



A COLLABORATIVE PROCURE TO PAY MARKETPLACE

CSUBUY: Procure-to-Pay (P2P)

Demo Series: Branding & Logo

Presenter: Christian Burke, CSU Chico





Agenda

- Introduction
- Timeline
- Demo
- Key Objectives and Takeaways
- Q & A

Strategic Advisors



Acceleration Group 1 SA: Carrie Schmidt

- East Bay
- San Jose
- San Francisco

Acceleration Group 2 SA: Nicole Lack

- Stanislaus
- Sacramento
- Monterey Bay

Acceleration Group 3 SA: Sara Rumiano

- Northridge
- Channel Island
- Dominguez Hills
- Long Beach

Acceleration Group 4 SA: Tawny Fleming

- San Bernardino
- Pomona
- Los Angeles
- Fullerton

Live CSUBUY Campuses



CSUBUY P2P: Project Vision & Goals Review



CSUBUY P2P: Vision

It 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

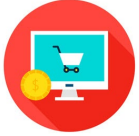


CSUBUY P2P: Objectives

- Develop a systemwide platform that integrates disparate data and processes into one streamlined solution
- Implement an intuitive and easy to use solution
- Create visibility to preferred and sustainable suppliers and guide end users to contracted suppliers.
- Drive process efficiency through integration and automation to reduce manual work
- Improve compliance and reduce costs



CSUBUY P2P: Benefits



Streamline Procurement and Payment Processes: Consolidate disparate data and processes into a single streamlined electronic solution, increasing automation to reduce manual inefficiencies

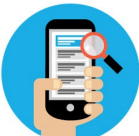


Improve User Experience: For both suppliers and internal customers, CSUBUY P2P will offer an intuitive and simplified experience.

- Suppliers will benefit from electronic receipt of PO's and submission of invoices, timely payment and self-service access to check invoice approval and payment status.
- Internal Customers will have easy shopping and check out, access to order and payment status, and a single tool for reconciliation of purchases and payments



Better Data Quality for Decision Making: Improve reporting capabilities, enabling CSU to better identify shared suppliers and leverage negotiating power to drive cost savings.



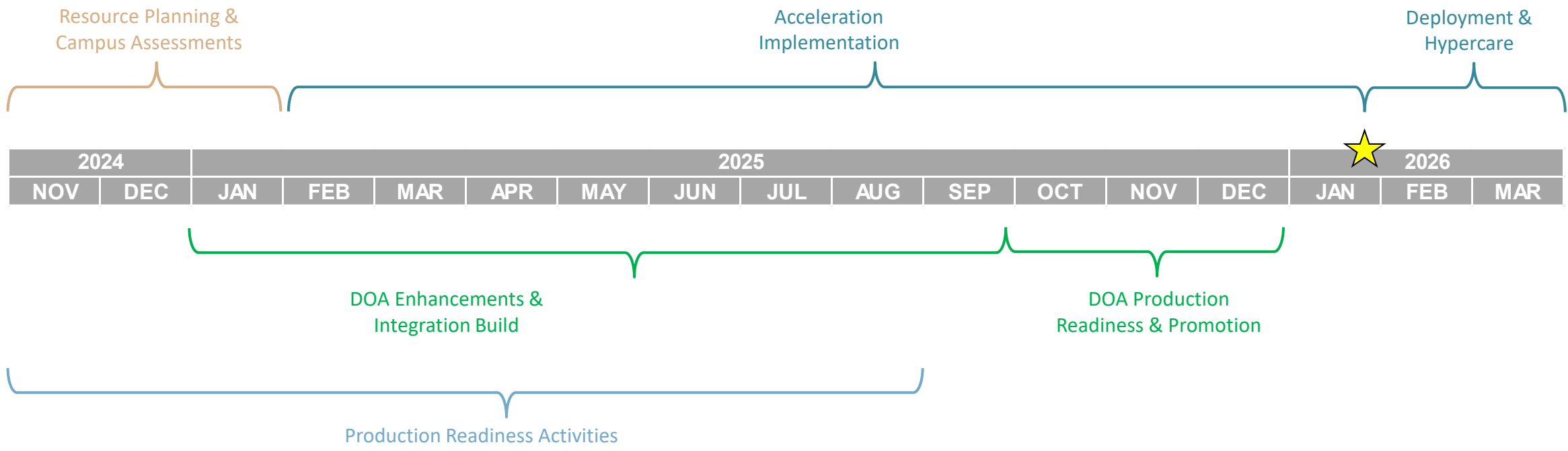
Increased Visibility: One consolidated P2P system will increase access to data and information for both CSU employees and our suppliers, enabling cross campus visibility in key areas.



Continuous Improvement: CSUBUY P2P drives forward the strategic, systemwide focus on continuous improvement to increase efficiency and effectiveness throughout the organization.

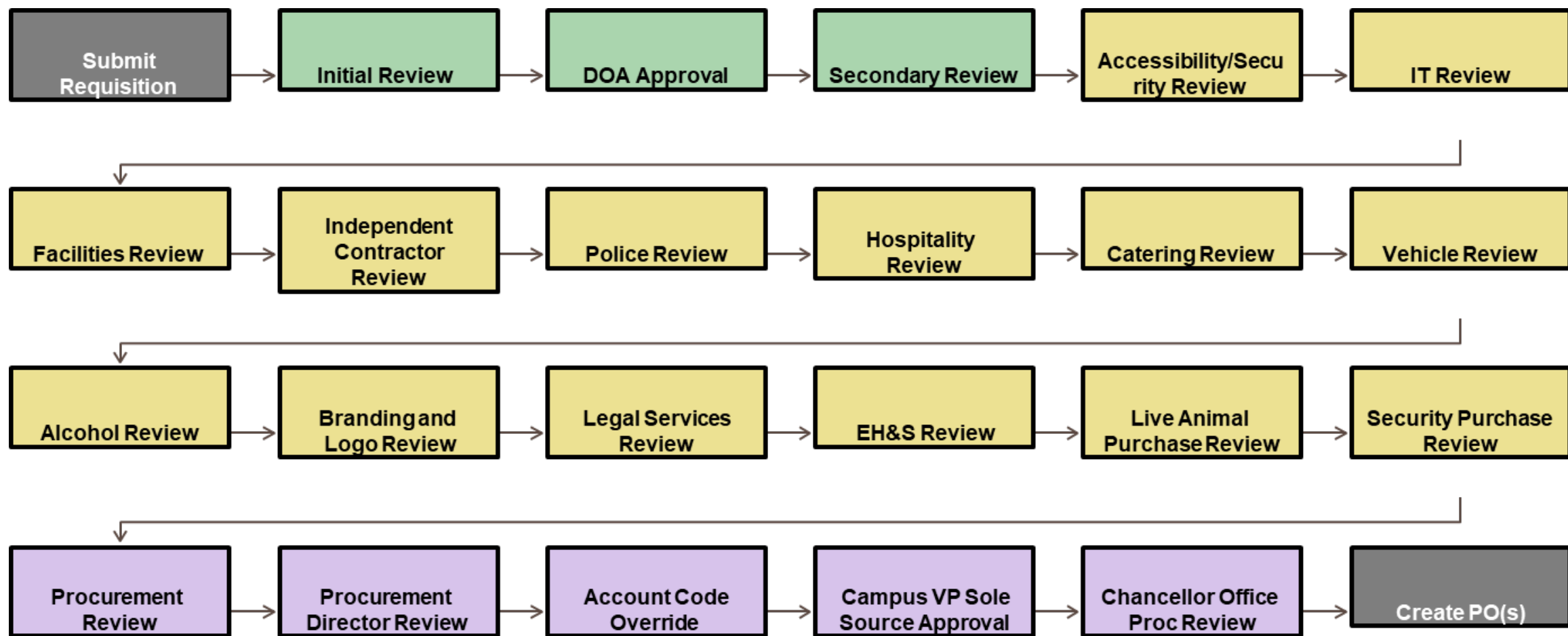


CSUBUY: Acceleration Timeline





CSUBUY P2P: Requisition Workflow Steps



Fiscal

Compliance

Procurement



CSUBUY P2P: Requisition Workflow Triggers – Branding & Logo

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**Branding and
Logo Review**

Business Purpose: Route for review and approval requisitions which contain line items that may apply a CSU Logo or Brand

Triggers: Yes response on G&S Request or Hospitality Request to the question: includes the use of a campus or CSU logo or brand

Approvers: “Approver” Role, typically members from a Communications Department

Action: Approver would review and approve the transaction for compliance

Campus Ask:

Evaluate if this step is needed and provide details of the request in the WFRules Assignment Excel

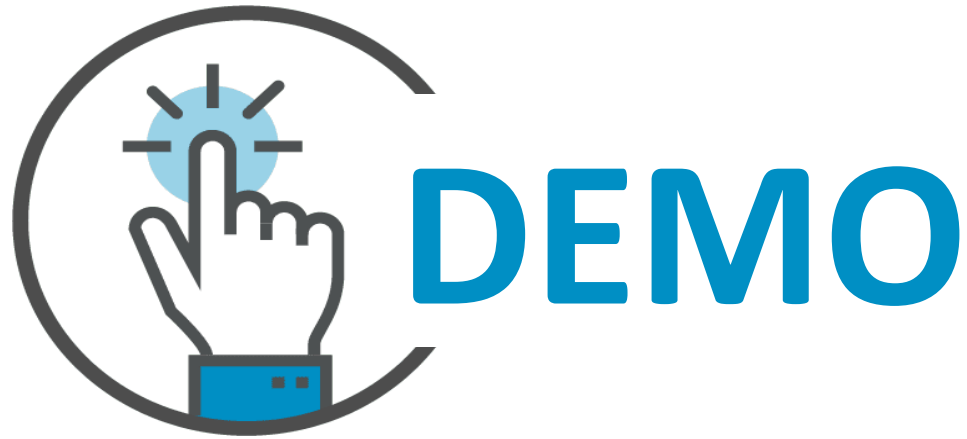


CSUBUY P2P: Configuration Disclaimer

*All functional materials, recommendations, and application configurations have been defined by the CSUBUY P2P Core Project Team based on best practice, initial requirements and specific insights from the live campuses. **The configuration shown today is in our Test Site. You may see functionality that are in pending review by various user groups and may be subject change.***



CSUBUY P2P: **Branding & Logo Overview**



Activity

Prior vs. Current State

Workflow Triggers

- "Yes" response on Goods & Services or Hospitality to the question: includes the use of a campus or CSU logo or brand

Notification of When Something Needs Approval

- Email
- In P2P

Reviewing

- Assign to Self
- Policy and Compliance
- Other Area Specific Review
- Comment Feature

Action

- Approve
- Return
- Reject



CSUBUY P2P: Campus Contact

Campus	Contact	Email
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