NC STATE UNIVERSITY

College of Agriculture and Life Sciences

Business Operations

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) **Journal Voucher/Interdepartmental Journal/Interdepartmental Sales** (JV/IDJ/IDS)
      i. Completed CBO journal entry form
      ii. Additional forms can be found at https://cals.ncsu.edu/intranet/cals-business-operations/documents-forms/

2. Prepare the CBO Document Transmittal (CDT) form
   a) Enter the name of the person to be contacted for additional information
   b) Enter the department.
   c) Confirm which transaction is being submitted.
   d) Place "CBO Document Transmittal Form" before each transaction to scan individually.
   e) Additional forms are located on the CBO Homepage under "Documents and Forms".

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Cbo_help@ncsu.edu

3) Scan to "**CALS Business Operations (CBO)"**

NOTE: Some Wolfcopiers may require you to enter a password. Contact your Business Coordinator or Administrator for the code.

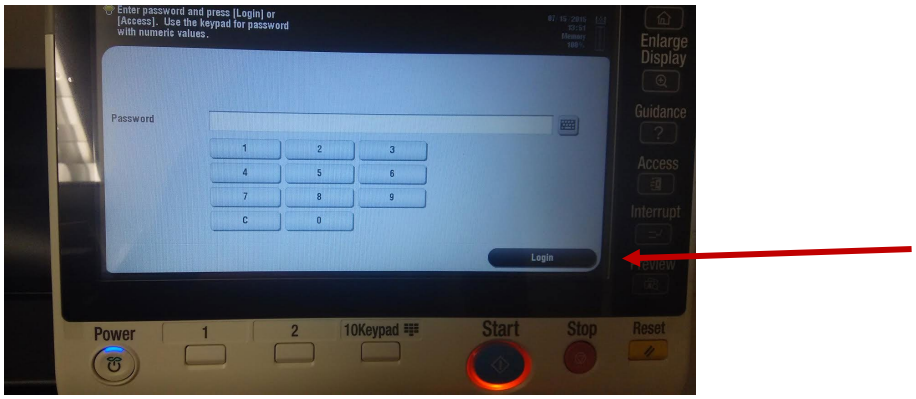


Figure 1-Login the system

4) Select the "**Menu**" Button

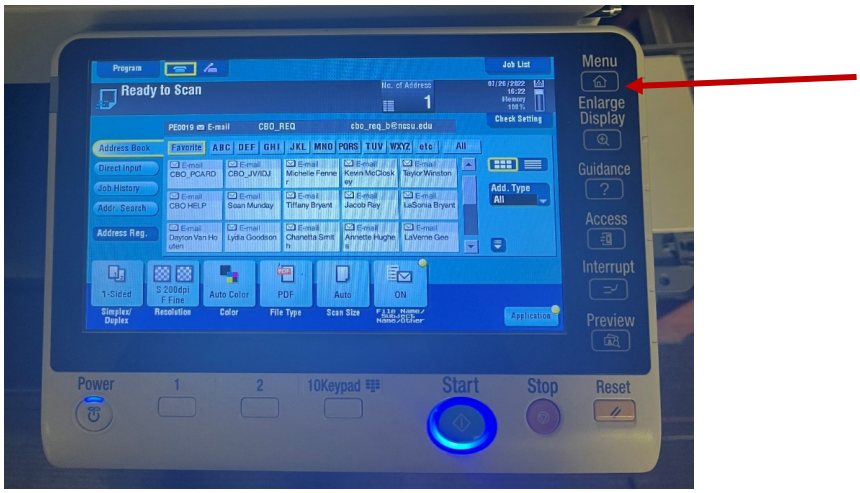


Figure 2- Select the proper button

5) Select "**Scan/Fax**"

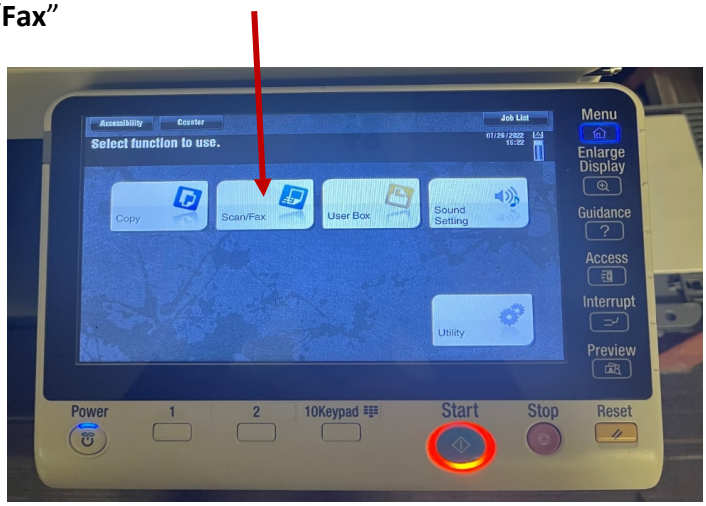


Figure 3- Select the proper button

6) Select "**Program**"

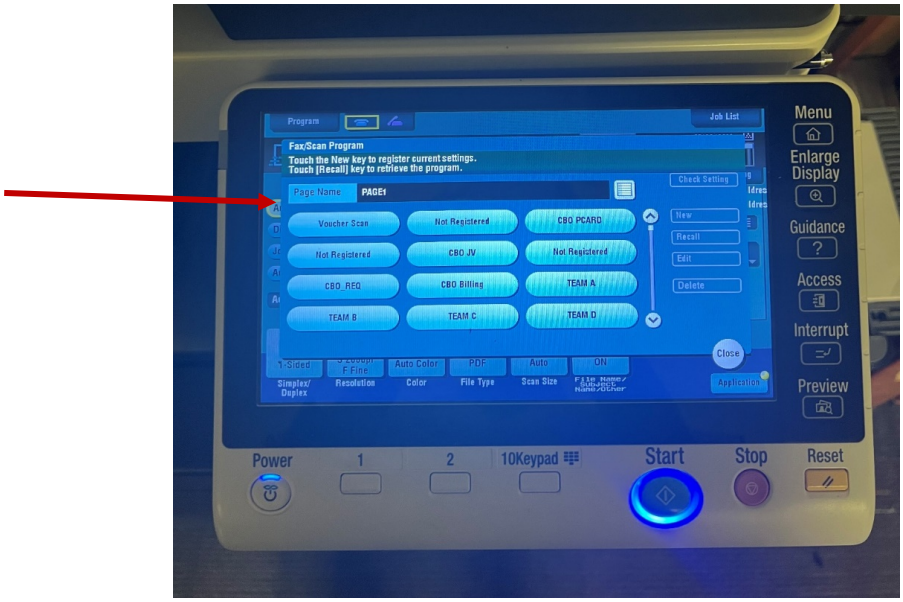


Figure 4- Select the proper button

7) Select the appropriate submission type and press that button (figure 5 below)

a. CBO Voucher

b. CBO JV
   i. Includes Interdepartmental Journal and Interdepartmental Sales (IDJ/IDS) requests
   ii. Requisition request

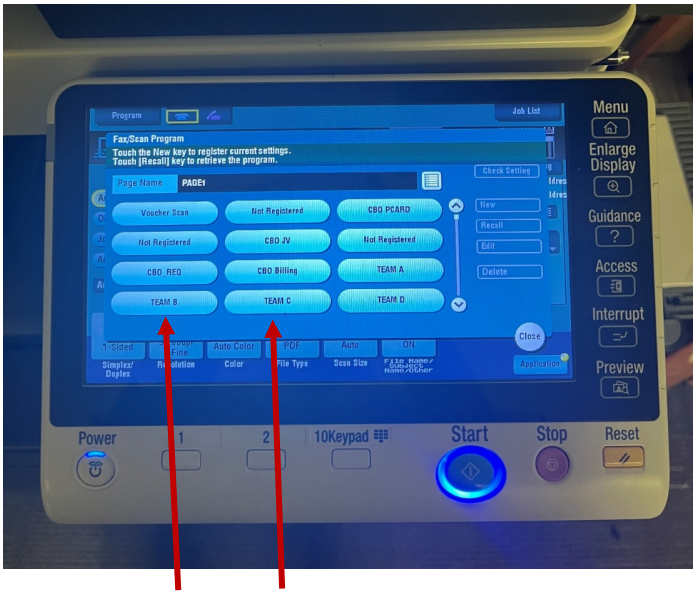


Figure 5- Select the proper button

8) Press **"Recall"**

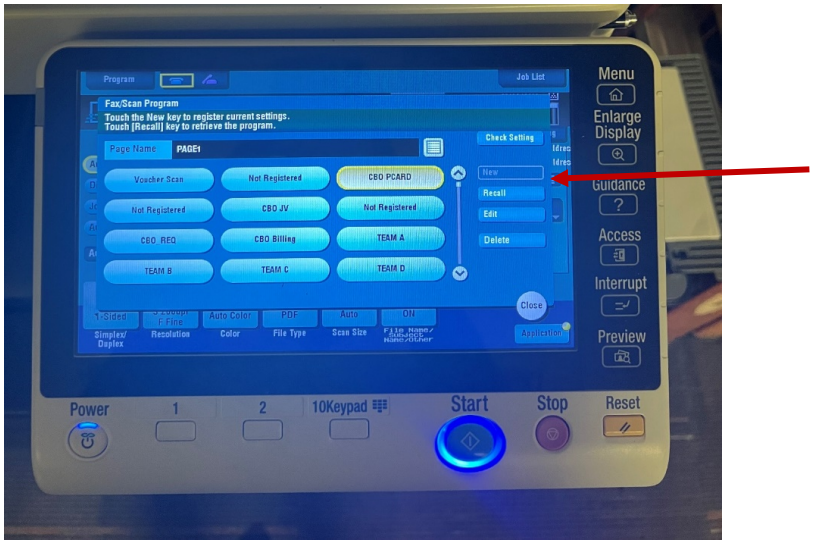
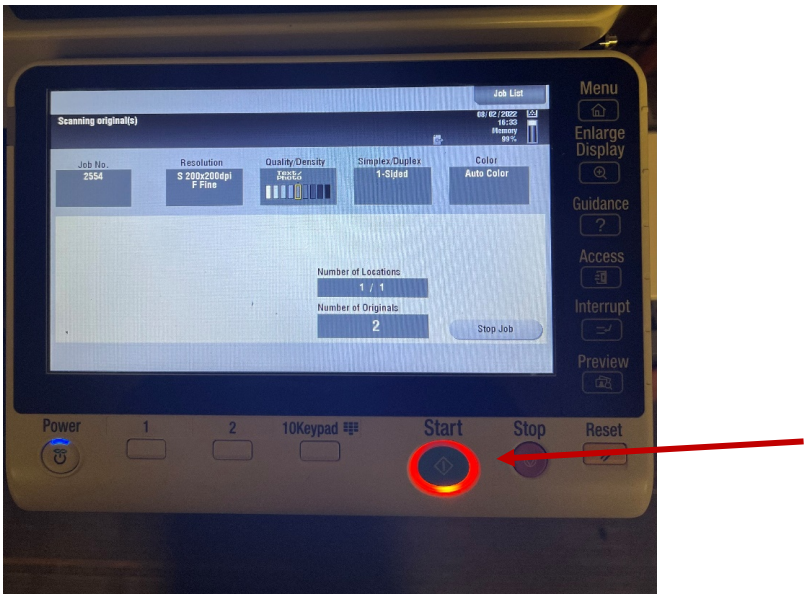


Figure 6- Select the proper button

9) Press "**Start**"

a. This image will populate while documents are being scanned



b. Once the scan is completed there is no confirmation but the documents scanned in will be submitted to ServiceNow. The contact person listed on the transmittal form will receive email updates as the request is processed.

10) Repeat Step 4 (Scan to "**CALS Business Operations (CBO Help)**") between each transaction

<u>NOTE:</u> The **"CBO Document Transmittal Form"** can be reused for the same type of transaction

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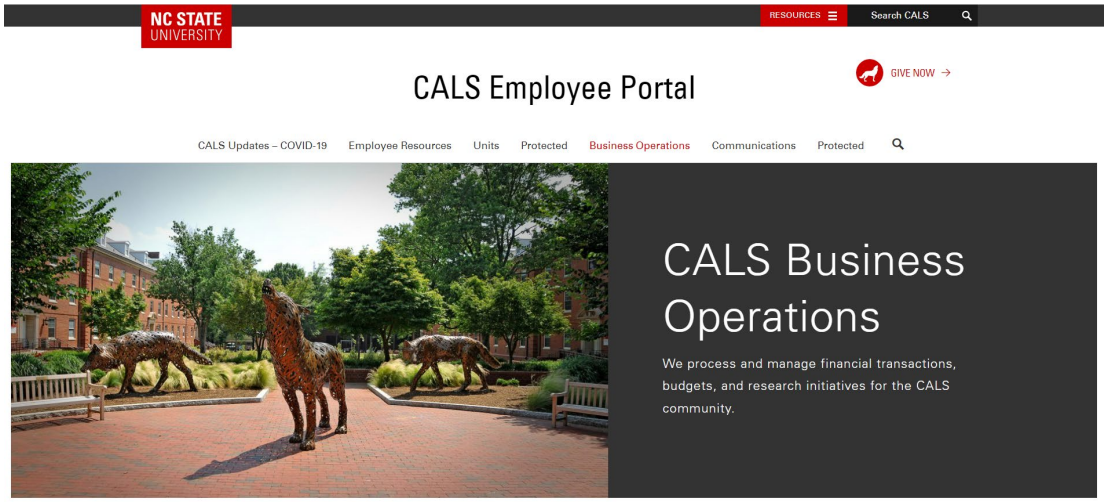
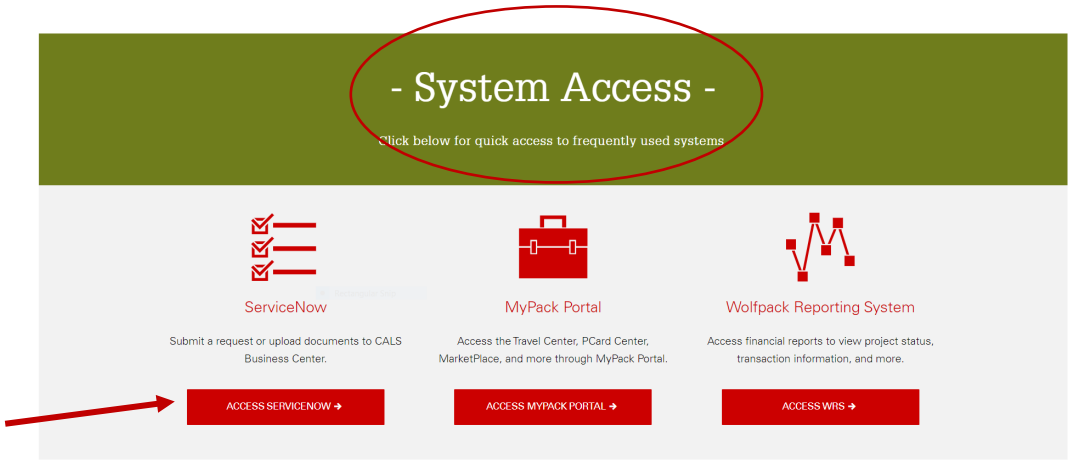
Option 2: Upload from an Electronic Device

1) Save the image/electronic copy to a folder or location assessable for retrieval on your computer.
2) Navigate to Service Now via the [CALS Business Operations webpage](#).



a. Scroll down and under the green heading labeled "System Access." Click on "**Access ServiceNow"**



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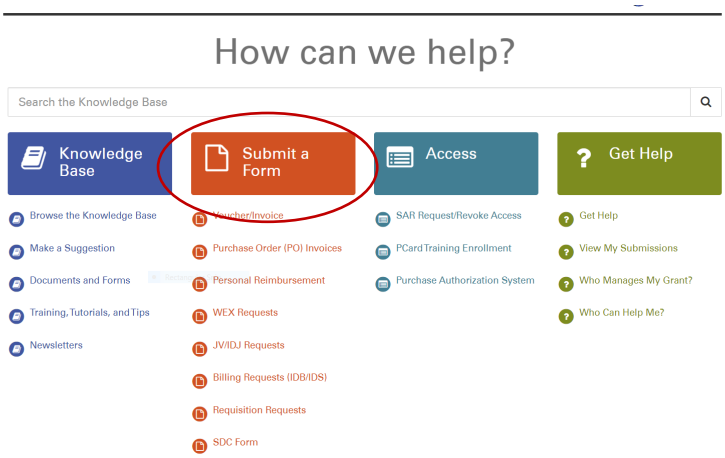
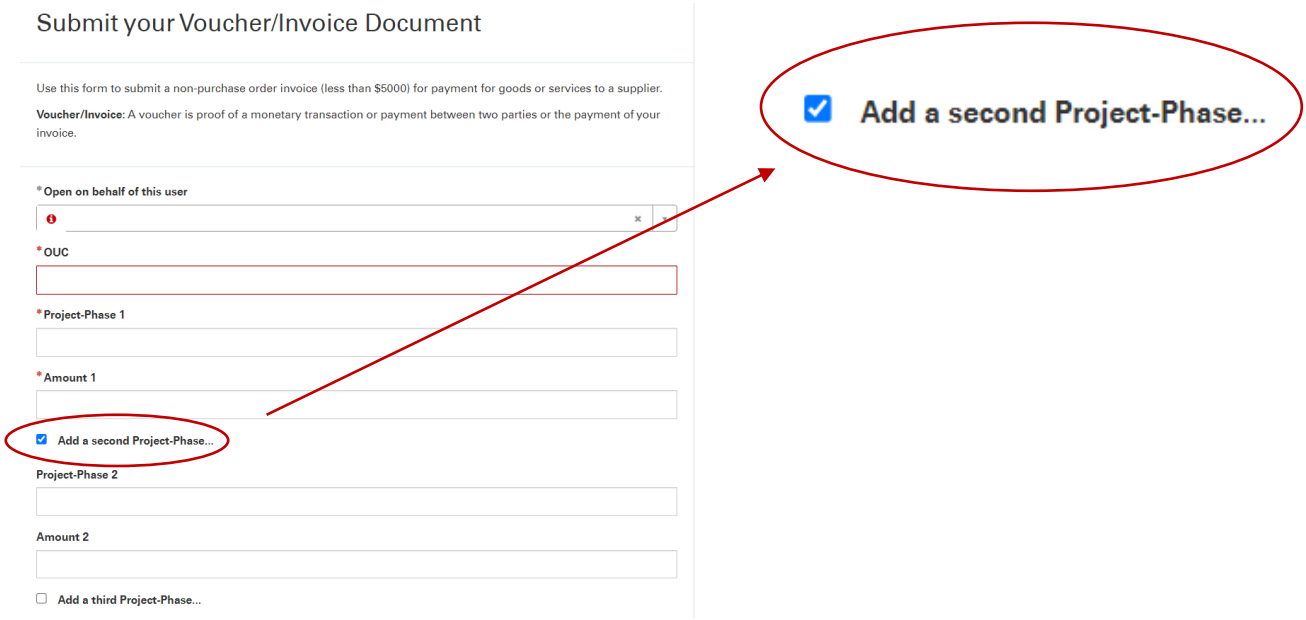
3) Under the heading labeled **"Submit a Form,"** select the type of request you're submitting.



4) Enter the project number **or** Purchase Authorization (PA) Number.

a. For payments that will be splitting the cost between projects, check the box that says, "**Add a second project/phase**". This will cause fields for Project/Phase 2 to display. Complete the fields with the appropriate information for the second project. (If multiple projects are being used, continue by clicking the "Add a third Project/Phase.")



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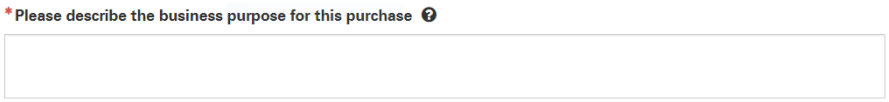
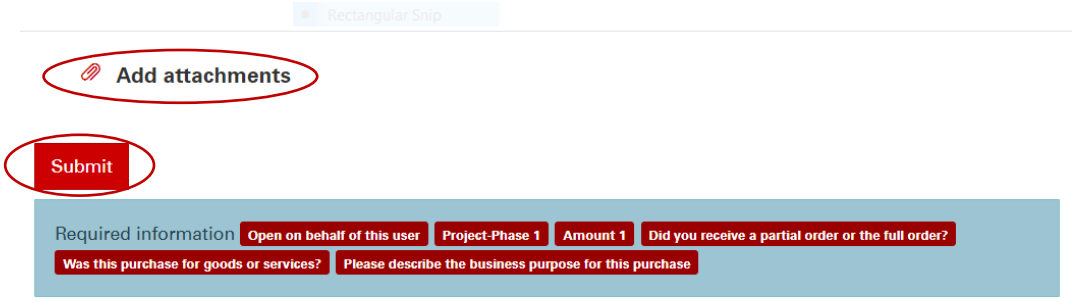
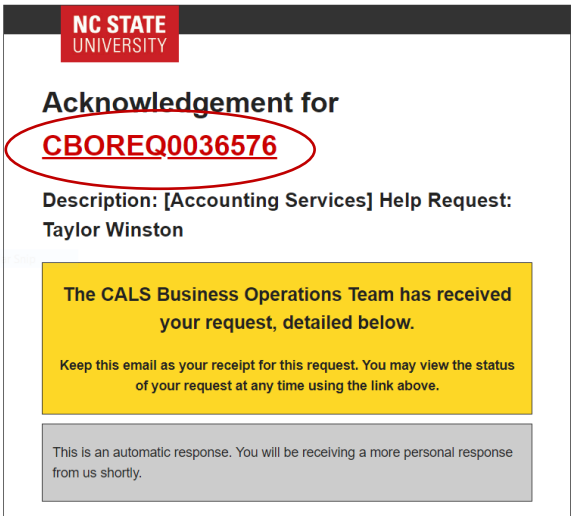
5) Enter additional information including the Business Purpose in the field labeled *"Please describe the business purpose for this purchase."*



6) Attach supporting documentation by clicking **"Add Attachments"**.
7) When all documents have been attached then click "**Submit".**



8) A request number (CBOREQXXXXXXX) will be assigned to your submission and you will receive an email with a copy of your request including the request number. This will allow you to follow the processing and status of your request.



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