Campus Box 7644
3210 Faucette Drive
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Submitting Documents to CALS Business Operations (CBO) Electronically

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)***

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

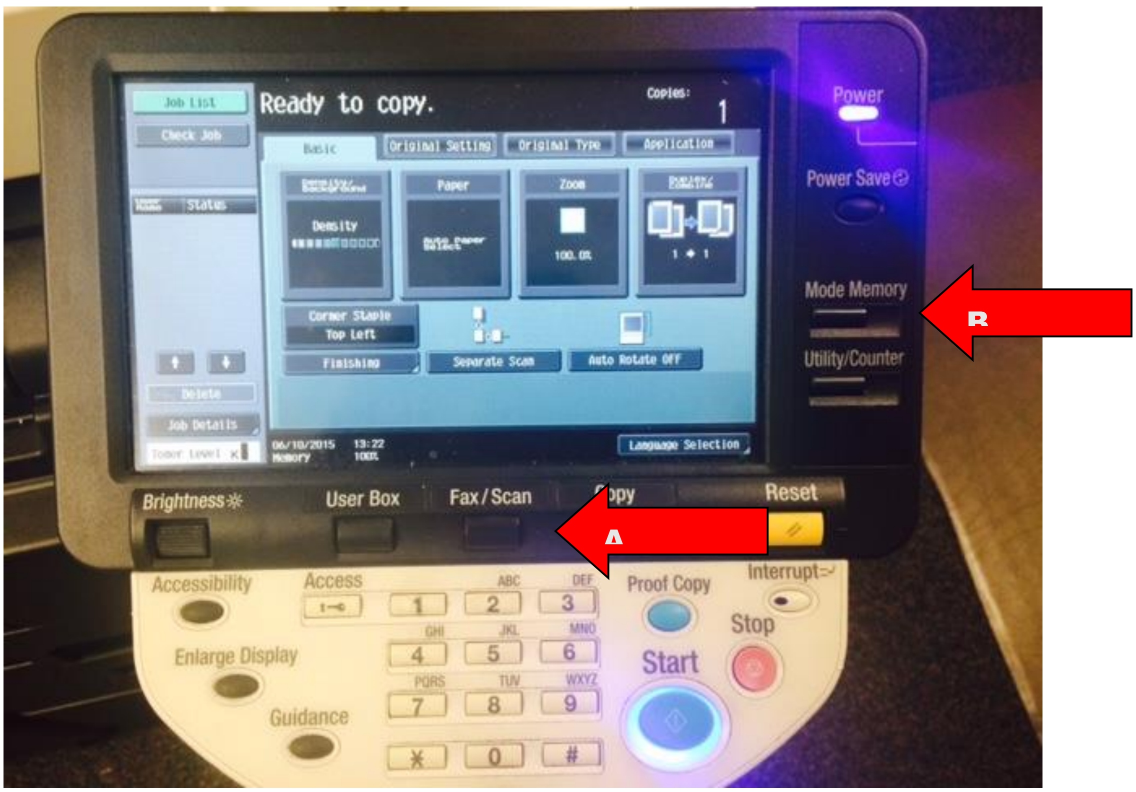


Figure 1-Prepare to Scan

   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

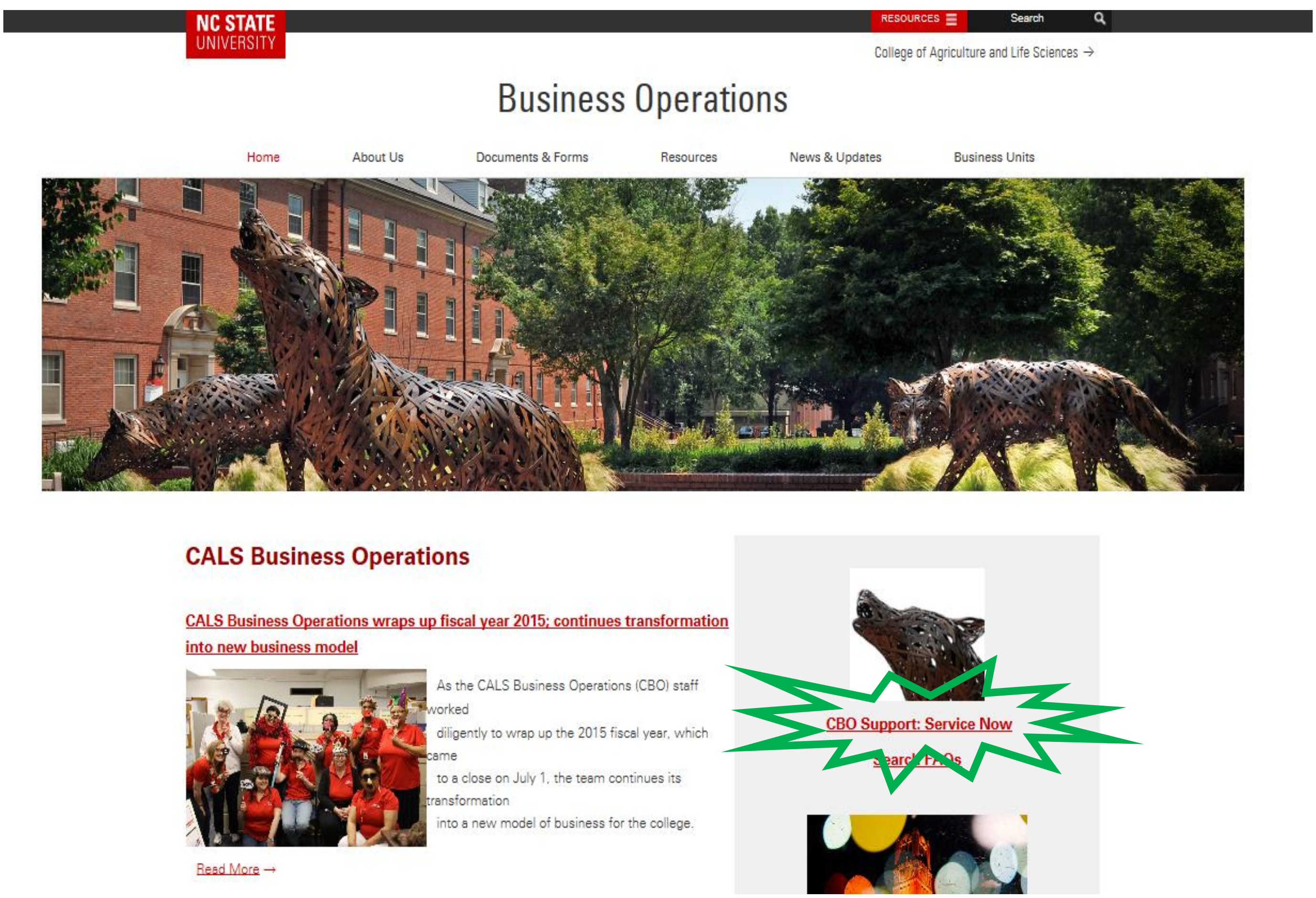
d) Press OK
e) Press Start
f) Repeat step 3 between each transaction
   i. CBO Document Transmittal can be re-used for the same type of transaction
   ii. One pcard holder is considered a transaction
      1. Can scan multiple receipts for the same pcard holder under one cover at the same time

Figure 2- Select proper button

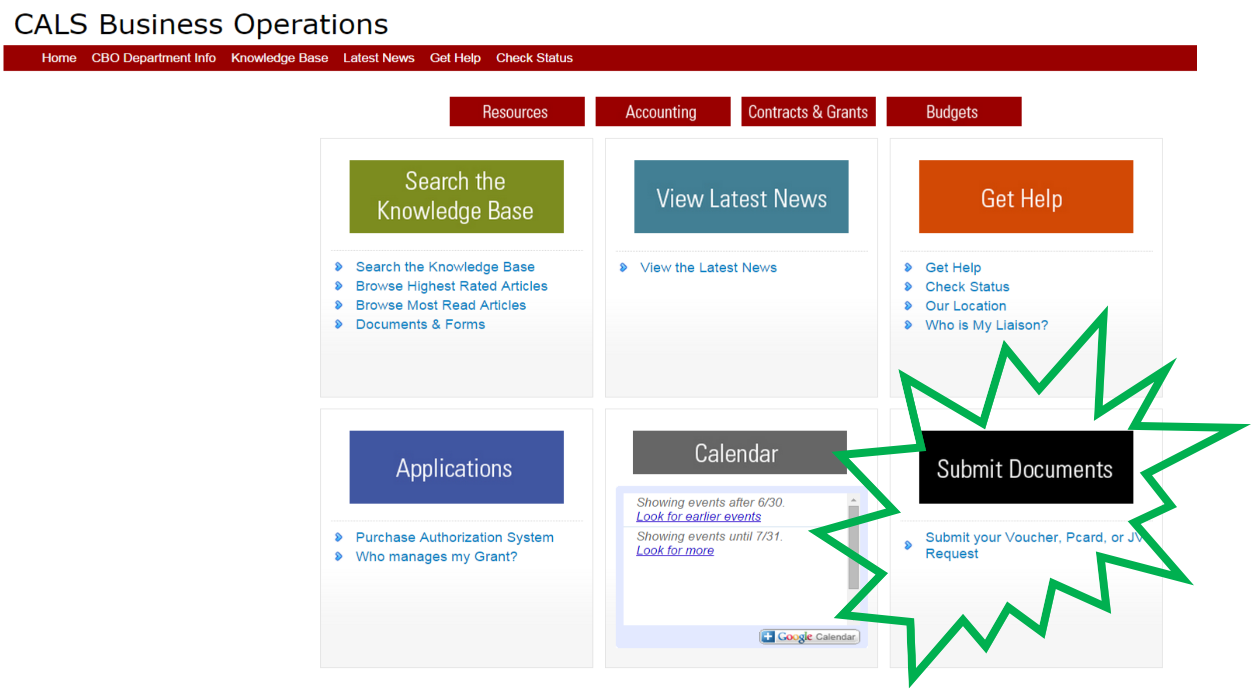
Option 2: Upload from an Electronic Device

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

    b. Click Get Help CBO Support: Service Now



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

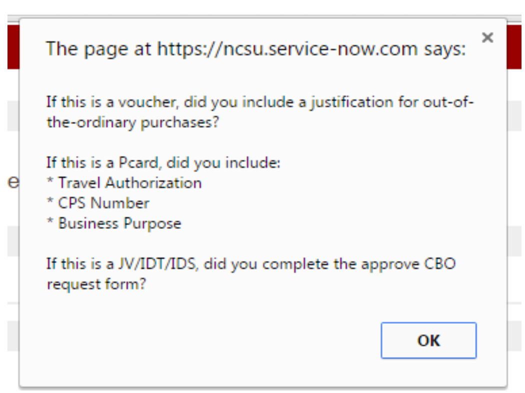
   a. Voucher- for all invoices

   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



NC STATE UNIVERSITY

College of Agriculture and Life Sciences
CALS Business Operations

cals.ncsu.edu/cals business center

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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

PA#

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 **Submit**

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