

Quick Reference Guide

CSUBuy User Roles & Responsibilities



IMPACTED USER GROUPS

- All Users

Introduction

CSUBuy uses role-based access, meaning a user's actions in the system are determined by the role or roles assigned to them. A single user may hold multiple roles; however, certain roles are restricted to prevent users from approving their own transactions. Roles in CSUBuy were initially assigned based on a user's role in the legacy CSF system.

If a user did not previously hold a comparable role in CSF, the appropriate CSUBuy role must be requested by submitting a CIA access request to Information Services:

<https://www.csusb.edu/its/security/computerized-information-access-cia-request>

Shopper

Purpose: Build carts, but cannot submit purchases

What they CAN do:

- Browse catalogs and punch-out suppliers
- Search for items and services
- Create shopping carts
- Assign carts to a Requester for checkout

What they CANNOT do:

- Submit requisitions
- Approve transactions
- Make payments

This is the most basic end-user role.

Requestor

Purpose: Submit purchases into workflow

What they CAN do:

- Shop for items and services
- Receive carts from Shoppers
- Edit carts and requisitions
- Submit requisitions for approval
- Attach required documentation

What they CANNOT do:

- Approve for budget or compliance (unless separately assigned)
- Issue purchase orders

Requesters are responsible for accuracy and completeness.



Compliance Approver

Purpose: Ensure purchases meet CSU and campus policy requirements

(This is a policy review role only, not budget authority)

What they CAN do:

- Review requisitions routed by CSUBuy workflow
- Verify compliance with applicable policies, such as:
 - Procurement method and thresholds
 - Required documentation (e.g., sole source, quotes)
 - Contract and supplier eligibility
 - Review compliance forms, such as Information and Communication Technology (ICT) forms, Independent Contractor Review (ICR) forms, Environmental Health and Safety, Institutional Animal Care and Control, Risk Management, etc.
- Approve, return, or reject transactions for compliance reasons
- Add comments requesting corrections

What they CANNOT do:

- Create carts or requisitions
- Approve funding
- Select vendors
- Convert requisitions to POs

Compliance Approvers are reviewers, not buyers or spenders.

Approver

Purpose: Approve spending authority and funding. This individual must be listed in the Delegation of Authority system. For more information, please follow this link:

<https://www.csusb.edu/accounting/resources/delegation-authority>

What they CAN do:

- Review requisitions for:
 - Budget availability
 - Delegation of Authority limits
 - Appropriate account and fund usage
- Approve or return transactions

Approval is based on what fiscal authority the individual has on file on the DOA. This is NOT a policy review role (aka Compliance Approver).

**Receiver**

Purpose: Confirm goods were received

What they CAN do:

- Enter receipt of goods in the system, which enables invoice matching and payment

What they CANNOT do:

- Approve purchases
- Submit requisitions

Receiving is a critical control for payment processing.

Buyer (Procurement/Purchasing Staff)

Purpose: Execute the official purchase on behalf of the university

What they CAN do:

- Review approved requisitions
- Create and issue Purchase Orders
- Manage contracts and suppliers
- Handle bids, RFPs, and special purchases
- Maintain catalogs and system procurement controls

Buyers are centralized procurement professionals.

Typical CSUBUY Workflow

1. **Shopper** builds cart.
2. **Requestor** submits requisition
3. **Compliance Approver** reviews policy requirements
4. **Budget Approver** approves funding
5. **Buyer** issues PO (if applicable)
6. **Receiver** confirms receipt
7. **Accounts Payable** processes payment

Note: Some steps may occur in parallel or be skipped depending on purchase type.



Summary Table

| Role | Shop | Submit | Compliance Review | Budget Approval | Receive | Issue PO |
|----------------------------|------|--------|-------------------|-----------------|---------|----------|
| <i>Shopper</i> | | | | | | |
| <i>Requestor</i> | | | | | | |
| <i>Compliance Approver</i> | | | | | | |
| <i>Budget Approver</i> | | | | | | |
| <i>Receiver</i> | | | | | | |
| <i>Buyer</i> | | | Partial | Partial | Partial | |