CSUBuy P2P System Implementation

A review of successes and speed bumps

RESEARCH ADMINISTRATION

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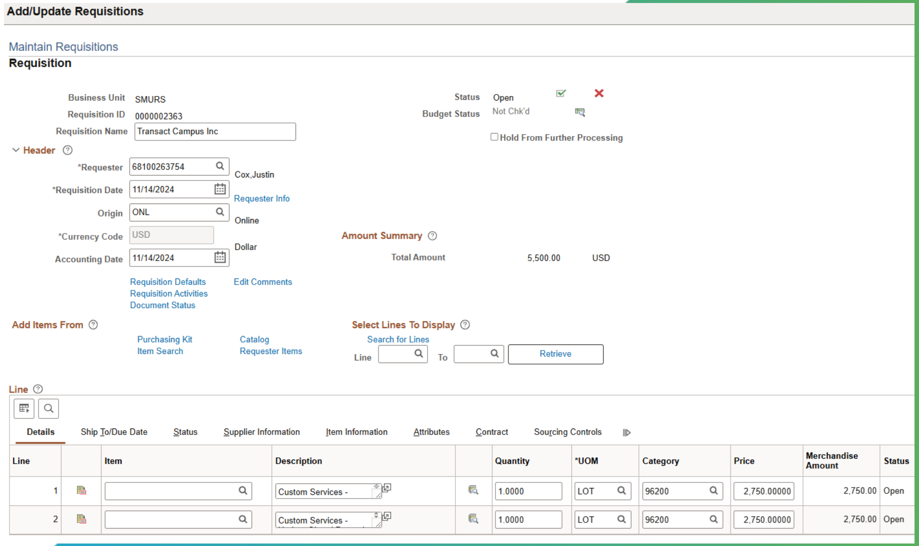
PeopleSoft Challenges

Familiar isn't always Good

UI and User Experience Flaws

- Lack of built-in approval workflow
- Varying practices between groups
- Clunky interface
- Manual processing for Buyer
- Opaque status view



PeopleSoft Challenges

Sponsored Projects Perspective

CFS Requisition Approval Process

- Analysts were not notified when a new req was created.
- Required to manually go into CFS every day and complete 7 steps just to check if a new req was submitted.
- If a new requisition showed up, an additional 36 steps (for a total of 42 steps) were required in order get all the required documentation from CFS.
- From there, the analyst had to manually combine multiple PDF files, then send the file via email for signature, then email send the signed file to Bus Ops to create the PO in CFS.
- Takeaway: WAY too many steps, no system routing, no system notifications, extremely difficult to teach new employees the process.

PeopleSoft Quick-Guide:

Checking for suppliers (vendors)

1. Log into CFS
2. Navigation: Navigator> Suppliers>Supplier 360
3. *SetID: "SMCMP"
4. Contains for "Name"
5. Enter search info, like a first name or company name
6. "Search"
7. List should provide "Supplier ID;" if not listed, it may not be in the system.

Checking requisition queue for submissions

This function serves solely to summarize order information for when project administrators submit requisitions. You cannot pull into the actual requisition from this screen.

1. Navigation: Navigator>Purchasing>Purchase Orders>CSU Buyer Assignment Requisition Que
2. Change "*Selection Criteria:" to "All"
3. Click "View all" in top right corner of the list
4. Check the check box next to the new requisitions
5. Assign CSUSM Corporation buyer under "Buyer" (copy paste from the req's above)
6. Click save
7. Notate the requisition numbers so you can check for backup documentation

In this area you will need to note req # belong to you

Printing backup for requisitions

1. Navigation: Main menu>Purchasing>Requisitions>Add/Update Requisitions
2. Click the "Find an existing value" tab
3. Business Unit (=): "SMURS"
4. Requisition ID: choose "contains"
5. Requisition ID: "####"
6. Click "Search"
7. Click "Edit Comments"
8. If buttons indicate "View," there is back up documentation attached. If it indicates "Attach," there is no additional documentation. 1 full scan
9. Click "View"
10. Print backup

Print Requisitions
Main Menu > Requisitions > Report > Print Req

Printing Purchase Orders

1. Main Menu>Purchasing>Purchase Orders> Dispatch POs
2. Click the "Find an existing value" tab
3. Click "Search"
4. Business Unit: "SMURS"
5. To: "SMURS"
6. Enter PO number, including zeroes (there are usually 6)
7. Under Miscellaneous options group, check boxes next to "Print PO Item Description" and "Print duplicate"
8. Click "Run"
9. Check box next to "PO Dispatch/Print"
10. Specify *Type as "Web"
11. Specify *Format as "PDF"
12. Click "OK"
13. Click Process Monitor

Using Process Monitor

1. If you've run a report, sent a PO to dispatch, or printed a requisition, the request will be logged in the Process Monitor.
2. Navigation: Navigator> PeopleTools> Process Scheduler > Process Monitor
3. The top entry will be your requested action
4. Click "Refresh" until the field "Run Status" reads "Success" and the "Distribution Status" reads "Posted"
5. For most requests, to access the report/document that you ran, click "Details"
   a. If printing a PO (from *initial* dispatch), click "PODISP" instead of "Details"
   b. Click "PODISP00X Success"
6. Click "View Log/Trace"
7. Click the link suffixed with ".pdf"

Print backup for PO's

1. Navigation: Main menu>Purchasing>Purchase Orders>Add/Update PO's
2. Search for PO (remember to change "begins with" to "contains")
3. Enter PO number
4. Click Search
5. Click "Edit Comments" under "Header"
6. Click "View"

P2P Improvements

New! Shiny!

Improved Experience for Everyone

- Built-in Approval Workflow
- Greatly Improved UI
- Improved communication
- Increased Automation = Speed
- Greatly Improved Buyer Experience

~300%

Improvement in average turnaround time once Reqs are submitted

P2P Improvements

Sponsored Projects Perspective

DRAMATICALLY Improved Experience for Sponsored Projects Team

- **Automated Workflow & Routing**
- Automatic routing and approvals streamline the requisition-to-PO process.
- Removes the need for manual collection of forms/signatures (e.g., IC Agreements, ITRs).

- **Improved Visibility**
- Users can see where a requisition is in the approval process.
- Consolidated view of requisitions, POs, and invoices in one system.
- Notifications for requisitions ready for review, comments, or changes.

P2P Improvements
Sponsored Projects Perspective

DRAMATICALLY Improved Experience for Sponsored Projects Team

•**Enhanced Communication & Collaboration**

•Ability to add/view comments, track comment history, and communicate with multiple stakeholders without separate emails.

•Email notifications for updates, reminders, and comments after OSP approval.

Flexibility for Requesters and Approvers

Approvers can correct account codes.

Requesters can make changes without restarting the process.

Immediate visibility of project information when a requisition exists.

P2P Improvements

Sponsored Projects Perspective

DRAMATICALLY Improved Experience for Sponsored Projects Team

- **Centralized Documentation:** All attachments saved in CSU Buy for easier tracking and reference.

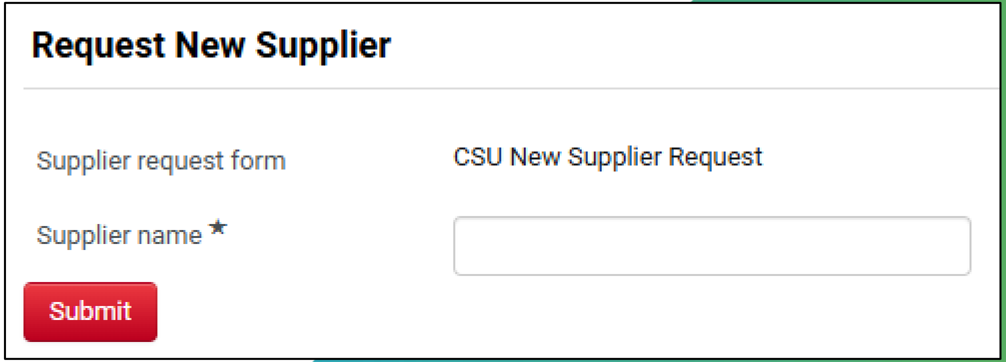
- **Efficiency and Simplicity**
- If everything looks good, simply click “approve.”
- Took a 42-step process (req approval in CFS) and reduced it down to 2 steps.

P2P Challenges

Not all that glitters

Standardization Trade-offs

- Supplier Setup
- Rigid Approval Flows
- Built for Stateside



P2P Challenges
Sponsored Projects Perspective

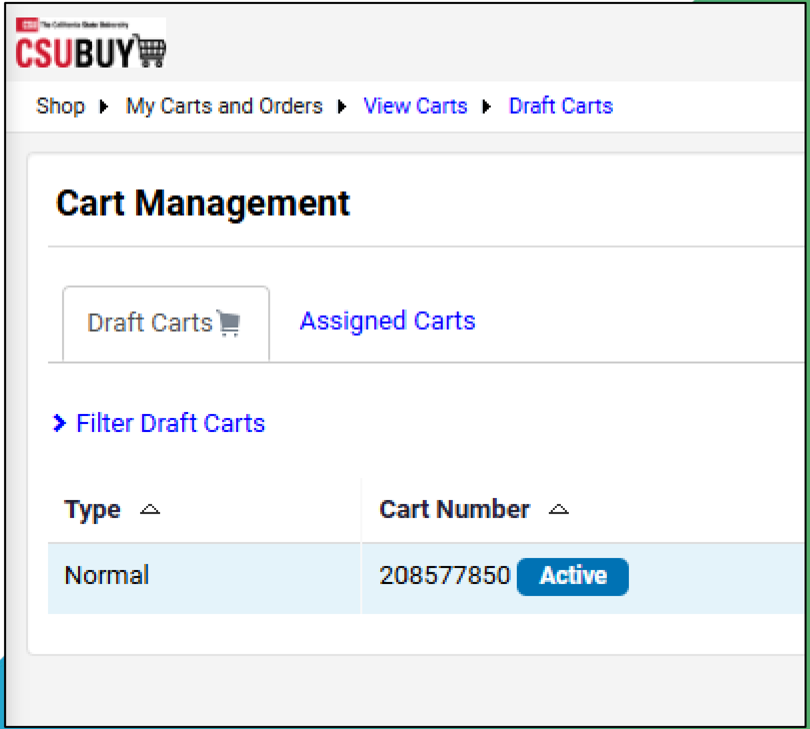
- **Vendor Setup**
- Vendors are required to set themselves up in the system before they can be paid.
- Process is perceived by some vendors as time consuming and confusing.

- **Voucher Process**
- Project staff not aware they must login and approve voucher indicating receipt of goods/services before payment is processed.
- Potential to bypass PI/OSP approvals on subaward invoices if invoices sent directly to AP, and the voucher is approved by the staff member that created the req.

P2P Challenges
Only Slightly Quirky

Idiosyncrasies

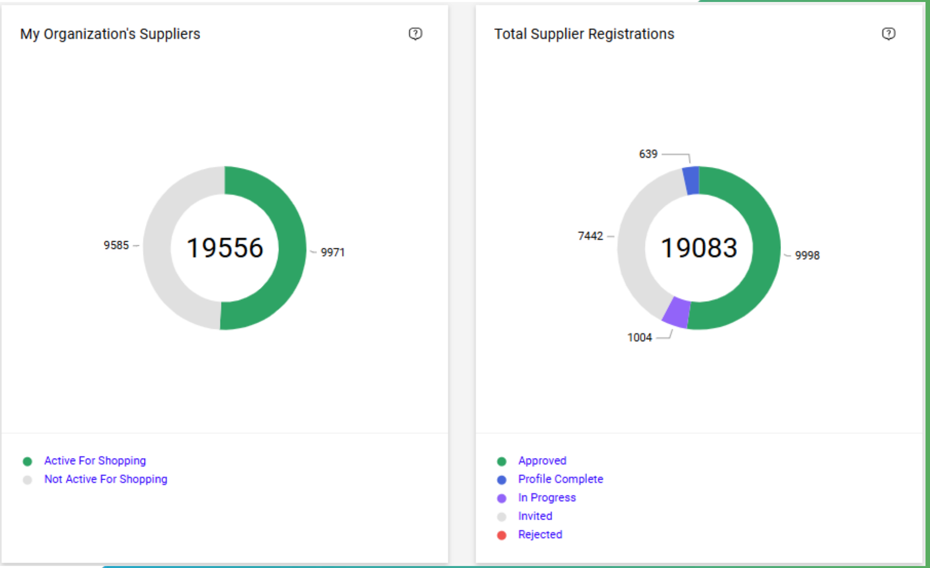
- Cart system
- Change Orders
- Business Units (“Personas”)



PO Process
Supplier Setup

Building a Solid Foundation

- Highly-detailed Supplier Setup process, makes life easier later.
- Managed 100% by the Chancellor's Office Supplier Management Team.
- Speed Bump: If the Supplier struggles at this step, not much we can do.



PO Process

Req/PO Process

The New School

- Speedbump: Always check your Persona (Business Unit)!
- Requisition starts as a Form, which collects all relevant information
- Each item (Form) in your Cart becomes a Line on the Req.
- Once you submit the Req, it flows automatically through the required approvals.
- After all approvals are complete the PO is automatically sent to the Supplier.

PO Process

Payment Vouchers

Give Them Their Money

- Two ways to initiate:
- Supplier can submit invoice through Supplier Portal
- Supplier can send invoice to Requestor, who submits invoice to AP

- Speedbump: When Voucher routes for approval to pay, it will always go to the original Req Requestor.

- Speedbump: Pay attention to the Receiving Required checkbox when creating your Req.

Final Thoughts
P2P Opinions After 1 Year

Who's Happy

- Project Admins/Support Staff
- Buyers

Who's Not Happy

- Low-Tech-Savy Users (& Suppliers)

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Final Thoughts

Sponsored Projects Perspective After 1 Year

CSUBuy has improved efficiency and transparency for our team through:

- **Automated Workflows:** automatic routing and approvals, clear visibility into requisition status, and consolidated tracking of requisitions, POs, and invoices greatly improve transparency and efficiency.
- **Centralized Communication and Documentation:** Built-in comments, shared comment history, and timely email notifications (requisitions, comments, reminders, and approvals) reduce the need for separate emails and status follow-ups.
- **Flexible tools that reduce manual effort and rework:** Embedded forms and signatures, ability to make changes without restarting the process, account code corrections by approvers, and centralized attachment storage streamline and speed up the overall process.

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