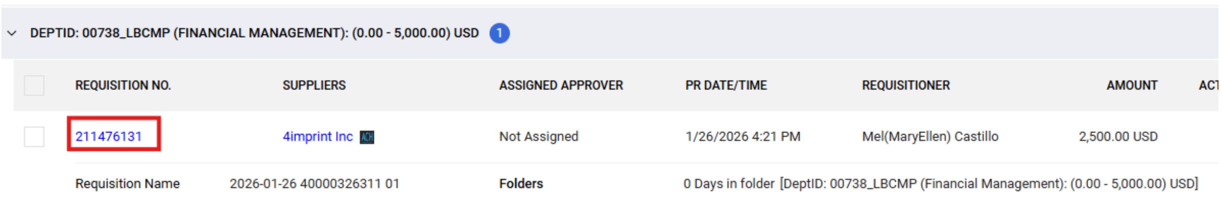
When identifying a requisition in the Approval queue, you may:

1. Select the Requisition by clicking on the box to the left of the Requisition
2. Click on the "Select an Action" drop down
3. Select Assign

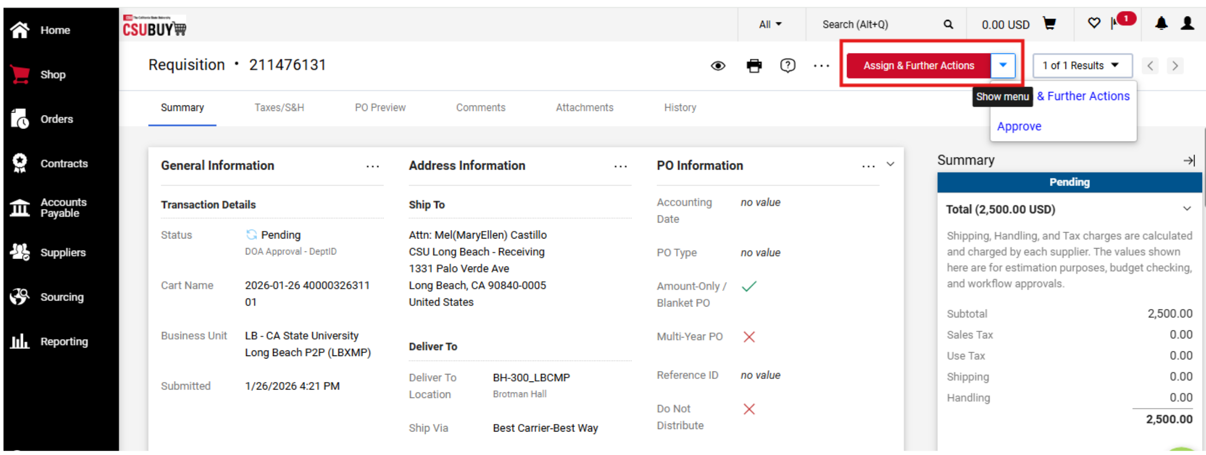




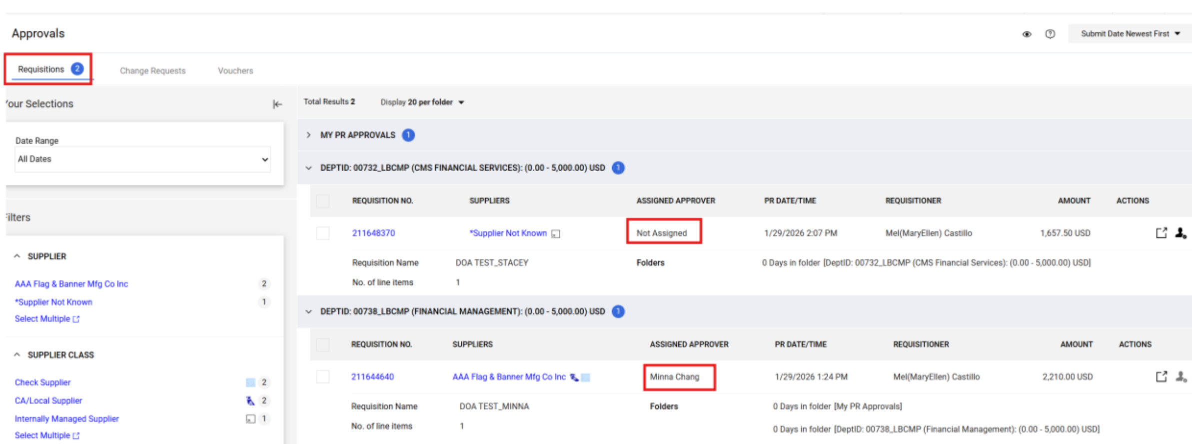
You may also open the requisition by clicking on the blue hyperlink.



Then select Assign & Further Action



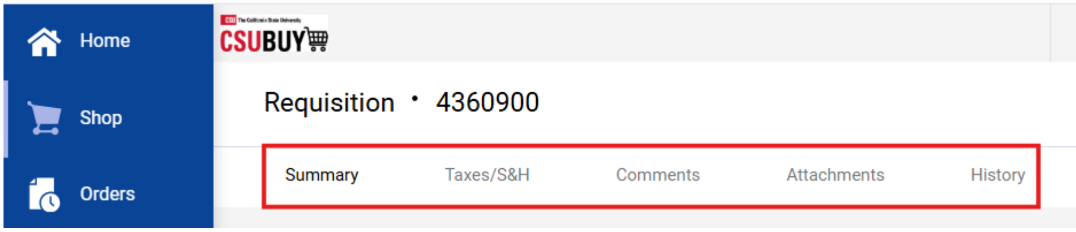
Requisition Approval Queue View of Assigned and Unassigned



3-REVIEWING A REQUISITION FOR APPROVAL

The DOA Approver cannot make any changes to the Requisition EXCEPT, change the Chartfield, add Comments & Attachments, and add a PO Reference ID. Note: When you see a pencil icon, you may make an edit.

These are the key elements to review in a requisition. Click on each section to view details.

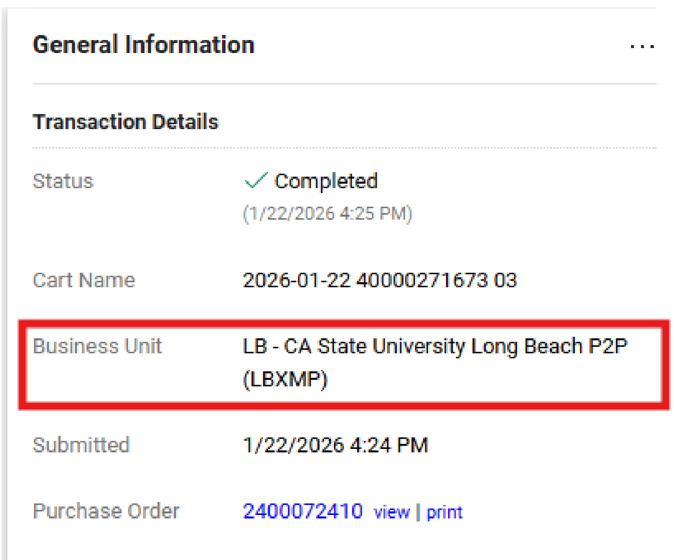


Summary

This is the most important section to review.

<u>General Information</u>

Make sure the Business Unit is correct.



<u>Address Information</u>

- **Ship To** is typically the address for our Campus Receiving
- **Deliver To** is the building and room within Campus the product will be delivered to
- **Bill To** is to the AP Dept address

PO Information

PO Information	
Accounting Date	*no value*
PO Type	*no value*
Amount-Only / Blanket PO	✗
Multi-Year PO	✗
Reference ID	*no value*
Do Not Distribute	✗

Accounting Date is usually blank unless there is a reason to specify this field such as a Change Request after the closing of the accounting period.

Amount-Only/Blanket PO – These are Purchase Order for goods or services with multiple payments not based on quantities being delivered.

- By indicating YES, the entire PO remains open until the total dollar amount has been fully vouchered.
- Each line on an Amount-Only/Blanket PO should have a quantity of ONE using the Unit of Measure (UOM) each or lot. The entire PO must be by quantity or by amount, it cannot contain a mix of both line types.
- Multi-Year PO - This should never be selected for our campus.

Other Participants

Provides information on the Requisition
Prepare by – Requester, who is the person who kicked off the Requisition to workflow
Prepare for – The person who created the Shopping Cart, usually the Shopper or Requester

Other Participant Information	
Prepared by	Michael Pruitt
Prepared for	Michael Pruitt
Buyer	*no value*

Internal Notes and Attachments	
Internal Note	*no value*
Internal Attachments	

External Notes and Attachments	
Note to all Suppliers	*no value*
Attachments for all suppliers	

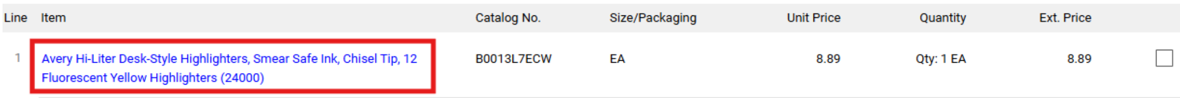
Internal Notes & Attachments can only be viewed by a person in the CSU who has access to CSUBUY

External Notes & Attachments can be viewed by a person in the CSU who have access to CSUBUY and by Suppliers

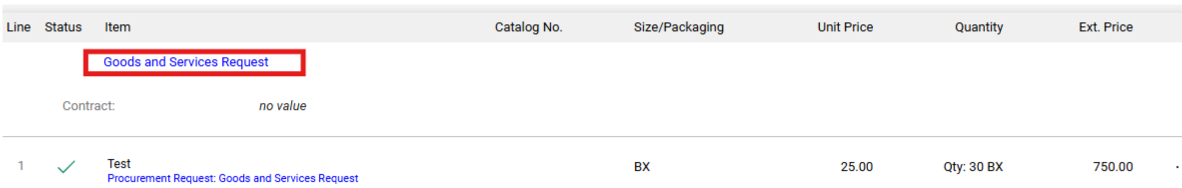
Supplier Detail
Information on the supplier is provided.

Item Detail

If the Item listed provides an item description, this Requisition is from a Punchout Catalog.

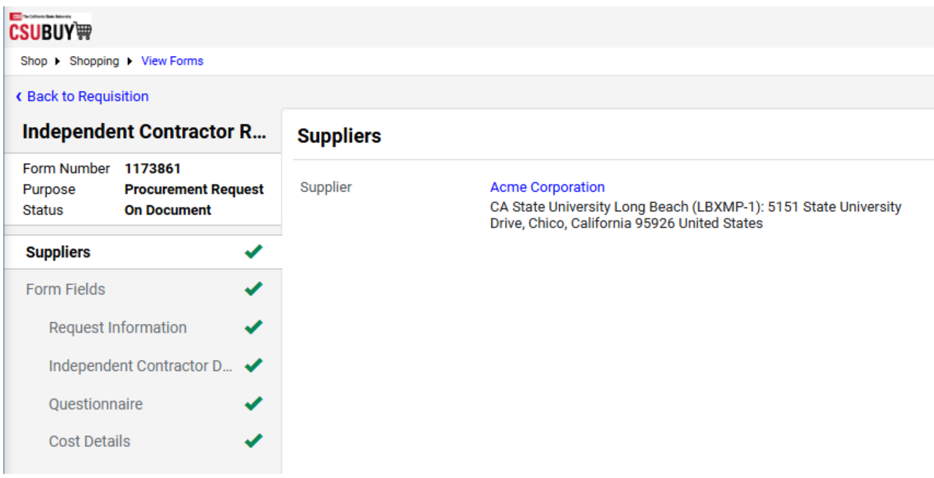


If the item listed is titled with **Request**, this Requisition is using a **Form**. You may click on the blue hyperlink and review that the Form has been completed appropriately.

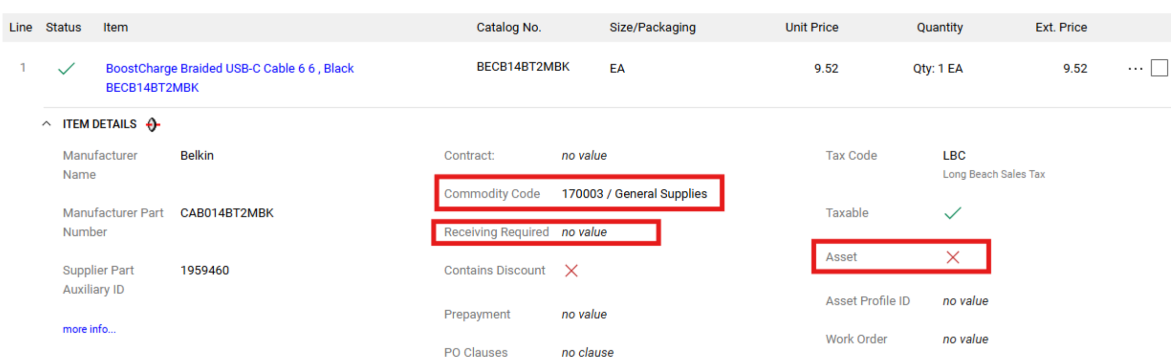


You may click on

Click on each **Form** field (green check marks) to review details.



All Requisitions include the following fields to be reviewed:



Commodity Code - Confirm commodity code is correct for the item being purchased. Please note this is an important field because the commodity code is what triggers a requirement to Create a Receipt when the goods arrive or a Compliance Review. Please see *Chapter 2 Shopper/Requester; Section 12 Commodity Code and Compliance Reviews* for a list of Commodity Codes that trigger a requirement to Create a Receipt and Compliance Reviews and Chapter 6, Section 1 for a complete list of Commodity Codes.

Receiving Required – This is automatically checked based on commodity code and will trigger the requirement to Create a Receipt when the product or service is received. The Shopper/Requester has been instructed not to adjust this field.

Asset - Mark "yes" if you know the item is an asset that will be capitalized, typically assets over $5,000. This also triggers the requirement to Create a Receipt.

<u>Chartfields</u>

Review and ensure the Chartfields are correct. If the Account is incorrect, you have the ability to update the Account by entering an Account Override.

CHARTFIELD

Values have been overridden for th line

Business Unit	Fund	DeptID	Commodity CF	Account	Account Override	Program	Class	Project
LBCMP CA State University Long Beach	GF001_LBCMP CSU Operating Fund	00738_LBCMP Financial Management	170003 General Supplies	660003_LBCMP Supplies and Services	*no value*	*no value*	*no value*	*no value*

Taxes/S&H

Review of Sales and Use Tax for item.

Comments

Review for comments from individuals involved in the purchase of the item. You may also add comments.

Attachments

Review attachments associated with the Requisition. It could be a quote, email, or other information.

History

This provides a history of all those who took any action on the requisition. Since this is extensive, you may opt not to review in detail unless you are searching for specific information regarding the requisition.

Approver Checklist Tips

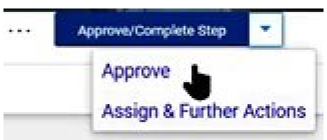
1. Verify account, fund, department, and project number, if applicable.
2. Verify shipping address, contract number and price or bid, as applicable.
3. Verify business purpose/appropriateness of allow-ability of purchase.
4. Verify the correct form was used, if applicable. Note that non-catalog suppliers are those suppliers who do not have a catalog in CSUBuy. Direct Payment Request forms are used for to pay an invoice for purchases already made such as utilities.
5. Verify required documents are attached such as quotes/bids, invoices, if applicable.
6. Review order for accuracy and reasonableness – amount and price

4-APPROVER ACTION

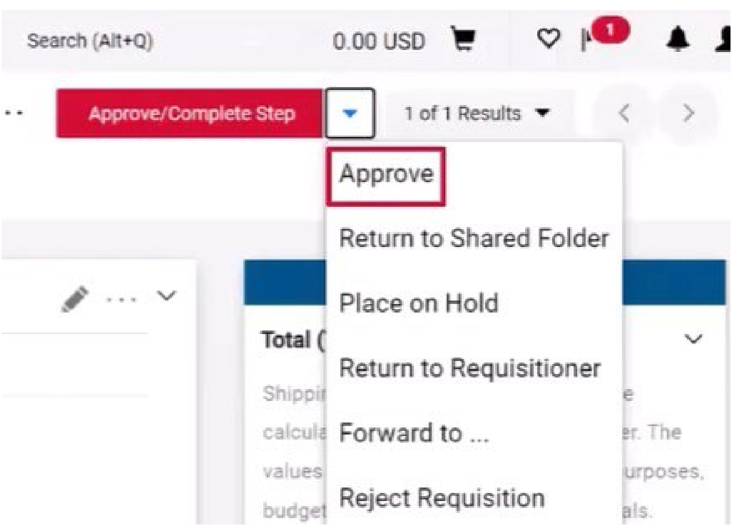
Once you locate the Requisition for your review, assign the Requisition to yourself and review the Requisition, there are multiple actions available for you to take as DOA Approver.

Approve a Requisition	Return to Shared Folder	Place Requisition on Hold	Return to Requisitioner
Forward Requisition	Reject Requisition	Add Ad-Hoc Approver	Assign Substitute

Open the Requisition and choose Approve if everything is correct and it can move to the next step or select **Approve & Further Actions**.



Approve & Further Actions provides additional options including Approve as shown:



Below are a list and description of approver's actions available:

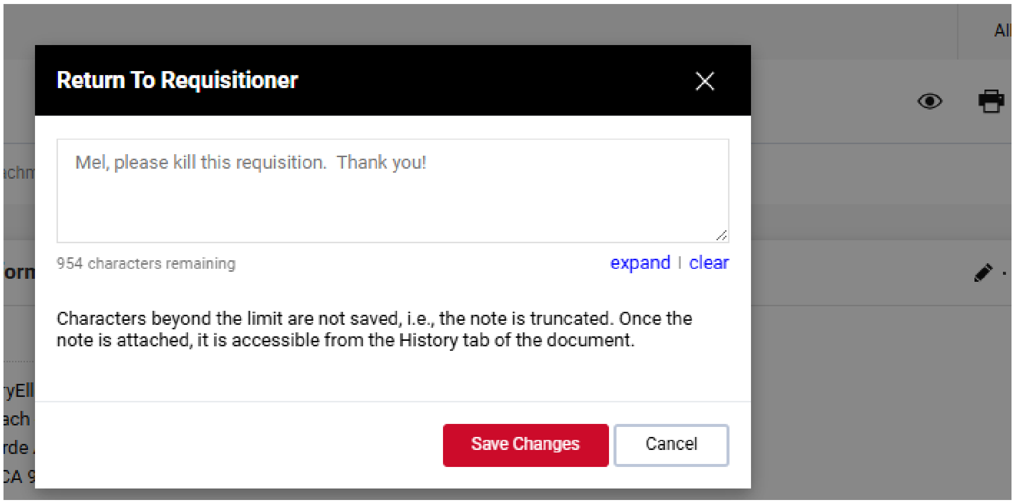
Approve: Everything looks good and completes the current step and authorizes it to proceed to the next step in the process.

Return to Share Folder: You <u>unassign</u> yourself and return the requisition to the share folder and allow access to other approvers. It is important to note that no notification occurs when this action is taken.

Place on Hold: Requisitions may be put on hold to resolve issues or gather more information before approval. This lets the Requester know that you have viewed the requisition and are working on it.

Return to Requisitioner: An approver may return the requisition back to the requester for edits and/or corrections.

- In the pop-up window, enter the reason for the return.
  The note will be available via the Comments and recorded in the History tab with the Requester being notified. When you Save Changes, the Requisition will be sent back.



- The Requester can access the requisition from the Draft Carts screen (Shop>My Carts and Order>View Carts>Draft Carts).
- The Type column will indicate the requisition was returned. The cart can be opened, updated, and resubmitted to workflow.

Forward to: You may forward the requisition to another approver to review and approve the requisition. Forward to an approver who has the same DOA level authority as yourself. Keep in mind that when forwarding, you are forwarding your authority.

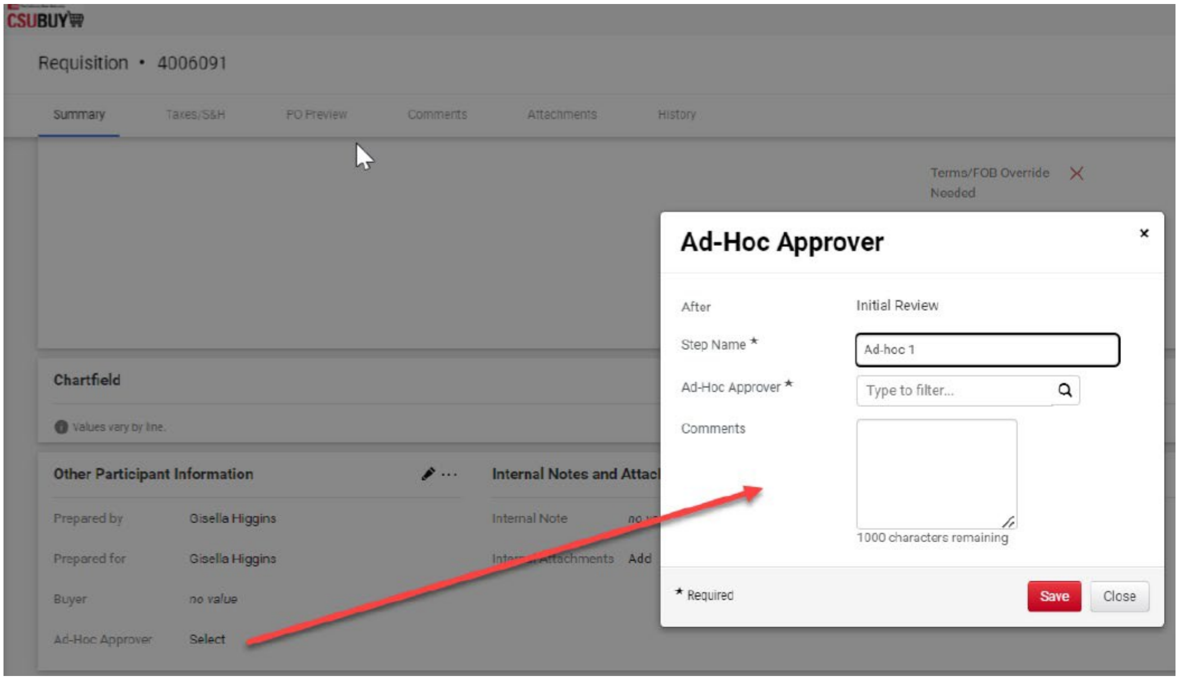
Reject a Requisition: This action terminates the requisition from workflow. The action is not reversible and essentially kills the requisition so no further action can be taken on it.

- Enter the reason for the rejection in the pop-up window and select Reject Requisition to save the comment and reject. Requester will be notified it is rejected.

__Other Additional Actions:__

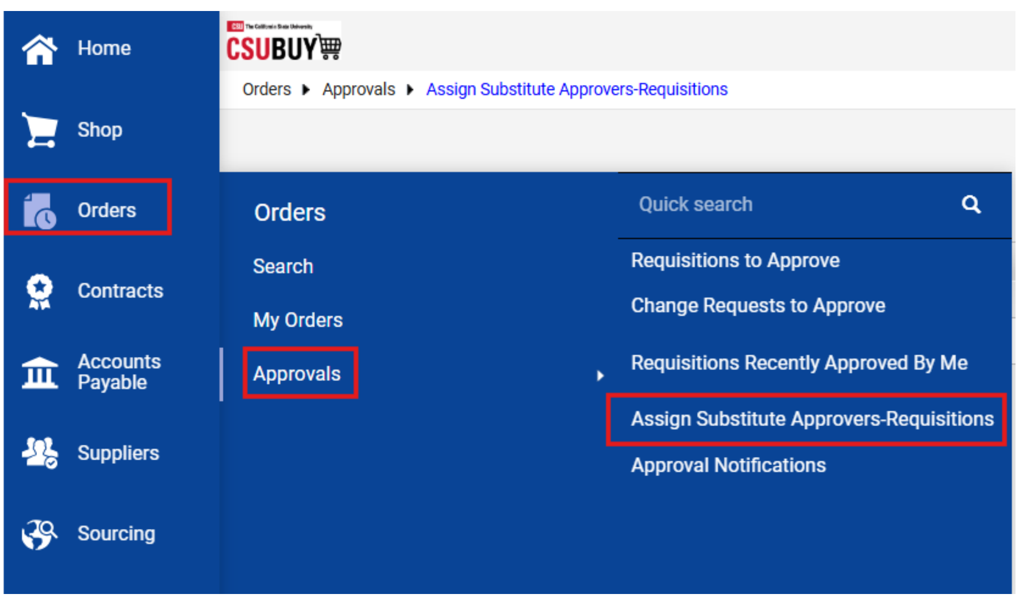
Ad-Hoc Approver: You may add another Approver, if needed. This action adds the approver in workflow after your approval step and does not replace you or return to your approval step. Please consider if adding a Comment would be sufficient for your needs since adding an Ad-Hoc Approver will slow down the workflow.

1. Go to the Requisition to be approved
2. Scroll down to Other Participant Information
3. Go to Ad-Hoc Approver
4. Select the person
5. Add a Comment, if needed.

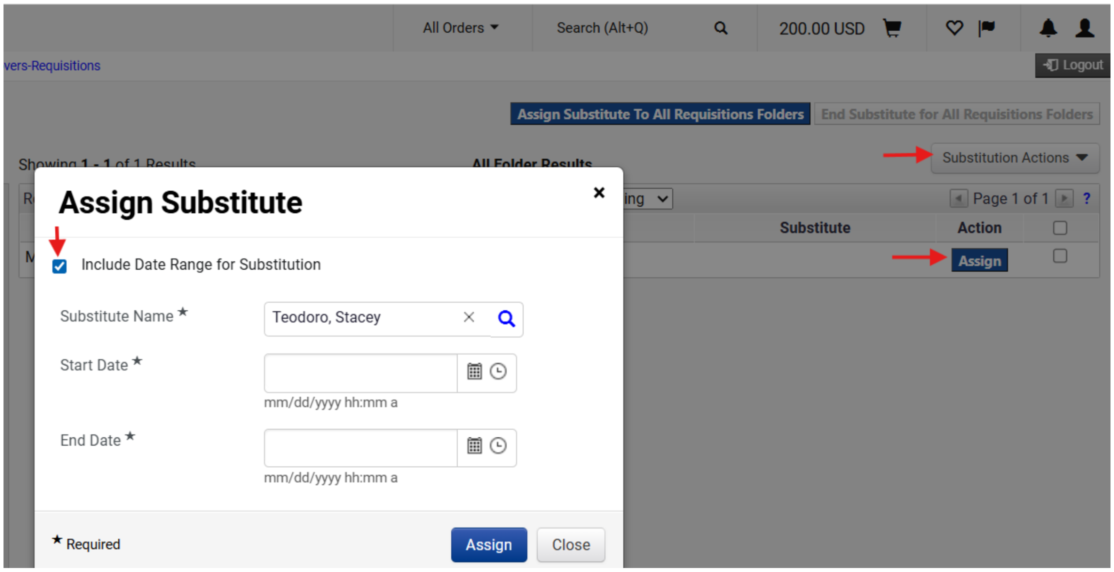


Assign Substitute Approver: This action replaces yourself as the Approver. You may use this action if you are going on vacation and need someone to cover for you. Please make sure the Substitute Approver has same DOA level authority. Although the substitute approver may approve the requisition, you are ultimately responsible for the requisition so ensure your substitute approver is trustworthy.

1. Go to Shop Home page and Orders fly out
2. Select Approvals and then Assign Substitute Approvers-Requisitions



3. Click on either “Assign” or “Substitute Actions”
4. Select the name
5. Enter a date range for the substitute by clicking on the check box and select the date range in which the substitute approver period begins and ends.

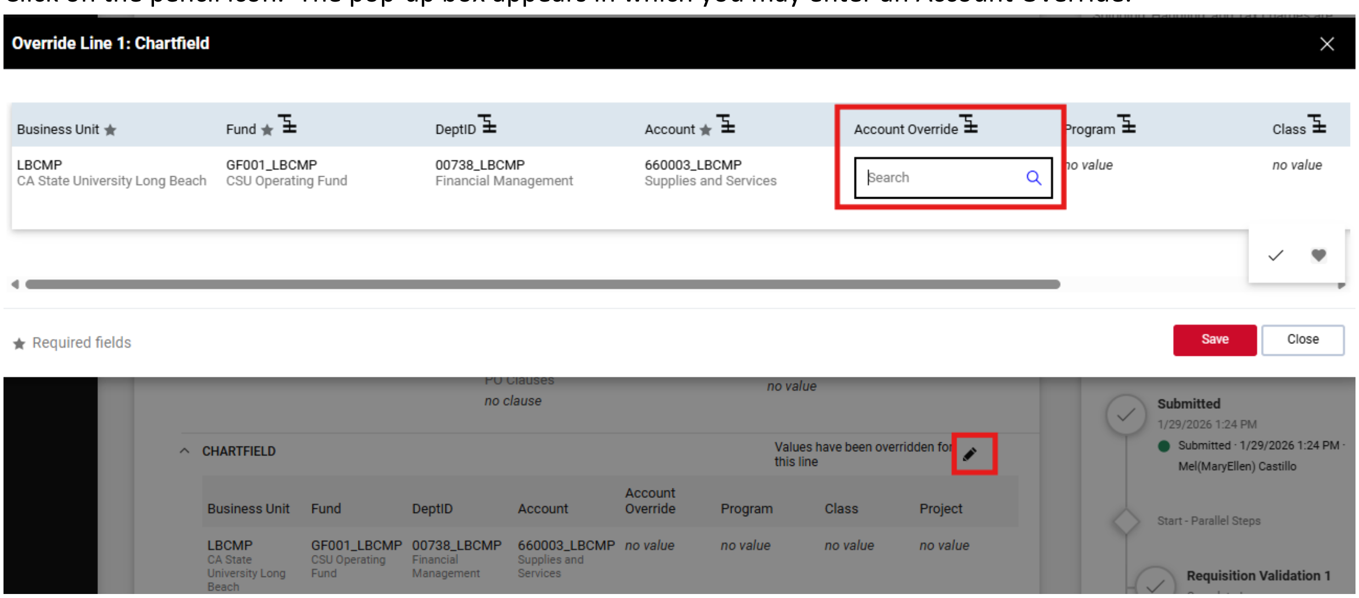


Making Changes to the Requisition

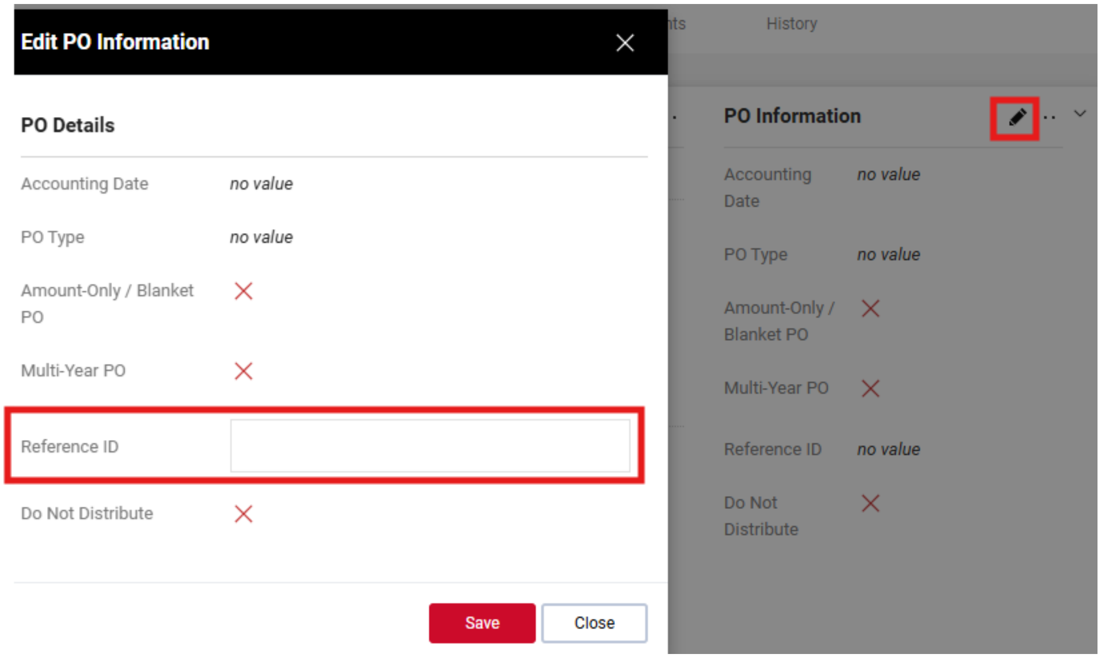
As the assigned Approver, the only change you could make on the Requisition is the following:

1. Chartfield: Account Override

   Click on the pencil icon. The pop-up box appears in which you may enter an Account Override.

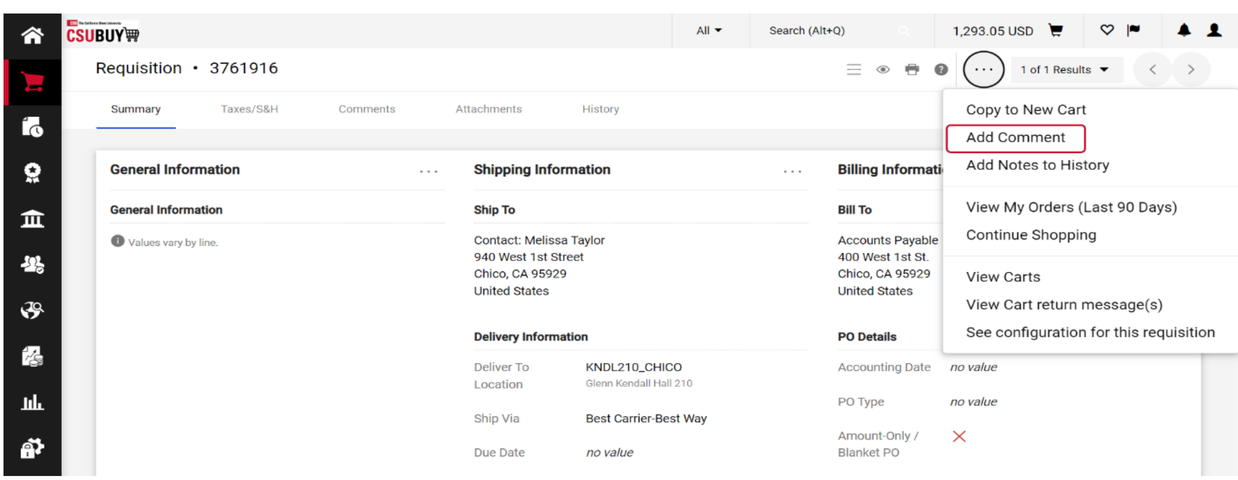


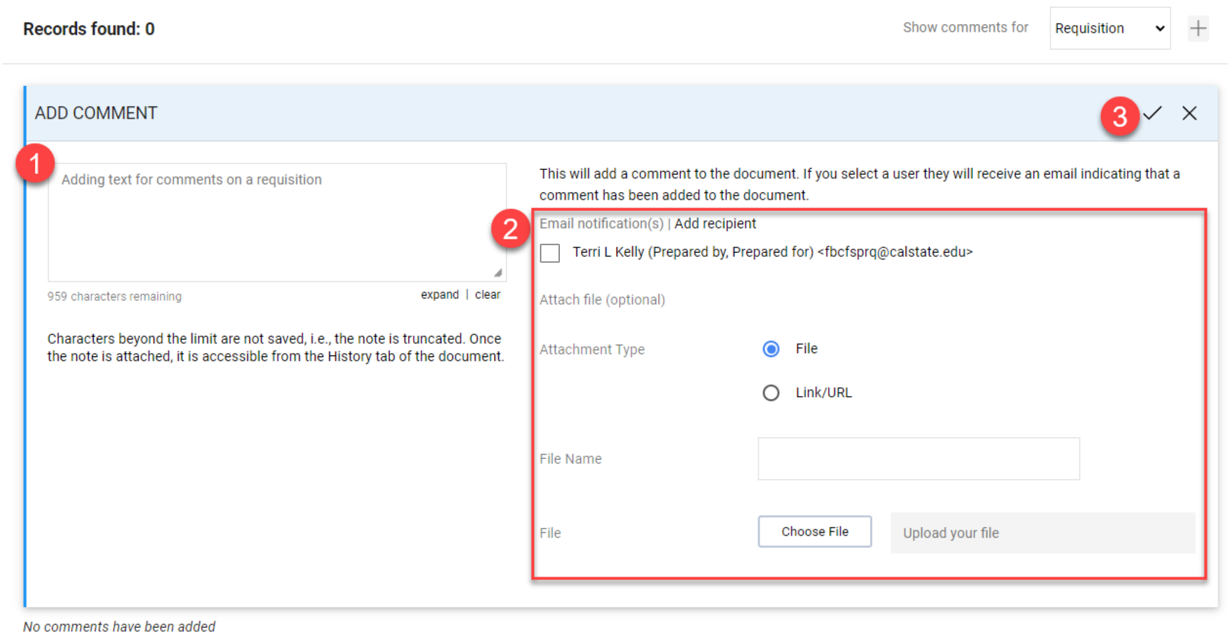
2. PO Information: Reference ID
   Click on the pencil icon. Edit or add the Reference ID. This field populates in the CFS PO as Reference ID. If left blank the CFS PO Reference ID will automatically populate the Requisition number + Order Owner (usually the Shopper or Requester). Therefore, it may be left blank here.



3. Add Comment and Internal Note
   - The comments become a permanent part of the document history.
   - The recipient of the comment will receive an email that includes the comment as well as a link to the specific document, so they don't have to search for the document.
   - You are able to select any user in CSUBUY to be the recipient
   - Attachments can also be included in the comments

To add a Comment:



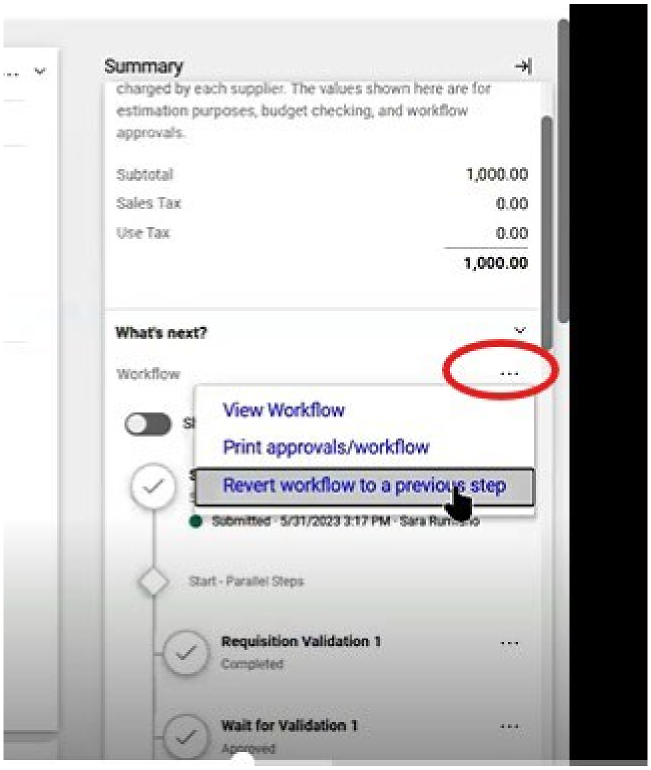


Revert Workflow to Previous Step

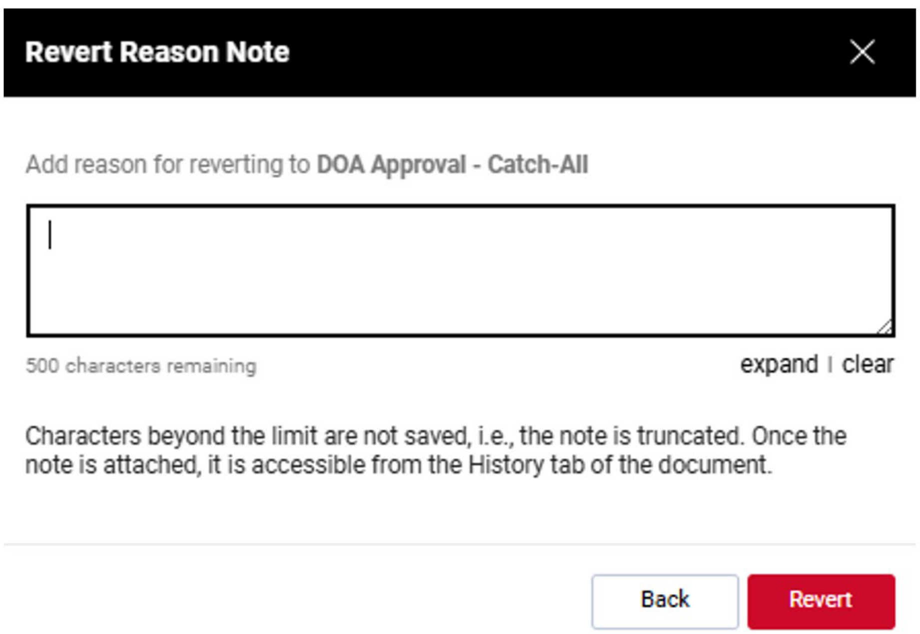
This sends any document to a previous step in the Workflow. You may use this action if you have not approved the requisition but would like to revert the requisition back to the Requester. (Note: Return to Requester is another way to do the same thing.) The Requester may then edit the requisition and submit the requisition again to workflow. When reverting to a previous step, you would like the person in the previous step to review and/or make edits and then submit the requisition again to workflow.

To revert the requisition,

1. Open the requisition.
2. On the right, locate the Workflow panel
3. Click on the three dots
4. Select Revert workflow to previous step
5. Select the step in the workflow to send the document back to

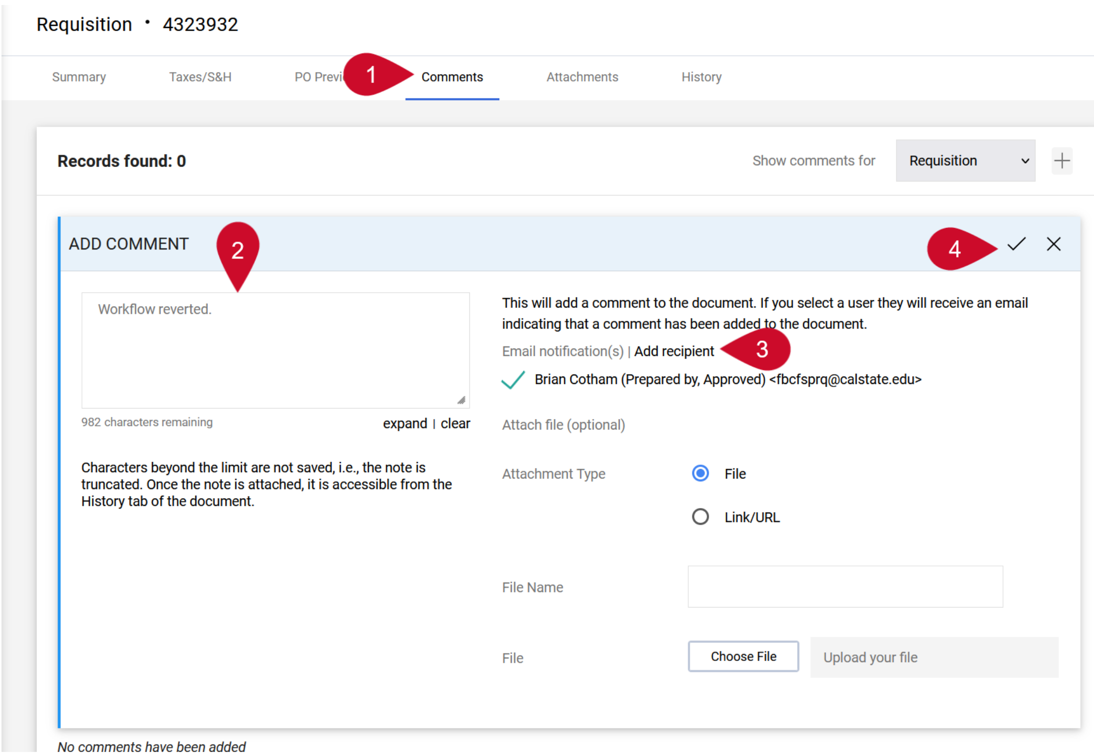


6. Add a reason for the reversion. Please note that the reason entered is only visible in the History tab.



In order to notify the person in the previous step of the revision, please add a comment.

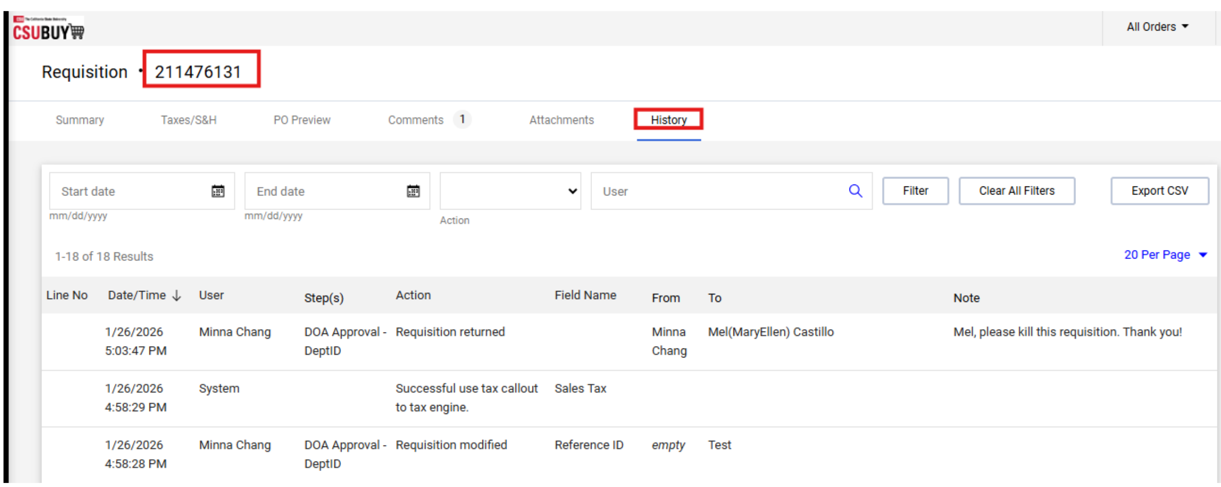
1. Click back to open the requisition.
2. Go the Comments tab.
3. Add your message and tag the person to receive the email.
4. Return to Revert screen and complete action.



Once reverted, the document will re-enter workflow starting at the step you selected.

Using History to View all Action Taken on the Requisition

You could always go back to the Requisition by searching for the Requisition Number, opening it and reviewing the History. This allows you to view every action taken on the Requisition.

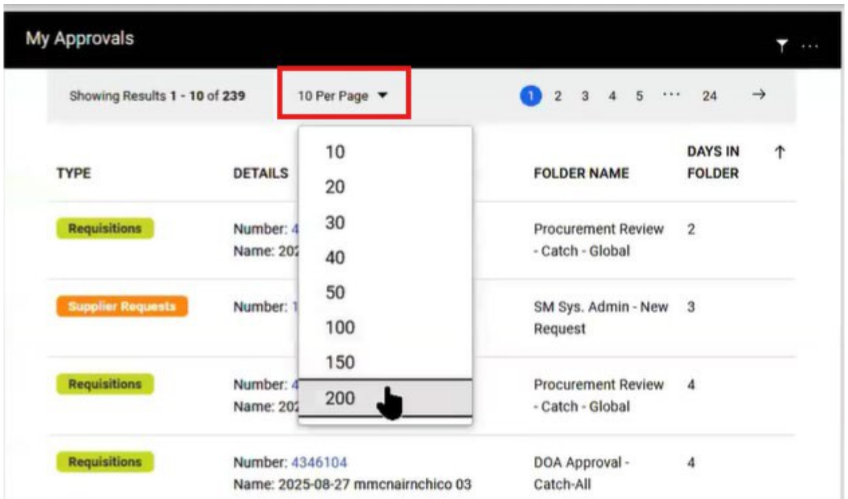


5-FILTERING MY APPROVALS ON HOME PAGE

To customize how you view the My.Approval section, please see the available filter options.

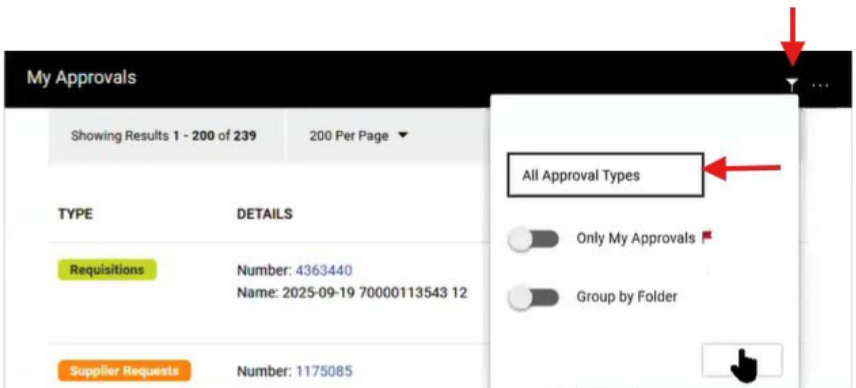
Number of Approvals on My Approval

You may adjust how many approvals you'd like to see per page by going to the drop-down menu.

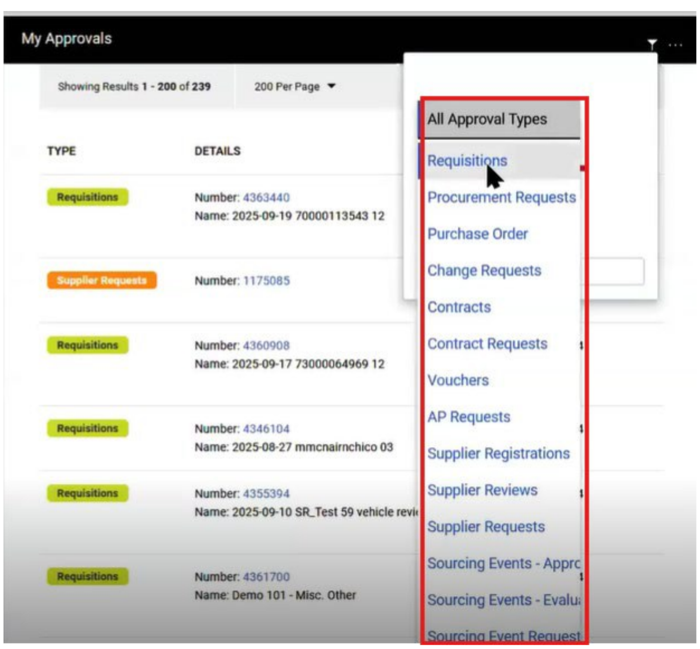


Filter for Type of Approvals

Use the filter icon and click on the box

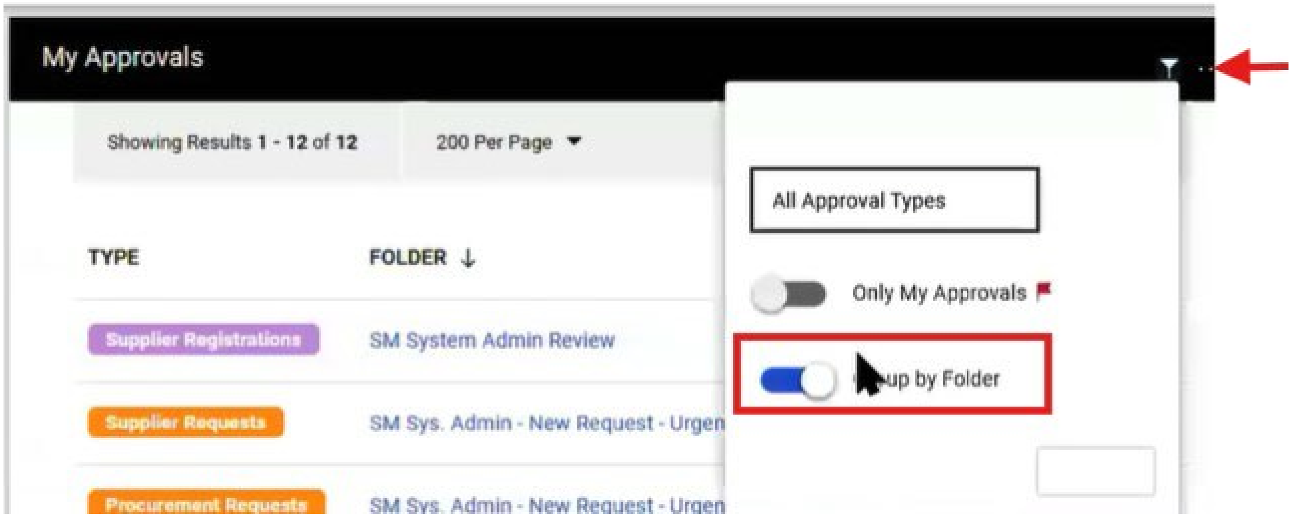


Select the type of approvals you would like to see:

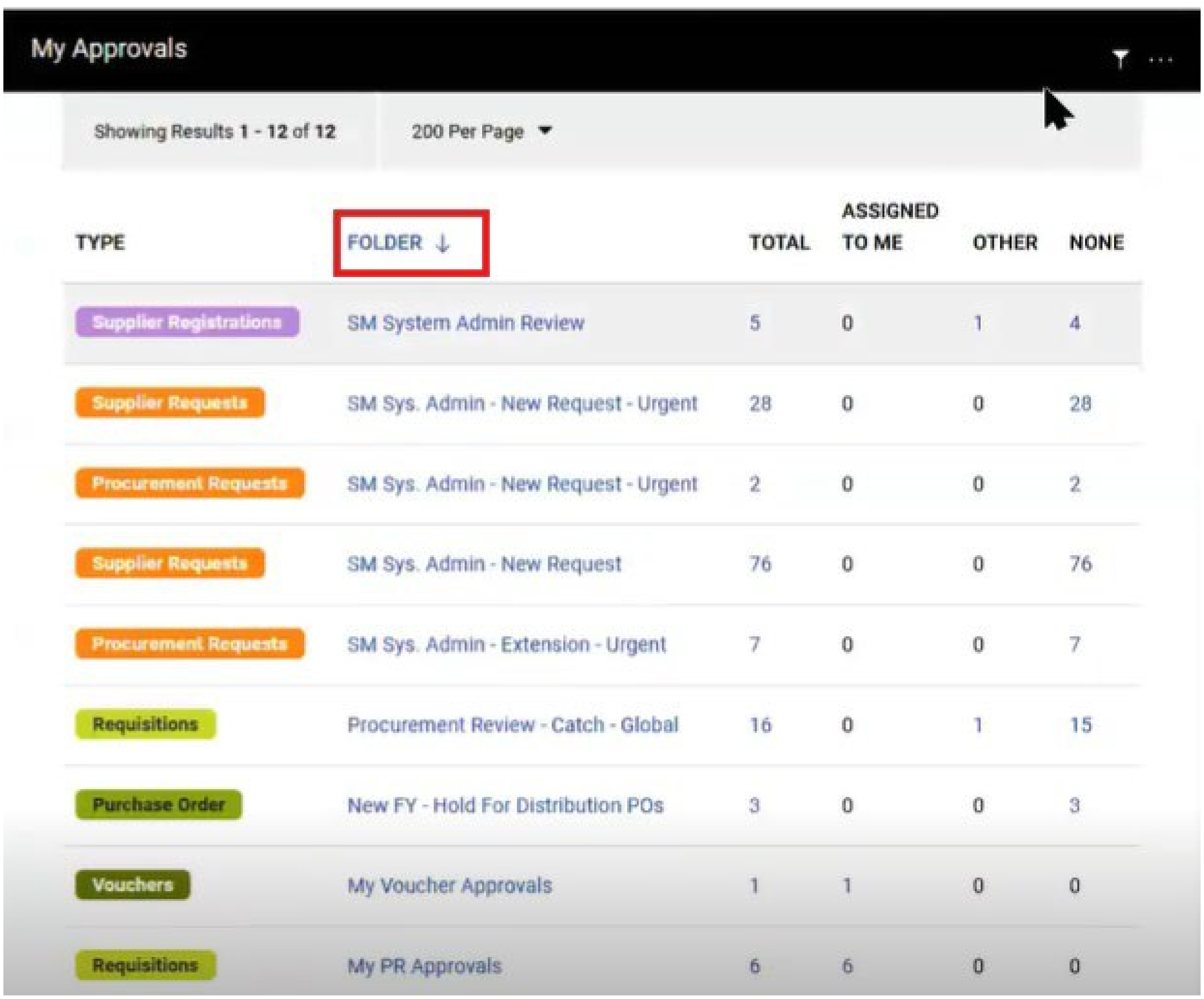


Filter by Folder
Click on the filter icon and then move the switch to the right for **Group by Folder**.

Now, rather than seeing each document (requisition, voucher, etc), you see them grouped in folders.

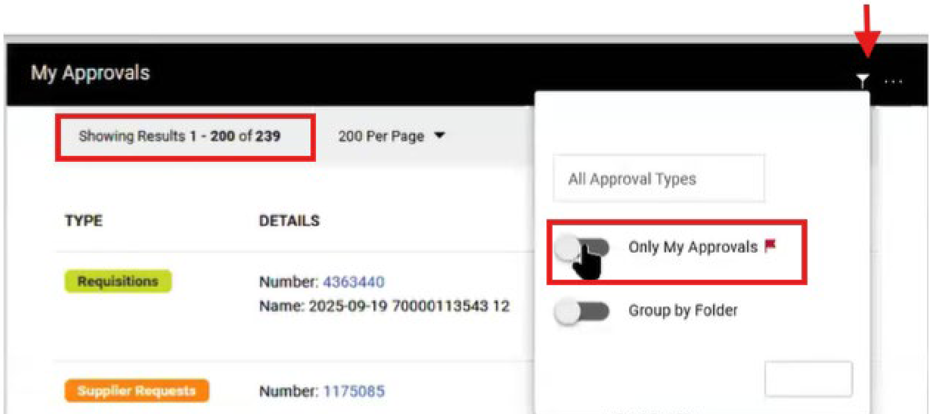


You will see that you can now filter by Folder.

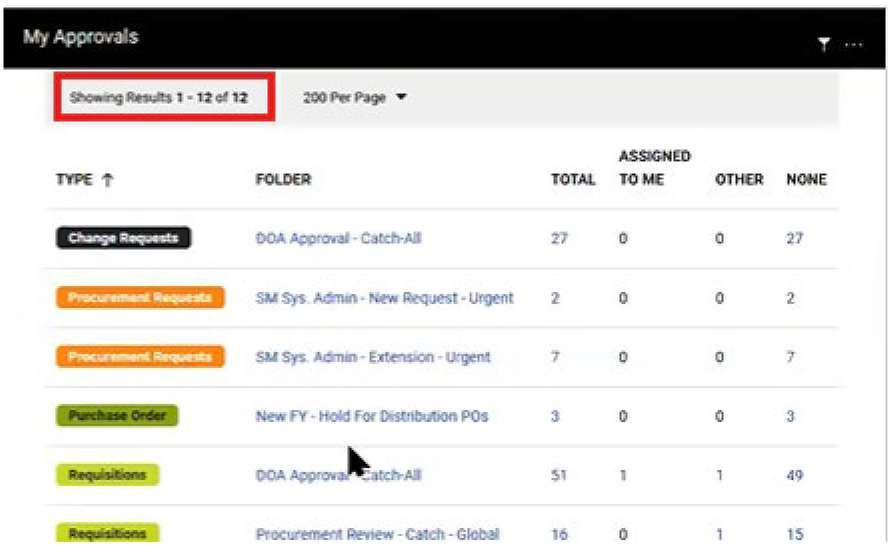


Filter by My Approval

In My Approvals, you will see a list of all approval needed. Below there are 239 approvals needed. To only see items that have been sent for your Approval, click on the **filter icon** and then move the switch to the right for **Only My Approvals**.



You now view only 12 items assigned to you.



CHAPTER 5: ORDER SEARCHES

1-ORDER SEARCHES

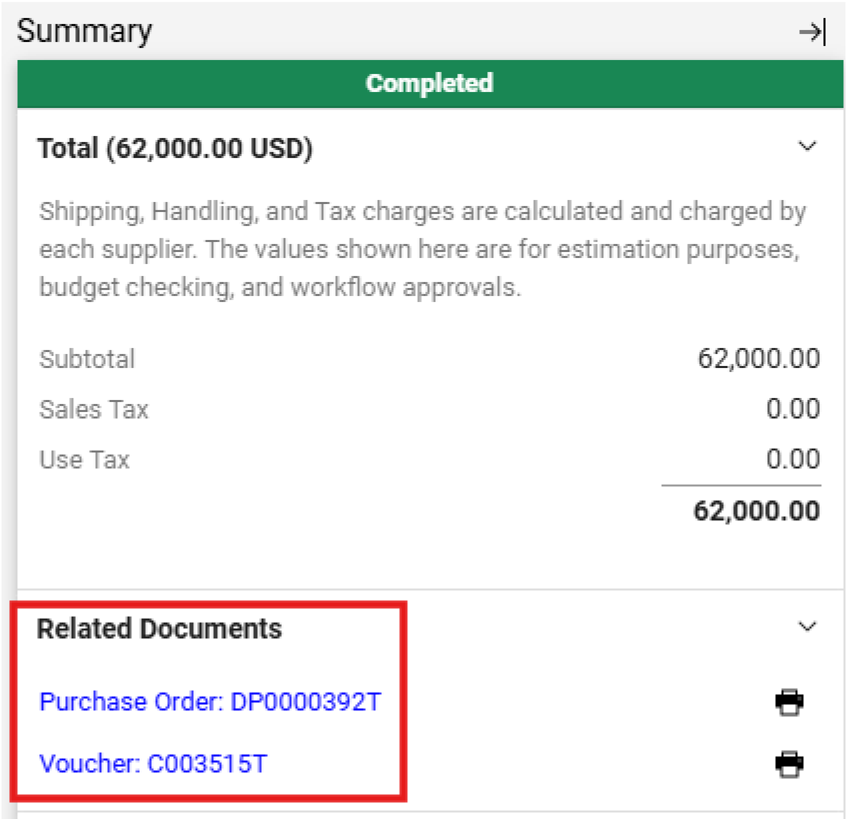
There are multiple ways to search for orders or documents in CSUBUY. The first thing to keep in mind is that a complete order has the following documents associated with it: Requisition, Purchase Order, and Voucher.

Below reflects the documents associated with an order or purchase.

If you click on any of the blue hyperlink as shown below, you will be able to see the related documents in the workflow section.

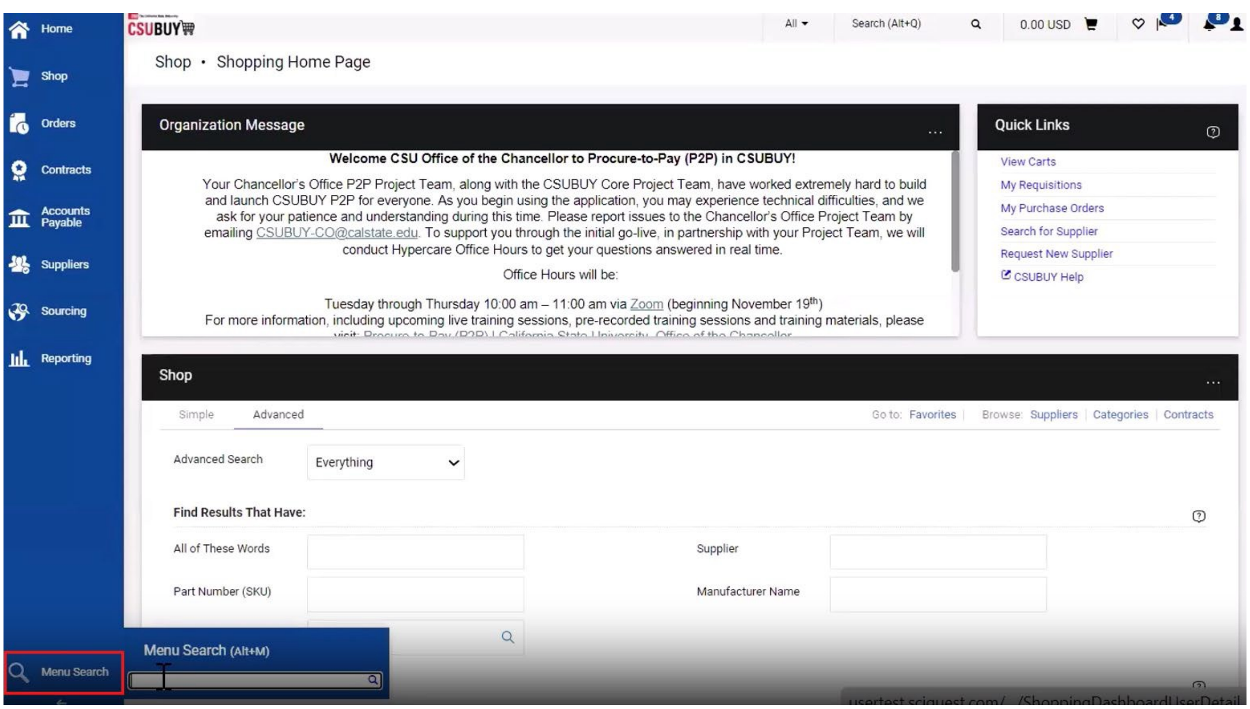
☐	4385371	Requisition	Complete	Mel(MaryEllen) Castillo	10/23/2025 2:03:33 PM	10/23/2025 2:10:18 PM	Acme Corporation ⓘ	62,000.00 USD
☐	DP0000392T	Purchase Order	Complete	Mel(MaryEllen) Castillo	10/23/2025 2:10:17 PM	10/23/2025 2:10:47 PM	Acme Corporation ⓘ	62,000.00 USD
☐	C003515T	Voucher	Complete	Mel(MaryEllen) Castillo	10/23/2025 2:10:42 PM	10/23/2025 2:19:02 PM	Acme Corporation ⓘ	62,000.00 USD

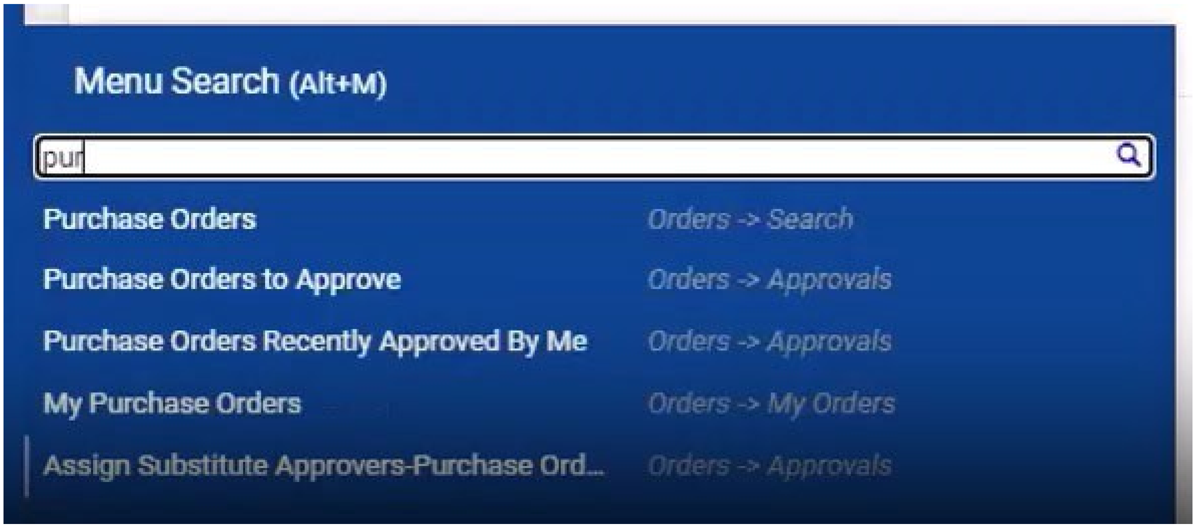
For example, if clicking on the blue hyperlink number for Requisition, the below is provided on the workflow section. You may click on the blue hyperlink to bring up the Purchase Order and Voucher.



Navigation Menu Search

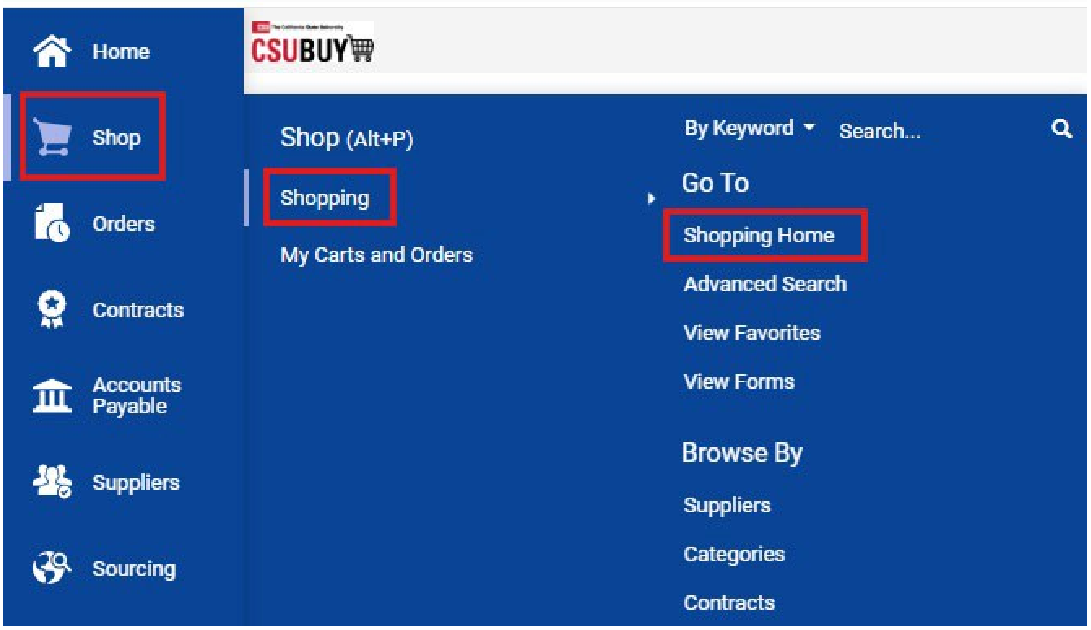
Typing in the Menu Search field brings up other specific areas to search as shown below. Note that this is not for Product Searches, which is used for Shopping.



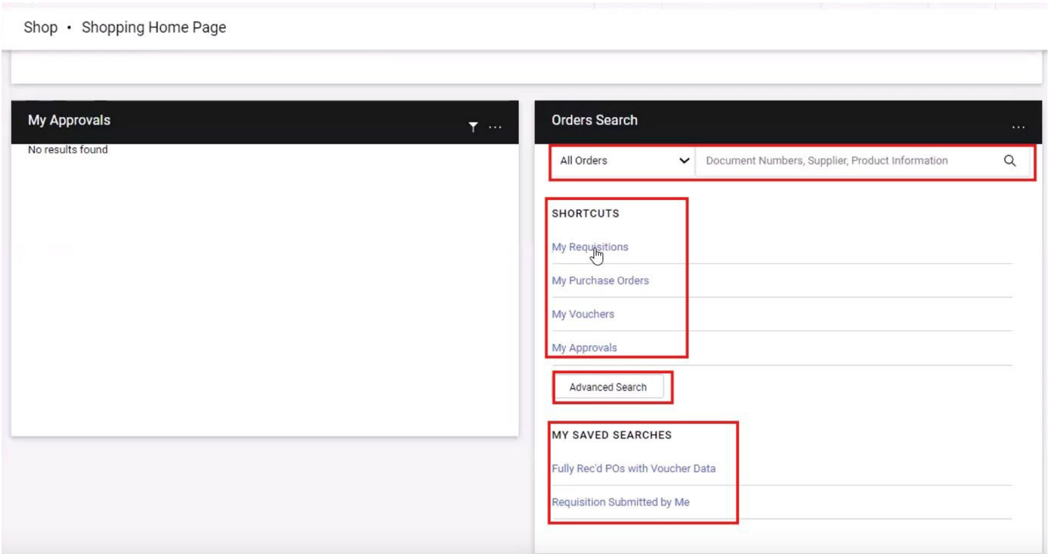


Order Search on the Shopping Home Page

You may perform an Order Search from the Shopping Home Page. Navigate to the Shopping Home Page by going to Shop>Shopping >Shopping Home. Then go to the Order Search section.

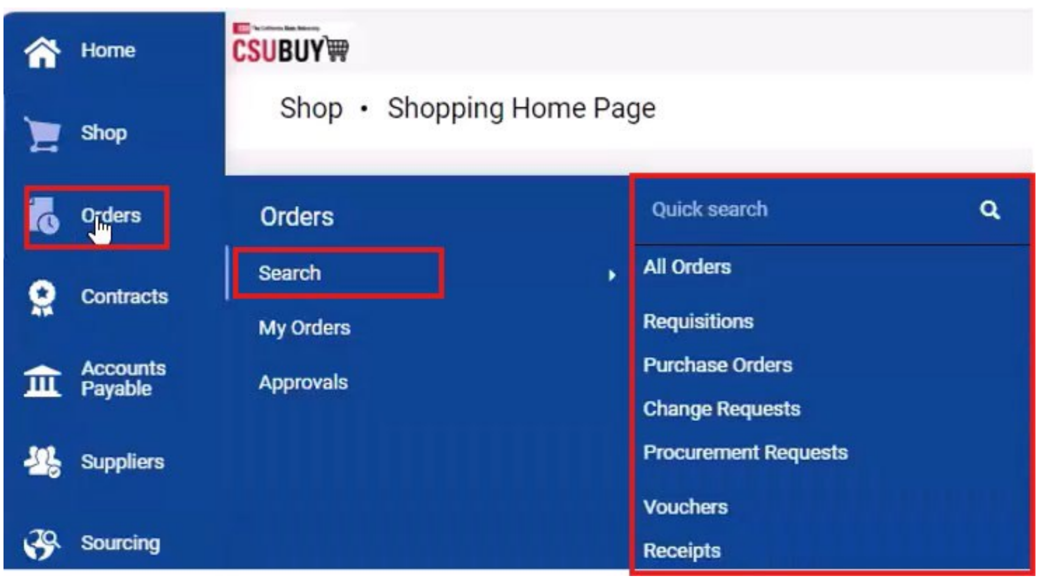


1. The top section with a drop-down menu allows you to search based on specific information including individuals with roles in CSUBuy.
2. **Shortcut** – Search for specific types of documents in which **you are the owner**.
3. **Advanced Search** – Clicking on this takes you to All Orders search results and includes Quick Filters to choose a supplier, business unit, order owner, approved by, commodity code, contract type, participant, pending approver, product flags, status flags, or supplier class.
4. **My Saved Searches** – These are the searches that you have created and saved.



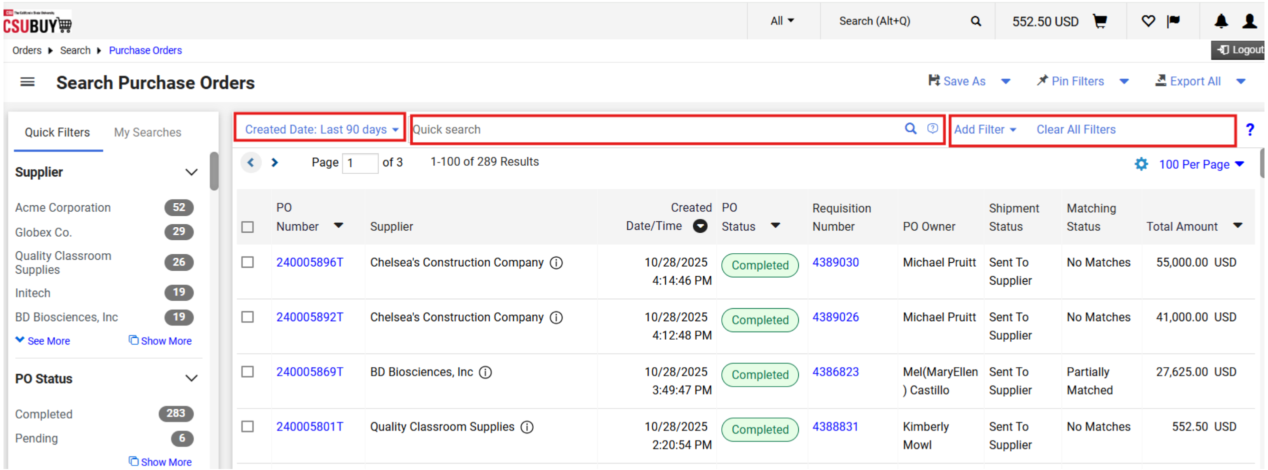
Order Search using Fly Outs

In the Orders Fly Outs, type in a Quick Search (similar to Home Page) with the magnifying glass, or you may select a search by specific type of document such as Requisitions and Purchase Orders. Note these searches return documents owned by others besides you.

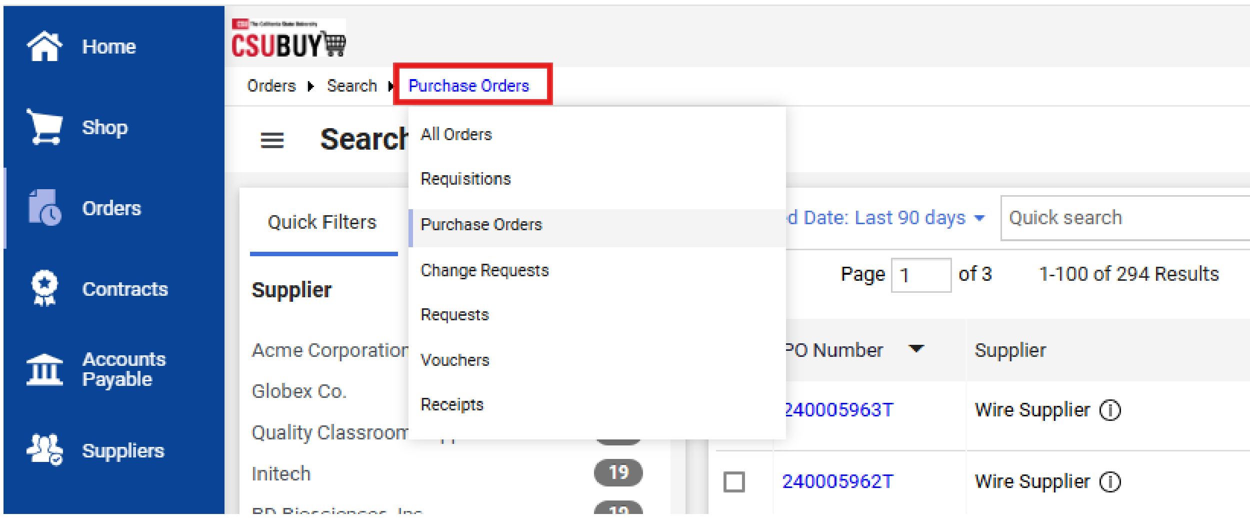


The search result will return the type of document you select created in the last 90 days.

For example, if you select Purchase Orders, you will receive the following results. You may adjust the **Create Date** by clicking on the drop-down. You may type a **Quick search** from the Purchase Orders. You may also **Add Filters** to narrow your search further. (See Section 2 for how to Filter)



If you click on the blue Purchase Order hyperlink, the drop-down menu will appear to change your search to other types of documents, such as All Order or Requisitions.

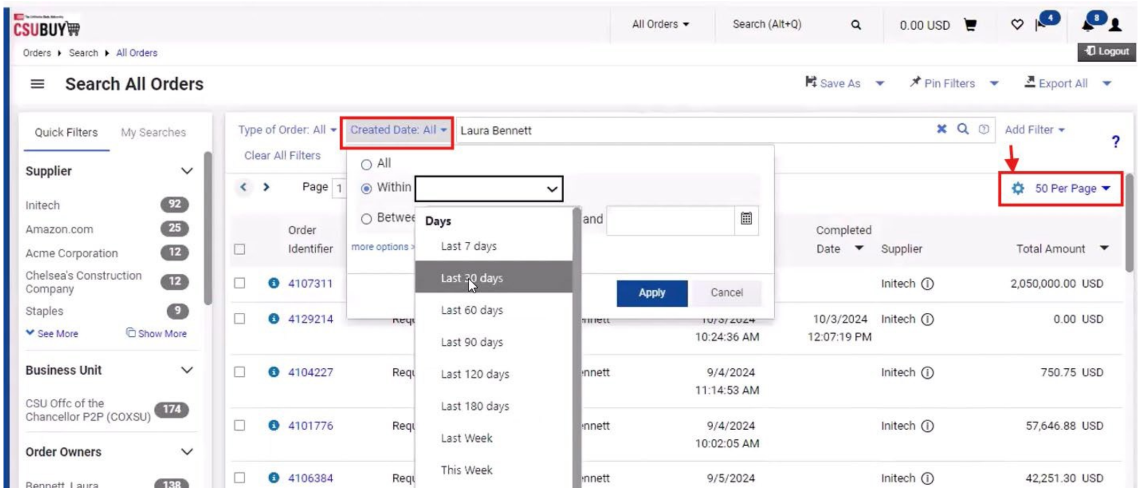


2-FILTERING ORDER SEARCHES

When search results come up, you have the ability to filter the results to narrow down the results.

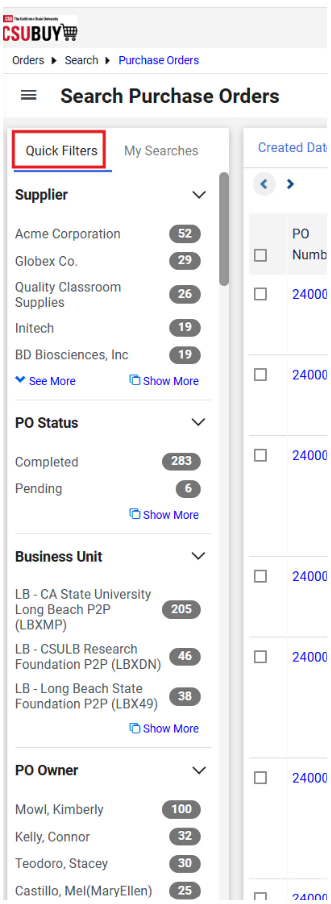
You may adjust the **number of results** you would like to see per page by clicking on the gear and selecting number per page.

You may also filter by **Create Date** of the document by entering a date range or by entering the search by past days, week, month as shown below.



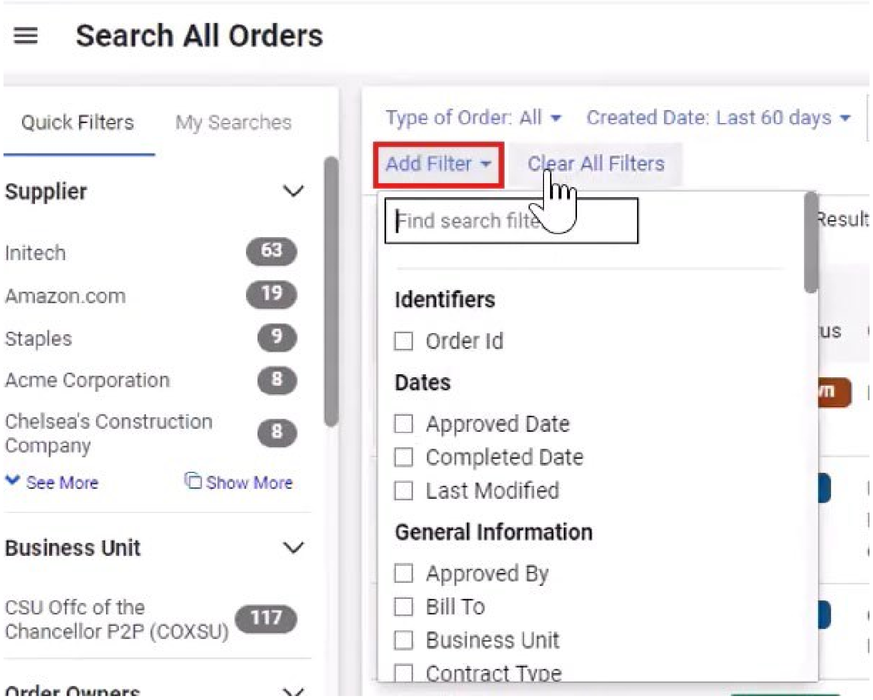
Quick Filters

To the left side of your search results, Quick Filters have multiple predefined filters.

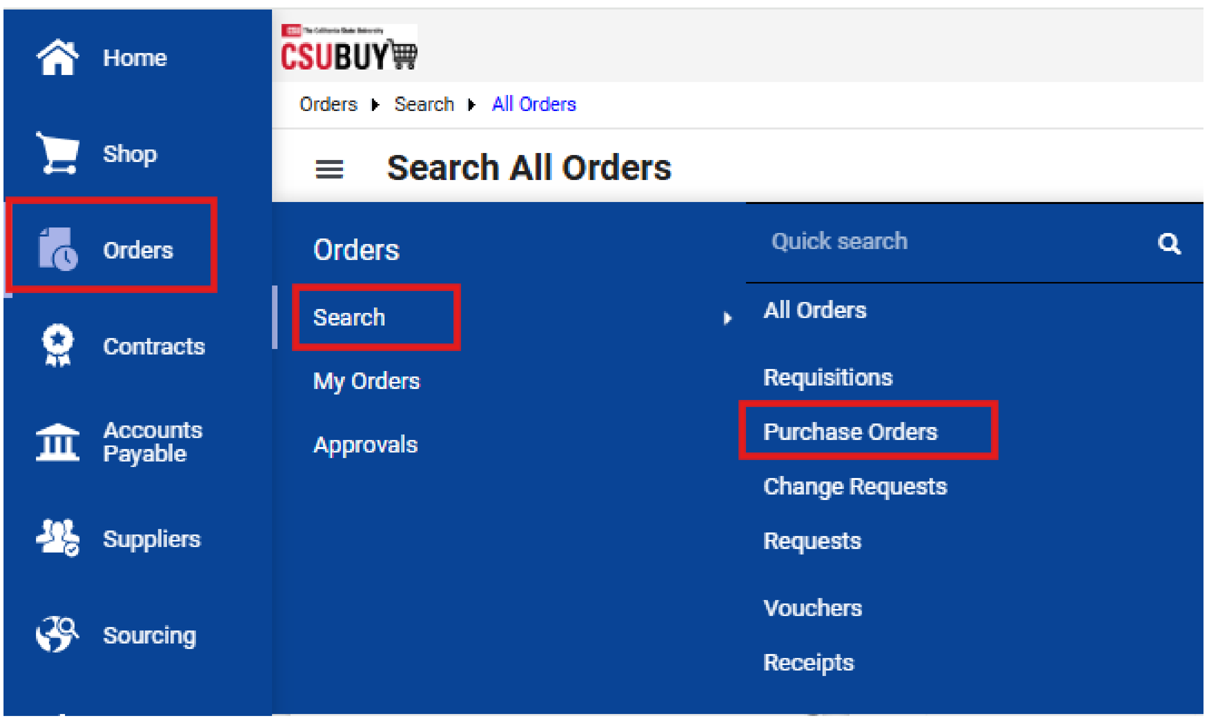


NOTE: Different filters are available based on the document being searched. Purchase Order Searches will have different filters from All Order searches.

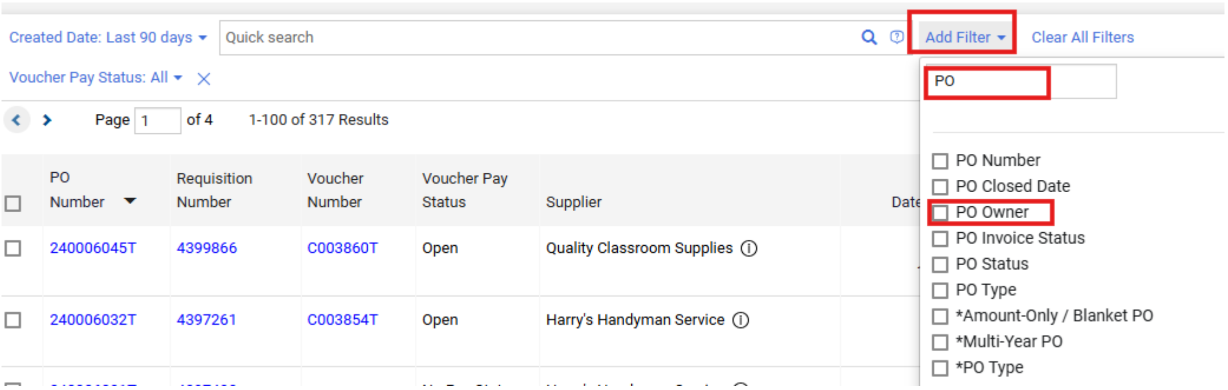
You may also add filters and clear all filters:



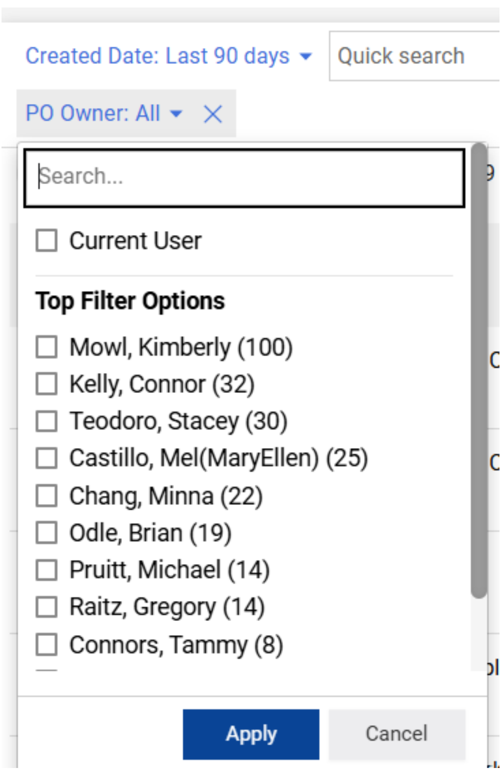
For example, when searching Purchase Orders



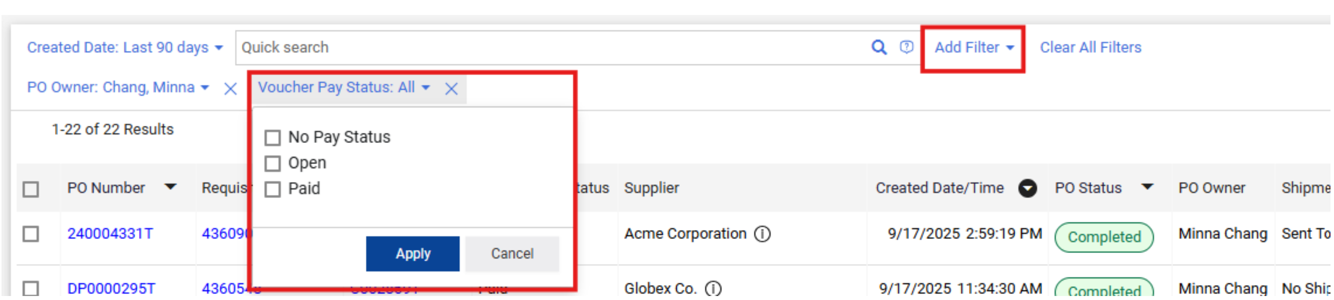
Add a **PO Owner** filter.



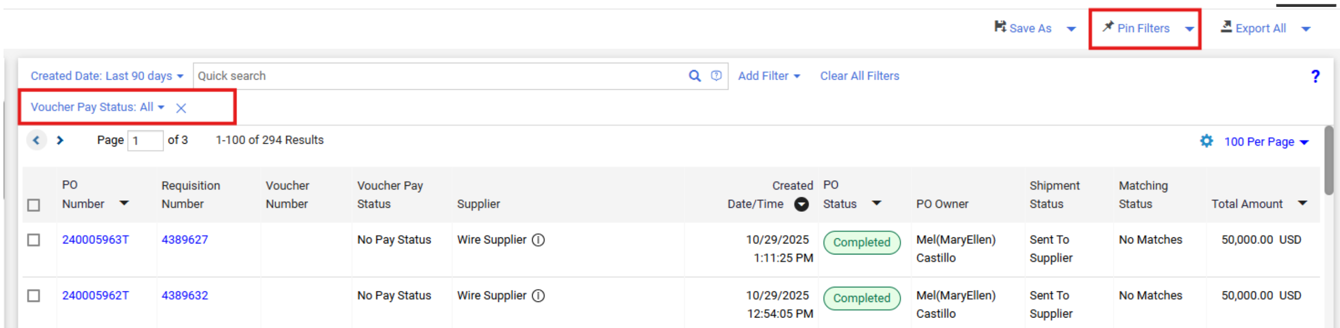
The following filter appears:

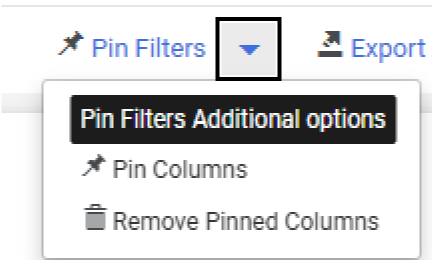


Another example is adding a filter for **Voucher Pay Status**.
The following filter appears. Check the desired boxes and then click Apply.



You may also Pin Filters, which will keep the Filter whenever you go to that particular Search. See Section 3-Cutomizing Search Results for more information.





3-CUSTOMIZING SEARCH RESULTS

When search results come up, you may customize the information that appears on the Search Result page.

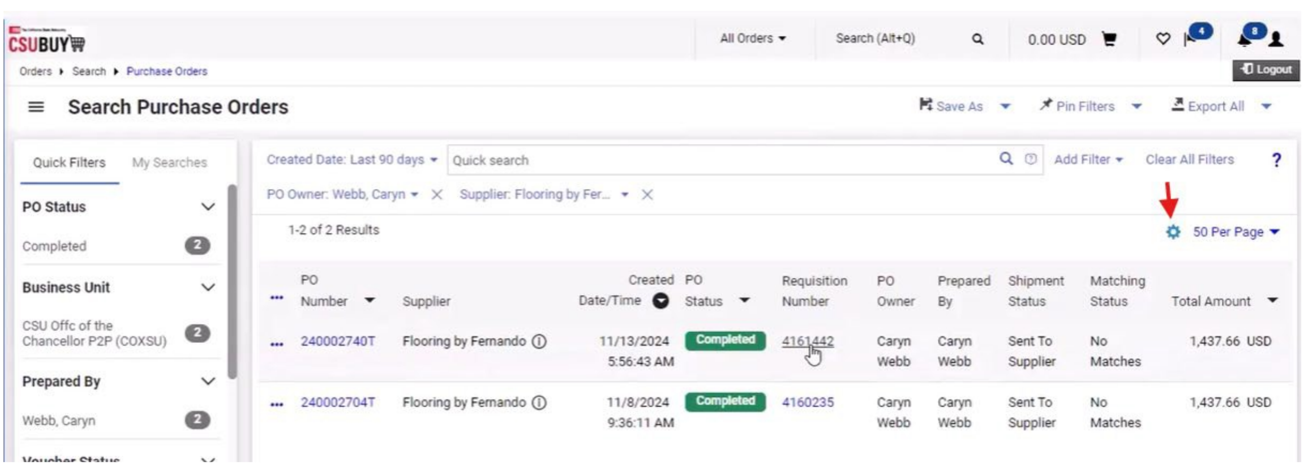
Please note that each Search Page must be customized separately. For example, the Purchase Order and Requisition search results each require their own customization.

Search Purchase Orders and My Purchase Orders in the Order Search section share the same customization settings. The only difference is that My Purchase Orders displays only the purchase orders assigned to you.

Customize Columns

Please follow these steps to customize the information your search results displays:

Click on the gear:

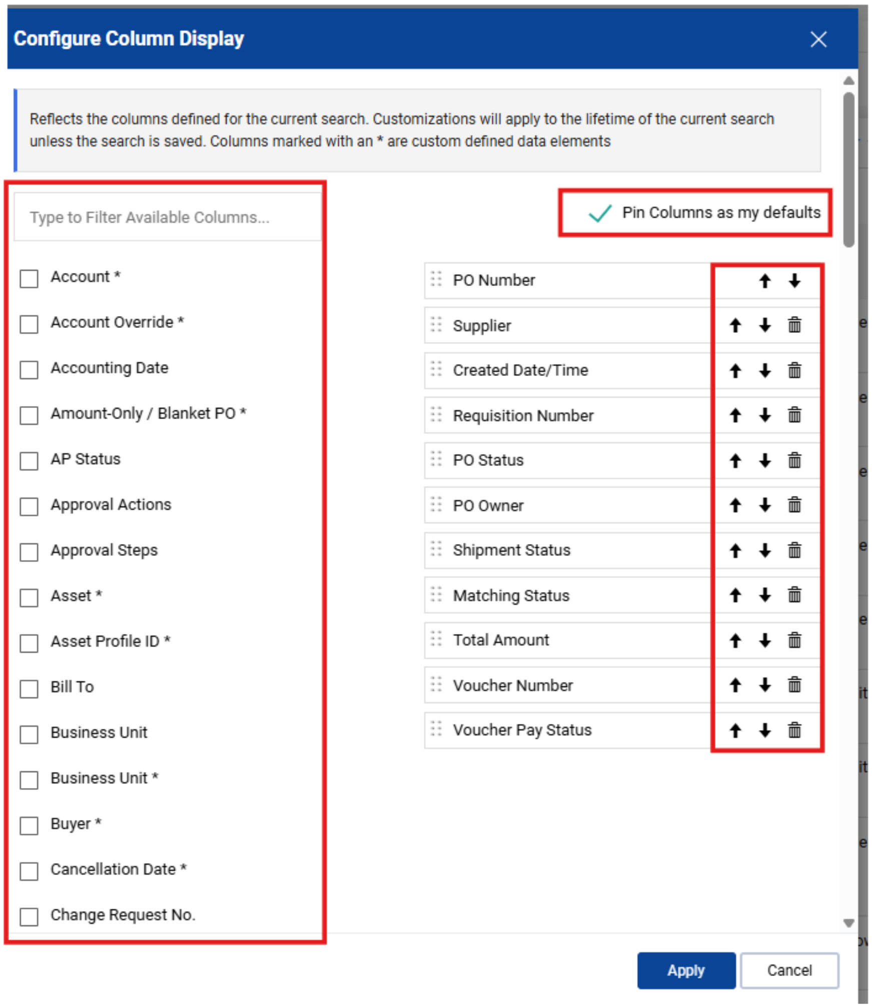


When clicking on the gear, the below pop-up window appears.

You may **select the information** you would like to appear by clicking on the check box next to the item (section on left). When you click the checkbox, the item will appear on the right. The items on the right are information that will appear on your Search Results.

You may **change the order** up or down or drag the item to where you would like the item to appear.

Finally, make sure you **check off Pin Columns as my defaults**.
(If you don't check the box, the column configuration will disappear the next time you go into the Search)

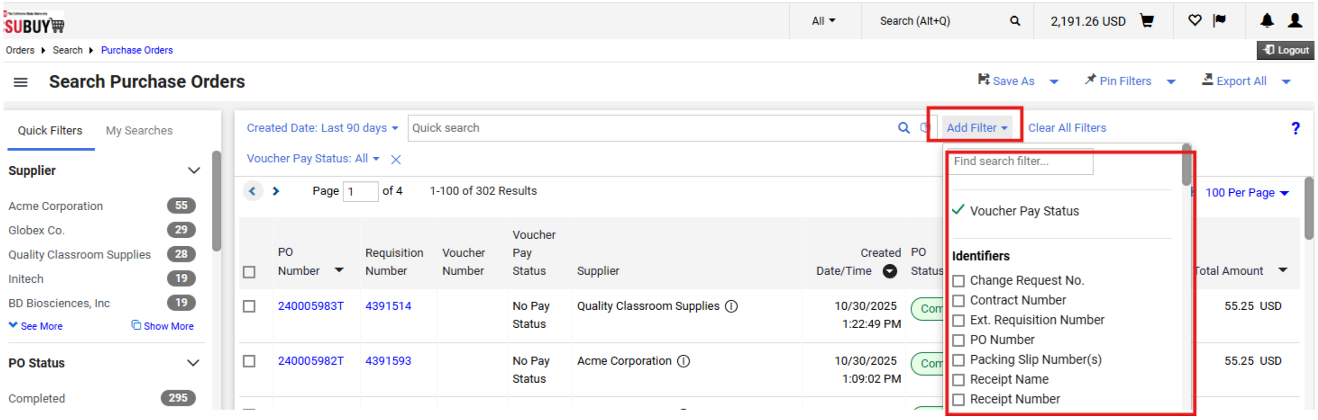


Customize Filters on Search Result

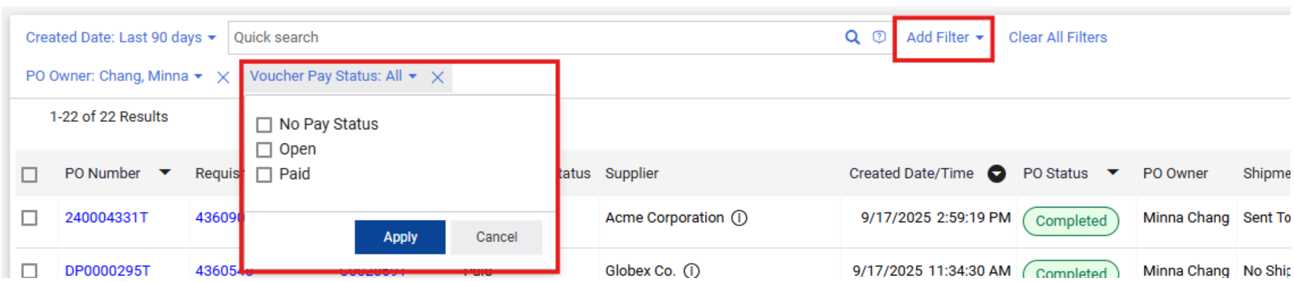
You could also customize the filters you would like to have on your Search Results. Please note that you would need to customize each document Search separately. The example below is for **Search Product Orders**.

Click on **Add Filter**. A list of items will appear. Check the box for information you would like to filter. You may add more filters as you need them.

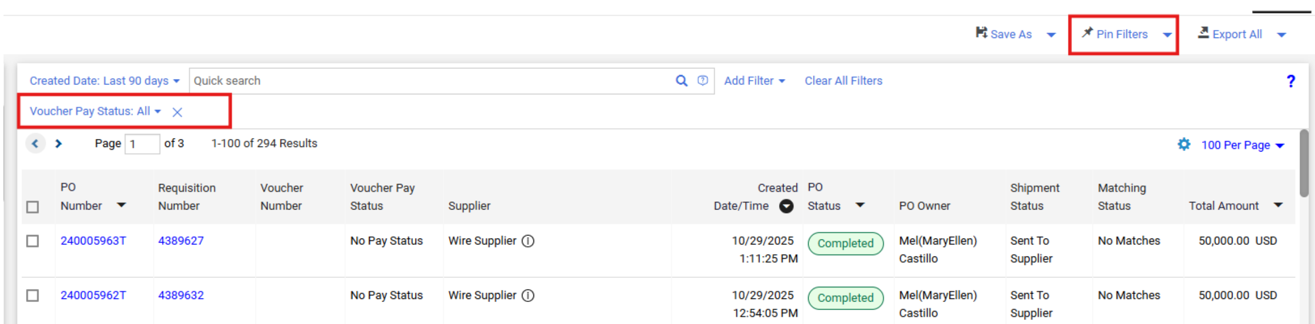
In the below example, the Voucher Pay Status filter was already added but you may add more filters.



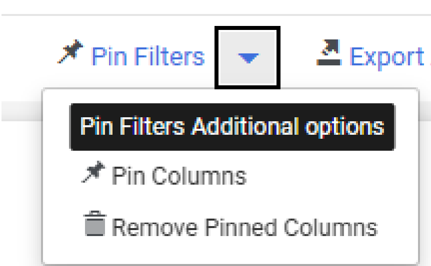
The filter appears, and I may select which status I want to appear.



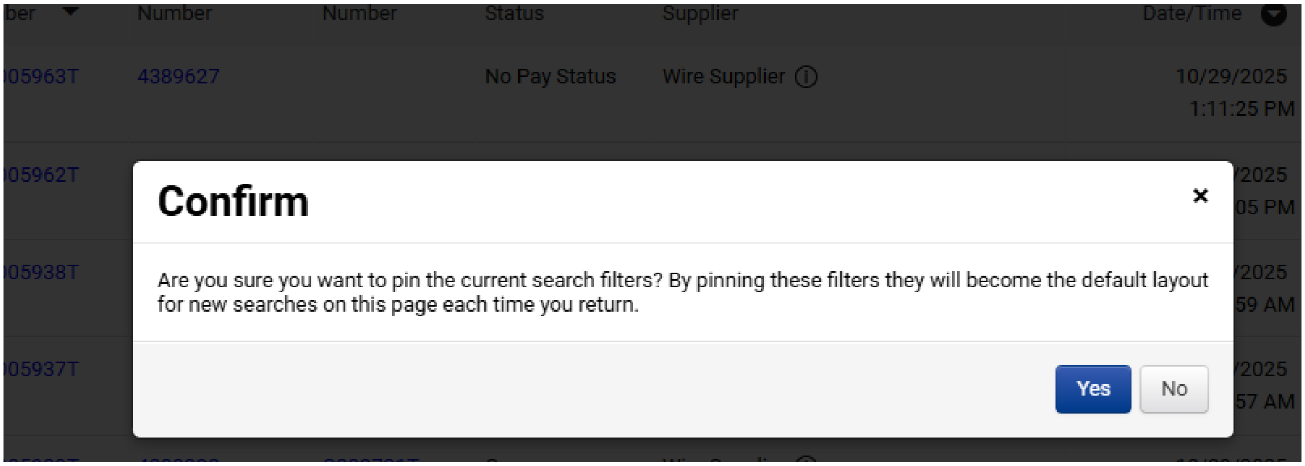
To keep the filter so that it always appears on the **Search Product Orders**, click on the Pin Filters icon.



The drop-down menu allows you to Pin Filters, Pin Columns and Remove Pinned Columns



Click Yes:

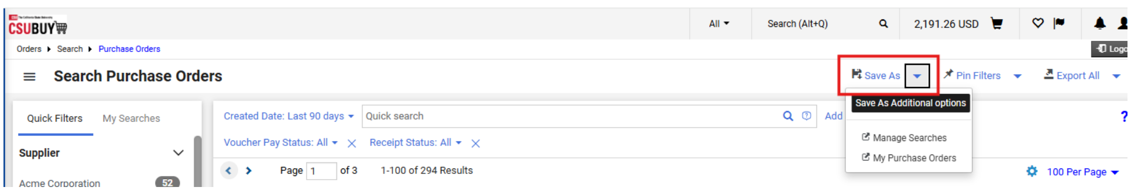


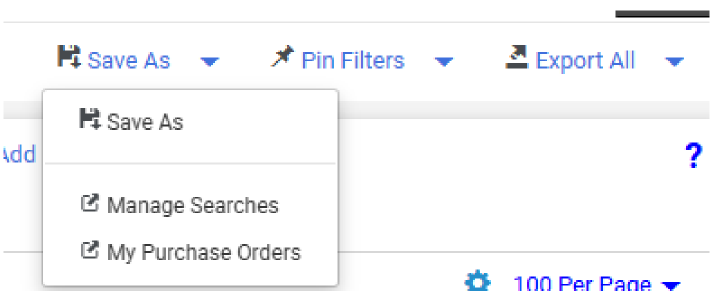
4-SAVING SEARCHES

Once you have customized a Search, you may save the search.

Creating a Saved Search

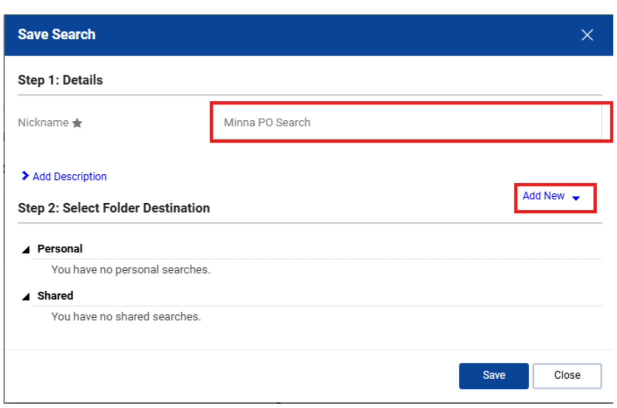
After customizing a search, click **on Save As**.



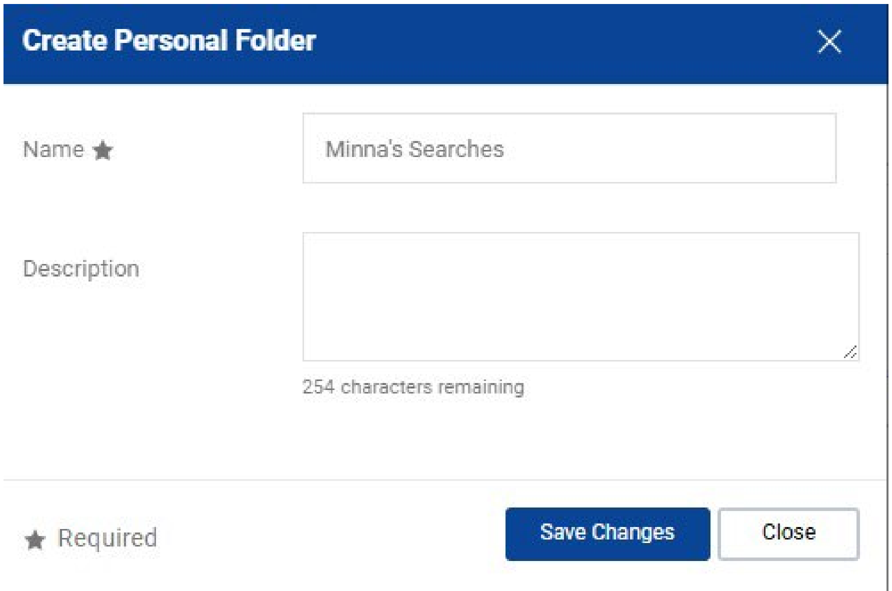


Create the name of the Search in the Nickname field.

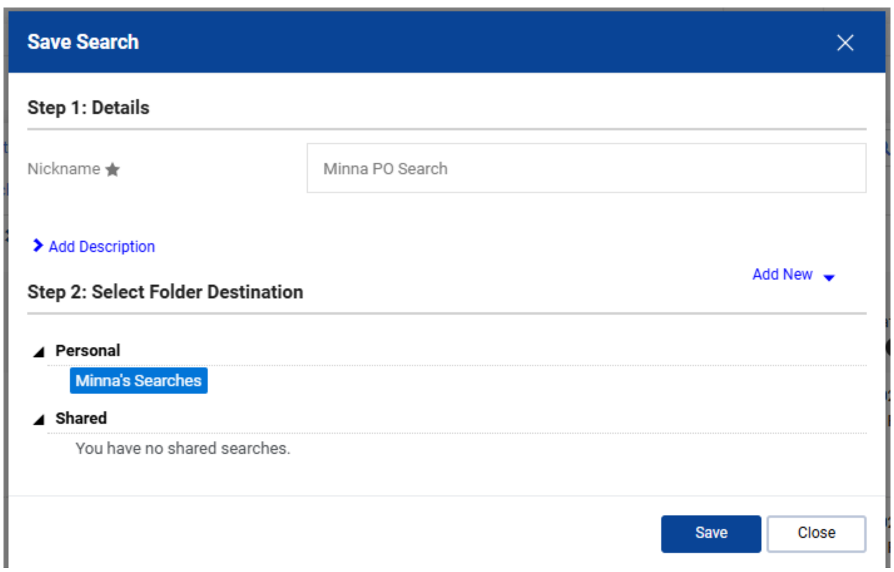
Click on Add New to create a Folder if you would like to create a new folder for your search.



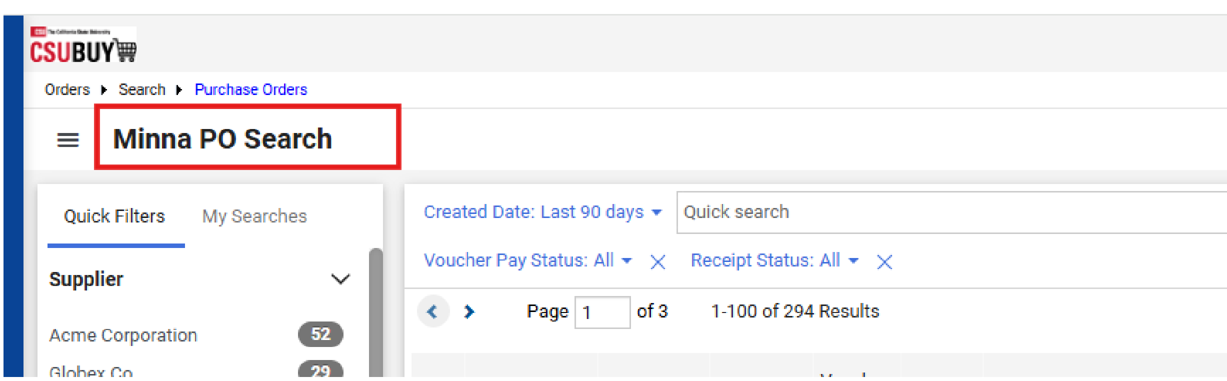
The **Create Personal Folder** box will come up. Add the name of the folder you would like in the Name field and a Description, as needed. Then click **Save Changes**.



Select the folder and **Save**.

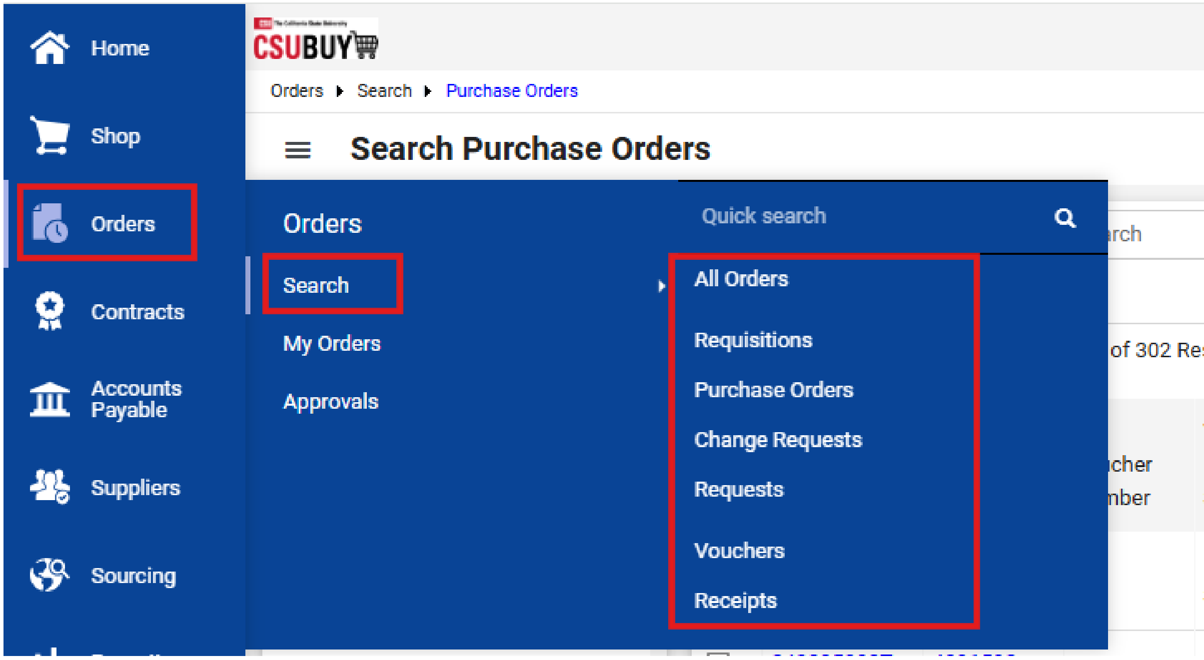


The saved search now displays your Search Name.

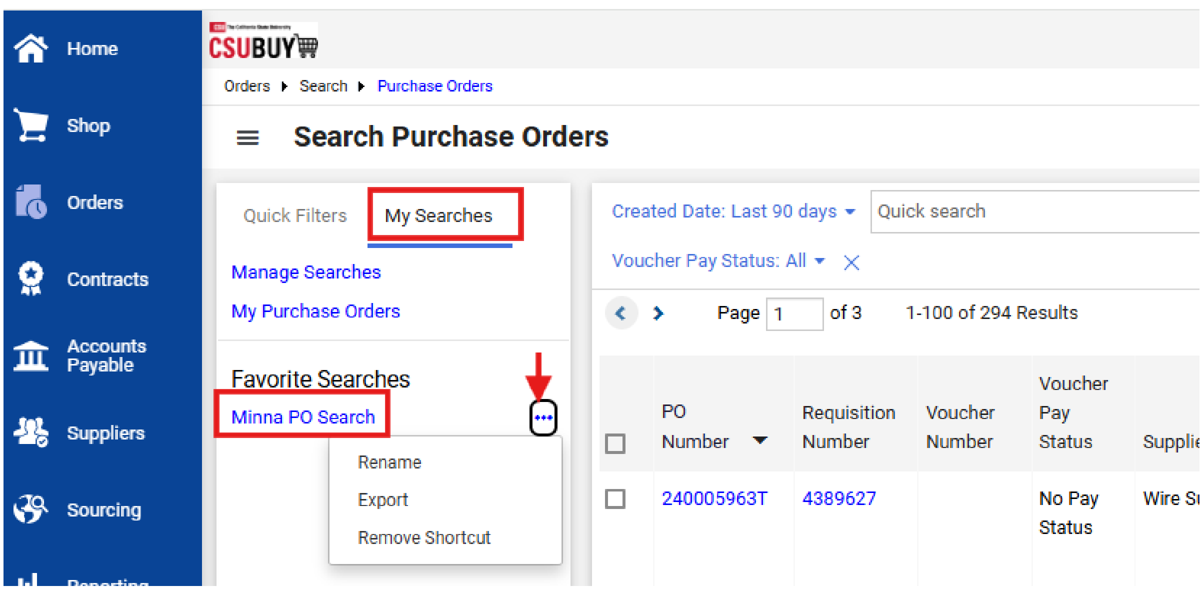


Finding Your Saved Search

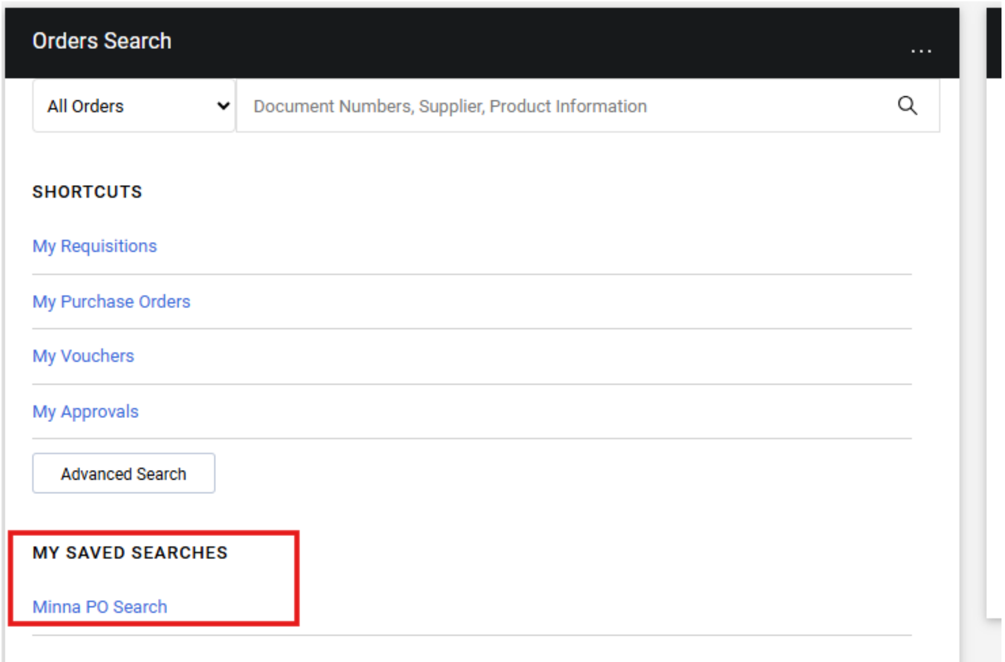
You may locate your saved search by going to the Fly Out and selecting the document for your saved search. Since the example is a saved search for Purchase Order, Purchase Orders below should be selected below.



Then click on the My Searches tab and the saved search will be under Favorite Searches. The three dots below also allow you to **rename, export, or remove the search**.



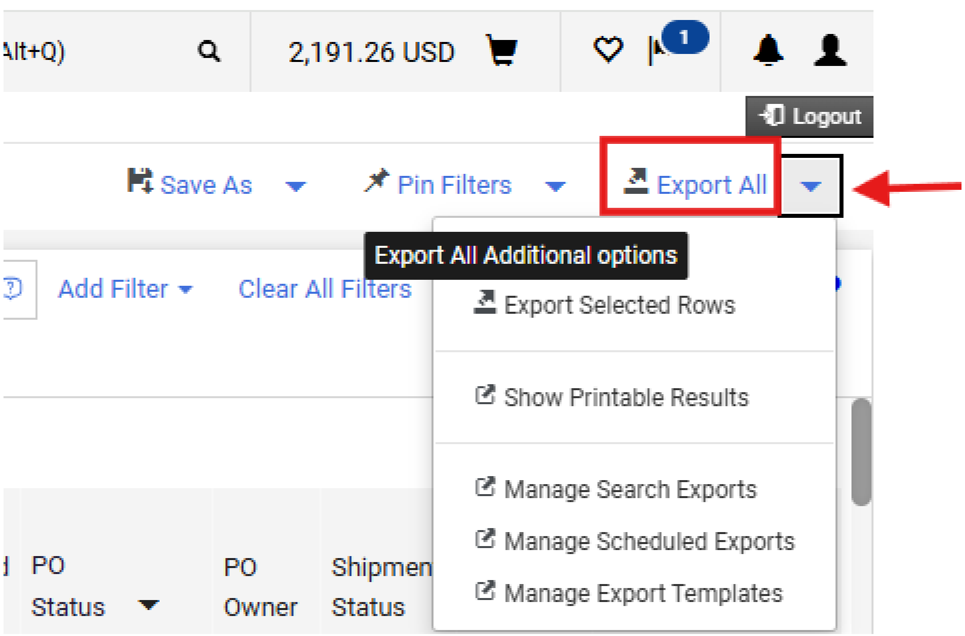
You may also locate your Saved Search on the Home Page in the Orders Search section.



5-EXPORTING SEARCH RESULTS TO A REPORT

You have the ability to export your search results to a report.

Click on Export All to export the entire search results.
Or you may click on the arrow, which provides other options.

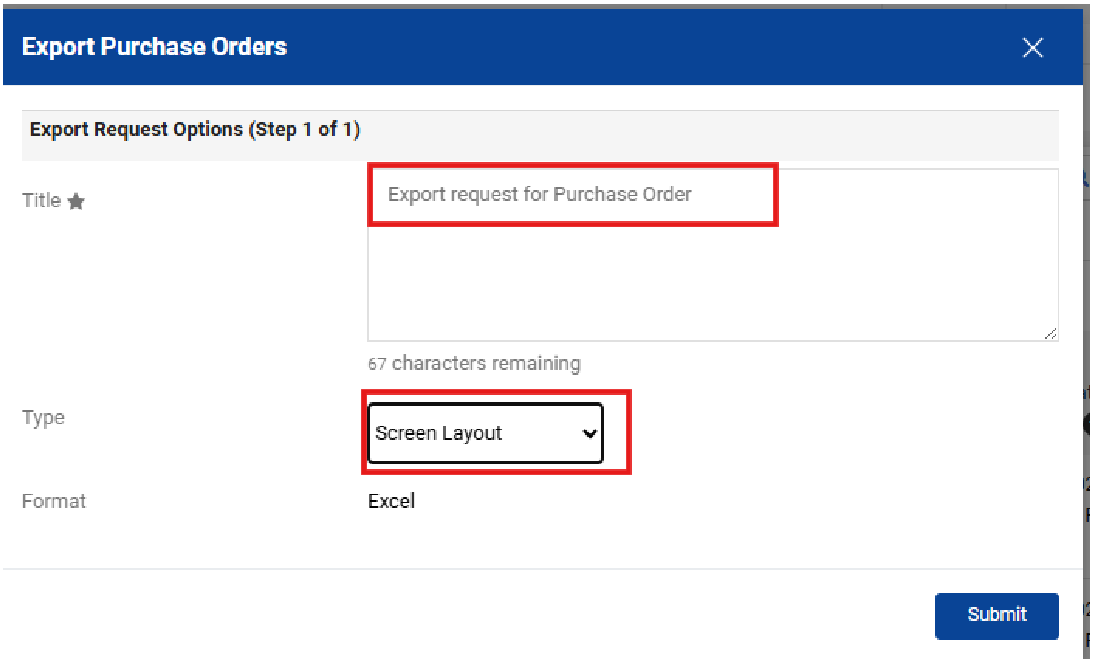


- Export All – To export all your search results
- Export Selected Rows – Check off the box for rows you would like to export.
- Show Printable Results – Creates a report that you may print or save as a pdf.

- Manage Search Export – Takes you to all your exports
- Manage Scheduled Export – Takes you to all your scheduled exports
- Manage Export Templates – Takes you to all your export templates

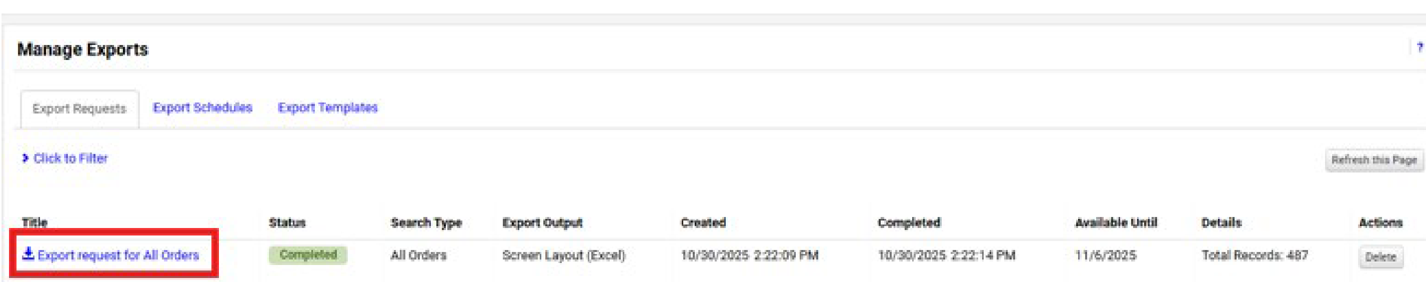
Export All

When Click Export All and/or selecting Export All, the pop-up box appears.
You may change the Title in the field below



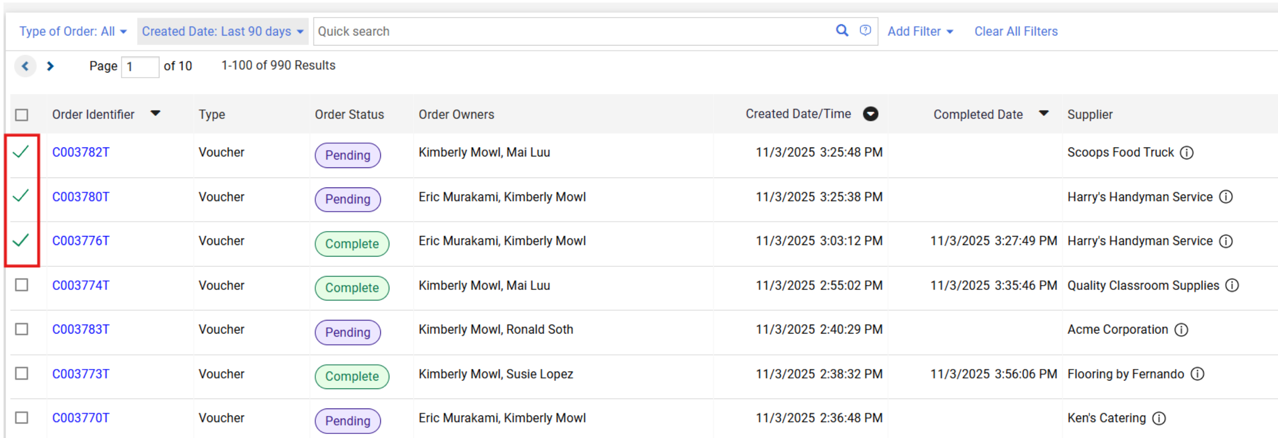
You may also change the Type of export. In most cases, you would select Screen Layout.
When you click Submit, the following pop-up window appears. Click on the blue hyperlink, which will take you to a screen with all your search exports.

Click on the blue hyperlink with your title as shown below and then the file will export.



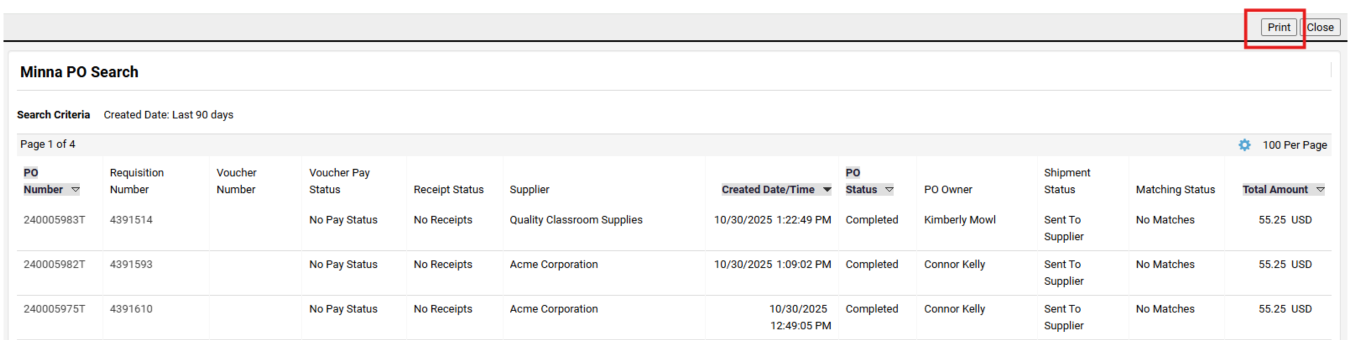
Export Selected Rows

When selecting Export Selected Rows, only the rows that you check off as shown below will be exported. Note: Only Screen Layout is available



Show Printable Results

This is helpful if you need a hard or soft copy of your search results. When selecting this option, a new screen will appear as shown below. Click on Print to receive your report



Type (not available)

- The drop-down menu for Type in the Export window has the following selection:
- Screen Layout – Export will appear as shown on the screen
- Full Export – Exports every information available providing a folder with multiple reports. This is not recommended.
- Transaction Export – Exports search results for rows checked off.
- User Defined Template

CHAPTER 6: OTHER TOPICS & REFERENCES

1-LIST OF COMMODITY CODES TO ACCOUNT CODES (USE ACCOUNT OVERRIDE TO UPDATE ACCOUNT YOU NEED)

COMMODITY CODE FOLDER	COMMODITY CODE	COMMODITY CODE DESCRIPTION	ACCOUNT	ACCOUN
Capital Projects	100001	Capital-Preliminary Plans	607022	Capital De
Capital Projects	100002	Capital-Construction	607031	Capital-Co
Capital Projects	100004	Group II Capital Assets	607009	Group II E
Capital Projects	100005	Real Estate Acquisition	607002	Acquisitio
Capital Projects	100006	Capital-Pollution Remediation Costs	607043	Capital - F
Capital Projects	100007	Capital-State Agency Costs	607032	Construct
Capital Projects	100008	Capital-Construction Other	607033	Construct
Capital Projects	100009	Capital-Master Plan	660066	Cap-Strat
Equipment	105002	Equipment	619001	Other Equ
Equipment	105003	Vehicles	619001	Other Equ
Equipment	105004	Farm Equipment	619001	Other Equ
IT	115001	IT Accessories/Supplies	660940	Computer
IT	115002	IT Hardware	616002	I/T Hardw
IT	115003	IT Hardware Maintenance	616801	I/T Hardw
IT	115004	IT Software	616003	I/T Softwa
IT	115005	IT Software Maintenance	616003	I/T Softwa
IT	115006	Telecommunications Supplies	616001	I/T Comm
IT	115007	Telecommunications Services	616001	I/T Comm
IT	115008	IT Professional Services	613001	Contractu
IT	115009	IT Consulting	613800	Consultin
Leases/Rentals	140001	IT Lease/Rental Services	616002	I/T Hardw
Leases/Rentals	140002	Equipment Lease/Rental Services	660822	Equipmen
Leases/Rentals	140003	Real Estate & Space Lease/Rental Services	660041	Space Ren
Leases/Rentals	140004	Vehicle Lease/Rental Services	660937	Vehicle Le
Maintenance, Repair, and Operations	145001	Building Maint/Repair Services	660061	Building M
Maintenance, Repair, and Operations	145002	Custodial Maint/Repair Services	660003	Supplies a
Maintenance, Repair, and Operations	145003	Elevator Maint/Repair Services	660061	Building M
COMMODITY CODE FOLDER	COMMODITY CODE	COMMODITY CODE DESCRIPTION	ACCOUNT	ACCOUN
Maintenance, Repair, and Operations	145004	Equipment Maint/Repair Services	660003	Supplies a
Maintenance, Repair, and Operations	145006	Landscape Maint/Repair Services	660064	Rep & Ma
Maintenance, Repair, and Operations	145007	Vehicle Maint/Repair Services	660932	Motor Ve
Maintenance, Repair, and Operations	145009	Custodial Supplies	660812	Custodial
Maintenance, Repair, and Operations	145010	Facilities Supplies	660003	Supplies a
Maintenance, Repair, and Operations	145011	Housing Supplies	660003	Supplies a
Maintenance, Repair, and Operations	145013	Vehicle Parts/Accessories	660932	Motor Ve
Maintenance, Repair, and Operations	145014	Utilities Maint/Repair Services (Co-Generation Plants)	660003	Supplies a
Maintenance, Repair, and Operations	145015	Housing Maint/Repair Services	660061	Contractu

Misc. Other	150003	Works of Art	660003	Supplies a
Misc. Other	150006	Controlled Substances	660003	Supplies a
Misc. Other	150007	Furniture	619804	Furniture
Misc. Other	150008	Official Guest	660003	Supplies a
Misc. Other	150009	Official Guest Travel	660003	Supplies a
Misc. Other	150011	Insurance	660010	Insurance
Misc. Other	150012	Memberships	660816	Dues and
Misc. Other	150015	Subscription/Publication (non-IT)	660816	Dues and
Misc. Other	150018	Training/Professional Dev	660009	Professior
Misc. Other	150019	Weapons	619001	Other Equ
Misc. Other	150021	Shipping/Freight (Non-Taxable)	660001	Postage a
Misc. Other	150022	Shipping/Freight & Handling (Taxable)	660001	Postage a
Misc. Other	150025	Accreditation Services	660043	Accredita
Non-Recycled Items	156001	Antifreeze - Non-Recycled	660003	Supplies a
Non-Recycled Items	156002	Mulch/Compost - Non-Recycled	660003	Supplies a
Non-Recycled Items	156003	Glass Products - Non-Recycled	660003	Supplies a
Non-Recycled Items	156004	Lubricating Oils - Non-Recycled	660003	Supplies a
Non-Recycled Items	156005	Paint - Non-Recycled	660003	Supplies a
Non-Recycled Items	156006	Paper - Non-Recycled	660003	Supplies a
Non-Recycled Items	156007	Plastic - Non-Recycled	660003	Supplies a
Non-Recycled Items	156008	Metals - Non-Recycled	660003	Supplies a
COMMODITY CODE FOLDER	**COMMODITY CODE**	**COMMODITY CODE DESCRIPTION**	**ACCOUNT**	**ACCOUNT**
Non-Recycled Items	156009	Tire Derived Products - Non-Recycled	660003	Supplies a
Non-Recycled Items	156010	Tires Larger 15in - Non-Recycled	660003	Supplies a
Non-Recycled Items	156011	Tires Smaller 15in - Non-Recycled	660003	Supplies a
Non-Recycled Items	156012	Building Finishes - Non-Recycled	660003	Supplies a
Non-Recycled Items	156013	Carpet - Non-Recycled	660003	Supplies a
Non-Recycled Items	156014	Erosion Control Products - Non-Recycled	660003	Supplies a
Non-Recycled Items	156015	Pavement Surfacing - Non-Recycled	660003	Supplies a
Non-Recycled Items	156016	Printing & Writing Paper - Non-Recycled	660003	Supplies a
Non-Recycled Items	156017	Soil Amendments & Soil Toppings - Non-Recycled	660003	Supplies a
Non-Recycled Items	156018	Textiles - Non-Recycled	660003	Supplies a
Fuel	157001	Diesel	605002	Gas
Fuel	157002	Gasoline	605002	Gas
Fuel	157003	Dyed Diesel	605002	Gas
Hospitality	158001	Catering Services	660922	Hospitalit
Hospitality	158002	Hospitality Space Rental	660922	Hospitalit
Hospitality	158003	Food and Beverage (Non-Taxable)	660922	Hospitalit
Hospitality	158004	Food and Beverage (Taxable)	660922	Hospitalit
Recycled Items	159001	Antifreeze - Recycled	660003	Supplies a
Recycled Items	159002	Mulch/Compost - Recycled	660003	Supplies a
Recycled Items	159003	Glass Products - Recycled	660003	Supplies a
Recycled Items	159004	Lubricating Oils - Recycled	660003	Supplies a
Recycled Items	159005	Paint - Recycled	660003	Supplies a

Recycled Items	159006	Paper - Recycled	660003	Supplies a
Recycled Items	159007	Plastic - Recycled	660003	Supplies a
Recycled Items	159008	Metals - Recycled	660003	Supplies a
Recycled Items	159009	Tire Derived Products - Recycled	660003	Supplies a
Recycled Items	159010	Tires Larger 15in - Recycled	660003	Supplies a
Recycled Items	159011	Tires Smaller 15in - Recycled	660003	Supplies a
Recycled Items	159012	Building Finishes - Recycled	660003	Supplies a
Recycled Items	159013	Carpet - Recycled	660003	Supplies a
Recycled Items	159014	Erosion Control Products - Recycled	660003	Supplies a
COMMODITY CODE FOLDER	**COMMODITY CODE**	**COMMODITY CODE DESCRIPTION**	**ACCOUNT**	**ACCOUN**
Recycled Items	159016	Printing & Writing Paper - Recycled	660003	Supplies a
Recycled Items	159017	Soil Amendments & Soil Toppings - Recycled	660003	Supplies a
Recycled Items	159018	Textiles - Recycled	660003	Supplies a
Services	160001	General Services	660003	Supplies a
Services	160002	Legal Services	613803	Legal Serv
Services	160004	Printing Services	660002	Printing
Services	160005	Advertising/Promotional/Media Services	660017	Advertisin
Services	160006	Bus Charter Services	606001	Travel-In
Services	160007	HazMat/Chemical Services	605006	Hazardou
Services	160008	Professional Services	613001	Contractu
Services	160009	Safety/Security Services	660003	Supplies a
Services	160011	State Fire Marshal Services	617002	Services f
Services	160012	Employee Recruitment Services	660042	Recruitme
Services	160013	Auxiliary Organization Services	660003	Supplies a
Supplies	170001	Lab/Scientific Supplies	660910	Laborator
Supplies	170002	Medical Supplies	660003	Supplies a
Supplies	170003	General Supplies	660003	Supplies a
Supplies	170005	Advertising/Promotional Supplies	660017	Advertisin
Supplies	170006	HazMat/Chemical Supplies	605006	Hazardou
Supplies	170007	Safety/Security Supplies	660003	Supplies a
For Library Use Only	180001	Bookbinding (Library Only)	660003	Supplies a
For Library Use Only	180002	Library Books (Library Only)	608001	Library Bo
For Library Use Only	180003	Library Serials (Library Only)	608001	Library Bo
For Library Use Only	180004	Library Periodicals (Library Only)	608001	Library Bo
For Library Use Only	180005	Library Subscriptions (Library Only)	608005	Library Su
Direct Purchase	700002	Attorney Fee	660019	Litigation
Direct Purchase	700003	Freight/Postage/Shipping	660001	Postage a
Direct Purchase	700004	Legal Settlement	660090	Expenses-
Direct Purchase	700005	Local/Federal Gov. Payment	660090	Expenses-
Direct Purchase	700006	Medical Service Payment	660003	Supplies a
Direct Purchase	700007	Memberships	660816	Dues and
COMMODITY CODE FOLDER	**COMMODITY CODE**	**COMMODITY CODE DESCRIPTION**	**ACCOUNT**	**ACCOUN**
Direct Purchase	700009	Official/Referee Payment	613001	Contractu

Direct Purchase	700010	Permits/Licenses (non IT)	660003	Supplies a
Direct Purchase	700011	Credit Card Bank Payment	107003	Expense A
Direct Purchase	700012	Royalty Payment	660003	Supplies a
Direct Purchase	700013	Utilities - Electricity	605001	Electricity
Direct Purchase	700014	Utilities - Gas	605002	Gas
Direct Purchase	700015	Utilities - Oil	605003	Oil
Direct Purchase	700016	Utilities - Water	605004	Water
Direct Purchase	700017	Utilities - Sewage	605005	Sewage
Direct Purchase	700019	Utilities - Telecommunication	604001	Telephon
Direct Purchase	700020	Direct Pay Other	660090	Expenses-
Direct Purchase	700021	Student Union Return of Surplus	660045	Student U

2-LIST OF ACCOUNT CODES

ACCOUNT	DESCRIPTION	ACCOUNT	DESCRIPTION	ACCOUNT	DI
604001	Telephone Usage	616004	I/T Infrastructure	660047	CO
604090	Other Communications	616005	Misc Info Tech Costs	660049	In
604808	Mobile Phone Charges	616101	Interagency I/T Software	660061	Bu
604809	IT Voice & Data Charges	616801	I/T Hardware Maintenance	660064	Re
605001	Electricity	616803	I/T Hardware Other	660066	Ca
605002	Gas	617001	Services fr Oth Funds/Agencies	660089	Ot
605003	Oil	617002	Services fr State Fire Marshal	660090	Ex
605004	Water	617090	Services from Auxiliary Org	660091	De
605005	Sewage	617101	Service frm bet. Campuses & CO	660095	De
605006	Hazardous Waste	617103	Services fr Office Fire Safety	660096	De
605800	Non-Hazardous Waste	617800	Accounting Service Charges	660105	In
606001	Travel-Domestic, In California	617801	Fingerprinting	660804	At
ACCOUNT	**DESCRIPTION**	**ACCOUNT**	**DESCRIPTION**	**ACCOUNT**	**DI**
606002	Travel-Domestic, Out of State	619001	Other Equipment	660807	W
606803	Travel - International	619800	Instructional Equip Misc	660810	Pr
607002	Real Estate Acquisition	619803	Equipment Other	660811	Fu
607008	Service Districts Assessments	619804	Furniture	660812	Cu
607009	Group II Equipment - Cap Projt	620001	SP-Subrecipient - 25K & Under	660813	Gi
607010	Lease Purchase	620002	SP-Subrecipient - Over 25K	660815	Ex
607022	Capital Design	622001	SP-Participant Support -w/F&A	660816	Du
607026	Capital-Working Drawings (W)	622002	SP-Participant Support -No F&A	660820	Te
607031	Capital-Construction Contract	622801	SP-Research Incentives-w/F&A	660821	Pa
607032	Construction Management	623001	SP-Materials, Suppl & Services	660822	Ed
607033	Construction Other	623801	SP-Laboratory/Resrch Supplies	660830	Sp

607037	Capital-Insurance Premiums	624001	SP-Scholarships-w/F&A	660833	M
607043	Capital - Pollution Remed Exp	624002	SP-Scholarships-NO/F&A	660834	Ac
608001	Library Books (Lbry use only)	624801	SP-Scholarships-Tuition w/ F&A	660835	Le
608005	Library Subscriptions	624803	SP-Scholarships-Tuition NO F&A	660837	At
609001	State E.O.P. Grant Program	624804	SP-Scholarships-Books NO F&A	660838	St
609002	State University Grant	660001	Postage and Freight	660839	Sp
609003	State Grants-Other	660002	Printing	660840	Gi
609004	State Graduate Fellowship	660003	Supplies and Services	660887	Pr
609005	Other Student Scholar/Grants	660004	Interfund Interest Expense	660902	Ot
609007	Scholarships/Grants - Private	660005	Interest Expense-Finance Lease	660910	La
609008	Scholarships/Grants - Institut	660006	Interest on Bonds and Notes	660919	Ta
609009	Fin Aid - CSU Educ Doctorate	660007	Principle on Bonds and Notes	660922	Ho
609010	DPT Financial Aid-Non SUG	660008	Interest Charges-Others	660923	Cr
609011	DNP Financial Aid Non-SUG	660009	Professional Development	660927	In
609013	Summer Enrollment Grant FA Exp	660010	Insurance Expense	660930	Co
ACCOUNT	**DESCRIPTION**	**ACCOUNT**	**DESCRIPTION**	**ACCOUNT**	**D**
609099	Scholarship Allow Tuition Disc	660014	State Service Charges for SRB	660937	Ve
609800	Student Grants Awarded	660016	Property Insurance Premium Exp	660940	Co
610001	Federal Financial Aid	660017	Advertising & Promotion	660942	Pa
610002	Federal Fin Aid Loan Disb	660019	Litigation Cost	660955	Fo
612001	State Pro Rata Charges-Admin	660024	Overhead - Other	660981	Im
613001	Contractual Services	660025	Overhead-Chancellor's Office	660982	De
613800	Consulting Contract Services	660027	Pollution Remed Exp (non-cap)	660983	Co
613801	Non-Credit Instructr Pay (001)	660040	Bad Debt Expense	660987	Bi
613802	UCES-Field Trips-Test (001)	660041	Space Rental	660989	Fe
613803	Legal Services	660042	Recruitment	662001	F&
613804	Audit Services	660043	Accreditation Expense	662003	Pr
616001	I/T Communications	660044	Loan Cancellation and Defaults	662004	Pr
616002	I/T Hardware	660045	Student Union Return Surplus	662801	F&
616003	I/T Software	660046	Wells Fargo Bank Charges	662802	F&
				662803	F&

3-CSUBUY FIELDS TO CFS DATA WAREHOUSE FIELDS

Most fields in CFS Data Warehouse are populated by CSUBUY. As shown Doc ID in Data Warehouse is Voucher # in CSUBUY. Doc Ln Descr in Data Warehouse is Item in CSUBUY.

			CSUBUY:	CSUBUY: Voucher #		CSUBUY: Item in Shopping Cart	CSUBUY:
Business Unit	Fiscal \	Period	Accounting Date	Doc ID	Doc Src Fdescr	Doc Ln Descr	Amount
LBCMP - CA State University	2025	7	01/23/2026	C0140855	'CH - AP Voucher Accounting	FB NITRILE GLV PF LF L 100/PK	8.34
LBCMP - CA State University	2025	7	01/24/2026	C0140789	VCH - AP Voucher Accounting	FGO Organic Jasmine Green Tea	16.40

CSUBUY:	CSUBUY:	CSUBUY:	CSUBUY:			JAG indicates the transaction came from CSUBUY			
Purchase Order	Supplier ID	Supplier Name	Invoice ID	Jrnl ID	Jrnl Descr	CSU Descr	CSU Ref 1	CSU Ref 2	Ledger Fdescr
2400072409	0003825401	FISHERSCIE-001	6264644Y	AP02682181	-	JAG	-	-	ACTUALS - Actuals
2400072402	0000126526	AMAZONBUSI-001	1X9T-336T-NLYX	AP02682182	-	JAG	-	-	ACTUALS - Actuals

From CSUBUY:

Fisher Scientific Company LLC · 1 Item · 7.55 USD

SUPPLIER DETAILS CA State University Long Beach (LBXMP-3) : 6722 Bickmore Avenue, Chino, California 91708 United States

Contract	*no value*	Supplier Account No.	*no value*
Quote number	*no value*	PO Clauses	*no clause*

Need to make changes? **VIEW ITEMS** Item(s) was retrieved on: 1/22/2026 4:18:17 PM

- FB NITRILE GLV PF LF L 100/PK

Line	Status	Item	Catalog No.	Size/Packaging
1	✓	FB NITRILE GLV PF LF L 100/PK	191301597D	PK

Voucher • Fisher Scientific Company LLC • C0140855

Summary | Tax Details | Matching | Supplier Messages | Comments 10

General Information ···

Invoice Details

Supplier Name **Fisher Scientific Company LLC**

Supplier No. 0003825401

Additional Information

Remit To

PO Box 50129
Los Angeles, California 90074-0129

United States
Address Id 5

4-AMAZON ACCOUNTS AND ACCESS

In order to access Amazon Business and start shopping through CSUBUY, create or convert your Amazon account.

Amazon Punchout

The CSU has a central Amazon Business account. To shop in CSU's Amazon Business account properly, you must understand how it is set up.

- Every user will have their own unique Amazon Business profile, which is tied to an email address.
- Email addresses can only be used one time across any Amazon account.
- Punching out to the Amazon Business account from CSUBUY lands you into the correct shopping group.
- The email address used for CSUBUY purchases in Amazon will be the one listed in your CSUBUY user profile.

RECOMMENDATION: BEFORE punching out from CSUBUY to Amazon, check your existing Amazon account to see what email address is used (log in directly to Amazon without punching out from CSUBUY).

If you did not check beforehand that's OK, it's still possible to shop in Amazon through CSUBUY. The initial setup may be a little different. See below for additional details on each and how to properly get connected.

Scenarios

1. If you're already using CSU's Amazon Business account with this email address, you're all set! (Scenario 0)
2. Email address is new to Amazon (Scenario 1)
3. Email address is being used for an Amazon retail account
   A. You want purchase history to merge (Scenario 2)
   B. You want purchase history kept separate (Scenario 3)
4. Email address is being used for another Amazon Business account (Scenario 4)

If you are having difficulty accessing Amazon, it may be due to the email address and one of the scenarios listed above.

Scenario 0: Email Address is in the CSU Amazon Business account

You're already using CSU's Amazon Business account with this email address. This is most likely from using the CSU Pro-Card Marketplace. No additional setup is required in this scenario. Just click on the Amazon Business tile from CSUBUY to punchout to Amazon Business account and start shopping.

Scenario 1: Email Address is New to Amazon

If your email address is not used on any Amazon account, to punchout and start shopping in Amazon Business:

1. Click on the Amazon Business tile in CSUBUY.
2. Amazon may start you with a registration wizard. If prompted, enter your first and last name.
3. Complete the registration process.
4. You will have an Amazon profile set up, and your email address will be tied to CSU's Amazon Business account.
5. Click "Start Shopping" to access Amazon Business.

Scenario 2: Email Address is Being Used for Retail Account (Want to Merge)

This scenario is for users who purchased items on a regular, individual Amazon retail account, which was not tied to any Amazon Business account. Purchases in this situation were not made through the CSU Pro-Card Marketplace or any other CSU-related account.

If you used Amazon for work purchases and have your work email as the main email address in your Amazon profile, the Amazon account will need to be changed to tie in with the CSU Amazon Business account. There are some options in this conversion process. This scenario lists how to merge your account. Merging will transfer all purchase history.

IMPORTANT: After merging, your individual retail account will no longer be active, and you'll lose access to any subscriptions or Prime benefits that were tied to that account. You'll use the same email to sign in to CSU's shared Amazon Business account.

WARNING: Merging transfers ALL purchase history – personal and work-related. If you made any personal purchases in the Amazon retail account, you may want to choose Scenario 3 below to separate out work vs. personal.

To merge an Amazon retail account with the CSU Amazon Business account:
1. Click on the Amazon Business tile in CSUBUY.
2. Sign into your existing Amazon account when prompted.
3. When asked, select "Yes, add to my organization's shared account".
4. Click "Next"
5. Click "Start Shopping" to access Amazon Business.

Result: Your Amazon account is now part the CSU's Amazon Business account.
Purchase history should have migrated over. To shop, always punchout from the tile in CSUBUY.

Scenario 3: Email Address is Being Used for Retail Account (Want to Keep Separate)

This scenario is like Scenario 2 above, but you want to keep it a separate and personal account.
This is for users who purchased items on a regular, individual Amazon retail account, which was not tied to any Amazon Business account. Purchases in this situation were not made through the CSU Pro-Card Marketplace or any other CSU-Related account.

If you used Amazon for work purchases and have your work email as the main email address in your Amazon profile, the Amazon account will need to be changed. This scenario lists how to keep the personal account separate.

RECOMMENDATION: BEFORE punching out from CSUBUY, log into Amazon and change the account email address.
*** Update the email address in your Amazon retail account to a non-CSU email to avoid additional conversion steps.**
*** If the email address is updated before starting, the CSU email is no longer being used on the personal account. The resulting initial CSUBUY punchout will be an easy setup using Scenario 1 above.**

If the email was not changed beforehand, then follow the steps below.

To separate an Amazon retail account to a non-CSU email address:
1. Click on the Amazon Business tile in CSUBUY.
2. Sign in to your existing Amazon account
3. Select "No, I want to keep this account personal"

4. Enter a DIFFERENT email address for your Amazon Business account. Use a personal, non-CSU email address that's not used on any Amazon account. A new email address may need to be created.
5. Verify the new email by entering the OTP (One Time Password) sent to that address.
6. Enter your full name and create a password for your new Amazon Business account
7. Click "Create your Business account"
8. Click "Start Shopping" to access Amazon Business.

Result: Your personal Amazon account remains separate with its order history and subscriptions intact. The personal account is tied to a personal email address Your CSU email address is now tied to the CSU Amazon Business account.

Scenario 4: Email Address is Being Used for Another Amazon Business Account

Having a separate Amazon Business account is the most complex conversion scenario. This is a business account different than the central CSU Amazon Business account. There are several options and variables to consider.

- Is the other business account a single-user or multi-user?
- Is your email address in the other business account profile identified as an admin or non-admin?
- When converting, do you want purchase history in the other business account merged or not merged?

Setup may require deregistering your email from the other business account. You may need an invitation email sent.

RECOMMENDATION: Contact Amazon Business help line or account rep for assistance.
Registration Support: (844) 428-3060 or use this LINK to get a phone call from an agent on a pre-authenticated line.

CSU's account representative: Rachel Kaizoji, kaizoji@amazon.com
Also use **CSU-Amazon Business Resource Hub**

Tips, Tricks & FAQ

1. Pop up blocker – When punching out to Amazon Business the first time, it may appear that it is not connecting. Most likely it is your browser blocking a pop-up window. Since Amazon opens in a new browser window, you will need to set your browser to always allow pop-ups for Amazon.

2. When checking out the first time in Amazon. It may require you to select your campus address. This is a placeholder address only, and it is not the final address where the product will be shipped. The final delivery address is the ship-to address listed on the CSUBUY requisition/purchase order.

3. When ready to checkout in Amazon, the button may say "Submit order for approval". Another place on the checkout page may say "This order requires approval." This is Amazon's way of saying "send the cart back to CSUBUY." Click the button to return the cart to CSUBUY.
Like all punchout suppliers, shopping is 2-step process:
a. Punchout to the supplier, shop and put items in the cart.
b. Return the cart to CSUBUY then submit the requisition to place the final order.

4. Punchout agreement – after returning the cart to CSUBUY, Amazon will hold the item inventory quantity and price. After 7 days, it may still go through, but there's no guarantee that the price will be the same or quantity available. There is risk that some or all the order will be cancelled. Process the order timely.

5. After returning the cart to CSUBUY, do not make changes. Do not add or delete lines. There is risk that some or all the order will be cancelled because the final order placed does not match the cart returned from Amazon. If you need to make changes, it's recommended to delete that cart and start over.
Remember: Before you start, check your cart (in CSUBUY).

6. Passwords set up in Amazon are not tied to SSO campus credentials. It's the password you set up directly with Amazon. Performing an action in the Amazon punchout other than shopping and checking out may require you to enter your password. This includes checking on order status or reviewing past purchases.

7. For Amazon purchases to process correctly, it's important to always punchout from the CSUBUY page. Punching out from CSUBUY to get into the correct Amazon purchasing/punchout group. If you see a warning that says that the order can't be placed and must go through your eprocurement system, it's likely that you went directly to Amazon. Start with CSUBUY and click on the Amazon Business tile to punch out to Amazon. It will get you in the correct Punchout Group "CSUBUY P2P PROD".

8. To meet CSU's strategic sourcing requirements, some items may be restricted or blocked from purchasing.

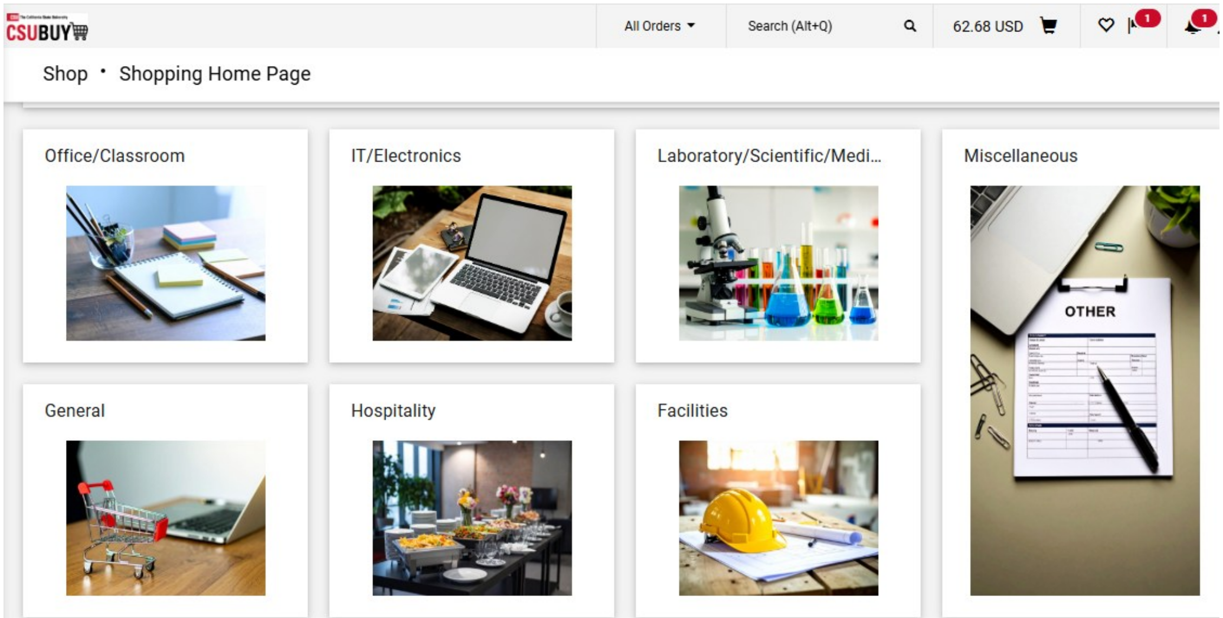
9. Like all orders in CSUBUY P2P, purchases made through Amazon Business will be processed on a PO and will be billed by invoice, not on your procurement credit card.

Help & Resources

- **CSU-Amazon Business Resource Hub**
- Amazon Business help line: (844) 428-3060 or use this LINK to get a phone call from an agent on a pre-authenticated line.
- CSU's Amazon account representative: Rachel Kaizoji, kaizoji@amazon.com
- Open a ticket using https://csu.service-now.com/csubuy

5-PUNCHOUT CATALOG GUIDANCE

You may locate these Punchout Catalogs in the tiles of the Shopping Home Page.



Below is a list of Punchout Catalogs and the tiles they are located in.
We have been informed that the Punchout Catalogs highlighted in yellow are not yet working.
In addition, the Punchout Catalog **Suppliers** highlighted in salmon are not available when using Forms.

Please review the messages on the Shopping Home Page for updates.

NOT WORKING		
NO FORMS		
Office/Classroom	**Laboratory/Scientific/Medical**	**Facilities**
Staples	Carolina	Black Box Safety
School Specialty	Fisher Scientific	Lowe's
Complete Book	Henry Schein	Lowe's
	Medline	Maxie
IT/Electronics	Thomas Scientific	Grainger
B&H	VWR	Grainger
CDWG	Millipore Sigma	Graybar
Dell		Gordon Industrial
Connection	**General**	
HP	Amazon	
IRG		
SHI		

6-IT PURCHASES GUIDANCE

When making IT related purchases in CSUBUY, you may make the purchase using a Punchout Catalog or using a Form.

The chart below provides additional guidance on the commodity code, type of form and account code to use. Currently, one shopping cart can only contain one type of form. Even if the purchase is from the same supplier for IT hardware and IT software, please use different shopping carts since different forms must be used. IT maintenance associated with the IT hardware and IT software may be in the same Shopping Cart using the same Form but as separate items.

For example, when purchasing IT hardware such as a laptop and there is an IT hardware maintenance plan with the purchase, you would use the IT Hardware Form for both. One line item in the shopping cart would be for the laptop and a second line item in the shopping cart would be the maintenance plan. If you also have IT software, please create a new shopping cart for the IT software.

Folder	Commodity Code	Commodity Code Description	CSUBUY Form	Detailed Description	Account	Account Code Description
IT	115001	IT Accessories/Supplies	Goods & Services Form	Used for IT-related accessories and supplies, such as mouse, keyboard, cables, etc. when more detailed object codes (see 616001 to 616004) are not appropriate.	660940	Computer Supplies
IT	115002	IT Hardware	IT Hardware Form	Used to record expenditures for non-communication equipment, including laptops/desktops, printers, monitors, servers, etc., and related initial maintenance costs. If used for IT infrastructure, override to object code 616004.	616002	I/T Hardware
IT	115003	IT Hardware Maintenance	IT Hardware Form	Used to record on-going maintenance expenditures for non-communication equipment, including laptops/desktops, printers, monitors, servers, etc. If used for IT infrastructure, override to object code 616004.	616801	I/T Hardware Maintenance
IT	115004	IT Software	IT Software Form	To record expenditures for IT software or software as a service, including initial maintenance costs related to the use of the software.	616003	I/T Software
IT	115005	IT Software Maintenance	IT Software Form	To record on-going maintenance expenditures for IT software, related to the use of the software.	616003	I/T Software
IT	115006	Telecommunications Supplies	Goods & Services Form	Used to record costs for communications equipment, such as telephone equipment, routing equipment and network software. It may also include tax, initial maintenance and related training costs.	616001	I/T Communications
IT	115007	Telecommunications Services	Goods & Services Form	Used to record costs for communications services, and on-going maintenance and related training costs.	616001	I/T Communications
IT	115008	IT Professional Services	Independent Contractor Form	Payments for IT expenditures made pursuant to a formal agreement executed between the CSU and the provider of services. A formal agreement is used when detailed specifications are required, where there is a deviation from the CSU's standard contract provisions, where issues of risk need to be addressed and/or where services will be provided over an extended period of time. The value of any individual contract is generally significant (such as for a major project). Reimbursement of vendor travel costs, if a provision of the agreement, is also charged to this object code.	613001	Contractual Services
IT	115009	IT Consulting	Independent Contractor Form	Payments for IT expenditures made pursuant to a formal agreement executed between the CSU and the provider of services. A formal agreement is used when detailed specifications are required, where there is a deviation from the CSU's standard contract provisions, where issues of risk need to be addressed and/or where services will be provided over an extended period of time. The value of any individual contract is generally significant (such as for a major project). Reimbursement of vendor travel costs, if a provision of the agreement, is also charged to this object code.	613800	Consulting Contract Services