2026 ANNUAL CONFERENCE   OAKLAND, JANUARY 11 - 13

AUXILIARY ORGANIZATIONS ASSOCIATION

THE NEXT ERA OF AUXILIARIES
SHAPING TOMORROW

# Navigating CSUBUY Procure-to-Pay

## A Peer Exchange on Processes, Staffing, and User Experience

BUSINESS AND FINANCIAL SERVICES

PRESENTED BY
**Peter Zerkel & Sam Caudill**
Cal Poly Humboldt

# System Strengths

- Transparency in approvals and routing

- Stronger collaboration with Procurement and IT

- Better documentation and workflow consistency

- Growing user confidence and proficiency

# Opportunities for Improvement

- Streamlining supplier onboarding
  - New Digital Adoption Platform (DAP) Shows users where to click!

- Reducing legacy system reliance

- Improving routing automation

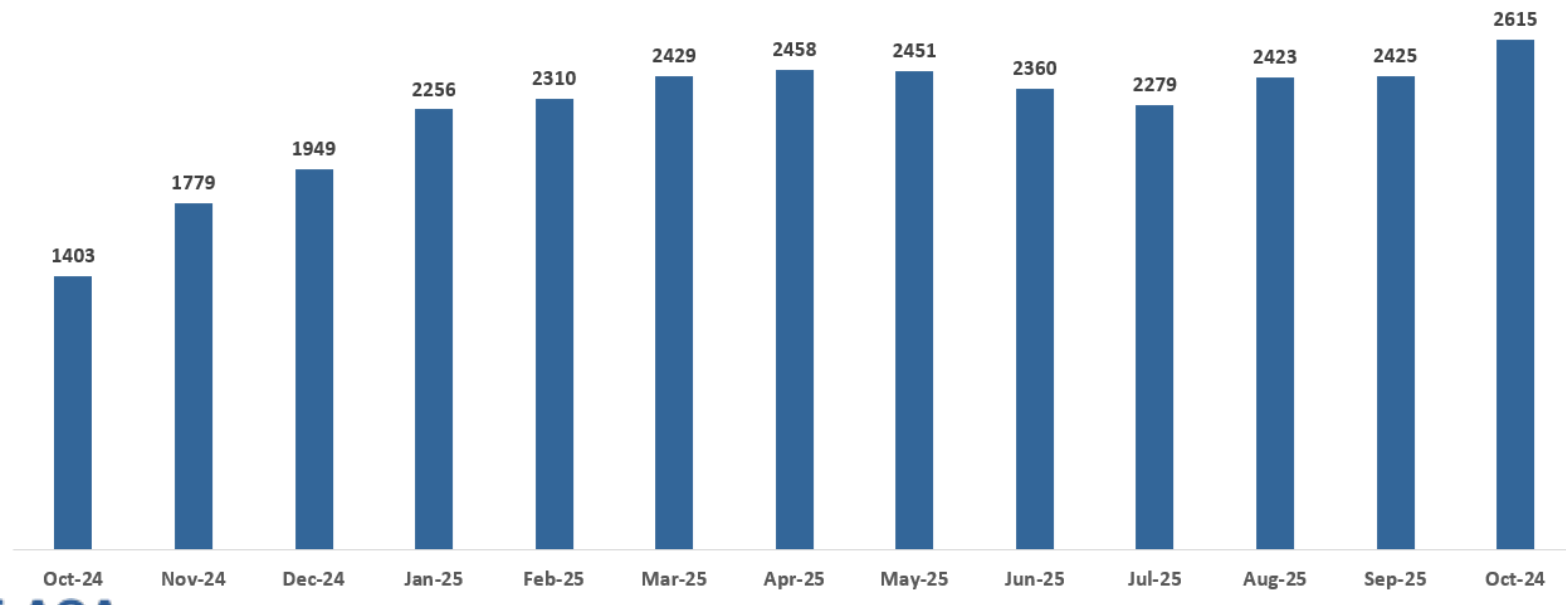- Enhancing clarity of forms and documentation

# Guided Buying
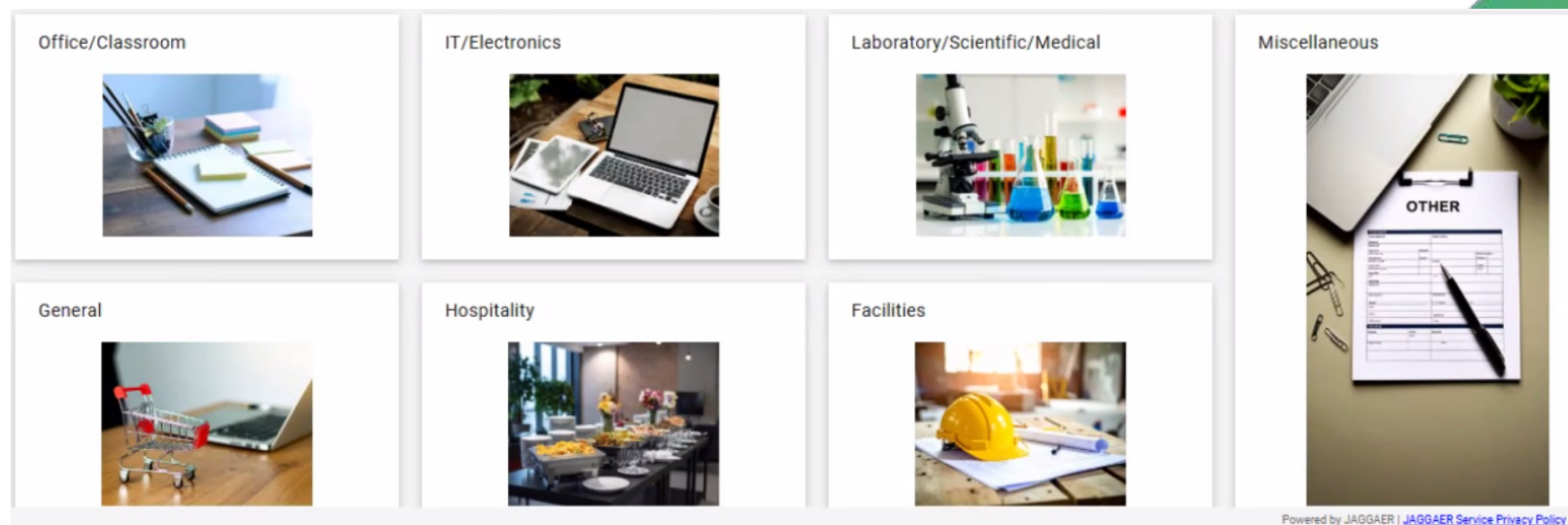
# User Experience & Forward Momentum

- Training challenges eased over time

- Recognition of CSUBUY's long-term value

- Interest in auxiliary-focused enhancements

- Increased engagement and feedback

# CSUBUY P2P: Adoption and System Usage – Users Per Month



Chart values by month:
- Oct-24: 1403
- Nov-24: 1779
- Dec-24: 1949
- Jan-25: 2256
- Feb-25: 2310
- Mar-25: 2429
- Apr-25: 2458
- May-25: 2451
- Jun-25: 2360
- Jul-25: 2279
- Aug-25: 2423
- Sep-25: 2425
- Oct-24: 2615

**2026 AOA**
ANNUAL CONFERENCE

# CSUBUY P2P: Adoption and System Usage – Requisition Count by Campus

**Highlight: Reflects continued adoption of CSUBUY.**

| Bakersfield | |
|---|---|
| **Business Unit Description** | **Requisition Count** |
| Bakersfield | 3,749 |
| Foundation | 422 |
| Sponsored Programs Admin | 245 |
| Stdnt-Centered Enterprises | 85 |
| Associated Students Inc | 85 |
| CSUB | 3 |
| **Total** | **4,589** |

| Chancellor's Office | |
|---|---|
| **Business Unit Description** | **Requisition Count** |
| CSU Office of the Chancellor | 2,037 |
| CSU Foundation | 12 |
| Chancellor's Office | 1 |
| **Total** | **2,050** |

| Chico | |
|---|---|
| **Business Unit Description** | **Requisition Count** |
| California State Univ, Chico | 6,274 |
| **Total** | **6,274** |

| Fresno | |
|---|---|
| **Business Unit Description** | **Requisition Count** |
| CSU Fresno | 8,600 |
| CSU, Fresno Athletic Corp | 1,958 |
| **Total** | **10,558** |

| Humboldt | |
|---|---|
| **Business Unit Description** | **Requisition Count** |
| Cal Poly Humboldt | 3,970 |
| Cal Poly Sponsored Programs | 1,940 |
| Cal Poly Humboldt Foundation | 208 |
| Cal Poly Associated Students | 17 |
| Cal Poly Real Estate Holdings | 2 |
| **Total** | **6,137** |

| San Luis Obispo | |
|---|---|
| **Business Unit Description** | **Requisition Count** |
| Cal Poly, San Luis Obispo | 9,383 |
| **Total** | **9,383** |

| San Marcos | |
|---|---|
| **Business Unit Description** | **Requisition Count** |
| Cal State San Marcos | 3,885 |
| CSUSM Corporation | 573 |
| CSUSM Foundation | 316 |
| CSUSM Associated Students Inc | 51 |
| **Total** | **4,825** |

| Sonoma | |
|---|---|
| **Business Unit Description** | **Requisition Count** |
| Sonoma State University | 3,222 |
| Associated Students of SSU | 123 |
| Sonoma State Enterprises, Inc | 83 |
| SSU Foundation | 11 |
| **Total** | **3,439** |

**2026 AOA**
ANNUAL CONFERENCE

# CSUBUY P2P: Efficiency - Requisition Cycle Time by Campus Go-Live VS. Today

| Requisition Cycle Time | | | |
|---|---|---|---|
| Campus | Sep. 2023 | Previous 30 Days | Last 30 Days |
| Fresno | 4.8 | 2.8 | 2.0 |
| Delta | -0.8 | | |

| Requisition Cycle Time | | | |
|---|---|---|---|
| Campus | Oct. 2023 | Previous 30 Days | Last 30 Days |
| Chico | 1.5 | 2.2 | 2.0 |
| Delta | -0.2 | | |

| Requisition Cycle Time | | | |
|---|---|---|---|
| Campus | Mar. 2024 | Previous 30 Days | Last 30 Days |
| Bakersfield | 2.6 | 3.0 | 3.1 |
| Delta | +0.1 | | |

| Requisition Cycle Time | | | |
|---|---|---|---|
| Campus | Mar. 2024 | Previous 30 Days | Last 30 Days |
| San Luis Obispo | 4.3 | 2.4 | 2.4 |
| Delta | 0.0 | | |

| Requisition Cycle Time | | | |
|---|---|---|---|
| Campus | Nov. 2024 | Previous 30 Days | Last 30 Days |
| Chancellor's Office | 7.4 | 2.1 | 2.1 |
| Delta | 0.0 | | |

| Requisition Cycle Time | | | |
|---|---|---|---|
| Campus | Nov. 2024 | Previous 30 Days | Last 30 Days |
| Humboldt | 6.5 | 2.0 | 3.0 |
| Delta | +1.0 | | |

| Requisition Cycle Time | | | |
|---|---|---|---|
| Campus | Nov. 2024 | Previous 30 Days | Last 30 Days |
| San Marcos | 8.5 | 3.4 | 4.4 |
| Delta | +1.0 | | |

| Requisition Cycle Time | | | |
|---|---|---|---|
| Campus | Nov. 2024 | Previous 30 Days | Last 30 Days |
| Sonoma | 5.4 | 4.6 | 6.7 |
| Delta | +1.1 | | |

# CSUBUY P2P: Efficiency - Voucher Cycle Time by Campus

| Voucher Cycle Time | | | |
|---|---|---|---|
| Campus | Sep. 2023 | Previous 30 Days | Last 30 Days |
| Fresno | 13.3 | 7.6 | 5.8 |
| Delta | -1.8 | | |

| Voucher Cycle Time | | | |
|---|---|---|---|
| Campus | Mar. 2024 | Previous 30 Days | Last 30 Days |
| Bakersfield | 8.7 | 5.5 | 8.6 |
| Delta | +3.1 | | |

| Voucher Cycle Time | | | |
|---|---|---|---|
| Campus | Nov. 2024 | Previous 30 Days | Last 30 Days |
| Chancellor's Office | 22.6 | 2.8 | 8.9 |
| Delta | +6.1 | | |

| Voucher Cycle Time | | | |
|---|---|---|---|
| Campus | Oct. 2023 | Previous 30 Days | Last 30 Days |
| Chico | 35.2 | 3.4 | 3.7 |
| Delta | +0.3 | | |

| Voucher Cycle Time | | | |
|---|---|---|---|
| Campus | Mar. 2024 | Previous 30 Days | Last 30 Days |
| San Luis Obispo | 23.9 | 8.5 | 6.8 |
| Delta | -1.7 | | |

| Voucher Cycle Time | | | |
|---|---|---|---|
| Campus | Nov. 2024 | Previous 30 Days | Last 30 Days |
| Humboldt | 17.2 | 3.5 | 4.1 |
| Delta | +0.6 | | |

| Voucher Cycle Time | | | |
|---|---|---|---|
| Campus | Nov. 2024 | Previous 30 Days | Last 30 Days |
| San Marcos | 11.2 | 6.3 | 4.1 |
| Delta | -2.1 | | |

| Voucher Cycle Time | | | |
|---|---|---|---|
| Campus | Nov. 2024 | Previous 30 Days | Last 30 Days |
| Sonoma | 29.3 | 8.6 | 9.3 |
| Delta | +0.7 | | |

**2026 AOA ANNUAL CONFERENCE**
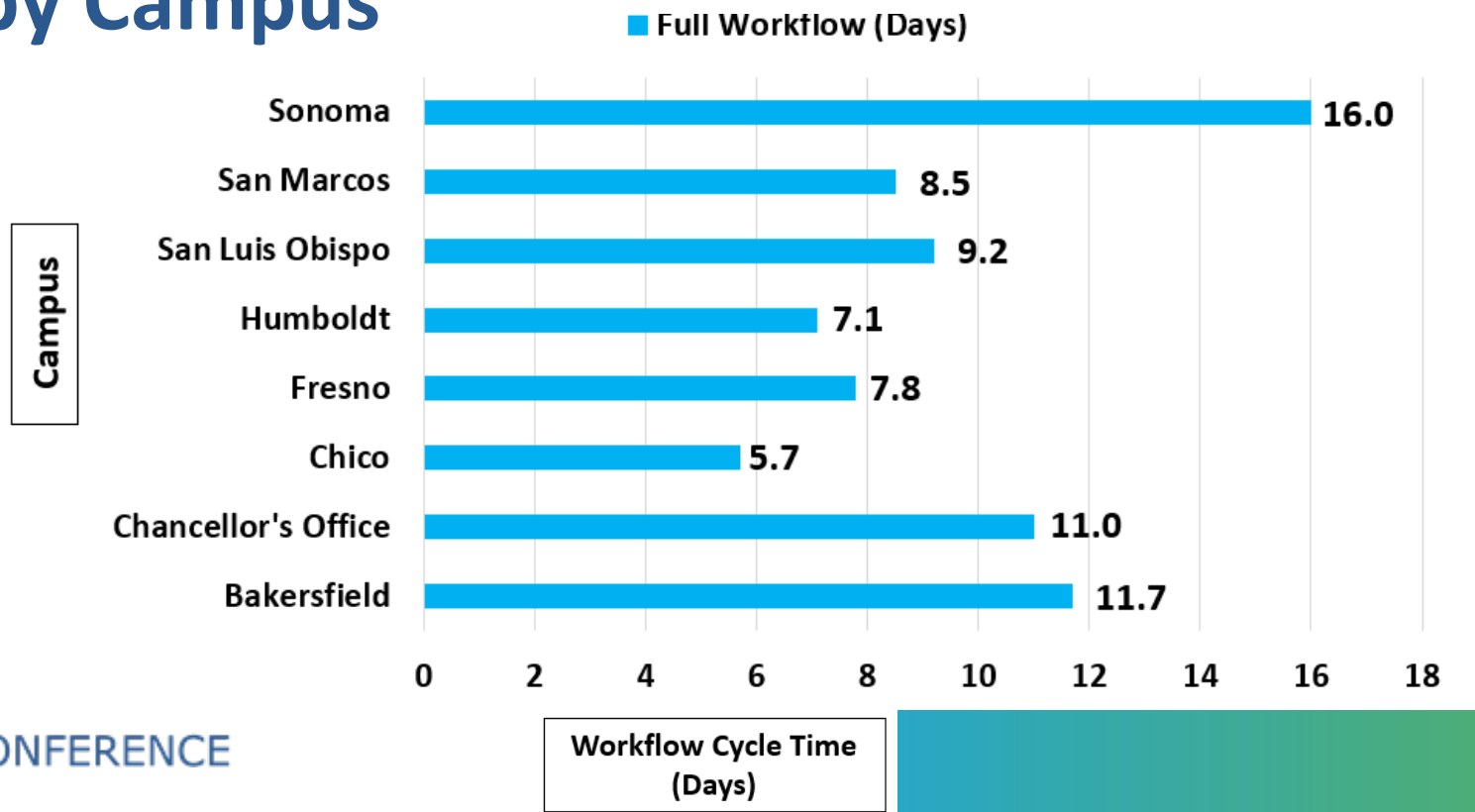
# CSUBUY P2P: Supplier Performance - Invoice Source

Table display the number of invoices by source type.

**Highlight: 47% of the invoices are submitted electronically by suppliers.**

| Source | Invoice Amount | Number of Invoices |
|---|---|---|
| Manual | 493.97 M | 44,000 |
| Supplier Portal | 228.61 M | 3,783 |
| Automated | 136.47 M | 5,378 |
| Electronic (Supplier System) | 7.28 M | 29,435 |

● Invoice Amount   ● Number of Invoices
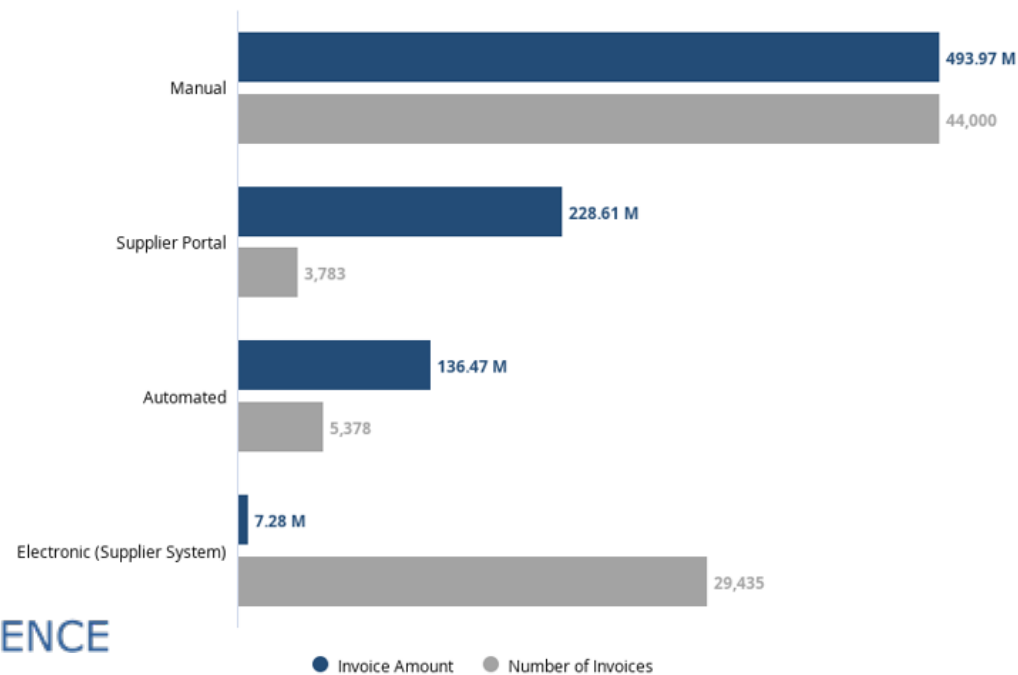
# Key Takeaways

- CSUBUY P2P provides strong transparency and workflow controls

- Collaboration and user confidence continue to grow

- Targeted enhancements will further benefit auxiliary operations

2026 ANNUAL CONFERENCE  OAKLAND, JANUARY 11 - 13

**AUXILIARY ORGANIZATIONS ASSOCIATION**

**THE NEXT ERA OF AUXILIARIES**
**SHAPING TOMORROW**

# THANK YOU!

2026 ANNUAL CONFERENCE    OAKLAND, JANUARY 11 - 13

AUXILIARY ORGANIZATIONS ASSOCIATION

THE NEXT ERA OF AUXILIARIES
SHAPING TOMORROW


2026 ANNUAL CONFERENCE    OAKLAND, JANUARY 11 - 13

AUXILIARY ORGANIZATIONS ASSOCIATION

THE NEXT ERA OF AUXILIARIES
SHAPING TOMORROW

# ASSETS

# COMMITTEE ICONS

**PHILANTHROPY**

**RESEARCH ADMINISTRATION**

**BUSINESS AND FINANCIAL SERVICES**

**AS/SU/REC**

**PROPERTY DEVELOPMENT AND MANAGEMENT**

**HUMAN RESOURCES**

**RISK MANAGEMENT**

**INFORMATION TECHNOLOGY**

**COMMERCIAL SERVICES**

**GENERAL**

# GUIDELINES
## FOR USING THE PRESENTATION

**Presenters should:**
- First, download the pptx file
- Then, upload the pptx file to Microsoft PowerPoint or Google Drive
- Then, they can edit the presentation template with their information. Any slides that are not needed can be deleted.

**Tips:**
Using Committee Icons
- The icons are on the last slide
- They can be copy-pasted into the title slide, replacing the placeholder AOA General Sessions icon

**2026 AOA**
ANNUAL CONFERENCE