Submitting Documents to CALS Business Operations (CBO) Electronically

Option 1: Departmental Wolf Copier

1. Prepare document for submission to include the following
   a) Vouchers (Invoices)
      i. accurate and valid project/phase
      ii. date goods/service were received
      iii. business purpose
   b) P-card receipts
      i. accurate and valid project/phase
      ii. business purpose
      iii. Transaction ID (CPS) number
      iv. Travel Authorization (TA) number
      v. required signatures
      vi. receipt must show a zero balance
   c) P-card statements
      i. Signature of p-card holder
   d) Journal Voucher/Interdepartmental Journal/Interdepartmental Sales (JV/IDJ/IDS) requests
      i. Completed CBO approved journal entry form

2. Prepare CBO Document Transmittal (CDT)
   a) Enter name of person to be contacted for additional information
   b) Enter department
   c) Confirm which transaction is being submitted
   d) Place CBO Document Transmittal before each transaction to scan individually
3. Scan to CALS Business Operations (CBO)
   a) Enter the password to the Wolf Copier
      i. Ask the Business Coordinator or Administrator for this code

   ![Figure 1-Login the system](image)
   b) Choose the Menu Button

   ![Figure 2-Select proper button](image)
c) Select Fax/Scan

![Image of an electronic device screen with buttons for Copy, Scan/Fax, User Box, and Sound Setting.]

*Figure 3 - Select proper button*

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d) Select Program

![Image of a computer screen displaying program selection options.]

*Figure 4 - Select proper button*
e) Press the appropriate button (figure 5 below)

   i. CBO Pcard
   ii. CBO Voucher
   iii. CBO JV
   
   1. Includes Interdepartmental Journal and Interdepartmental Sales (IDJ/IDS) requests
   2. Requisition request
   3. Non-employee travel requests

*Figure 5- Select proper button*
f) Press Recall

![Image of a screen showing a selection menu for different types of documents, with options like CBO PCARD, CBO VOUCHER, and CBO JV, all marked as Not Registered.]

*Figure 6: Select proper button*

g) Press Start

h) Repeat step 3 between each transaction

   i. CBO Document Transmittal can be re-used for the same type of transaction

   ii. One pcard holder is considered a transaction

      1. Can scan multiple receipts for the same pcard holder under one cover at the same time
Option 2: Upload from an Electronic Device

1) Save image/electronic copy to a folder or location assessable for retrieval on your computer.
   a. Navigate to ServiceNow at https://ncsu.service-now.com/cbo/

2) Click the Submit Documents Button

3) On the new screen verify your name and department OUC is correct

4) Choose a category from the Type of Document drop down box
   a. Voucher- for all invoices
   b. Pcard- for all pcard receipts and statements
   c. JV- for all other requests (Requisitions, travel, billing)
5) Review reminders to ensure all required information has been included
   a. click OK once confirmed

   ![Reminder Reminder](image)

6) Enter project number or purchase authorization (PA) number
   a. For payments split on multiple projects enter additional project/phase and corresponding amount in the *Please describe your document below* field

   ![Project Phase Number](image)

   ![PA#](image)

7) Enter additional information in the *Please describe your document below* section
   a. If you would like your department business coordinator to view and track the transaction enter name
   b. Enter a justification for out of the ordinary purchases

8) Attach document from folder or location saved by clicking

   ![Click here to upload your document](image)

   ![Submit](image)
9) Click

10) An incident number (INC#) will be assigned to the submission for reference.