Charles Sturt University

Unimarket Browser User Guide

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Before You Start

Access to the CSU purchasing system, Unimarket, will only be granted following appropriate training.

Logging In

1. Open a web browser.
2. From the CSU Finance Page under “Systems & Software” click on the Procurement Unimarket link in “Systems & Software”.
3. A login page will appear.
4. Enter your CSU user name and password. Press Enter or click Login.
5. The Unimarket home page will open.

If you experience any issues logging in, please contact the Unimarket Administrator on Int; 34444, Ext; (02) 69334444 or by email at eProcurementAdmin@csu.edu.au

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Key Concepts

- CSU has an eProcurement system (Unimarket) to stream line purchasing and provide an effective tool for users to undertake the necessary tasks of correctly recording the expenditure of CSU funds.
- The Unimarket product is a hosted solution and as such, the software is standard off the shelf and used by others in Australia, New Zealand and the USA.
- Within Unimarket a user will:
    - select or search for a supplier,
    - shop for items to place in to their shopping cart,
    - checkout their items to create a requisition and to send it to an approver,
    - once approved Unimarket will send a Purchase Order to the supplier,
    - when the goods or services are received, the user will go in to Unimarket and receive the order to allow the payment to be made to the supplier.

- There are two types of suppliers found in Unimarket:
    - **Catalogue Supplier** – a supplier who has a hosted catalogue in Unimarket or provides a roundtrip/punchout access to their site from Unimarket.
    - **Non-Catalogue Supplier** – a supplier who does not have a hosted catalogue on Unimarket or does not provide roundtrip/punchout access to their site and instead requires products to be manually added/created in Unimarket.
- Products to be ordered from a supplier can be sourced via one of three methods:
    - **Catalogue**– supplier products are 'hosted' on the Unimarket Marketplace, meaning you do not leave the Unimarket website to search and order these products. Hosted Catalogs are identified with the folder icon.
    - **Roundtrip/Punchout** – supplier products are found on the suppliers' website with a direct link to and from the Unimarket Marketplace. Roundtrip/Punchout functionality is identified with the globe icon. A new window or tab opens and you are signed into the CSU account on the supplier's ecommerce site.
    - **Non-Catalogue** – products requiring information to be entered manually. Catalogue suppliers could have products that are entered manually if a product is not found in any of their catalogues. The manual order option is identified with the paper and pencil icon.

- It is a CSU procedure that Purchase Orders are to be issued before goods or services are requested from suppliers.

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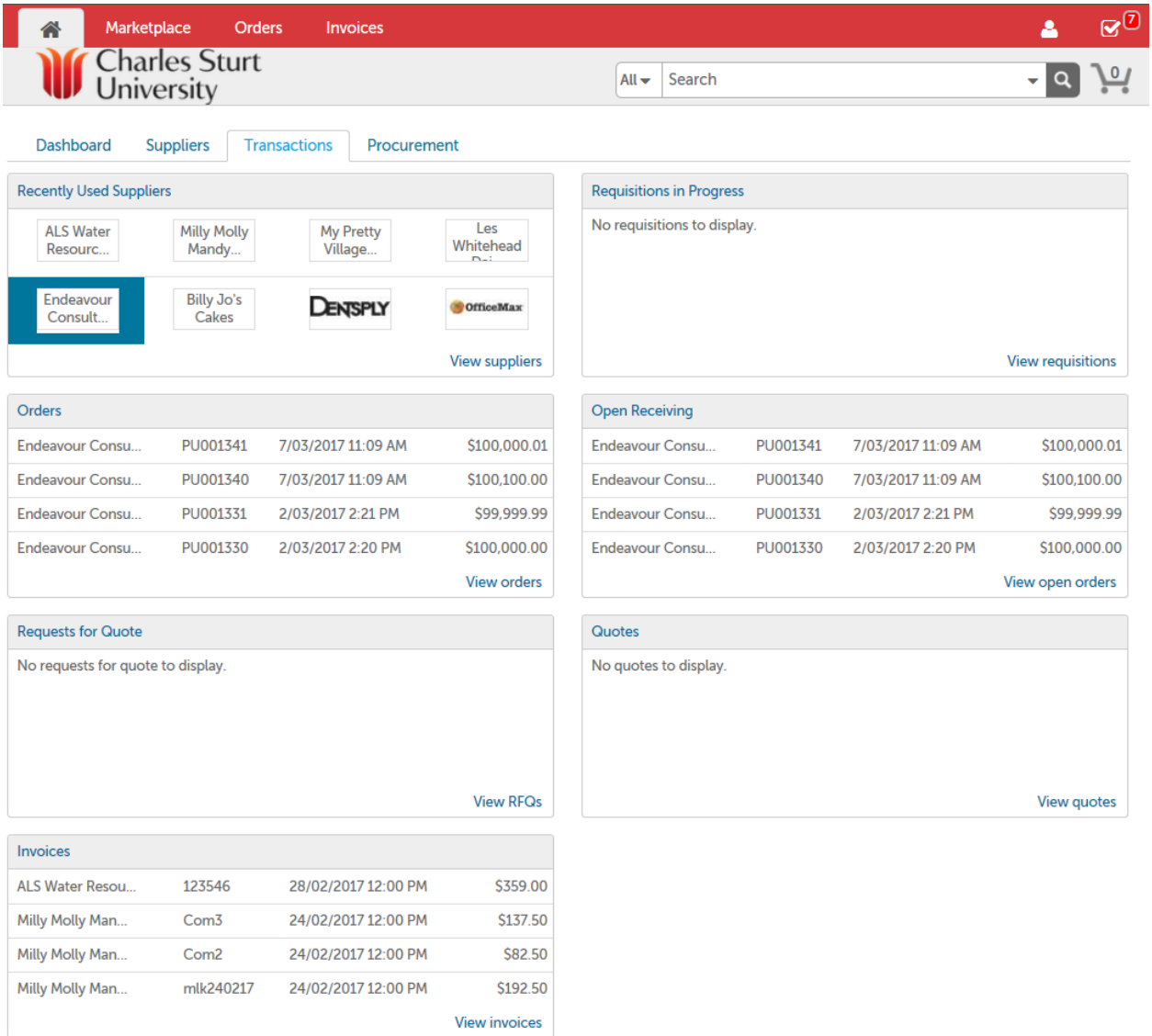
- In the event that this procedure is not followed, a user can create a '**Retrofit**' order to process an invoice that has already been received. An explanation of why normal procedure was not followed may be required.

The Dashboard



- From the Transactions Dashboard, you can view information about '**Recently Used Suppliers'**, '**Orders**' etc. and outstanding tasks, such as **'Requisitions in Progress'**, or '**Open Receiving'.**
- You can also access all information from the menu in the top menu bar.
- The options that display will depend on the user roles you have been assigned.

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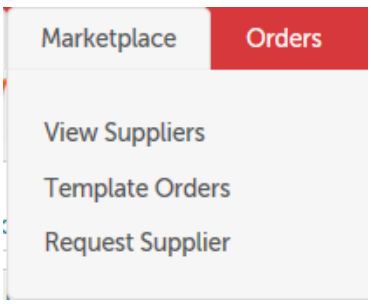
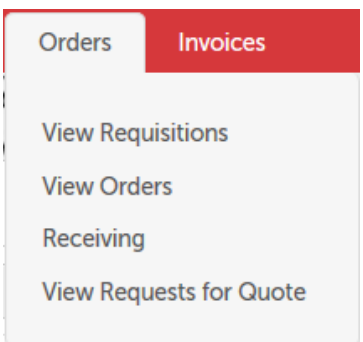
‘**Home’** – this will take you back to your dashboard from any screen

‘**Tasks’** – this is where you will find tasks awaiting your action.

’Shopping Cart’ – this is where you check out items to create a Requisition



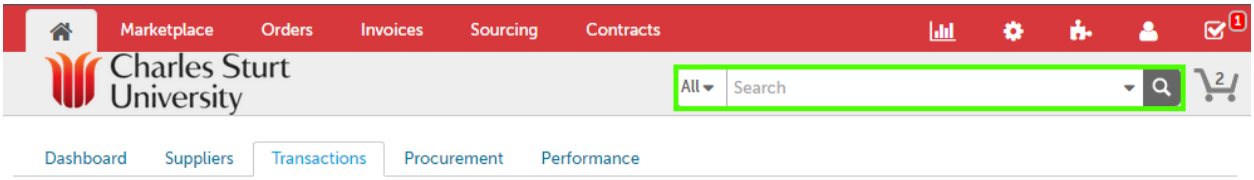
‘**Marketplace’** – allows you to view supplier information



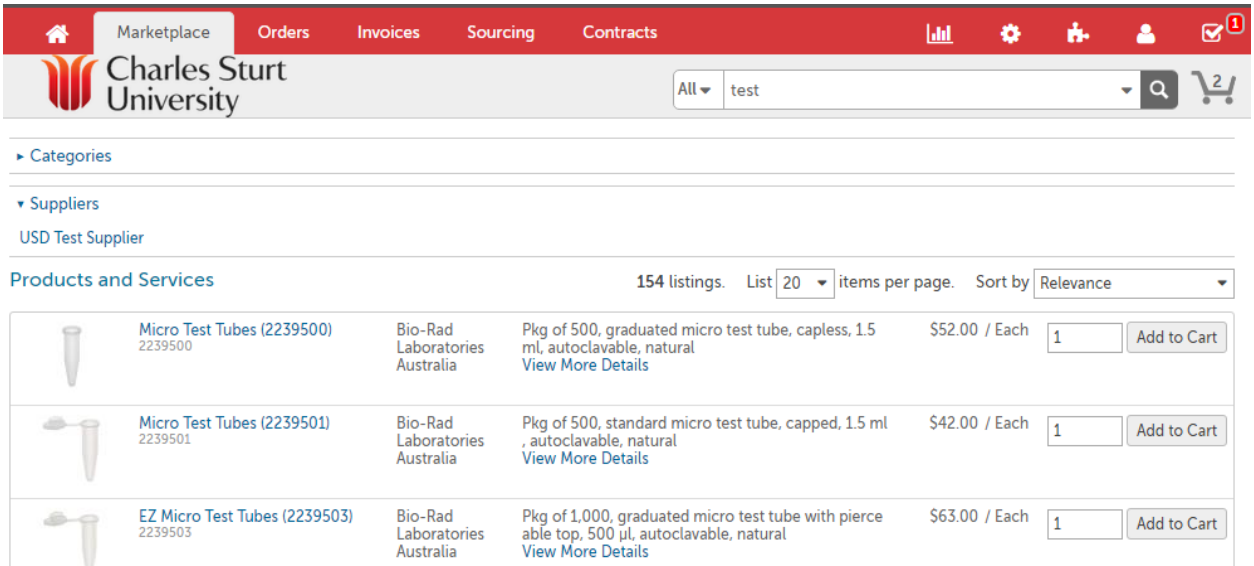
‘**Orders’** – is where you can find order related activities

Searching for Items to Purchase
(from 'Search' box)

- The easiest way to search for items is to simply enter the description or product code (if known) in the '**search box**' at the top. The system will search across all available catalogues from all suppliers at once.



- A list of matching items will be returned, then click '**Add to Cart**' on the item(s) that you require. Remember to add the quantity that you require if more than "1".



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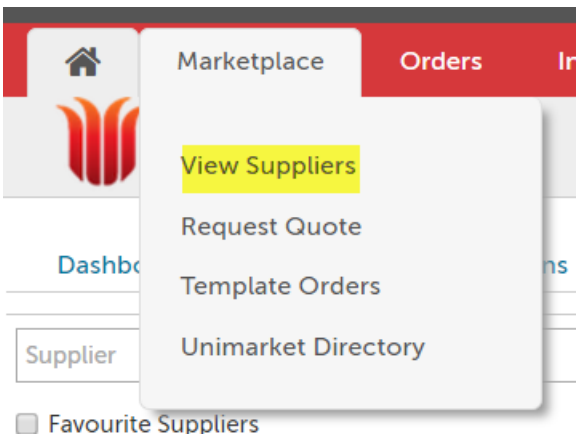
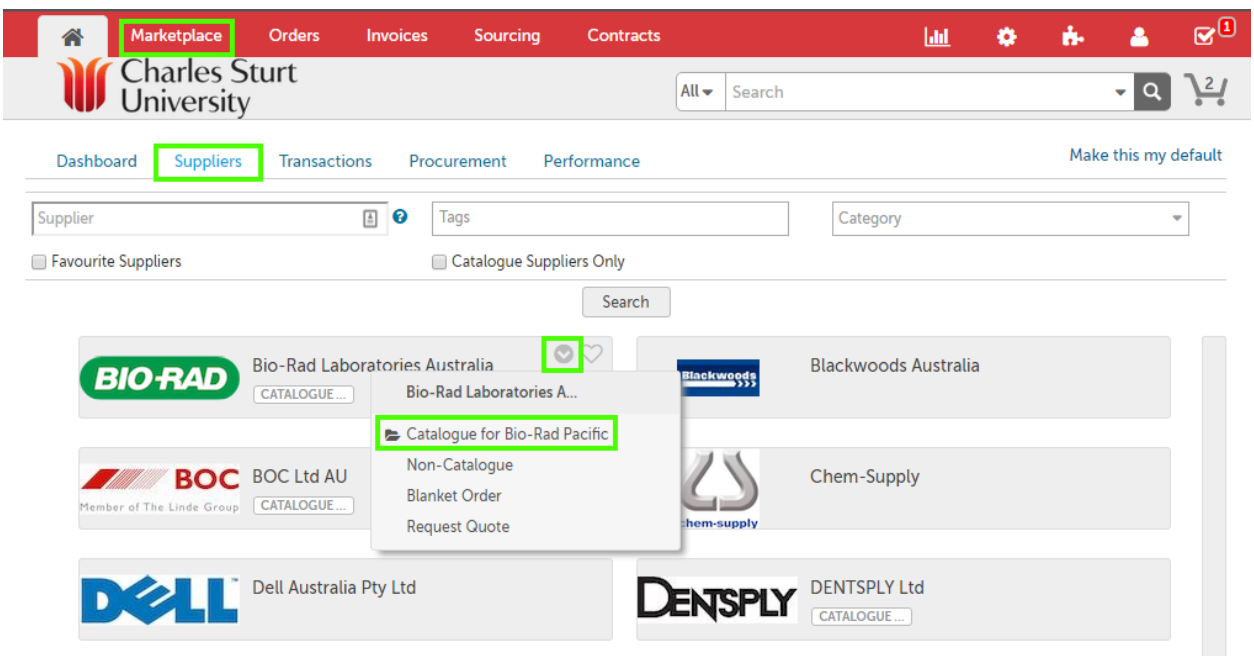
Searching for Items to Purchase

(from Supplier catalogue)

- If you know the specific supplier you want to purchase from, click on '**Marketplace**' then '**View Suppliers'** or, select the Supplier Dashboard tab.



- Select the supplier from the list.



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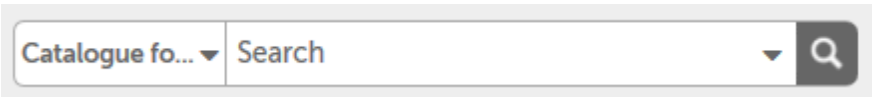
- You can select their ‘Hosted Catalogue’ either by hovering over the supplier in the list, clicking the small down arrow and selecting their catalogue from the menu that appears or, by clicking on the supplier tile and selecting their catalogue from the list (see below for Ordering from a Roundtrip).
- The list of products in the catalogue will now be displayed and you can scroll through the entire catalogue to search for items, or
- Enter the description or product code in the search box at the top of the page and a list of matching results from within the catalogue products will be returned.



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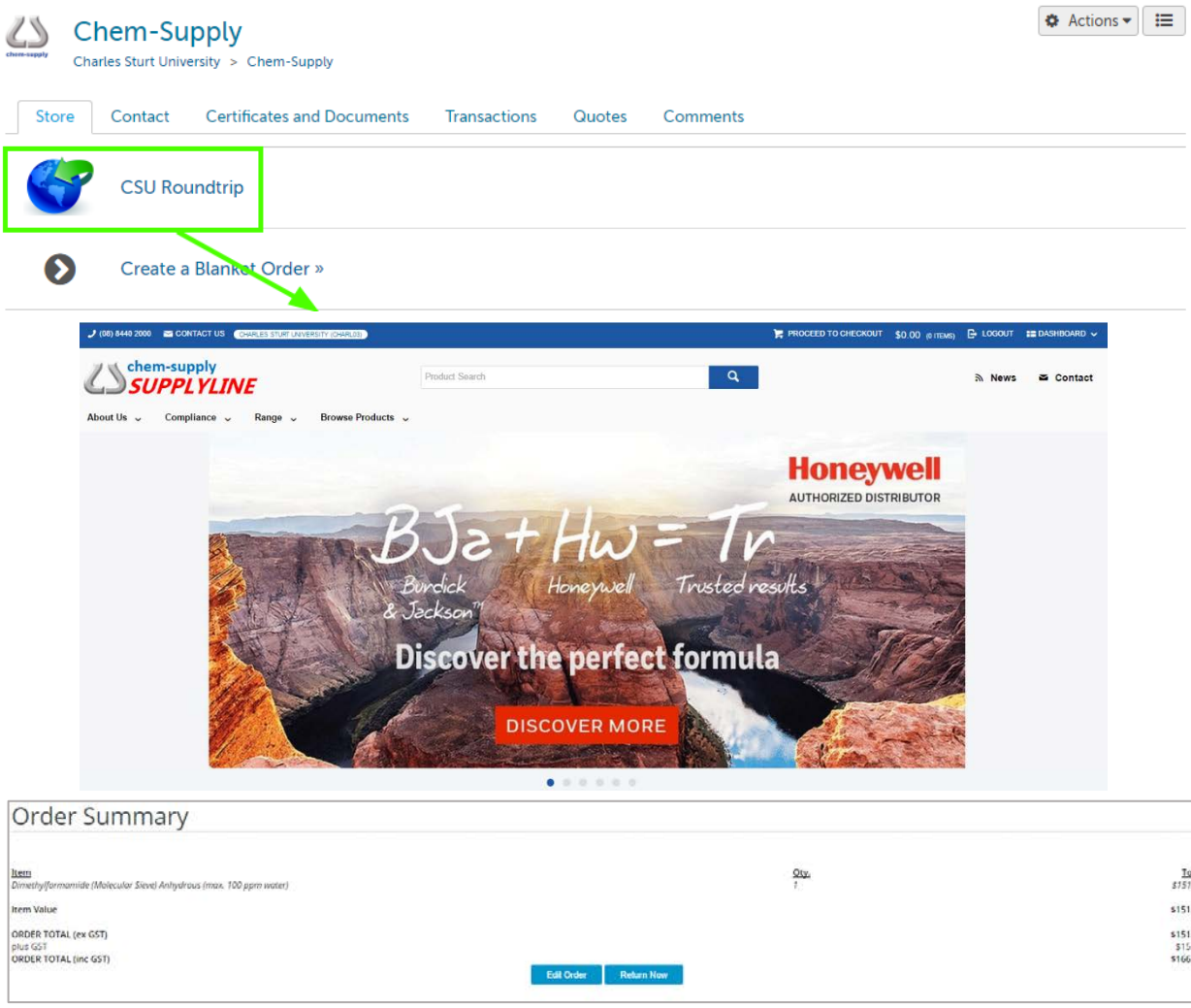
Selecting Items from a Roundtrip

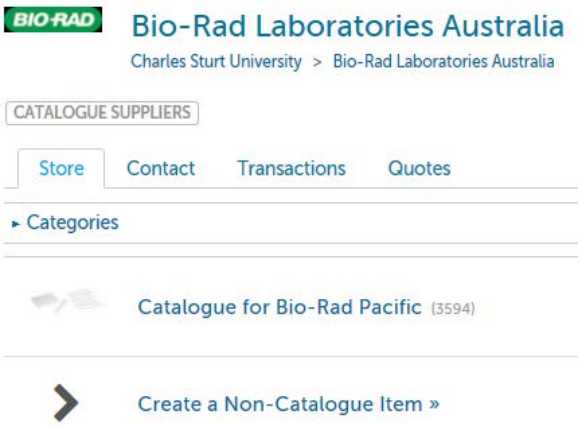
- Unimarket is integrated to some supplier websites so you can search for items directly on the supplier site, then return them to Unimarket to create a requisition.
- Select '**View Suppliers'** from the '**Marketplace'** menu, locate the supplier and either hover over the supplier in the list, click the small down arrow and select their roundtrip from the menu that appears or, click on the supplier tile and select their roundtrip from the list to be taken to their website.



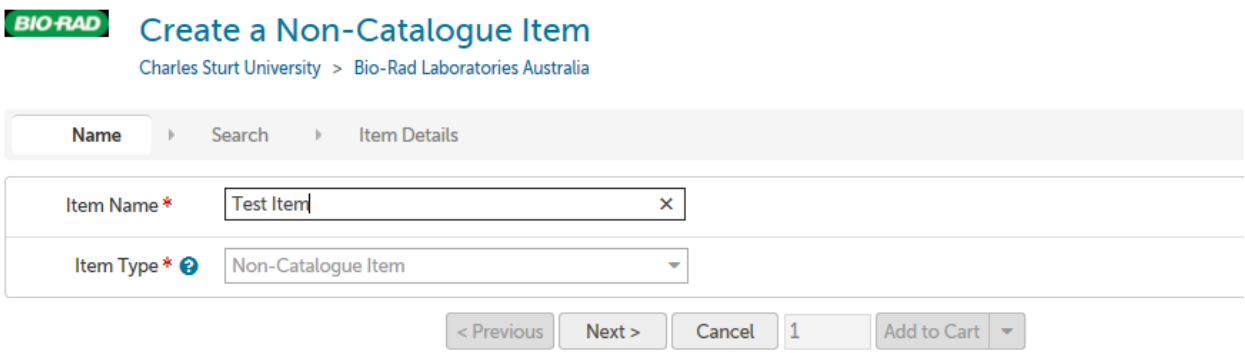
- Add the items to the supplier cart and then click '**Return Now**' (please note that the wording 'Return Now' may be different between supplier roundtrips).
- You will be returned, with the items, back to the Unimarket shopping cart.

Non-Catalogue Items

- Select the desired supplier from the '**Suppliers'** tab.
- Click '**Create a Non-Catalogue Item**'.



- Type the name of the item you want to purchase, then click '**Next**'.



- Note: The system will search across available products and suggest products should there be any that have the same or similar name. If none of the suggested products match what you are looking for click "Next" to skip this.
- Type in the product information.

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- Note: Fields marked with a red asterisk (*) are required fields.

  * **'Name'** - pre-filled in from your previous entry.

  * **'Unit Price'** – type the single unit price of the product, **GST exclusive**. This is very important as your Unit Price MUST reflect the cost without GST.

  'Unit of Measure' – type the Unit of Measure or select it by clicking the drop down.

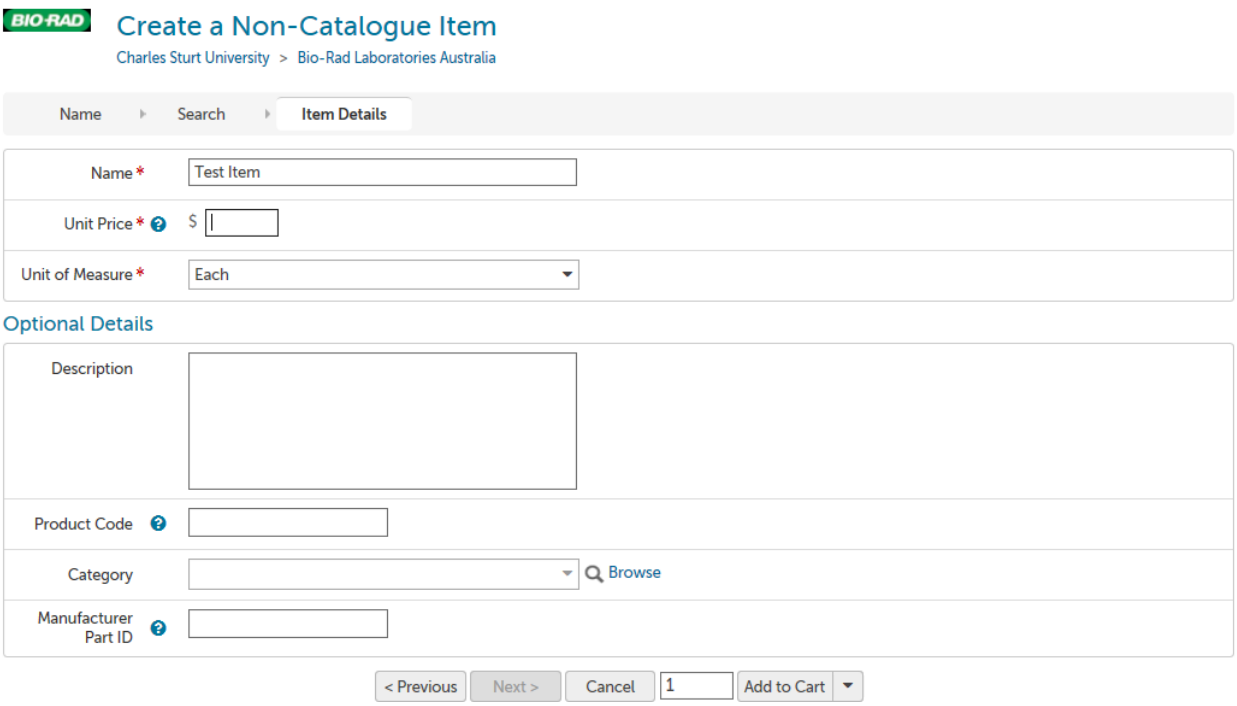
  'Description' – type a basic description of product, **this must reflect what the item is 'consumables' or 'advertising material' are not acceptable descriptions**. This is what the supplier will see on the purchase order and remittance advice.

  'Product Code' – type in the supplier's product number, if known.

  'Category' – this is not being used by CSU at this time.

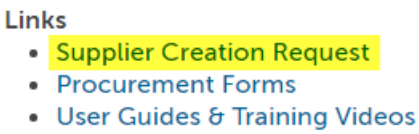
  'Manufacturers Part ID' – If the supplier is a reseller, you may type the additional product ID number that refers to the manufacturers product.

- Next to the '**Add to Cart**' button, you need to type in the quantity to be ordered.
- Click the '**Add to Cart**' button.



Request a New Supplier

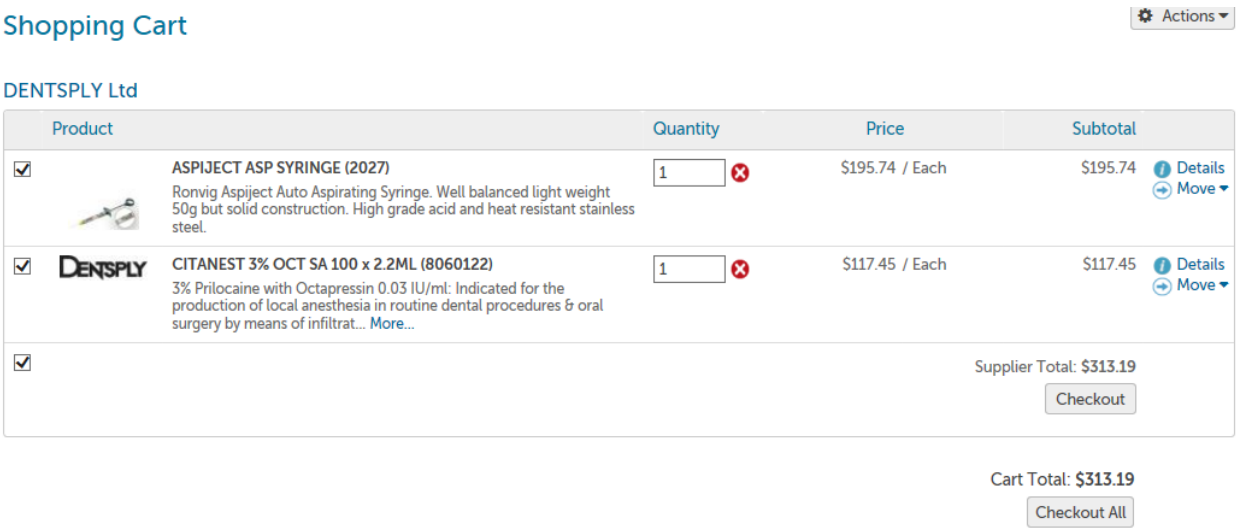
- If your search does not find the supplier you wish to use you will need to select '**Supplier Creation Request**'. It is a procedure of CSU that we only use approved suppliers.
- The supplier request process will allow you to request a supplier to be added for use in Unimarket. The CSU eProcurement Administrator can activate a previous supplier or invite a new supplier to register. You will be notified when the supplier request has been processed and when the supplier has been made available to you in Unimarket.
- On the '**Home Screen**' under '**Links**' you will find the '**Supplier Creation Request'** selection.



- Click '**Supplier Creation Request**' to be taken to University Supplier Creation Request form.
- The form will open. Complete the supplier information including Supplier Name, Contact name, phone and email address.
- Ensure you attach evidence of the suppliers address and ABN. This can be an e-mail or copy of a quote from the supplier.
- Once you have completed the request, email it to the eProcurement Administrator to process. You will be notified by email if the request has been accepted or declined.
- Once you send the request, the Unimarket Administrator will receive a task notification in Unimarket to process the request. You will be notified by email if the request has been accepted or declined.

Checkout Items

- Once you have selected the items you need and added them to your '**Cart'**, click the '**Cart**' icon at the top right of your screen.
- Within the '**Cart**', review the items and then click '**Checkout**' to start the creation of your requisition.
- If you have items from different suppliers in your '**Cart**' ensure you '**Checkout**' each supplier individually. CSU requires 1 requisition to 1 supplier.



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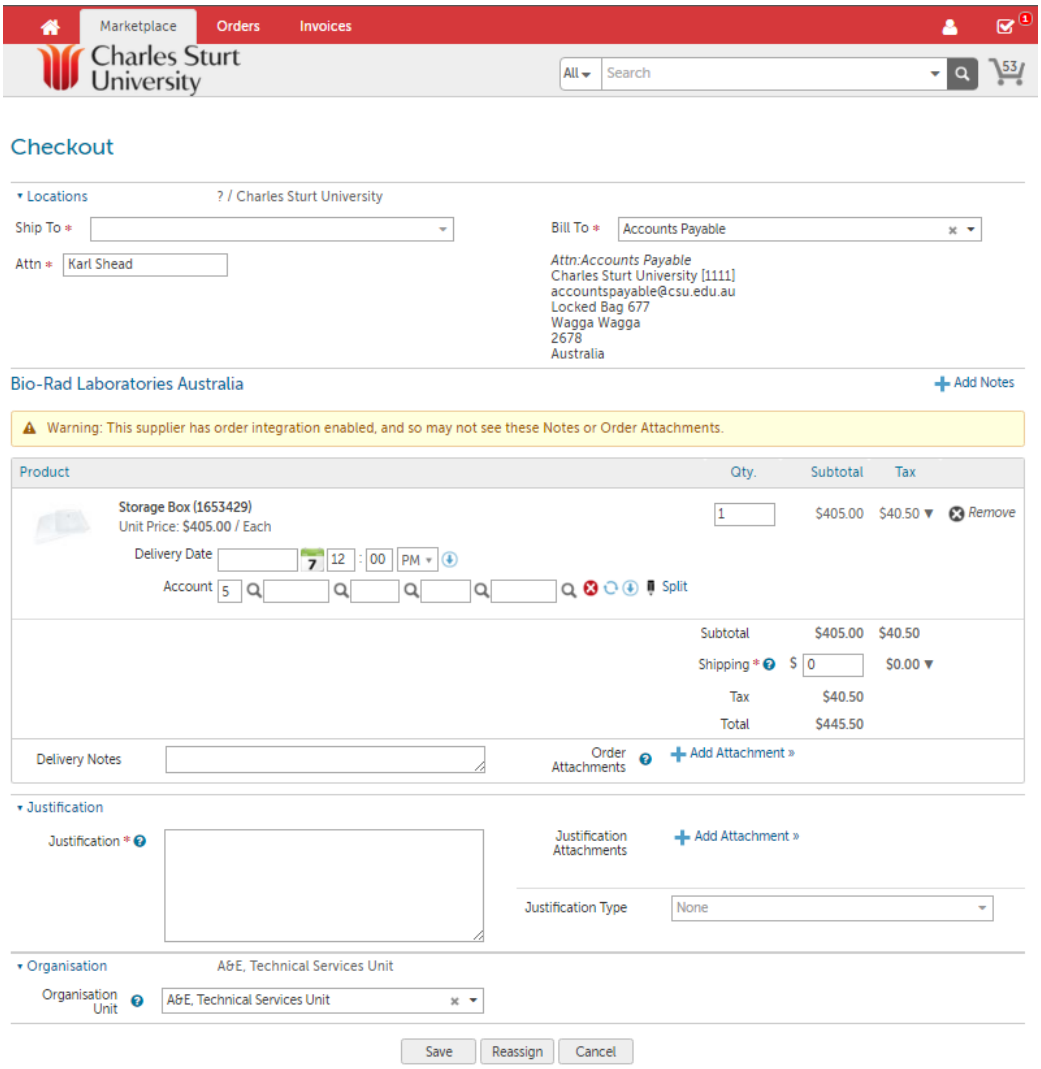
Create a Requisition

- As a Browser you are requested to complete as much of the following information as you can. The requisition will be reviewed and completed by the Buyer you 'Reassign' the requisition to. The more information you complete, the easier and quicker the process will be for the Buyer.



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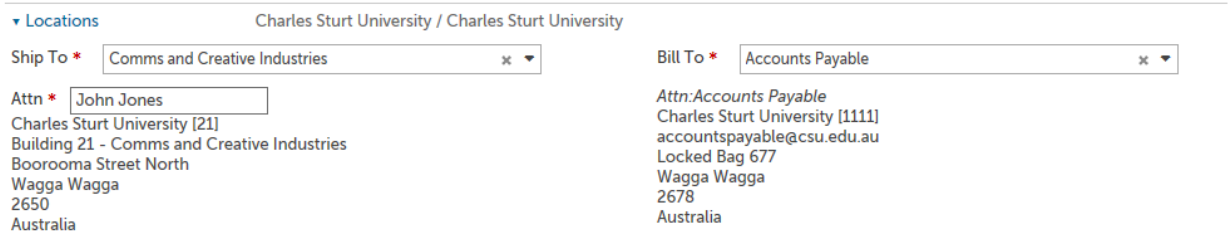
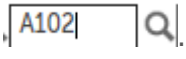
Charles Sturt University

Checkout



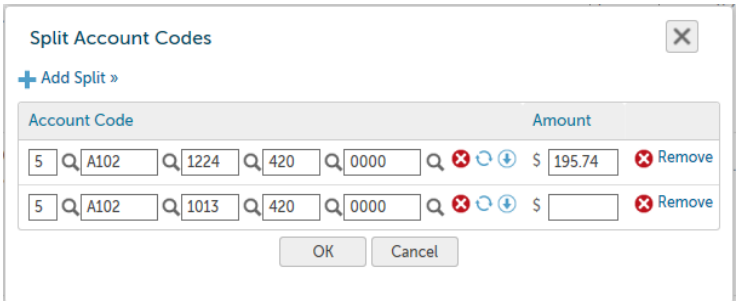
- You are required to complete the '**Ship To**' and '**Attn**' fields. This area will default to the last settings used for this supplier. By clicking on the you will be able to select from the list.

- You need to enter a '**Delivery Date**', this is when you require the goods to be delivered or the agreed date that the supplier has said they can deliver. The delivery date needs to be realistic and meets all parties requirements e.g. do not enter tomorrow's date if this is not the case. If it is left blank then the Purchase Order will not display a delivery date.

- In the '**Account**' section you will need to enter the appropriate Account Codes for this item to be costed against. You will need to enter the appropriate **F**und, **O**rganisation, **A**ccount and **P**rogram codes (FOAP). This can be typed in or searched by clicking on the magnifying glass to the right of the field 

.
- You can split the item across multiple FOAP's by clicking on the

button.
- Click on '**Add Split**' to view additional 'Account Code' lines.



- You will need to manually calculate the '**Amount**' for each 'Account Code'. Ensure that these balance with the total of your purchase.

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- '**Delivery Notes**' can be added here. These are any special instructions you wish the supplier to see. These may not go to integrated suppliers, it depends on if the supplier's system will take them.

- Click '**Add Attachment**' to add any relevant documentation such as a quote. These will be sent with the order to the supplier (this is not applicable to fully integrated suppliers).

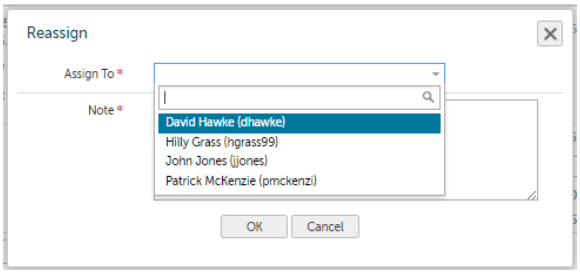
- '**Justification**' field is compulsory, this is where you enter what the purchase is for, who asked you to raise the Requisition or the activity the purchase is associated with.
- If CSU's procedures have not been followed and an invoice has already been received you will need to enter the details here and attach the invoice.

- Click '**Add Attachment**' to add any internal attachments, e-mails or other evidence to support the requisition. These do not get sent to the Supplier.

- The '**Justification Type**' contains forms that maybe appropriate to your requisition, e.g. Hazardous Materials, Radiation Safety or FBT. Forms will be added on an on-going basis. Buyers will need to review this field and use the relevant form for the requisition.

- Once you have completed all of the information in this section, select '**Reassign**' to send your requisition to a Buyer.

- When you select '**Reassign**' a popup will appear. Select the Drop Down beside '**Assign To**' to see the list of Buyers you can use.



- If you need to add more information or cannot finish the requisition you can 'Save' the requisition.

- The 'Incomplete Requisition' will be in your Task List and will be available for you to complete when you are ready to come back to it.

Approval and Order Creation

- Once you have reassigned the requisition it will be sent to the Buyer you selected for completion.
- When the Buyer '**checks out** the finished requisition it will be sent to the relevant Approver for the Organisational (Orgn) code used and the dollar value of the purchase based on the established Delegations.
- The Approver may approve, decline or comment on the requisition.

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- Comments will be notified via an e-mail and can also be viewed within the requisition by clicking on the Comments tab.

- Once approved the Buyer will receive an e-mail advising the Order Number of their requisition. The Purchase Order will be sent to the Supplier from the system.
- See ‘Approver User Guide’ for more information.

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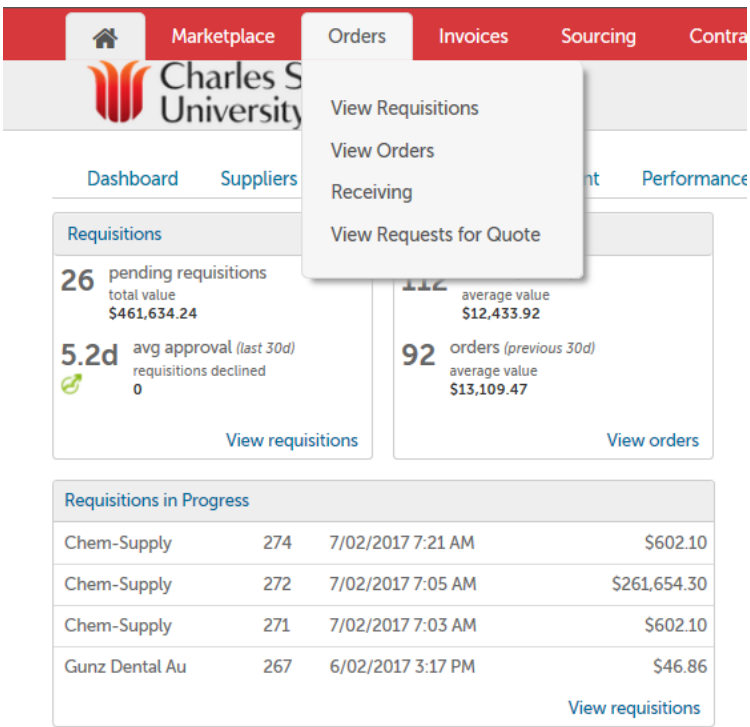
Track a Requisition

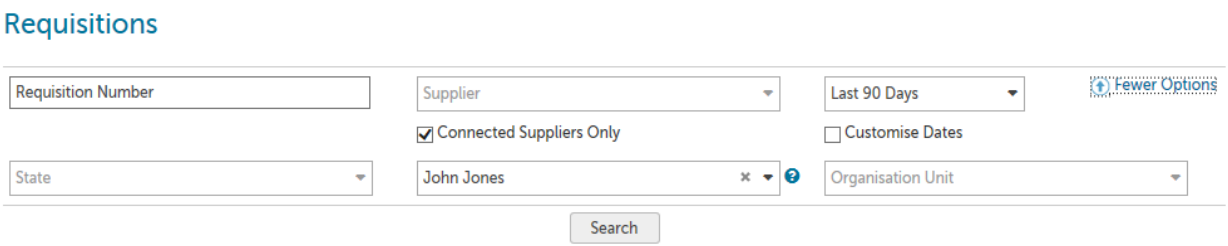
- After you successfully create a requisition you can monitor its progress from your Dashboard on Unimarket.

To track a requisition:

- Click the '**Home**' Icon to see Requisitions in Progress on the Dashboard and click on the requisition number.
- You can also click '**Orders**' then click 'View Requisitions'



- When selecting the '**View Requisitions**' screen, the top portion of the screen allows you to search for a requisition. Select from one or more of the options and then click the '**Search'** button.



- To select a requisition, click the **Requisition number** from the list.

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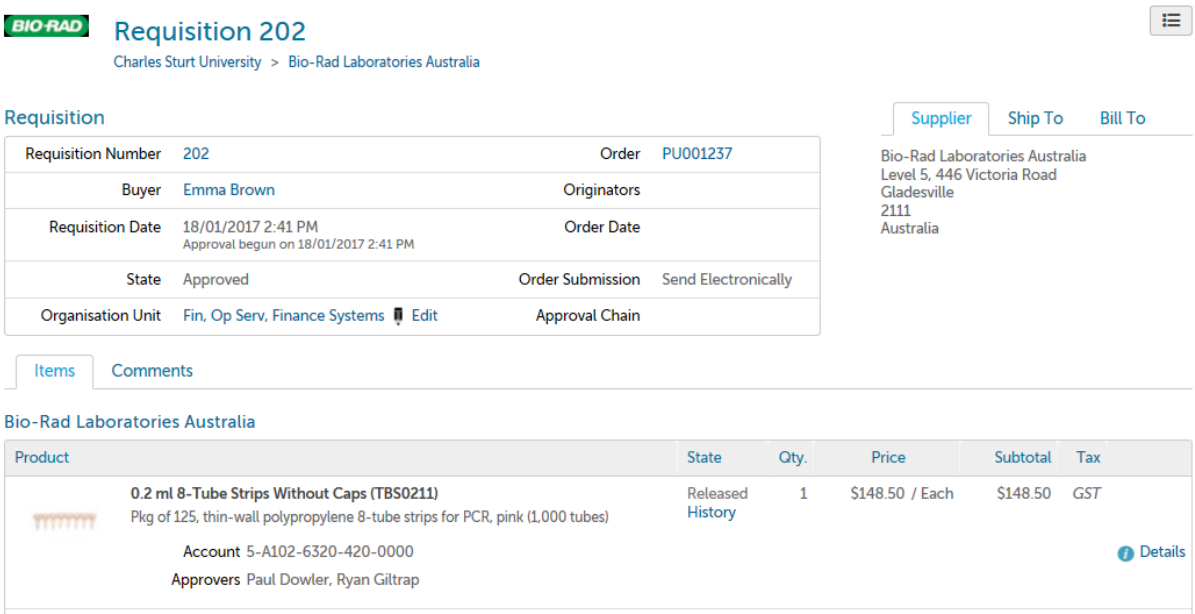
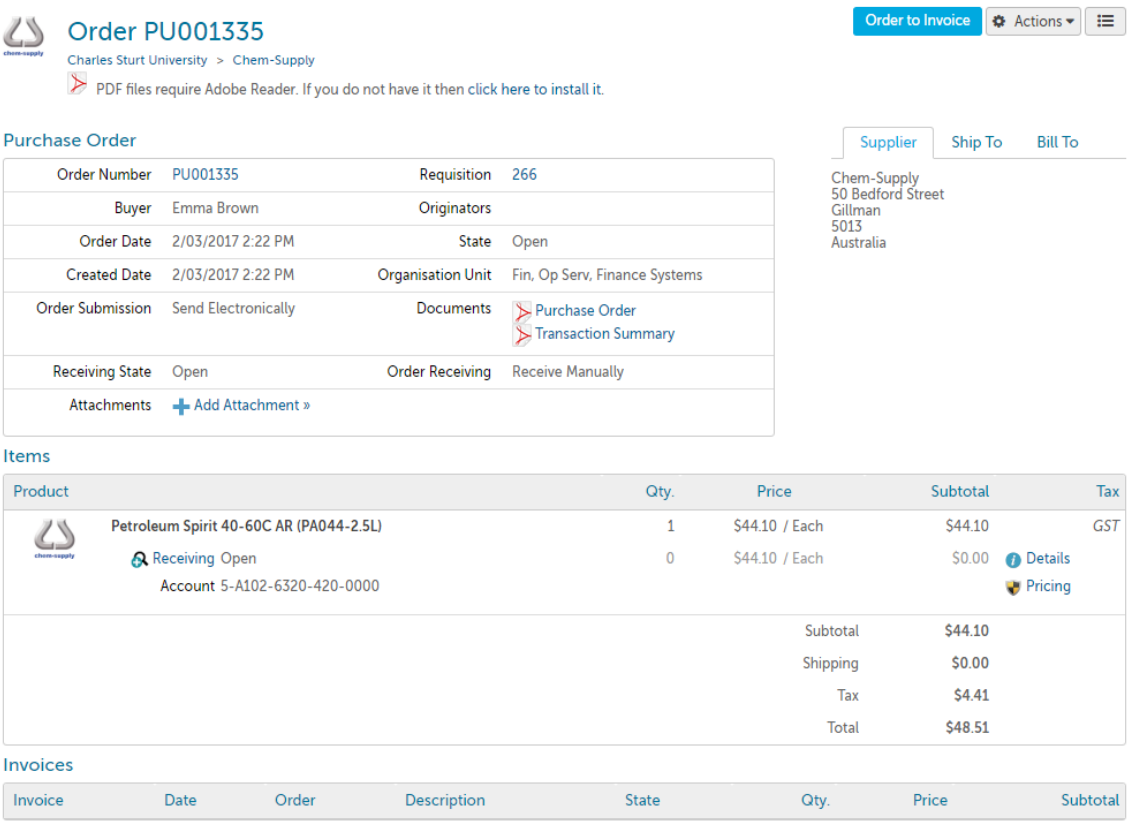
- The Requisition displays as below;



- The various approval statuses include:
    - **Approved** – approved and advanced to the next level
    - **Declined** – not approved and sent back to buyer, Declined requisitions can only be copied and edited for resubmittal by the buyer who originally created the requisition after any amendments have been made.
    - **Escalated** – skipped an individual to advance to the next level of approval.
    - **In Progress** – waiting first level of approval
- Once a requisition is completely approved, a purchase order is generated and sent to the supplier. An email with the purchase order number and details of the purchase order is sent to the Buyer.
- You as the Browser receive a confirmation email from Unimarket when the order is sent to the supplier. You may also receive a confirmation email from the supplier once they process the order.

Review an Order

- You can view a list of recent orders from the Transactions Dashboard or search for an order from the Orders menu.



Order PU001335

Charles Sturt University > Chem-Supply

PDF files require Adobe Reader. If you do not have it then click here to install it.

Order to Invoice | Actions

Purchase Order

Order Number	PU001335	Requisition	266
Buyer	Emma Brown	Originators	
Order Date	2/03/2017 2:22 PM	State	Open
Created Date	2/03/2017 2:22 PM	Organisation Unit	Fin, Op Serv, Finance Systems
Order Submission	Send Electronically	Documents	Purchase Order, Transaction Summary
Receiving State	Open	Order Receiving	Receive Manually
Attachments	Add Attachment »		

Supplier | Ship To | Bill To

Chem-Supply
50 Bedford Street
Gillman
5013
Australia

Items

Product	Qty.	Price	Subtotal	Tax
Petroleum Spirit 40-60C AR (PA044-2.5L)	1	$44.10 / Each	$44.10	GST
Receiving Open	0	$44.10 / Each	$0.00	Details, Pricing
Account 5-A102-6320-420-0000				

Subtotal	$44.10
Shipping	$0.00
Tax	$4.41
Total	$48.51

Invoices

Invoice	Date	Order	Description	State	Qty.	Price	Subtotal

Receiving Orders

- Once the goods or services are received, you will need to access Unimarket and receive the order to allow the payment of any invoices. See the '**Receiving/Returns User Guide**'

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Need Support?

- If you experience any issues, please contact the eProcurement Administrator on Int; 34444, Ext; (02) 69334444 or by email at ePROCUREMENTADMIN@CSU.EDU.AU
- Information can also be found at http://finance.csu.edu.au/purchasing-procurement

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