

## Title: Completing an IT Hardware Request Form

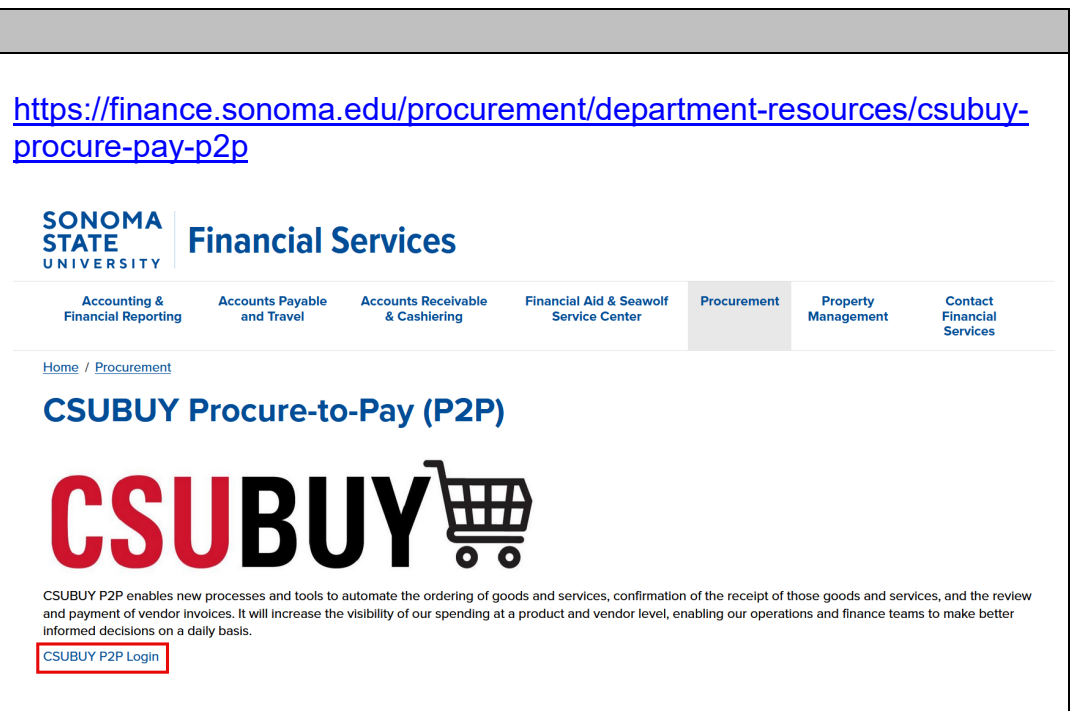
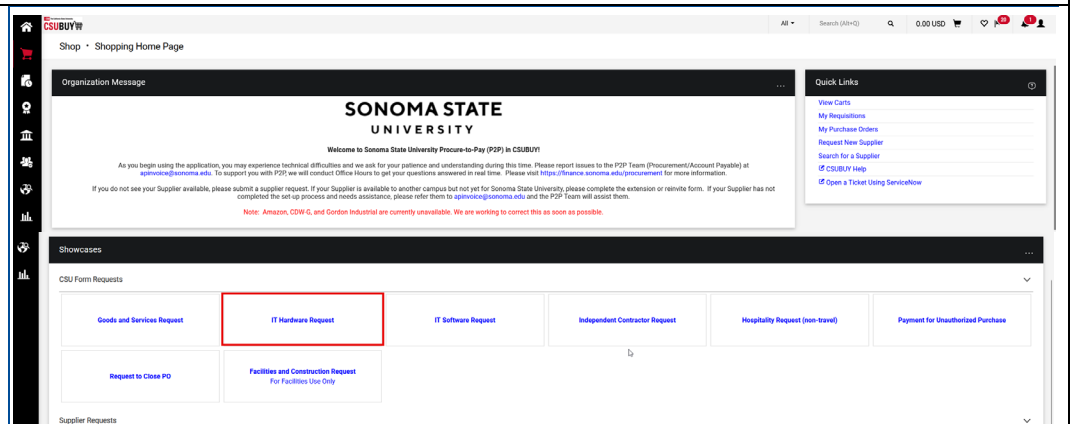
**OBJECTIVE: Completing an IT Hardware Request Form**

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# Lesson 1: Completing an IT Hardware Request Form

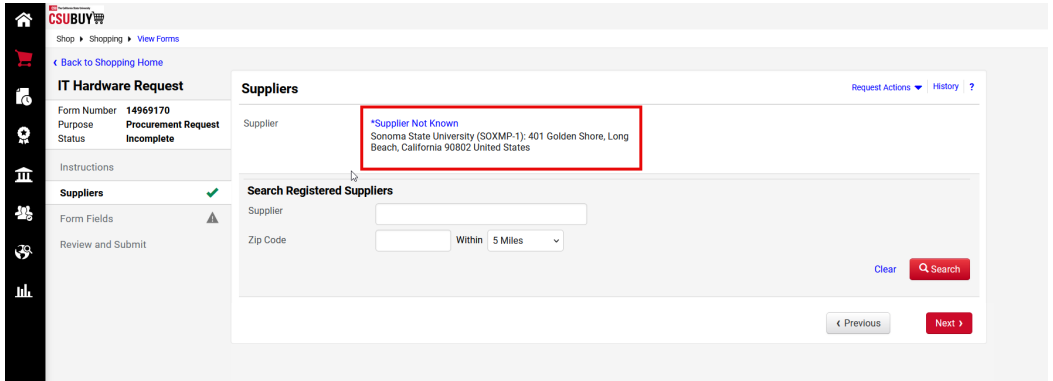
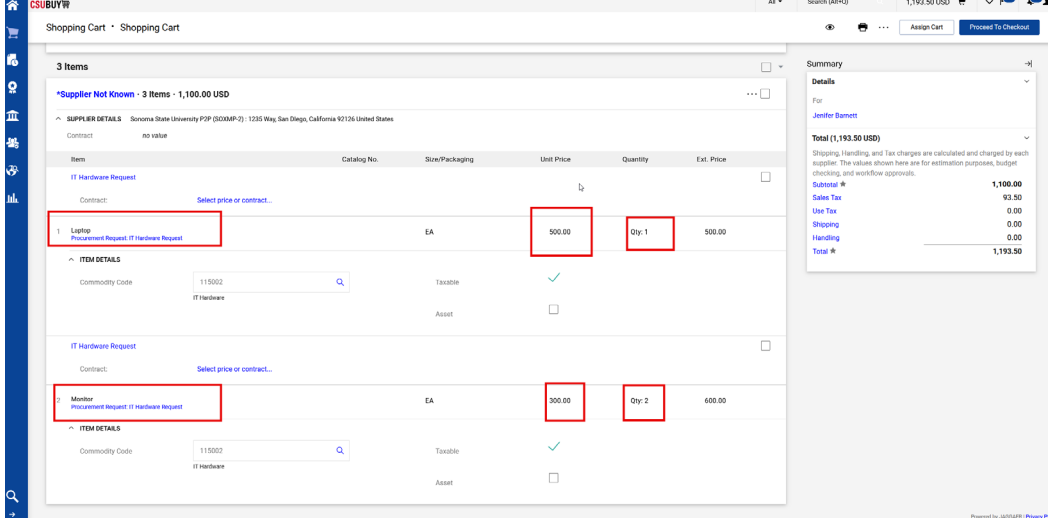
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Step	Action	
1	Log into CSUBuy P2P	<p><a href="https://finance.sonoma.edu/procurement/department-resources/csubuy-procure-pay-p2p">https://finance.sonoma.edu/procurement/department-resources/csubuy-procure-pay-p2p</a></p> 
2	From the Shopping Home Page scroll down to the Showcases section. Select the IT Hardware Request.	

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Jenifer Barnett

Last Updated: 1/22/25

<p>3</p>	<p>Please select Supplier Not Known</p>	
<p>4</p>	<p>Complete the Form Fields indicating items needed, budget amount and quantity.</p>	

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## 5 Select Proceed to Checkout

The screenshot displays the CSU BUYER Shopping Cart interface. The cart contains 3 items with a total value of 1,100.00 USD. The items are:

Item	Catalog No.	Stock/Packaging	Unit Price	Quantity	Ext. Price
1 Laptop Procurement Request: IT Hardware Request		EA	500.00	Qty: 1	500.00
ITEM DETAILS					
Commodity Code	115002	Taxable	<input checked="" type="checkbox"/>		
IT Hardware		Asset	<input type="checkbox"/>		
IT Hardware Request					
Contract: Select price or contract...					
2 Monitor Procurement Request: IT Hardware Request		EA	300.00	Qty: 2	600.00
ITEM DETAILS					
Commodity Code	115002	Taxable	<input checked="" type="checkbox"/>		
IT Hardware		Asset	<input type="checkbox"/>		
IT Hardware Request					
Contract: Select price or contract...					

The right sidebar shows a Summary section with a total of 1,193.50 USD, including shipping, handling, and tax charges. A red box highlights the 'Proceed To Checkout' button in the top right corner.

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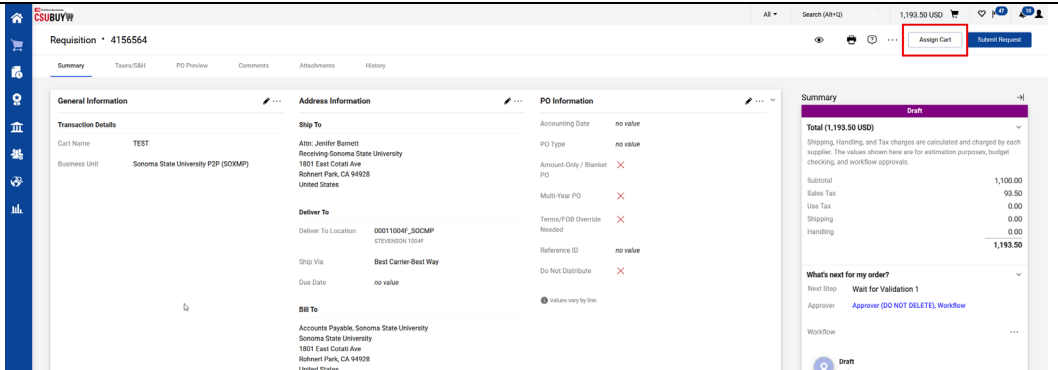
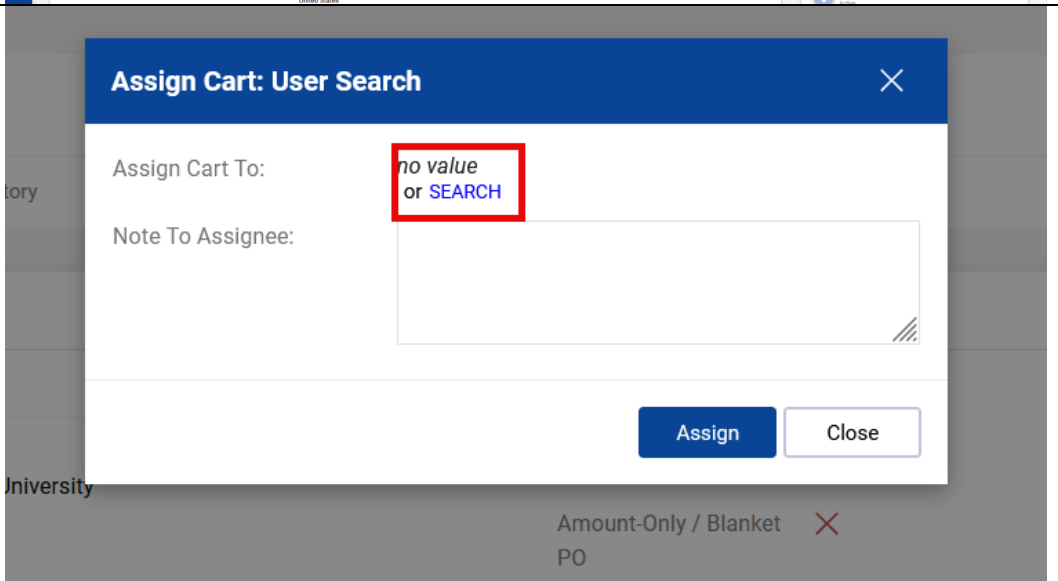
Last Updated: 1/22/25

<p>6</p>	<p>In the Requisition page, complete all required requisition fields including chartfield information.</p>	<p>The screenshot shows the 'IT Hardware Request' requisition page. Two red boxes highlight the 'CHARTFIELD' sections. The top box highlights the following data:</p> <table border="1"> <thead> <tr> <th>Business Unit</th> <th>Fund</th> <th>DeptID</th> <th>Account</th> <th>Account Override</th> <th>Program</th> <th>Class</th> <th>Project</th> </tr> </thead> <tbody> <tr> <td>SOCMP Sonoma State University</td> <td>SO100_SOCMP CSU Operating Fund</td> <td>3068_SOCMP Accounts Payable</td> <td>616002_SOCMP IT Hardware</td> <td>no value</td> <td>no value</td> <td>no value</td> <td>no value</td> </tr> </tbody> </table> <p>The bottom box highlights the same data for a second requisition line.</p> <p>Other visible details include: Contract: no value; Item 2: Monitor; Commodity Code: 115002 / IT Hardware; Taxable: checked; Override Receiving Required: unchecked; Prepayment: no value; PO Clauses: Add/View; Tax Code: RNP (Rohnert Park Sales Tax).</p>	Business Unit	Fund	DeptID	Account	Account Override	Program	Class	Project	SOCMP Sonoma State University	SO100_SOCMP CSU Operating Fund	3068_SOCMP Accounts Payable	616002_SOCMP IT Hardware	no value	no value	no value	no value
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<p>7</p>	<p>If you want to communicate comments for the IT team, that is located here but not required.</p>	<p>The screenshot shows the 'Comments' tab selected in the requisition navigation menu. The 'Comments' tab is highlighted with a red box.</p>																

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<p>8</p> <p>Once completed the Requisition page, Assign Cart</p>	
<p>9</p> <p>Click "SEARCH" and search for Nick Arnold</p>	

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**User Search** [Close]

Last Name ⓘ

First Name ⓘ

User Name ⓘ

Email ⓘ

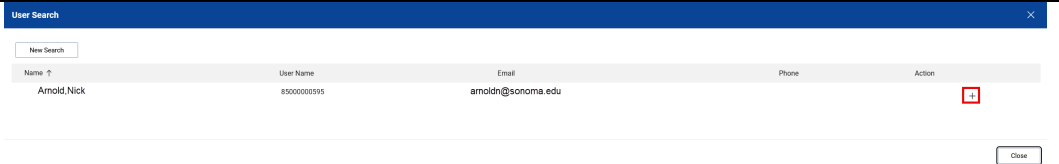
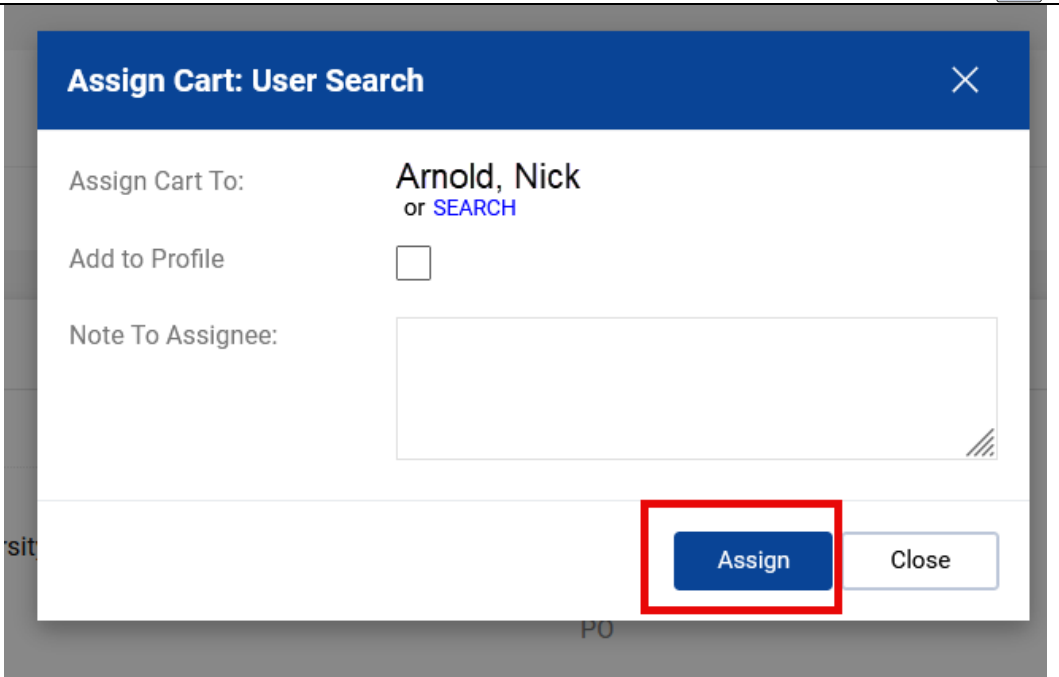
Business Unit ⓘ Sonoma State University P2P (SOXMP)

Role ⓘ

Results Per Page 10

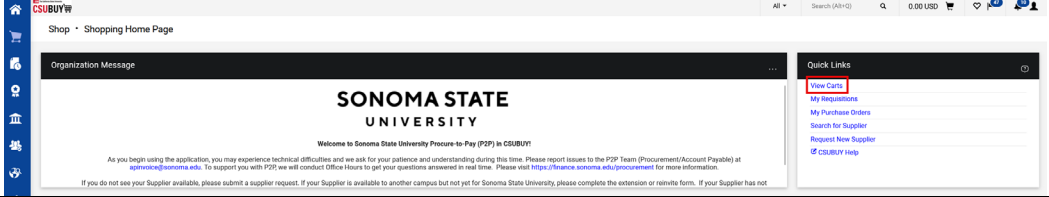
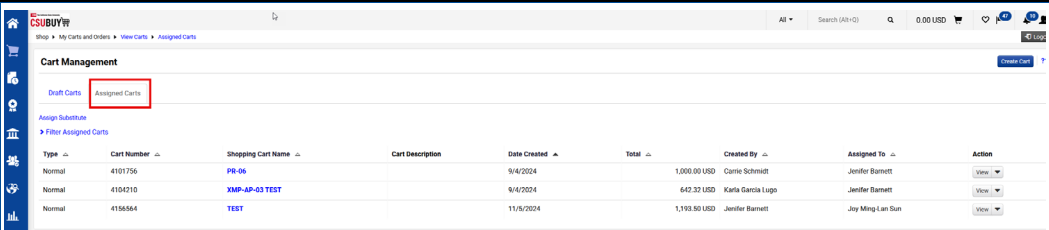
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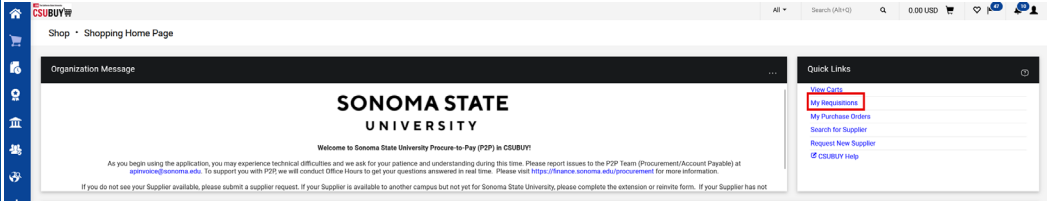
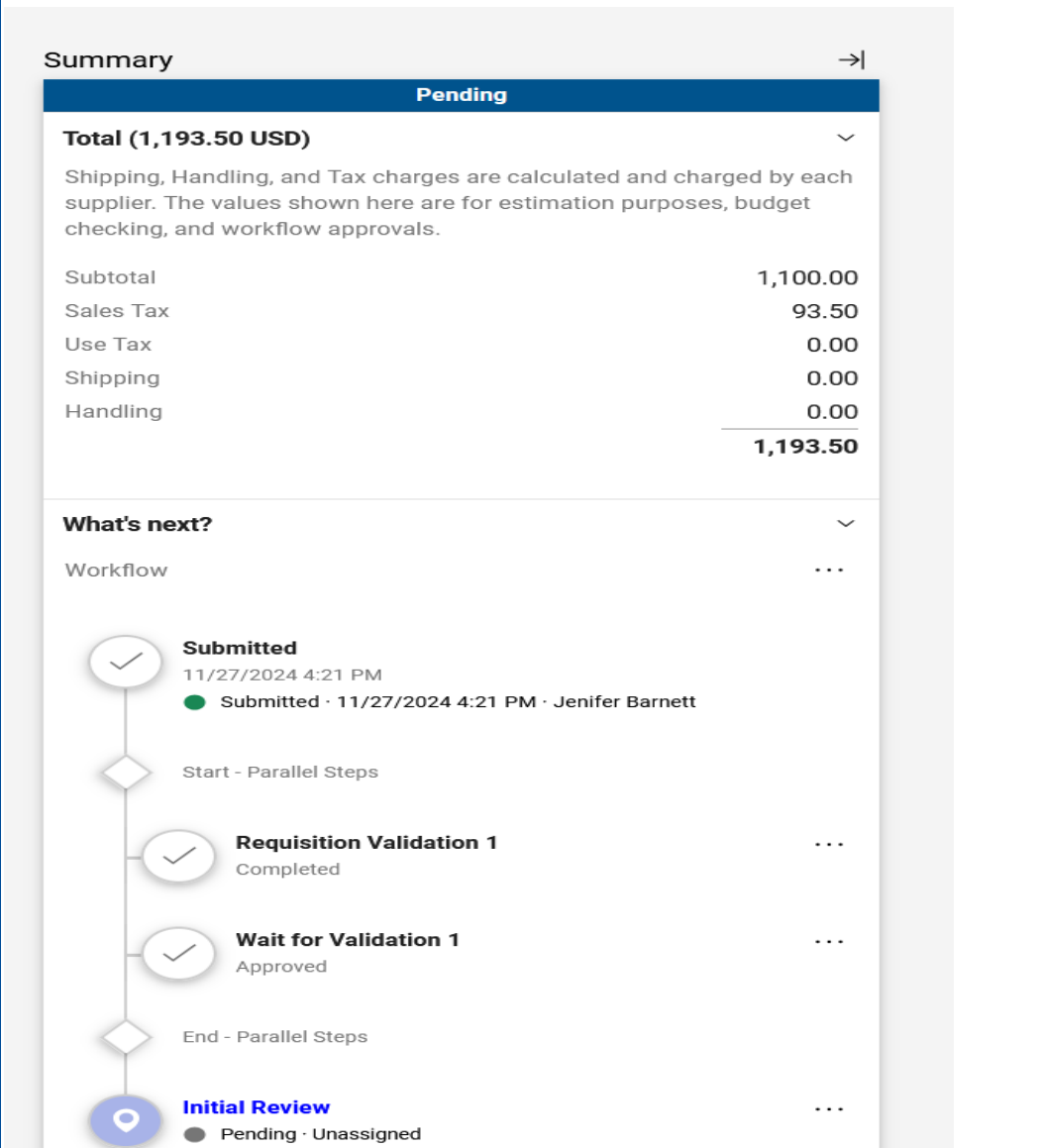
10	Click on the + button on the right.	
11	You can add a note if needed and then click Assign.	
12	Once the Requisition has been assigned to Nick Arnold. He or someone else on the IT Equipment Team will do one of the following:	<p>Option 1- Complete the requisition and submit into the workflow on behalf of the requestor.</p> <p>Option 2- (For a non punchout supplier) Return the requisition to requestor with instructions, product details, supplier and attach the quote. Requestor will complete the requisition and submit it to the workflow</p> <p>Option 3- (For a punchout Supplier) IT will Return or Reject the requisition; IT will start a new cart with punchout catalog and assign the shopping cart to the requestor. The requestor should complete the cart and submit the requisition into the workflow.</p>



## Title: Viewing your cart before completed

1	To monitor your assigned cart, click on View Carts																																					
2	Click on the Assigned Carts Tab	 <table border="1" data-bbox="488 848 1531 1075"> <thead> <tr> <th>Type</th> <th>Cart Number</th> <th>Shopping Cart Name</th> <th>Cart Description</th> <th>Date Created</th> <th>Total</th> <th>Created By</th> <th>Assigned To</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Normal</td> <td>4101756</td> <td>PR-06</td> <td></td> <td>9/4/2024</td> <td>1,000.00 USD</td> <td>Carrie Schmidt</td> <td>Jenifer Barnett</td> <td><a href="#">View</a></td> </tr> <tr> <td>Normal</td> <td>4104210</td> <td>XMP-AP-03 TEST</td> <td></td> <td>9/4/2024</td> <td>642.32 USD</td> <td>Karla Garcia Lugo</td> <td>Jenifer Barnett</td> <td><a href="#">View</a></td> </tr> <tr> <td>Normal</td> <td>4156564</td> <td>TEST</td> <td></td> <td>11/5/2024</td> <td>1,193.50 USD</td> <td>Jenifer Barnett</td> <td>Joy Ming-Lan Sun</td> <td><a href="#">View</a></td> </tr> </tbody> </table>	Type	Cart Number	Shopping Cart Name	Cart Description	Date Created	Total	Created By	Assigned To	Action	Normal	4101756	PR-06		9/4/2024	1,000.00 USD	Carrie Schmidt	Jenifer Barnett	<a href="#">View</a>	Normal	4104210	XMP-AP-03 TEST		9/4/2024	642.32 USD	Karla Garcia Lugo	Jenifer Barnett	<a href="#">View</a>	Normal	4156564	TEST		11/5/2024	1,193.50 USD	Jenifer Barnett	Joy Ming-Lan Sun	<a href="#">View</a>
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## Title: Viewing your requisition once submitted into workflow

1	Once the IT Equipment Team submits the cart into work flow you can find it under My Requisitions													
2	The summary will also show you what step the requisition is in workflow.	 <p><b>Summary</b> →</p> <p><b>Pending</b></p> <p><b>Total (1,193.50 USD)</b></p> <p>Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.</p> <table border="1"> <tr> <td>Subtotal</td> <td>1,100.00</td> </tr> <tr> <td>Sales Tax</td> <td>93.50</td> </tr> <tr> <td>Use Tax</td> <td>0.00</td> </tr> <tr> <td>Shipping</td> <td>0.00</td> </tr> <tr> <td>Handling</td> <td>0.00</td> </tr> <tr> <td><b>Total</b></td> <td><b>1,193.50</b></td> </tr> </table> <p><b>What's next?</b></p> <p>Workflow ...</p> <ul style="list-style-type: none"> <li><b>Submitted</b> (11/27/2024 4:21 PM) - Submitted · 11/27/2024 4:21 PM · Jenifer Barnett</li> <li><b>Start - Parallel Steps</b></li> <li><b>Requisition Validation 1</b> (Completed) ...</li> <li><b>Wait for Validation 1</b> (Approved) ...</li> <li><b>End - Parallel Steps</b></li> <li><b>Initial Review</b> (Pending · Unassigned) ...</li> </ul>	Subtotal	1,100.00	Sales Tax	93.50	Use Tax	0.00	Shipping	0.00	Handling	0.00	<b>Total</b>	<b>1,193.50</b>
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