

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

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

Key Concepts

-  **Catalogue** – supplier products are ‘hosted’ on the UniMarket Marketplace
- **Roundtrip/Punch-out** – supplier products are found on the suppliers’ website
-  **Non-Catalogue** – products requiring information to be entered manually.

From the Transactions Dashboard, you can view information about recent transactions and outstanding tasks, such as pending requisitions, or open receiving. You can also access all information from menus in the top menu bar. The options you have will depend on the user roles you have been assigned.

The Dashboard



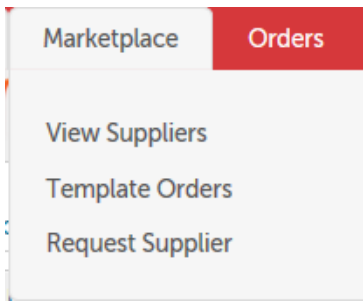
Home – this will take you back to your dashboard from any screen



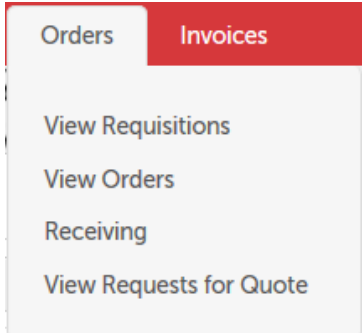
Tasks – this is where you can find actions waiting for you to complete



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

Buyer - Searching for Items

The easiest way to search for items is 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.



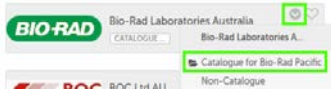
If you know the specific supplier you want to purchase from, click on Marketplace then View Suppliers or, select the Supplier Dashboard tab.

Select the supplier from the list.



Select their 'Hosted Catalogue' either by hovering over the supplier in the list, clicking

the small arrow and selecting their catalogue from the menu



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.



Select View Suppliers from the Marketplace menu, locate the supplier and click the small arrow and select their roundtrip from the menu that to be taken to their website.



Add the items to the supplier cart and then click Return Now (please note 'Return Now' may be different).

| Order Summary | | |
|--|-----|----------|
| Item | Qty | Total |
| Dimethylformamide (Molecular Sieve) Anhydrous (max. 100 ppm water) | 1 | \$151.20 |
| Item Value | | \$151.20 |
| ORDER TOTAL (ex GST) | | \$151.20 |
| plus GST | | \$15.12 |
| ORDER TOTAL (inc GST) | | \$166.32 |

[Edit Order](#) [Return Now](#)

You

will be returned to the Unimarket shopping cart.

Non-Catalogue Items

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

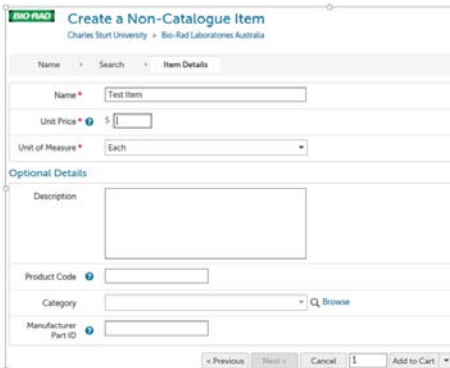
[> Create a Non-Catalogue Item »](#)

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

Item Name *

Note: The system will search across available. If none of the suggested products match what you are looking for click Next to skip this.

Type in the product information.



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 creation 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.

Links

- [Supplier Creation Request](#)
- [Procurement Forms](#)
- [User Guides & Training Videos](#)

- Click '**Supplier Creation Request**' to be taken to University Supplier 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.

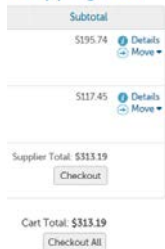
Checkout Items

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.

Shopping Cart



Subtotal

\$195.74 [Details](#) [Move](#)

\$117.45 [Details](#) [Move](#)

Supplier Total: \$313.19 [Checkout](#)

Cart Total: \$313.19 [Checkout All](#)


Create a Requisition

Locations Charles Sturt University / Charles Sturt University

Ship To *

Attn *

Charles Sturt University (21)
Building 21 - Comms and Creative Industries
Boorooma Street North
Wagga Wagga
2550
Australia

In this section you will be 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.

Order Type Standard

If CSU's procedures have not been followed and an invoice has already been received you will need to click '**Order Type**'.

Order Type Retrofit

Retrofit Order

Related Invoice Number

Order Submission *

Tick '**Retrofit Order**' and enter your invoice number.

In most cases you will not want an order to go to the supplier so the default is 'Do Not Send'.


Delivery Date / : PM

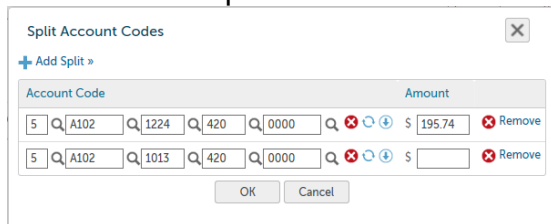
Account

Here you will enter your 'Delivery Date'.

In the 'Account' section you will enter the FOAP (ledger code) for this item to be costed against. You will need to enter the appropriate Fund, Organisation, Account and

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



| Account Code | Amount |
|---|---|
| <input type="text" value="A102"/> <input type="button" value="Q"/> <input type="text" value="1224"/> <input type="button" value="Q"/> <input type="text" value="420"/> <input type="button" value="Q"/> <input type="text" value="0000"/> <input type="button" value="Q"/> <input type="button" value="X"/> <input type="button" value="↺"/> <input type="button" value="↻"/> | \$ 195.74 <input type="button" value="X Remove"/> |
| <input type="text" value="A102"/> <input type="button" value="Q"/> <input type="text" value="1013"/> <input type="button" value="Q"/> <input type="text" value="420"/> <input type="button" value="Q"/> <input type="text" value="0000"/> <input type="button" value="Q"/> <input type="button" value="X"/> <input type="button" value="↺"/> <input type="button" value="↻"/> | \$ <input type="text"/> <input type="button" value="X Remove"/> |

You will need to manually calculate the 'Amount' for each 'Account Code'.

Delivery Notes

'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.

Order Attachments  [+ Add Attachment >](#)

This is for attachments that will be sent with the order to the supplier (not applicable to fully integrated suppliers).

Blanket Order 

If you need to use the 'Blanket Order' field you will have been trained in the use of this field (reference the 'Blanket Order User Guide').

Justification 

Justification 

'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.

Justification Attachments [+ Add Attachment >](#)

This is for internal attachments, e-mails or other evidence to support the requisition.

Justification Type

The 'Justification Type' contains forms that maybe appropriate to your requisition, eg. 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.

Organisation A&E, Technical Services Unit
On Behalf Of * John Jones
Organisation Unit A&E, Technical Services Unit

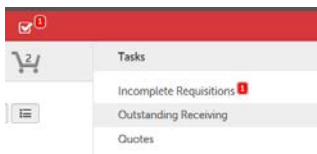
If you have 'On Behalf Of' privileges you will be able to enter someone else's name here.

If required a buyer can 'Reassign' the incomplete requisition to another buyer, for review, change or other as necessary and then to 'Checkout'

Checkout Save Reassign Cancel

If you need to add more information or cannot finish the requisition to 'Checkout' you can save the requisition.

The 'Incomplete Requisition' will be in your Task List  when you want to finish it.



Approval and Order Creation

Once you have checked out your requisition it will be sent to the relevant Approver for the 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.

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

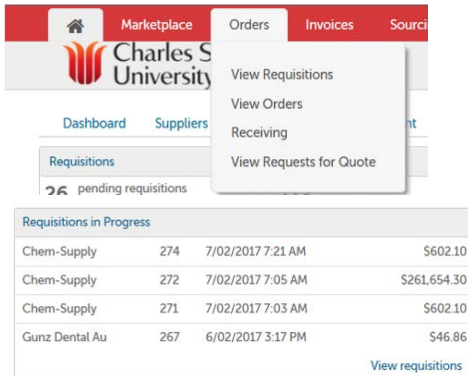
Once approved the Buyer will receive an e-mail advising the Order Number of their requisition.

See 'Approver User Guide' for more information

Track a Requisition

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

You can click 'Orders' then click 'View Requisitions'



The screenshot shows the Charles Sturt University Marketplace interface. The top navigation bar includes 'Marketplace', 'Orders', 'Invoices', and 'Sources'. A dropdown menu is open under 'Orders', listing 'View Requisitions', 'View Orders', 'Receiving', and 'View Requests for Quote'. Below the navigation, there are links for 'Dashboard' and 'Suppliers'. A 'Requisitions' section shows '26 pending requisitions'. A table titled 'Requisitions in Progress' is displayed below.

| Requisitions in Progress | | | | |
|--------------------------|-----|-------------------|--|--------------|
| Chem-Supply | 274 | 7/02/2017 7:21 AM | | \$602.10 |
| Chem-Supply | 272 | 7/02/2017 7:05 AM | | \$261,654.30 |
| Chem-Supply | 271 | 7/02/2017 7:03 AM | | \$602.10 |
| Gunz Dental Au | 267 | 6/02/2017 3:17 PM | | \$46.86 |

[View requisitions](#)

When the View Requisitions screen displays, 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.

The Requisition displays.

The various approval statuses include:

Approved – approved and advanced to the next level

Declined – not approved and sent back to buyer, Declined requisitions can be copied and edited for resubmittal by the buyer who originally created the requisition.

Escalated – skipped an individual to advance to next level

In Progress – current 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 buyer 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

Order to Invoice Actions

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

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: Chem-Supply
50 Bedford Street
Cullinan
5013
Australia

Ship To: Bill To:

Items

| Product | Qty. | Price | Subtotal | Tax |
|---|------|----------------|----------|-----|
| Petroleum Sprint 40-60C AR (PA044-2-51) | 1 | \$44.10 / Each | \$44.10 | GST |
| Account 5-A102-6320-420-0000 | 0 | \$44.10 / Each | \$0.00 | |
| Subtotal | | | \$44.10 | |
| Shipping | | | \$0.00 | |
| Tax | | | \$4.41 | |
| Total | | | \$48.51 | |

Invoices

| Invoice | Date | Order | Description | State | Qty. | Price | Subtotal |
|---------|------|-------|-------------|-------|------|-------|----------|
|---------|------|-------|-------------|-------|------|-------|----------|

Receiving

When the goods or services have been supplied, the buyer will receive them in Unimarket (to acknowledge they have them). The receiving is part of the matching process and has to be completed to allow the invoice to flow through for payment. Invoices will not be able to be paid until the necessary Receiving action is complete.

View Receiving

When you log-in, your Dashboard will display the most recent Orders that are open for receiving.


If you need to receive one of them simply click on the Order Number to go to receiving.

| Open Receiving | | | |
|--------------------|----------|--------------------|--------------|
| Billy Jo's Cakes | PU001354 | 7/03/2017 3:46 PM | \$26.20 |
| Chem-Supply | PU001343 | 7/03/2017 11:11 AM | \$261,184.50 |
| Inlogik Pty Ltd | PU001342 | 7/03/2017 11:10 AM | \$175,000.00 |
| Endeavour Consu... | PU001341 | 7/03/2017 11:09 AM | \$100,000.01 |

[View open orders](#)

To see a list of all orders that still need receiving select 'Orders' and then 'Receiving' from the menu at the top of the screen.

Note: The search will automatically default to results from the last 90 days, so when searching for older orders the date range will need to be changed.



Marketplace Orders Invoices Sources

Charles Sturt University

ng

ber

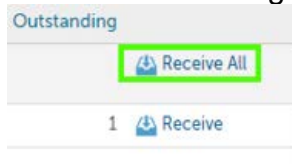
- View Requisitions
- View Orders
- Receiving
- View Requests for Quote

Once you click on Receiving, you will see a list of all available orders with open

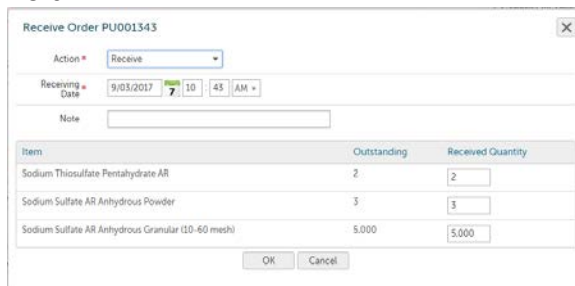
receiving.

Receiving Orders (View Receiving - Receive All)

From the Receiving screen you can select 'Receive All' next to the appropriate order.



A new window will appear to allow you to receive the entire order (default) or select lines of the order and enter the relevant quantity received in the Received Quantity field.



The screenshot shows a window titled 'Receive Order PU001343'. It has a dropdown menu for 'Action' set to 'Receive', a date field for 'Receiving Date' set to 9/03/2017 10:45 AM, and a 'Note' field. Below is a table with columns 'Item', 'Outstanding', and 'Received Quantity'.

| Item | Outstanding | Received Quantity |
|---|-------------|-------------------|
| Sodium Thiosulfate Pentahydrate AR | 2 | 2 |
| Sodium Sulfate AR Anhydrous Powder | 3 | 3 |
| Sodium Sulfate AR Anhydrous Granular (10-60 mesh) | 5,000 | 5,000 |

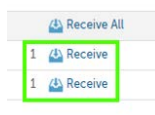
Buttons for 'OK' and 'Cancel' are at the bottom.

To ensure accuracy, review each line against the delivery docket or other appropriate document from the supplier.

If you have nothing to receive against a particular line place a 0 in the 'Received Quantity' field.

(View Receiving - Receive by Line)

Select 'Receive' next to the applicable item line to receipt a quantity for that line only.



The receiving window will appear for that line only.

To ensure accuracy, review the line against the delivery docket or other appropriate document from the supplier.

The 'Action' field is 'Receive'

The date is the actual date of receipt, this will affect payment terms established with the supplier, accuracy is important.

Receive Item 1 on Order PU001354

Name food

Action * Receive

Receiving Date * 9/03/2017 7:10:40 AM

Received Quantity * 1

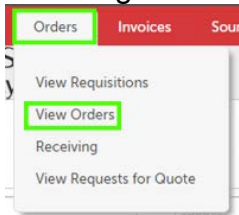
Note

| | Qty. |
|-----------|------|
| Ordered | 1 |
| Delivered | 0 |
| Received | 0 |
| Returned | 0 |
| Invoiced | 0 |

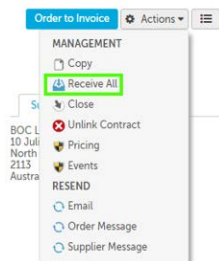
OK Cancel

(From Order)

You can also receive all or by line from within the order screen. Locate the order for the items that have been delivered by going to the Orders menu, selecting View Orders and using the search filters.



Receive by line is next to the order line item and Receive All is found in the Actions menu at the top right of the order screen.



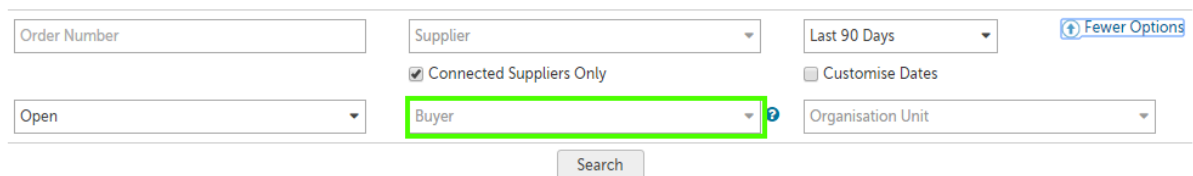
| Subtotal | Tax |
|----------|---------|
| \$489.27 | GST |
| \$0.00 | Receive |
| | Details |
| | Pricing |

Receiving On Behalf Of

If you have been given the 'On Behalf of Receiving' role or your community has 'Receiving Sharing' enabled when you go to the Receiving screen you can either see all the orders with open receiving for your whole community or within your Organization Unit(s).

Depending on your settings you may need to remove your name from the Buyer dropdown. You can receive items on behalf of other users using the usual receiving process.

Receiving



The screenshot shows a search interface with the following elements:

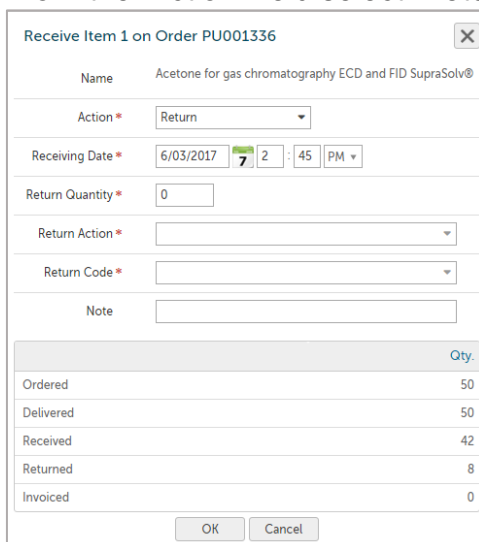
- Order Number:
- Supplier:
- Last 90 Days:
- [Fewer Options](#)
- Connected Suppliers Only
- Customise Dates
- Open:
- Buyer: (highlighted with a green border)
- Organisation Unit:
- Search:

Returns

This allows you to return items delivered by the supplier and also make changes to the received quantity if an error is made.

Select Receive next to the relevant item.

From the 'Action' field select 'Return'.




The dialog box shows the following details for 'Acetone for gas chromatography ECD and FID SupraSolv®':

- Name: Acetone for gas chromatography ECD and FID SupraSolv®
- Action:
- Receiving Date: 6/03/2017 7:24:45 PM
- Return Quantity:
- Return Action:
- Return Code:
- Note:

| | Qty. |
|-----------|------|
| Ordered | 50 |
| Delivered | 50 |
| Received | 42 |
| Returned | 8 |
| Invoiced | 0 |

Buttons:

Enter the appropriate details, including the Return Quantity, Return Code and if any further explanation is needed for why the item is being returned, use the note field. If the entire quantity has already been received for the item you will need to 'reopen' it.

Select  **Reopen** on the right side of the item.

Items

| Product | Qty. | Price | Subtotal | Tax |
|---|------|--------------------|----------|---|
|  HANDIGAS P SIZE (118P) Receiving Closed Account 5-A103-6024-403-0000 | 10 | \$44.00 / Cylinder | \$440.00 | GST |
| | 10 | \$44.00 / Cylinder | \$440.00 |  Reopen  Details |
| Subtotal | | | \$440.00 | |

Reopen item 1 on order PU001345 ✕

Name: HANDIGAS P SIZE

Description: HANDIGAS P SIZE

Note *

The 'reopen' popup will appear. Complete the 'Note' field with the reason for reopening the item. Select 'OK'

The item now has 'receive' available to be selected.

Item not to be Delivered

Item on an Order not to be delivered?

The line will need to be 'Manually Closed'

Select 'receive' against the item that is not to be delivered.

Receive Item 1 on Order PU001341 ✕

Name: Hush Hush stuff

Action *

Warning: Manually closing receiving will prevent any more goods from being received and may prevent invoices from being matched.

Note *

| | Qty. |
|-----------|------|
| Ordered | 1 |
| Delivered | 0 |
| Received | 0 |
| Returned | 0 |
| Invoiced | 0 |

In the 'Action' field select 'Manual Close'
fill in the 'Note' field with the reason.

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>