

**Title:** MetaBIM Purchases and Receipt Entry  
**Department:** Physical Plant Management  
**Effective Date:** January 1, 2025

## **PURPOSE**

This document outlines the internal procedures and guidelines by which Physical Plant Management processes invoices and purchased materials posted to MetaBIM.

## **RESPONSIBILITY**

Physical Plant Management adheres to all CSUN purchasing policies regarding off-campus purchases and requests for vendor services.

- Authorized purchasers are responsible for attaining a copy of the original receipt, making material purchases, making copies of original receipts, and filing copies of receipts for internal records.
- It is the purchaser's responsibility to ensure that all purchases are posted on appropriate work orders once a purchase has been made from external vendors.
- Authorized PPM Purchasers are responsible for providing receipts, filing purchases, and providing work order information for all transactions. *Authorized Purchasers include Shop Supervisors, Project Managers, Estimators, authorized staff (as needed/assigned), and Managers.*
- Distribution is responsible for entering purchase receipts and verifying that items are posted to the appropriate work orders.

## **PROCEDURES**

### **Authorized Purchaser**

- May Travel to Store/ Attain Vendor Quote, Pickup/ Order/Shop for materials, make a purchase (as needed), attain receipt from the vendor, and file/ log the receipt in shop records.
- Submit original receipt to Distribution Staff immediately upon return to campus for MetaBIM entry.
- *Authorized purchasers must ensure that all work orders have all purchases on a work order before processing to "Shop Verified" status within MetaBIM.*

### **Distribution**

- Once a purchase is made, the Authorized Purchaser provides the receipt, purchased material (as needed), and an appropriate work order number to the Distribution staff.
- Verifies items purchased with receipts.

- Enters the itemized receipt information into the appropriate MetaBIM work order.
- Submits the original receipts to PPM Financial Services daily for financial reconciliation.


**Financial Services**

- Purchases are reviewed and audited by Financial Services for billing purposes only.

**REFERENCES**

Specific processes and procedures within MetaBIM can be found in:

[https://mycsunemail.sharepoint.com/sites/ppm.it/shared documents/general/application implementation/metabim/standard operating procedures](https://mycsunemail.sharepoint.com/sites/ppm.it/shared%20documents/general/application%20implementation/metabim/standard%20operating%20procedures)

**APPROVED**  12/18/2024  
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 Jason R. Wang, Senior Director Date

**APPENDIX**

**REVISION HISTORY**

DATE	NAME	EVENT	NOTES
12/04/2024	M Amador	Created	
12/18/2024	E Garcia	Modified	Added SOP # and name
12/18/2024	E Garcia	Final – Sent for Signature	