CSU The California State University

CSUBUY
A COLLABORATIVE PROCURE TO PAY MARKETPLACE

CSUBUY
Introduction & Training
May 29, 2020

CSUDH

Campus Administrators

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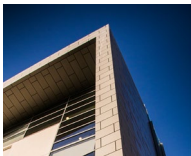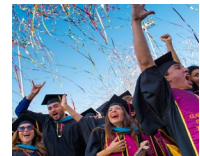Buyer II, Procurement and Contracts
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Agenda

➢ Presenter Introductions

➢ Timeline

➢ What is CSUBUY and why we are changing?

➢ What functionality does CSUBUY have now and future plans?

➢ Who is affected by the change?

➢ What Suppliers are featured?

➢ CSUBUY Roles

➢ Access Request Form

➢ Where do I find information on CSUBUY?

➢ CSUBUY Demonstration and User Training

➢ Q&A

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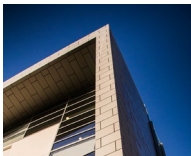
Timeline

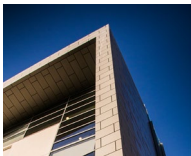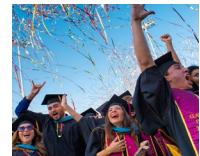**Last day to place orders on the Campus Marketplace**

- May 25, 2020

CSUBUY Go Live

- June 1, 2020

Last day to access Campus Marketplace

- July 15, 2020

What is CSUBUY and why are we changing?

What is the CSUBUY?

- Replaces Campus Marketplace ESM Solution
- CSUBUY (Jaggaer) has more potential for enhancement than current ESM Campus Marketplace.
- CSUBUY is the first step in transforming the way the CSU manages the Procure-to-Pay process.

Why are we changing?

- This change creates a foundation for future implementation of automated workflow, requisitioning, purchase orders, and AP functionality through integration into CFS and Oracle.
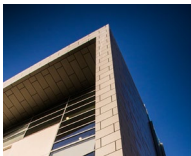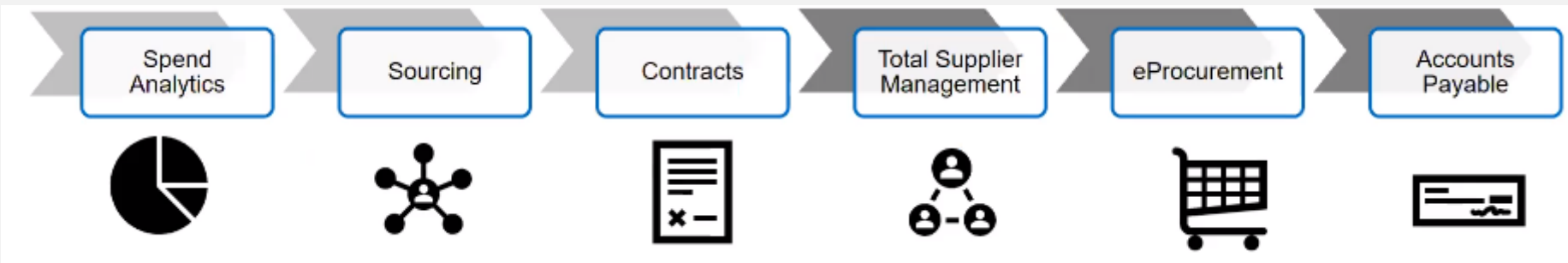
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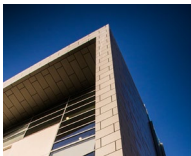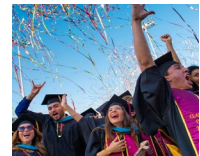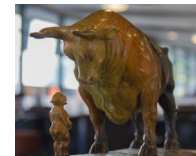
CSUBUY Current Functionality & Future Plans

Current
- CSUBUY was designed to be functionally equivalent to Campus Marketplace (ESM Solution).
- Lift and Shift – Ease of transition

Future (*Procure-to-Pay*)

Potential Future State – Procure-to-Pay

Shopping

Intuitive, Guided Shopping
- ✓ Faceted Search
- ✓ Guided Buying
- ✓ Showcase, Preferred, Contracted items (drive Savings)
- ✓ Catalogs, Punchouts, Web Forms, Free Form
- ✓ Item Comparisons
- ✓ Favorites

Content
- ✓ Content Filtering by Org, Location, Role
- ✓ Indirect, MRO, Direct

Purchasing Requests
- ✓ New Suppliers, Items, Sourcing

Dashboards-Visibility
- ✓ Personal Dashboards
- ✓ Org Dashboards
- ✓ Visibility to my Purchases
- ✓ Approval progress

Requisitioning

Checkout
- ✓ Quick & easy Cart Checkout
- ✓ Accounting defaults
- ✓ Split Accounting
- ✓ Opex, Capex, Project, Assets
- ✓ Internal / External Comments & Attachments
- ✓ Order on behalf Of
- ✓ Ship-To Address

Approvals
- ✓ Req Budget Checks
- ✓ Approval Flows, basic to complex
- ✓ Approval Delegations
- Mobile App

Dashboards-Visibility
- ✓ My Requisitions, All Requisitions
- ✓ Approvals - Pending, Status
- ✓ Saved Carts, Favorites

Ordering

Touchless Orders
- ✓ Auto PO Generation & Distribution

Multiple Channels
- ✓ Supplier Portal, cXML, EDI, Email

Broad Functionality
- ✓ Order Acknowledgements
- ✓ PO Change Requests & Change Orders
- ✓ PO Close options
- ✓ PO Template, T&C's

Dashboards-Visibility
- ✓ Contract Compliance
- ✓ Category Spend
- ✓ Sourcing & Catalog Opportunities

Receiving

PO Receiving
- ✓ Desktop & Centralized Receiving
- ✓ Electronic & Mobile Notifications / Reminders
- ✓ Facilitate 3-way (n-way) Matching
- ✓ Qty & $ Receiving
- ✓ Visibility to Invoice Open-Receipt Holds
- ✓ Auto-Reminders
- ✓ Receiving Tolerances by Category
- ✓ Receipt Attachments & Annotations
- ✓ Returns

Dashboards-Visibility
- ✓ Open/Escalated Receipts
- ✓ Receipt History

Invoicing

Invoice Processing
- ✓ Numerous Submission & Intake Options – Electronic & Touchless is the Goal
- ✓ PO and Contract Backed Invoice Matching (n-way) and Approvals
- ✓ Non-PO Approval Workflow
- ✓ Match Exception Workflow
- ✓ Collaborative Supplier Dispute Workflow
- ✓ Invoice Tolerances
- ✓ Credit Memos
- ✓ Invoice & Tax Compliance

Dashboards-Visibility
- ✓ Cycle Times
- ✓ Early Pmt Analysis & Discount Details
- ✓ Match Exceptions
- ✓ Credits & Disputes

Payments

Payment Processing
- ✓ Ok2Pay Invoice File passed to ERP or 3rd Party Pmt Platform/Service
- ✓ Invoice Pmt Compliance
- ✓ Payment Processing
- ✓ Dynamic Discounting
- ✓ Tax Engine – Use Tax, Self Assessment

Dashboards-Visibility
- ✓ Payment Schedule
- ✓ Supplier Visibility to Pmt Status
- ✓ Discount Cash Analysis
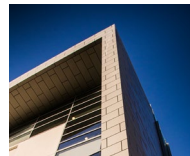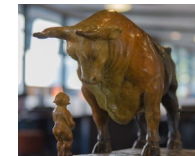
Who is affected by the change?

- 18 CSU Campuses on current ESM Marketplace
- Fresno, Fullerton, Long Beach, Cal Maritime, Monterey Bay, and Northridge will be onboarded in a few months.
- Over the next few years (pending CABO approval) deeper integration into CFS and Oracle will provide additional functionality to streamline Procurement, Accounts Payable, and Vendor Management.
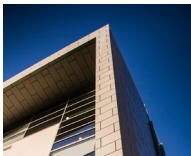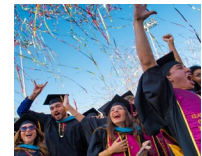
What suppliers are featured?

May the site be used for personal purchases?

- No, this site is for CSU Business Only. Discounted pricing is offered to us because of our role as a state agency or higher education entity.
- These prices are not offered by the suppliers to us as individuals.
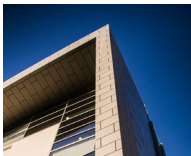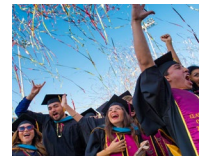
*Other vendors are soon to be added.

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CSUBUY Roles

Current Roles

- Shopper – Can shop but cannot send an order to supplier
- Requester – Can shop and complete an order, and complete orders for Shoppers (Assign Cart, *previously Transfer Cart*)
- Campus Administrators – Your main point of contact for **all** CSUBUY questions.
- System Administrator – Chancellor's Office

Access Request Form

- Existing users do not need to submit a new form
- All **NEW** Approvers, P-card and Non P-card users must submit the Access Request Form
- Transfer Cart Users must identify the P-card holder who will be processing their orders (Limited to one)
- Approvers must sign all Access Request Forms

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CSUBUY Online Access Request Form

The following Procurement Card holder has attended the CSUBUY training and reviewed the Training Guide, and is requesting access to the CSUBUY online ordering portal.

I.   P-Card User Information (*To be completed by P-card users*)

Name: _____ Phone Number: _____ Dept.:_____

Delivery Location (*Building/Room*): _____ Email: _____

Did you attend the Training? Yes _____ No _____ If No, did you view the 1-hour Zoom Training Video? Yes _____

I am requesting this account to obtain access to the CSUBUY portal. I agree to receive and process transactions in accordance with CSUDH Procurement policies. I assert that I attended the CSUBUY Training or that I viewed the recorded Zoom Training on the Procurement website.

_____   _____
P-card Holder Signature   Date

II.   Transfer Cart (*Non P-card Users Only*)

Name: _____ Phone Number: _____ Dept.:_____

Delivery Location (*Building/Room*): _____ Email: _____

P-card Holder Name (*Transferring the cart to?*): _____

Did you attend the Training? Yes _____ No _____ If No, did you view the 1-hour Zoom Training Video? Yes _____

I am requesting this account to obtain access to the CSUBUY portal. I will be adding items to my cart and will assign my cart to the P-card holder listed above. I assert that I attended the CSUBUYTraining or that I viewed the recorded Zoom Training on the Procurement website.

_____   _____
Non P-card Holder Signature   Date

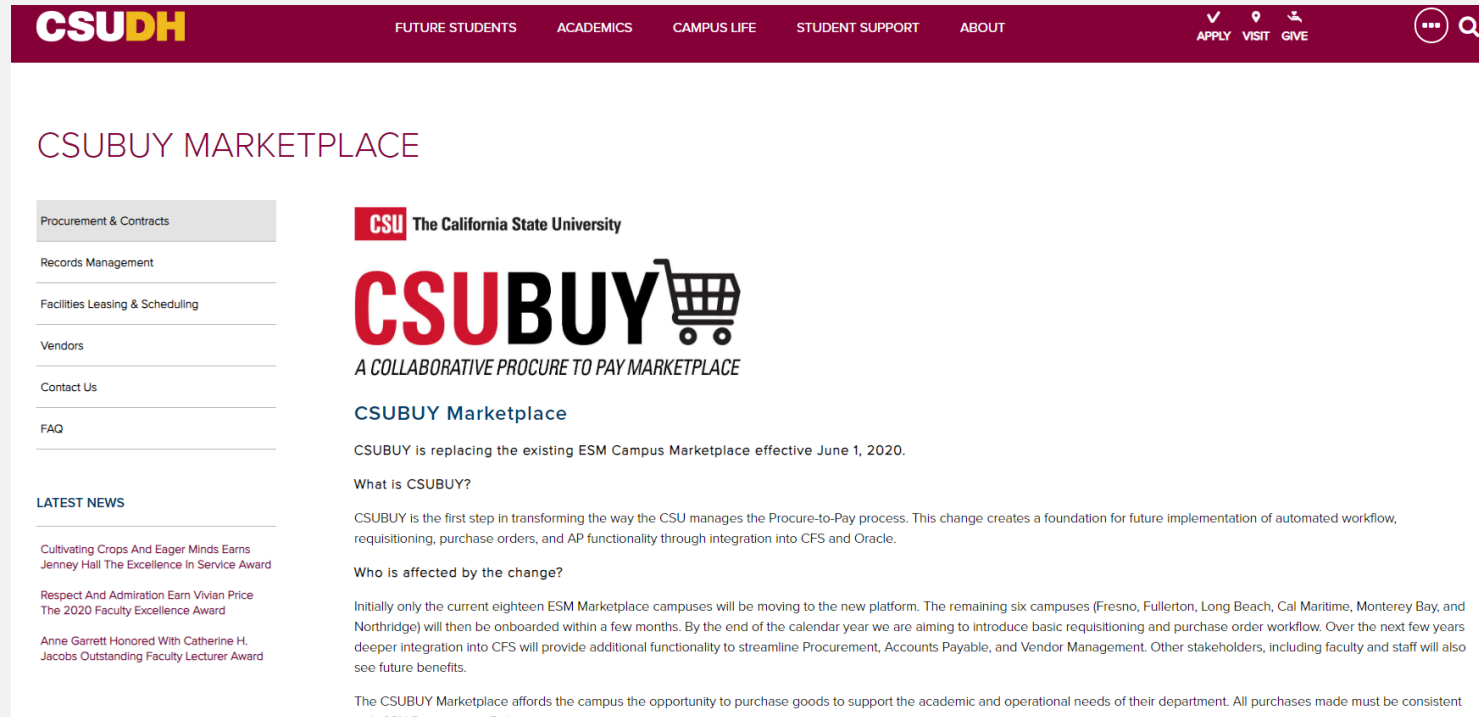**III.   Approval (*P-card Approver Only. Must be Department Head or Fiscal Officer*)**

Name:_____ Title: _____

Dept.:_____ Phone Ext.: _____ Email: _____

I am authorizing this user to obtain access to the CSUBUY Marketplace. I understand that I am responsible for all transactions, and shall ensure that they are made in accordance with CSUDH Procurement policies.

_____   _____
Approver Signature   Date

Complete and email to Stephanie Garcia at sgarcia@csudh.edu, and Sabrina Rodriguez at srodriguez@csudh.edu. You will then receive a confirming email inviting you to complete your registration on the CSUBUY portal.
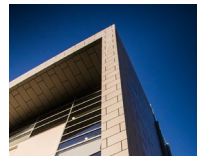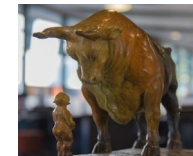
How to access the CSUBUY Marketplace?

https://www.csudh.edu/procurement/procurement-contracts/csubuy