



CSU The California State University

CSUBUY 
A COLLABORATIVE PROCURE TO PAY MARKETPLACE

CSUBUY: Procure-to-Pay (P2P)

Demo Series: Workflow & Approver





Agenda

- Introduction into CSUBUY
- Timeline
- General Project Update
- Demo

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

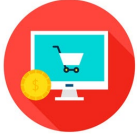


CSUBUY P2P: Objectives

- 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.



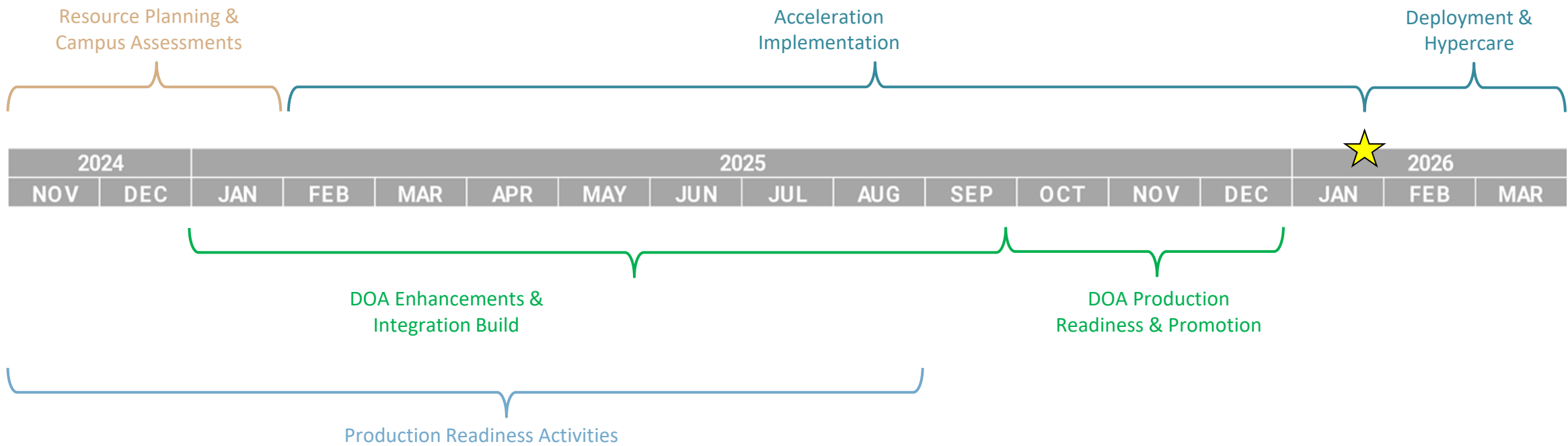
Increased Visibility: One consolidated P2P system will increase access to data and information for both CSU employees and our suppliers, enabling cross campus visibility in key areas.



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

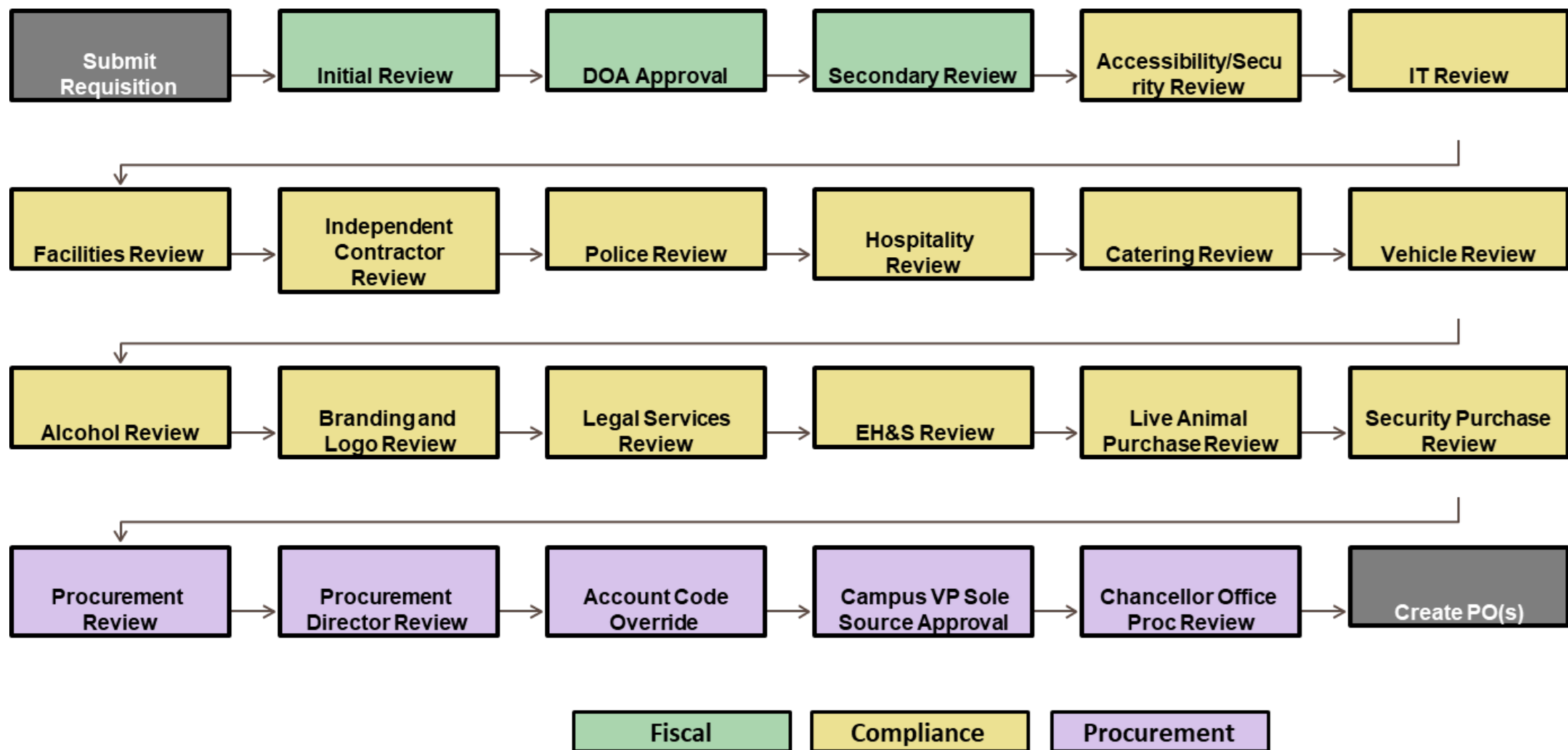


CSUBUY: Acceleration Timeline



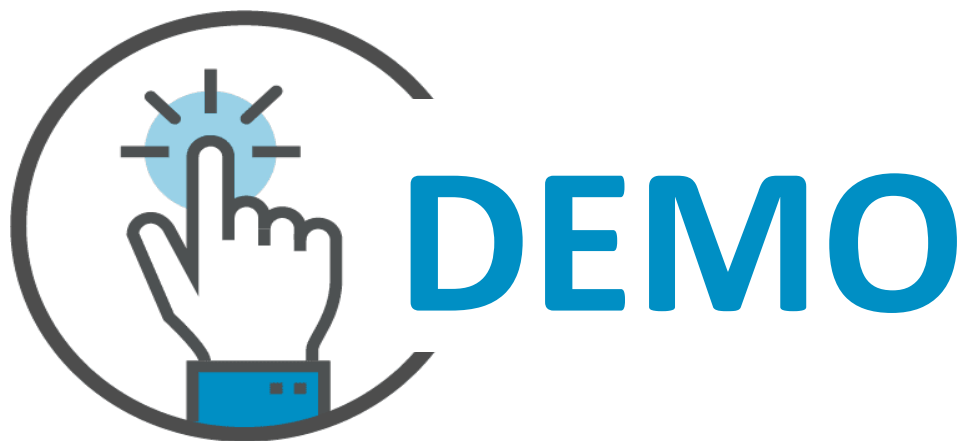


CSUBUY P2P: Requisition Workflow Steps





CSUBUY P2P: **Workflow & Approver Overview**



Activity

Requester vs. Approver

- Requester Can't Approve Own Requisition
- Punchout Low Dollar, Low Risk

Overview of Workflow

- Financial DOA
 - Levels and Limits
- Compliance
 - Area of Expertise

Form Review

- How to Lookup When Approving Req
- Which Form is Used
- Comments
- Attachments – Won't Always Have a Quote, CXML

Action Options

- Assign Substitution When Out of Office
- Assign to Self to Take Action
- Return, Reject, Comment, Approve



CSUBUY P2P: Campus Contact

Campus	Contact	Email
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