

CSU The California State University

CSUBUY 

A COLLABORATIVE PROCURE TO PAY MARKETPLACE

CSUBUY
Introduction & Training
May 29, 2020

CSUDH

DIRECTORY

CSUDH

CALIFORNIA STATE UNIVERSITY
DOMINGUEZ HILLS

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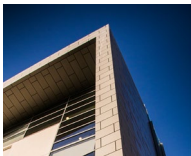
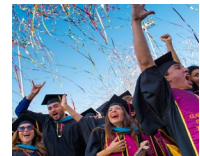
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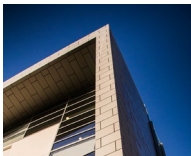
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Agenda

- 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



Timeline

Last day to place orders on the Campus Marketplace

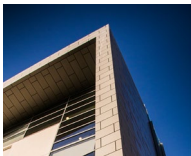
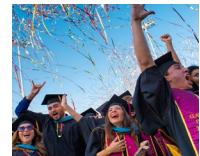
- May 25, 2020

CSUBUY Go Live

- June 1, 2020

Last day to access Campus Marketplace

- July 15, 2020



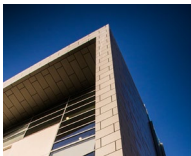
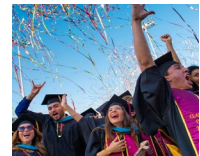
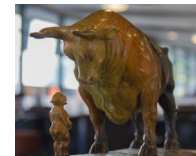
What is CSUBUY and why are we changing?

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.

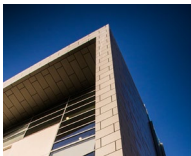
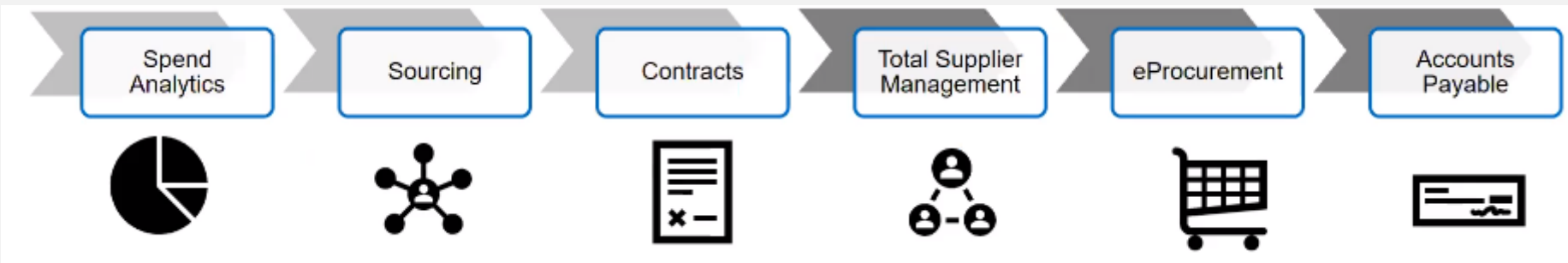


CSUBUY Current Functionality & Future Plans

Current

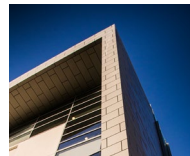
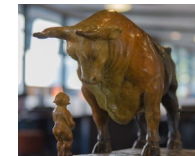
- CSUBUY was designed to be functionally equivalent to Campus Marketplace (ESM Solution).
- Lift and Shift – Ease of transition

Future (*Procure-to-Pay*)



Potential Future State – Procure-to-Pay

Shopping	Requisitioning	Ordering	Receiving	Invoicing	Payments
<p>Intuitive, Guided Shopping</p> <ul style="list-style-type: none"> ✓ Faceted Search ✓ Guided Buying ✓ Showcase, Preferred, Contracted items (drive Savings) ✓ Catalogs, Punchouts, Web Forms, Free Form ✓ Item Comparisons ✓ Favorites <p>Content</p> <ul style="list-style-type: none"> ✓ Content Filtering by Org, Location, Role ✓ Indirect, MRO, Direct <p>Purchasing Requests</p> <ul style="list-style-type: none"> ✓ New Suppliers, Items, Sourcing <p>Dashboards-Visibility</p> <ul style="list-style-type: none"> ✓ Personal Dashboards ✓ Org Dashboards ✓ Visibility to my Purchases ✓ Approval progress 	<p>Checkout</p> <ul style="list-style-type: none"> ✓ Quick & easy Cart Checkout ✓ Accounting defaults ✓ Split Accounting ✓ Opex, Capex, Project, Assets ✓ Internal / External Comments & Attachments ✓ Order on behalf Of ✓ Ship-To Address <p>Approvals</p> <ul style="list-style-type: none"> ✓ Req Budget Checks ✓ Approval Flows, basic to complex ✓ Approval Delegations <p>Mobile App</p> <p>Dashboards-Visibility</p> <ul style="list-style-type: none"> ✓ My Requisitions, All Requisitions ✓ Approvals - Pending, Status ✓ Saved Carts, Favorites 	<p>Touchless Orders</p> <ul style="list-style-type: none"> ✓ Auto PO Generation & Distribution <p>Multiple Channels</p> <ul style="list-style-type: none"> ✓ Supplier Portal, cXML, EDI, Email <p>Broad Functionality</p> <ul style="list-style-type: none"> ✓ Order Acknowledgements ✓ PO Change Requests & Change Orders ✓ PO Close options ✓ PO Template, T&C's <p>Dashboards-Visibility</p> <ul style="list-style-type: none"> ✓ Contract Compliance ✓ Category Spend ✓ Sourcing & Catalog Opportunities 	<p>PO Receiving</p> <ul style="list-style-type: none"> ✓ 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 <p>Dashboards-Visibility</p> <ul style="list-style-type: none"> ✓ Open/Escalated Receipts ✓ Receipt History 	<p>Invoice Processing</p> <ul style="list-style-type: none"> ✓ 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 <p>Dashboards-Visibility</p> <ul style="list-style-type: none"> ✓ Cycle Times ✓ Early Pmt Analysis & Discount Details ✓ Match Exceptions ✓ Credits & Disputes 	<p>Payment Processing</p> <ul style="list-style-type: none"> ✓ 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 <p>Dashboards-Visibility</p> <ul style="list-style-type: none"> ✓ Payment Schedule ✓ Supplier Visibility to Pmt Status ✓ Discount Cash Analysis



Who is affected by the change?



CALIFORNIA
STATE
UNIVERSITY

Chico



CALIFORNIA STATE UNIVERSITY, DOMINGUEZ HILLS



CAL STATE
EAST BAY



CAL POLY POMONA



SACRAMENTO
STATE



CALIFORNIA STATE UNIVERSITY
Stanislaus
ENGAGING · EMPOWERING · TRANSFORMING

CAL POLY
SAN LUIS OBISPO

HUMBOLDT
STATE UNIVERSITY

- 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?

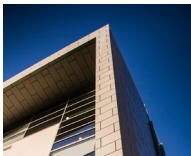
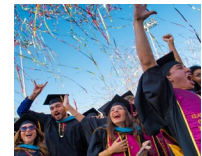
STAPLES
Business Advantage



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.

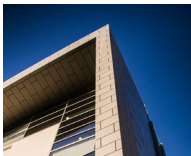
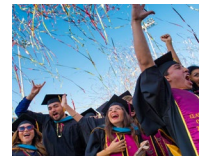
*Other vendors are soon to be added.



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 _____

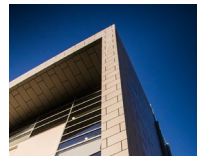
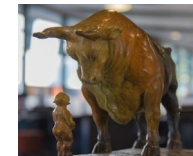
II. Transfer Cart (Non P-card Users Only)

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 CSUBUY Training 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)

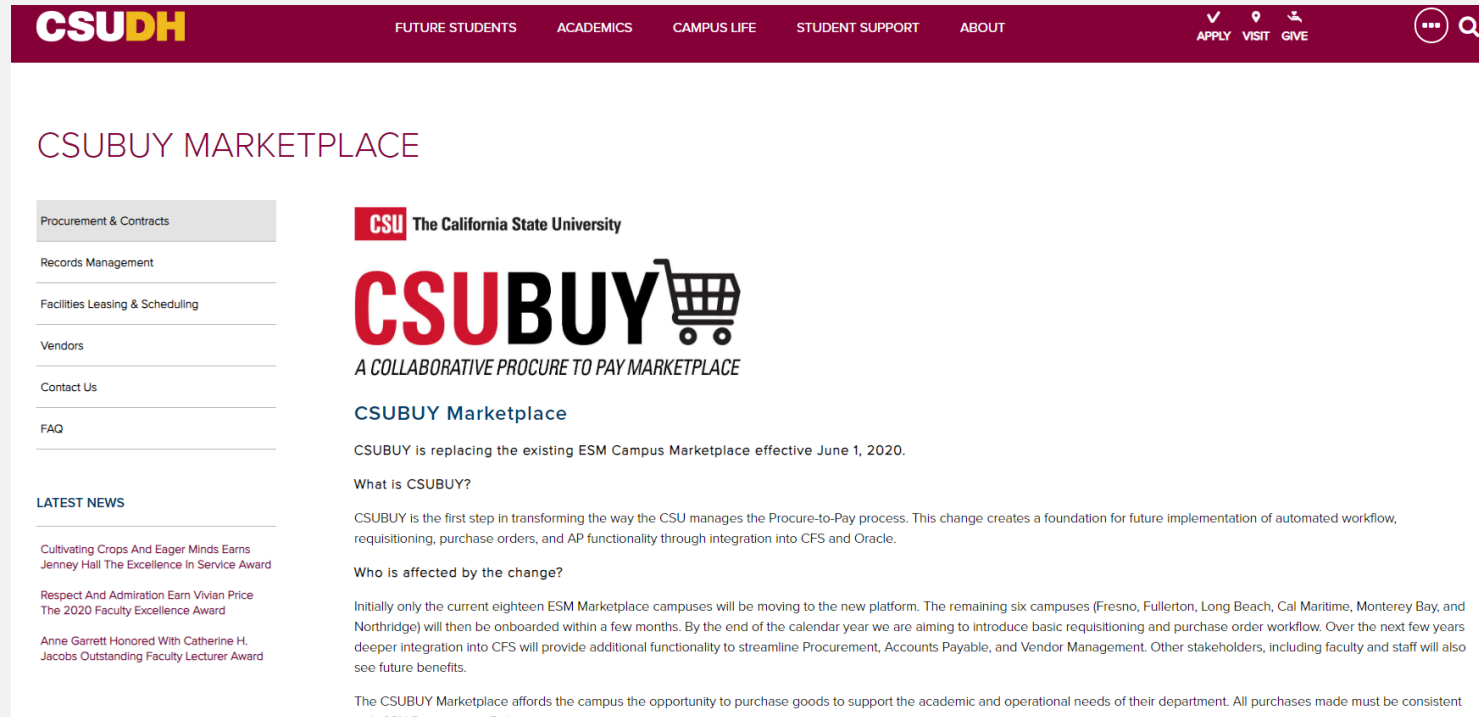
Name: _____ Title: _____
Dept.: _____ Phone Ext.: _____ Email: _____
I am authorizing this user to obtain access to the CSUBUY Marketplace. I understand that I am responsible for all transactions, and shall ensure that they are made in accordance with CSUDH Procurement policies.
Approver Signature _____ Date _____

Complete and email to Stephanie Garcia at sgarcia@csudh.edu, and Sabrina Rodriguez at rodriguez@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>



The screenshot shows the CSUDH website header with navigation links: FUTURE STUDENTS, ACADEMICS, CAMPUS LIFE, STUDENT SUPPORT, ABOUT, APPLY, VISIT, GIVE, and a search icon. The main content area is titled "CSUBUY MARKETPLACE". On the left is a sidebar menu with links: Procurement & Contracts (highlighted), Records Management, Facilities Leasing & Scheduling, Vendors, Contact Us, and FAQ. Below the menu is a "LATEST NEWS" section with three news items. The main content area features the CSU logo, the CSUBUY logo with a shopping cart icon, and the tagline "A COLLABORATIVE PROCURE TO PAY MARKETPLACE". Below this is the heading "CSUBUY Marketplace" and a paragraph stating "CSUBUY is replacing the existing ESM Campus Marketplace effective June 1, 2020." followed by sections for "What is CSUBUY?", "Who is affected by the change?", and a paragraph about the marketplace's purpose.

CSUDH FUTURE STUDENTS ACADEMICS CAMPUS LIFE STUDENT SUPPORT ABOUT APPLY VISIT GIVE

CSUBUY MARKETPLACE

Procurement & Contracts
Records Management
Facilities Leasing & Scheduling
Vendors
Contact Us
FAQ

LATEST NEWS

Cultivating Crops And Eager Minds Earns Jenny Hall The Excellence In Service Award

Respect And Admiration Earn Vivian Price The 2020 Faculty Excellence Award

Anne Garrett Honored With Catherine H. Jacobs Outstanding Faculty Lecturer Award

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CSUBUY

A COLLABORATIVE PROCURE TO PAY MARKETPLACE

CSUBUY Marketplace

CSUBUY is replacing the existing ESM Campus Marketplace effective June 1, 2020.

What is CSUBUY?

CSUBUY is the first step in transforming the way the CSU manages the Procure-to-Pay process. This change creates a foundation for future implementation of automated workflow, requisitioning, purchase orders, and AP functionality through integration into CFS and Oracle.

Who is affected by the change?

Initially only the current eighteen ESM Marketplace campuses will be moving to the new platform. The remaining six campuses (Fresno, Fullerton, Long Beach, Cal Maritime, Monterey Bay, and Northridge) will then be onboarded within a few months. By the end of the calendar year we are aiming to introduce basic requisitioning and purchase order workflow. Over the next few years deeper integration into CFS will provide additional functionality to streamline Procurement, Accounts Payable, and Vendor Management. Other stakeholders, including faculty and staff will also see future benefits.

The CSUBUY Marketplace affords the campus the opportunity to purchase goods to support the academic and operational needs of their department. All purchases made must be consistent with CSU Procurement Policies.

