

## Submitting Documents to CALS Business Operations (CBO) Electronically

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**Option 1: Departmental Wolf Copier (*Note- not all Wolf Copiers are identical, and machines are in process of being replaced. Please look for the buttons as titled below, however, they may appear in a place different from pictured depending on model. This guide will be updated as copy machines are replaced. References to specific forms are linked and may also be found at [go.ncsu.edu/cbo: Documents and Forms](http://go.ncsu.edu/cbo: Documents and Forms)*)**

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) Press FAX/SCAN
- b) Press MODE MEMORY

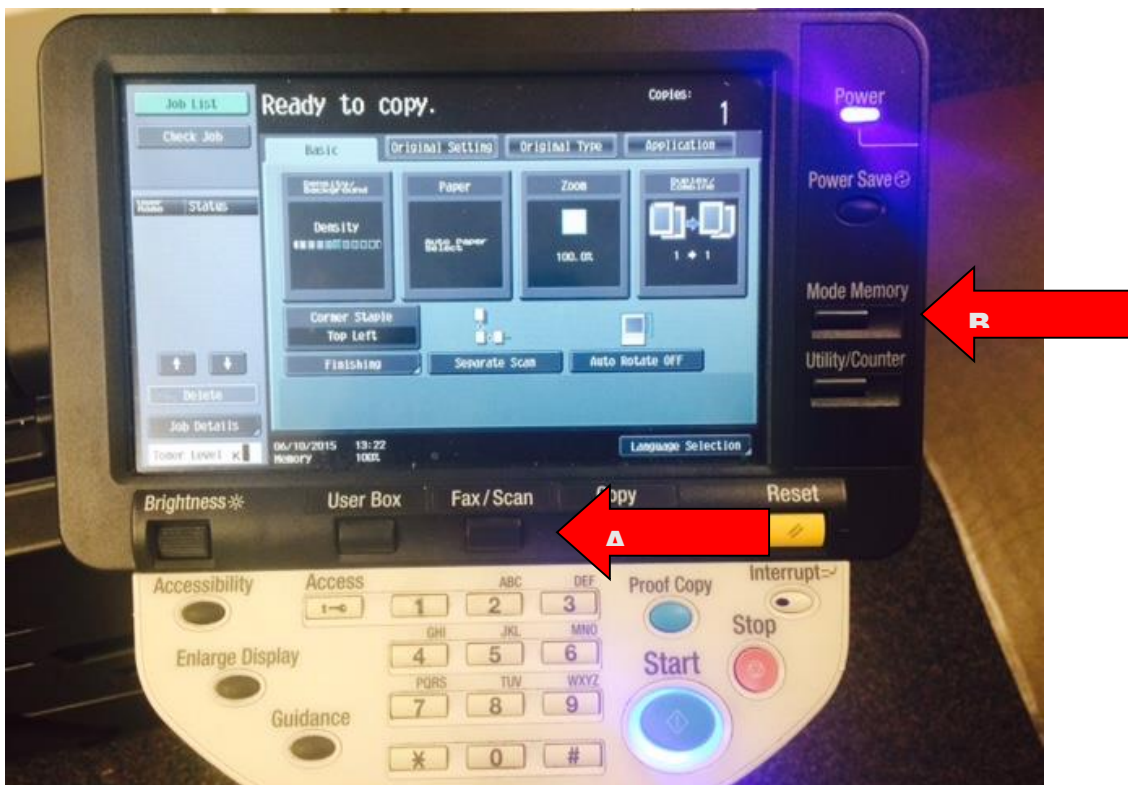


Figure 1-Prepare to Scan

- c) Press the appropriate button (figure 2 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

- d) Press OK
- e) Press Start
- f) 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



Figure 2- Select proper button

## 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 Service Now via the CALS Business Operations web page  
[go.ncsu.edu/cbo](http://go.ncsu.edu/cbo)
  - b. Click Get Help CBO Support: Service Now

**CALS Business Operations**

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# Business Operations

**CALS Business Operations wraps up fiscal year 2015; continues transformation into new business model**

As the CALS Business Operations (CBO) staff worked diligently to wrap up the 2015 fiscal year, which came to a close on July 1, the team continues its transformation into a new model of business for the college.

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**CBO Support: Service Now**

[Search FAQs](#)



## 2) Click the Submit Documents Button

### CALS Business Operations

The screenshot shows the CALS Business Operations website interface. At the top, there is a navigation bar with links: Home, CBO Department Info, Knowledge Base, Latest News, Get Help, and Check Status. Below this are four main navigation tabs: Resources, Accounting, Contracts & Grants, and Budgets. The main content area is a grid of service tiles:

- Search the Knowledge Base:** Includes links for Search the Knowledge Base, Browse Highest Rated Articles, Browse Most Read Articles, and Documents & Forms.
- View Latest News:** Includes a link for View the Latest News.
- Get Help:** Includes links for Get Help, Check Status, Our Location, and Who is My Liaison?
- Applications:** Includes links for Purchase Authorization System and Who manages my Grant?
- Calendar:** Shows event listings with filters for 'Showing events after 6/30' and 'Showing events until 7/31'. Includes a 'Google Calendar' link.
- Submit Documents:** A black button with white text, highlighted by a green starburst graphic. It is located in the 'Submit your Voucher, Pcard, or JV Request' tile.

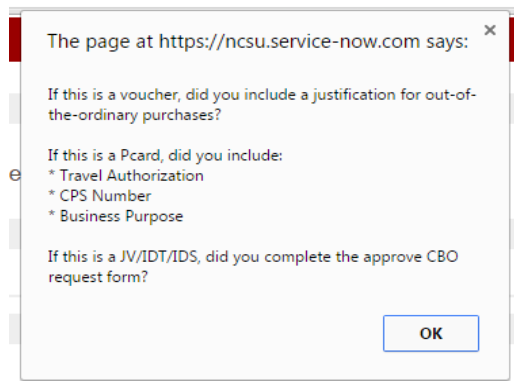
3) On the new screen verify your name and department OUC is correct

4) Choose a category from the *Type of Document* drop down box

- Voucher- for all invoices
- Pcard- for all pcard receipts and statements
- JV- for all other requests (Requisitions, travel, billing)

5) Review reminders to ensure all required information has been included

- click OK once confirmed



- 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

<b>Project Phase Number</b>
<input type="text"/>
<b>PA#</b>
<input type="text"/>

- 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](#)

- 9) Click

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