

# Unimarket Buyer User Guide

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## Guiding Principles: University Expenditures

The University is a public statutory body and all its funds, irrespective of the source, are public monies. The University's funds must be spent for its defined purposes and in its best interests.

The University is accountable publicly for the use of its funds and all employees exercising financial authority under delegation are responsible for ensuring that approvals for expenditures comply with University delegations, policies and procedures.

All purchasing transactions must meet the following four (4) principles. An expenditure must be:

1. Necessary to perform a valid business purpose fulfilling the mission of the University. If required, employees must be able to identify and justify the relationship or nexus between the expenditure and the official business of the University.
2. Reasonable and represent "value for money" in that the expenditure amount is not extreme or excessive.
3. Appropriate in that the expenditure is suitable and fitting in the context of the valid business purpose.
4. Allowable according to the terms of any regulation, law, sponsored contract, or University policy and procedures. There is evidence that University procedures have been followed to demonstrate that a prudent decision to incur the expense has been made.

Consistent with the above guiding principles:

- a. University funds cannot be used for private purposes, under any circumstances.
- b. An employee is entitled to the reimbursement of approved reasonable expenses they incur on behalf of the University.
- c. Research grants received by the University are University funds and must be used for specified purposes of the grants. Any property or goods and services purchased with the funds remain the property of the University at all times.
- d. An employee cannot provide goods or services to the University in any capacity, outside of those provided through their employment relationship.
- e. An employee cannot enter into a commitment for the supply of goods or the performance of services unless designated funds are available and the appropriate approval has been obtained as set out in University delegations.
- f. An employee approving purchases must ensure they are familiar with the restrictions outlined in the delegations' documentation.
- g. An employee cannot approve their own expenditures.
- h. All expenditures must be properly documented.

Managers should lead by example and foster a culture of moderation when spending University funds. They must scrutinise and exercise good judgement in approving and reimbursing expenditures, having due regard to the University's Code of Conduct.

The concept of "value for money" is not restricted to price alone and should include assessment of key factors like sustainability, quality, service and support, whole-of-life costs, as well as transaction costs associated with acquisition, use, holding, maintenance and disposal of the item purchased.

Confidentiality must be maintained in all purchasing transactions.

Employees must not accept gifts, gratuities, or any other benefit which may influence, or might be seen and deemed to influence equity, impartiality and sound judgements.

An employee cannot undertake negotiations, contracts or arrangements in which they have either a pecuniary or significant non-pecuniary relationship with any supplier. The latter relationship would include immediate family members.

Heads of budget centres are responsible for monitoring expenditures in their budget centre, and are encouraged to be frugal and to minimise their expenditures where possible.

Procurement of goods and services relating to specialised work functions and responsibilities of the University (such as building works and projects, information technology, library services and publications) must be placed either through or by the relevant Division/Office/Faculty. For example:

- Computers/ AV Equipment - contact: CSU Computer Shop;
- Books/ Journals/ Subscriptions - contact: Division of Library Services;
- Printing - contact: CSU Print;
- Radioactive Materials – contact: Radiation Safety Committee;
- Catering on campus – contact: CSU Events Unit.

Failure to follow the above principles (and any aspect of this document) may result in disciplinary action.

## Before You Start




Access to the CSU eProcurement system, Unimarket, will only be granted following appropriate training. User guides and training material can be found at <http://finance.csu.edu.au/systems/procurement>

## Logging In

- Open a web browser.
- Unimarket is accessed via the following link:  
<http://finance.csu.edu.au/systems/procurement>
- Log in using your CSU username and password.
- There is also a link to Unimarket on the Division of Finance webpage:  
<http://www.csu.edu.au/division/finserv>
- Enter your CSU user name and password.
- The Unimarket home page will open.

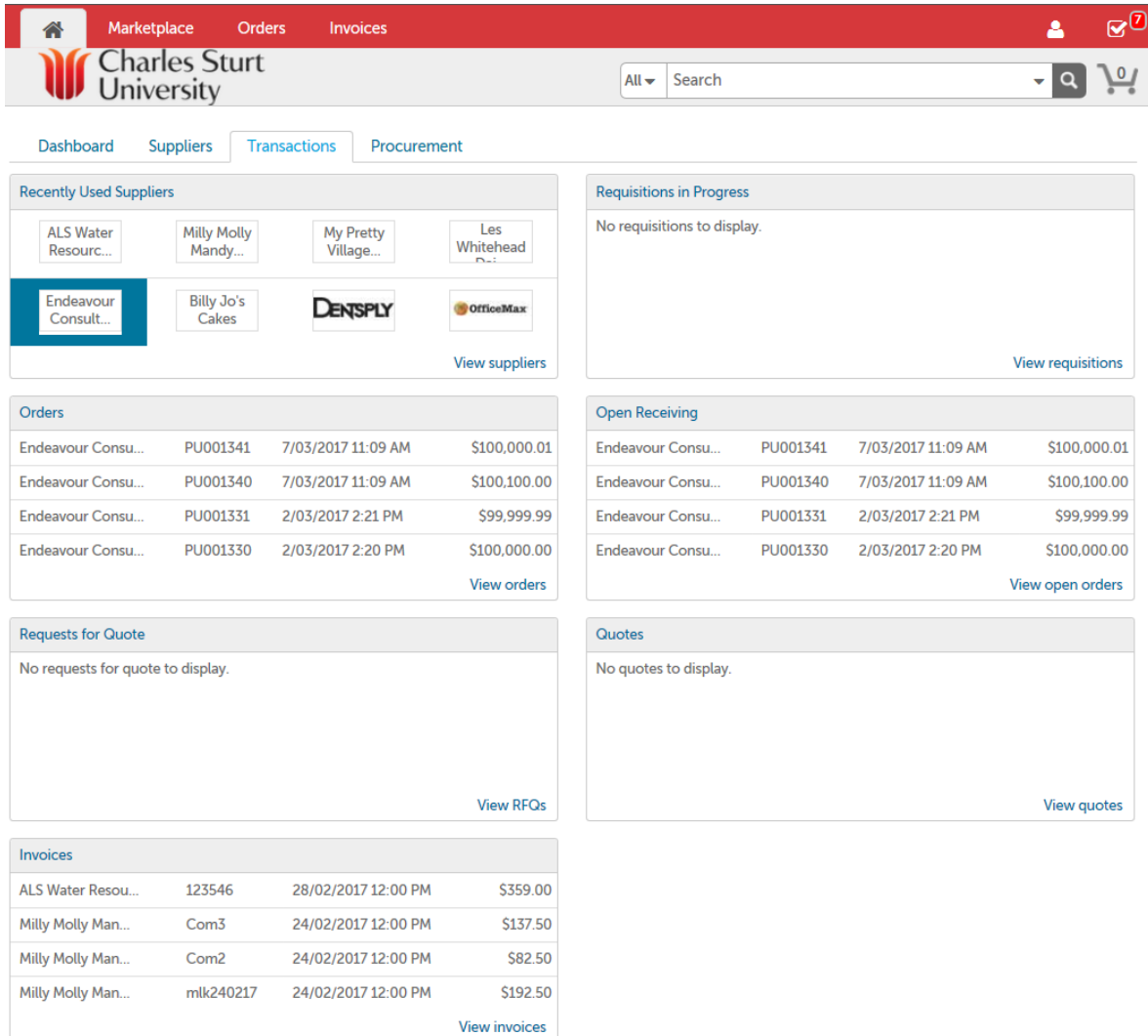
If you experience any issues logging in, please contact the Unimarket Administrator on Int; 34444, Ext; (02) 69334444 or by email at [eProcurementAdmin@csu.edu.au](mailto:eProcurementAdmin@csu.edu.au)

## Key Concepts

- CSU has an eProcurement system (Unimarket) to streamline 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,
  - select items to place in to their shopping cart,
  - checkout their items to create a requisition,
  - checkout the requisition 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/punch-out access to their site from Unimarket.
  - **Non-Catalogue Supplier** – a supplier who does not have a hosted catalogue in Unimarket or provide roundtrip/punch-out 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** – The supplier's products are listed in Unimarket via the Supplier Catalogue. Products can be selected and added to your shopping cart in Unimarket (i.e. no need to leave Unimarket to search and order these products).
  - If a catalogue supplier has a product that you want to purchase and it cannot be found in their catalogue, you can manually order the product as a non-catalogue item (see below).
  -  **Roundtrip/Punch-out** – The supplier's products are found on the suppliers' website via a direct link from the Unimarket Marketplace. A new window or tab opens and you are signed into CSU's account on the supplier's ecommerce site.
  -  **Non-Catalogue** – products requiring information to be entered manually. Catalogue suppliers could have products you want to purchase that are not on their CSU catalogues. If a product is not found in any of their catalogues, you can manually enter a non-catalogue item.
- It is CSU procedure that purchase orders are to be issued before goods or services are requested from suppliers.
- 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 should be provided in the 'Justification Box'.

## The Dashboard

- After logging in, the Unimarket Dashboard will appear in your browser. The Unimarket Dashboard is the navigation point from which the information stored in CSU's eProcurement Marketplace is viewed. Outstanding Tasks are also accessed via the Dashboard.



The screenshot shows the Charles Sturt University Unimarket Dashboard. The top navigation bar includes links for Marketplace, Orders, and Invoices. Below this, the dashboard is divided into several sections:

- Recently Used Suppliers:** A grid of supplier cards including ALS Water Resourc..., Milly Molly Mandy..., My Pretty Village..., Les Whitehead..., Endeavour Consult..., Billy Jo's Cakes, DENSPLY, and OfficeMax. A "View suppliers" link is at the bottom.
- Requisitions in Progress:** A section stating "No requisitions to display." with a "View requisitions" link.
- Orders:** A table listing orders from Endeavour Consult... with columns for order ID, date, time, and amount. A "View orders" link is at the bottom.
- Open Receiving:** A table listing open receiving orders from Endeavour Consult... with columns for order ID, date, time, and amount. A "View open orders" link is at the bottom.
- Requests for Quote:** A section stating "No requests for quote to display." with a "View RFQs" link.
- Quotes:** A section stating "No quotes to display." with a "View quotes" link.
- Invoices:** A table listing invoices from ALS Water Resou... and Milly Molly Man... with columns for invoice ID, date, time, and amount. A "View invoices" link is at the bottom.

- 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 menus in the top menu bar.
- The options that display will depend on the user roles you have been assigned.

## The Toolbar



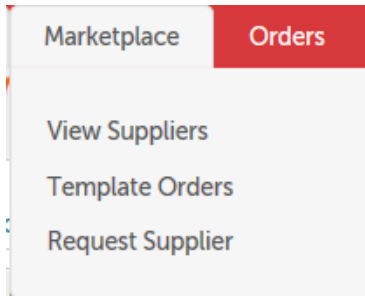
**'Home'** – this will take you back to your dashboard from any screen



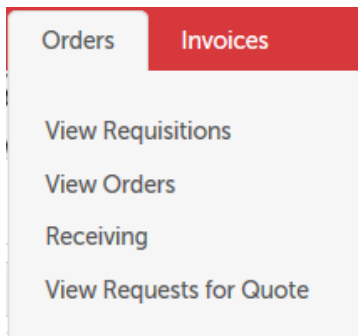
**'Tasks'** – this is where you will find tasks awaiting your action.



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



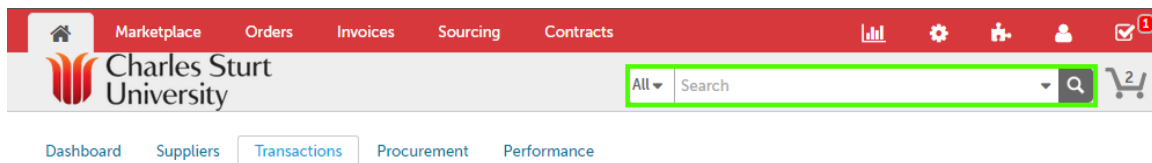
**'Marketplace'** – allows you to view supplier information



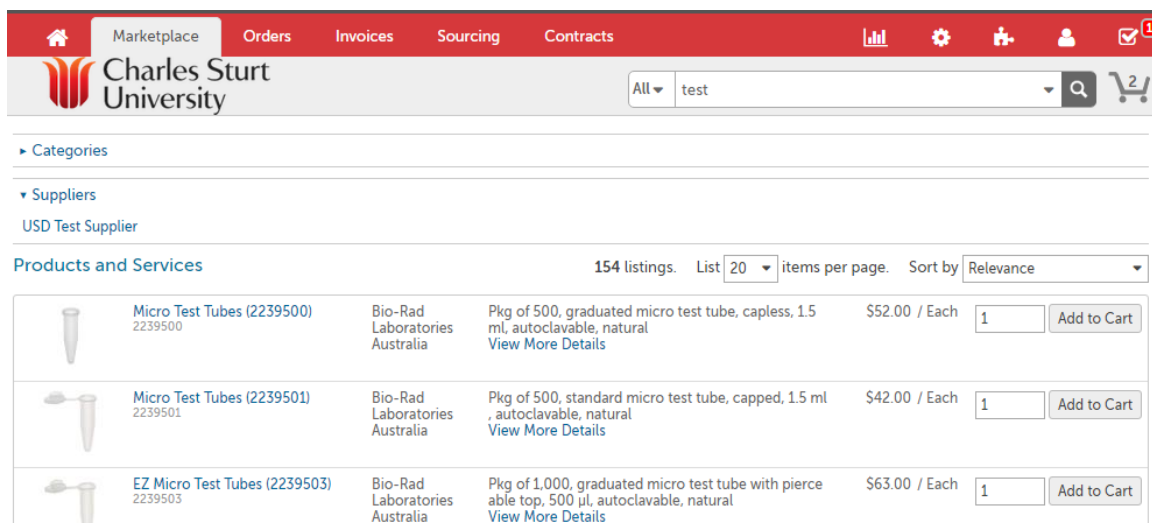
**'Orders'** – is where you can find order related activities

## 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.
- NOTE:** Roundtrip catalogues are not searched with this function. Only hosted catalogues will be searched.

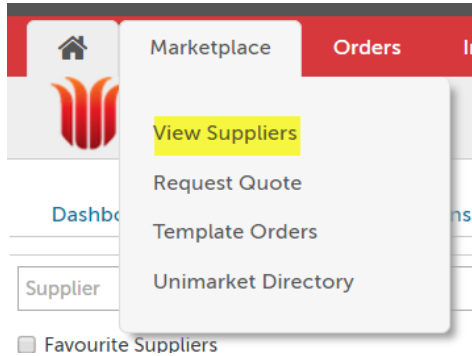


- A list of matching items will be returned, then click '**Add to Cart**' on the item(s) that you require. Remember to add the quantity that you require if more than "1".

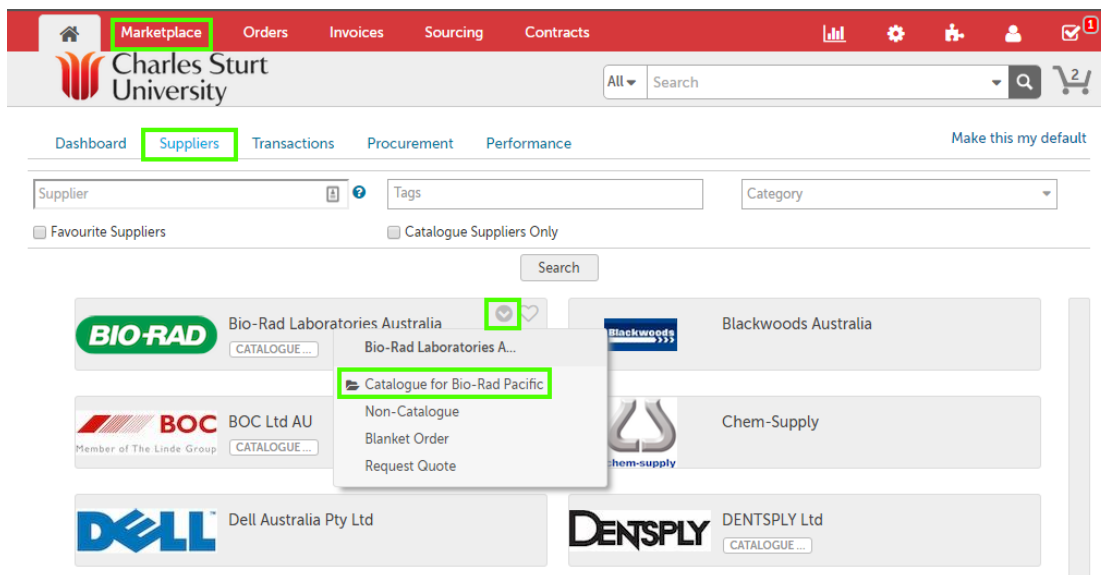


## Searching for Items to Purchase (from Supplier catalogue)

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



- Select the supplier from the list or search for them using the search fields.



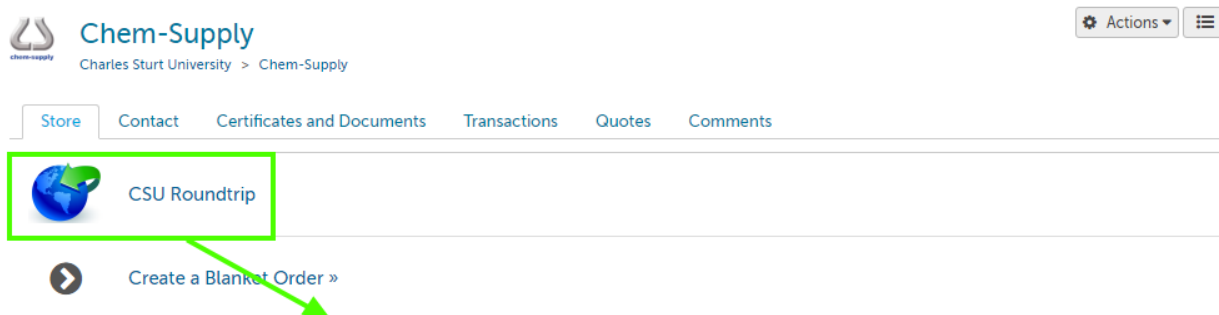
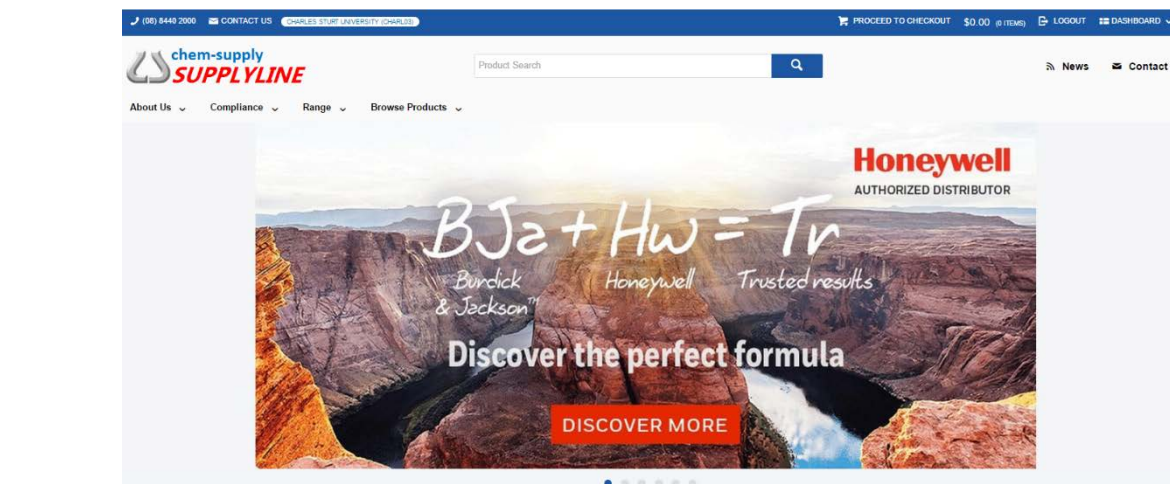
- You can select their 'Hosted Catalogue' either by hovering over the supplier in the list, clicking the small down arrow, and then select their catalogue from the menu that appears or, by clicking on the supplier tile and selecting their catalogue from the list (see below for Ordering from a Roundtrip).
- 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 hosted catalogue products will be returned.



- NOTE:** Roundtrip catalogues are not searched with this function. Only hosted catalogues will be searched.

## 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, the pricing you see is established for CSU.
- 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.

**Order Summary**


Item	Qty	Total
Dimethylformamide (Molecular Sieves) Anhydrous (max. 100 ppm water)	7	\$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](#)

- Add the items to the supplier cart and then click '**Return Now**' (please note that the wording 'Return Now' may be different for each Supplier).
- 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**'.




**Bio-Rad Laboratories Australia**  
Charles Sturt University > Bio-Rad Laboratories Australia

CATALOGUE SUPPLIERS

Store   Contact   Transactions   Quotes

► Categories


---

 Catalogue for Bio-Rad Pacific (3594)

---

➤ [Create a Non-Catalogue Item »](#)

- Type the name of the item you want to purchase. The name of the item should be kept to a maximum of 50 characters. You should include enough detail so that the supplier knows what you need them to provide and the description should be specific eg. "Scones" not "Morning Tea". Additional information can be entered when the unit price is entered.



**Create a Non-Catalogue Item**  
Charles Sturt University > 3M Australia Pty Limited

Name   Search   Item Details

Item Name\*

< Previous   Next >   Cancel   1   Add to Cart

- When you have given your product or service a name, 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.

Continue with a Non-Catalogue Item;

Name
Search
Item Details

Name \*

Unit Price \*

Unit of Measure \*

Optional Details

Description

Product Code

Category  [Browse](#)

Manufacturer Part ID

< Previous
Next >
Cancel
1
Add to Cart

- Type in the product information. Note: Fields marked with a red asterisk (\*) are required fields.

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

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

**NOTE - Foreign Currency** - In Unimarket a supplier can be 'Registered' or 'Lite'. A registered supplier can nominate a foreign currency to trade with us in. In this case, your 'Price' will be entered in the currency nominated by the supplier and Unimarket will process the conversion to AUD for the approval. The 'Unit Price' field has the foreign currency identified.

Unit Price \*

'Lite' suppliers are only loaded into Unimarket using AUD. Take the quoted currency and use a currency converter to estimate the AUD amount to enter into the 'Unit Price' field. Take a screen shot of the converter you used and attach it to the 'justification' area during the 'Create a Requisition' process. The foreign currency and original price are to be entered in to the 'Justification' area when creating a requisition.

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

**'Description'** – type a basic description of product. This is where you can provide further details for your item that were not in the Item Name, eg, size, colour, specifics, etc. **The item Name and Description 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.

**'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 manufacturer's product.

- Type in the quantity to be ordered, in the field before the 'Add to Cart' button.

---

< Previous	Next >	Cancel	1	Add to Cart
------------	--------	--------	---	-------------

- Click the '**Add to Cart**' button.

## Request a New Supplier

- It is CSU policy to use approved suppliers only. If your search does not find the supplier you wish to use, you will need to request that the supplier be created.
- 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.
- The **Unimarket Supplier Creation Request** form will need to be completed and forwarded to [eProcurementAdmin@csu.edu.au](mailto:eProcurementAdmin@csu.edu.au). The form can be found on the 'Home Screen' under 'Links' you will find the 'Supplier Request' selection, or from the Finance Website under Forms.

All ▾

▾

- 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. Note: if the form is opened with Chrome, please save to your desktop first and complete from there.

Charles Sturt University		UNIMARKET SUPPLIER CREATION REQUEST <small>INTERNAL PROCESS FORM ONLY – NOT FOR EXTERNAL DISTRIBUTION</small>		REQUESTED BY	
This form is to be used to request a supplier be created in Unimarket. Please note that all requests will go through a review process and not all requests will be approved for the supplier to be created. To protect CSU and its Suppliers, the fields indicated with a * require supporting documentation from the Vendor to be included with this form.				NAME: <input style="width: 150px;" type="text"/> DATE: <input style="width: 80px;" type="text"/> UNIT: <input style="width: 150px;" type="text"/>	
<b>Part 1. SUPPLIER DETAILS</b>					
Supplier Name: <input style="width: 500px;" type="text"/>					
Does the supplier have an ABN?		<input type="checkbox"/> Yes <input type="checkbox"/> No		Is the supplier a CSU Student?	
		<input type="checkbox"/> Yes <input type="checkbox"/> No			
* If Yes, what is their ABN		If Yes, Student ID			
Supplier Purchasing Contact Name		<b>Physical Address Details</b>			
Our account Number with the supplier		Street Address			
Email address for orders #		City			
Email address for remittance advices		State		Postcode	
If you have something from the supplier that shows their bank details, please send it with this form.		Phone		Country	
<b>Additional Information</b>					
Tags to be associated with this supplier Select as many as appropriate		<input type="checkbox"/> Accounting & Auditing Services <input type="checkbox"/> Accommodation <input type="checkbox"/> Advertising <input type="checkbox"/> Agricultural Providers <input type="checkbox"/> Audio Visual <input type="checkbox"/> Awards <input type="checkbox"/> Building & Hardware Supplies <input type="checkbox"/> Building Specialists <input type="checkbox"/> Building Services <input type="checkbox"/> Catering Services <input type="checkbox"/> Cleaning Services <input type="checkbox"/> Conference & Seminar Providers <input type="checkbox"/> Clothing Supplies <input type="checkbox"/> Donations & Sponsorship <input type="checkbox"/> Department Stores <input type="checkbox"/> Examination Services <input type="checkbox"/> Facilities Maintenance <input type="checkbox"/> Financial Services <input type="checkbox"/> Government Services <input type="checkbox"/> Health Providers <input type="checkbox"/> Hospitality Suppliers <input type="checkbox"/> IT Consultants & Contractors <input type="checkbox"/> IT Hardware Suppliers <input type="checkbox"/> Insurance Services <input type="checkbox"/> Internal Suppliers <input type="checkbox"/> Library Providers <input type="checkbox"/> Legal Services <input type="checkbox"/> Logistics Providers (Freight) <input type="checkbox"/> Motor Vehicles <input type="checkbox"/> Office Equipment <input type="checkbox"/> Office Furniture <input type="checkbox"/> Paper <input type="checkbox"/> Professional Services <input type="checkbox"/> Practicum Supervision <input type="checkbox"/> Photographic Providers <input type="checkbox"/> Printing Services <input type="checkbox"/> Postal Services <input type="checkbox"/> Research Providers <input type="checkbox"/> Schools <input type="checkbox"/> Scientific Providers <input type="checkbox"/> Specialty Suppliers <input type="checkbox"/> Stationery Suppliers <input type="checkbox"/> Students <input type="checkbox"/> Software Providers <input type="checkbox"/> Telecommunications <input type="checkbox"/> Veterinary Suppliers			
Search terms you would associate with this supplier					
<b>Part 2. DFM SUPPLIERS</b>					
a. Is this supplier a Division of Facilities Management (DFM) provider? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please answer b. below.					
b. Is this supplier on the DFM Endorsed Provider List? <input type="checkbox"/> Yes <input type="checkbox"/> No If No, please contact DFM Procurement and Risk Management to get their endorsement before submitting this form. If yes please attach supporting documentation.					
<b>Part 3. PAYMENT TERMS</b>					
Please advise all suppliers that CSU payment terms are 30 days					

- Ensure you attach evidence of the suppliers address and ABN. This can be an e-mail or copy of a quote from the supplier.
- Importantly, the **Requested By** needs to be completed so that the eProcurement Admin staff know who to advise when the supplier has been made available to you in Unimarket.
- Once you have completed the request, click 'submit' in the lower right corner and email the form to the eProcurement Administrator to process. You will be notified by email if the request has been accepted or declined. If the requested supplier is declined you will be notified of the reason.





## 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 – there is a tick box at the beginning of each item that shows if they will be include on the requisition you checkout.
- Click **'Checkout'** to start the creation of your requisition.
- You can **'Checkout'** each supplier or the whole **'Cart'**. If you need to use multiple cost codes for the different suppliers, checking out 1 at a time may be easier, but Unimarket will create and send 1 Purchase Order per Supplier.

### Shopping Cart

⚙️ Actions ▾

DENTSPLY Ltd

Product	Quantity	Price	Subtotal	
<input checked="" type="checkbox"/>  <b>ASPIJECT ASP SYRINGE (2027)</b> Ronvig Aspiject Auto Aspiring Syringe. Well balanced light weight 50g but solid construction. High grade acid and heat resistant stainless steel.	1 	\$195.74 / Each	\$195.74	<a href="#">Details</a> <a href="#">Move</a> ▾
<input checked="" type="checkbox"/>  <b>CITANEST 3% OCT SA 100 x 2.2ML (8060122)</b> 3% Prilocaine with Octapressin 0.03 IU/ml: Indicated for the production of local anesthesia in routine dental procedures & oral surgery by means of infiltrat... <a href="#">More...</a>	1 	\$117.45 / Each	\$117.45	<a href="#">Details</a> <a href="#">Move</a> ▾
			Supplier Total: <b>\$313.19</b>	<input type="button" value="Checkout"/>

Cart Total: **\$313.19**

## Create a Requisition


- During the creation of the requisition you will need to:
  - select the '**Ship To**' location (this will default to the last one used);
  - indicate the '**Order Type**';
  - enter the Ledger Account Codes (FOAP) to be used for each line;
  - select the delivery date;
  - identify GST component;
  - enter Justification text and attachments;
  - attach documentation that needs to go with the order to the supplier (e.g. Quote);
  - add '**Delivery Notes**' (not applicable to integrated catalogue suppliers).

**Note:** Buyers are not to communicate Requisition Numbers to Suppliers. Requisition numbers are an internal CSU reference only.

## Ship To

### Checkout

▼ Locations Charles Sturt University / Charles Sturt University	
Ship To * <input type="text" value="Division of Finance - 8"/>	Bill To * <input type="text" value="Accounts Payable"/>
Attn * <input type="text" value="Generic User"/> Charles Sturt University [8] Building 8 - Division of Finance Boorooma Street North Wagga Wagga 2650 Australia	Attn:Accounts Payable Charles Sturt University [1111] accountspayable@csu.edu.au Locked Bag 677 Wagga Wagga 2678 Australia


- 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 or just start typing your building number into the field and select from the options offered.

## Order Type


Order Type Standard

- Unimarket default is to an Order Type of 'Standard'.
- If CSU's procedures have not been followed and an invoice has already been received you will need to change from a 'Standard Order' to a 'Retrofit Order'.
- Click on '**Order Type**'.

Order Type Retrofit


Retrofit Order  ☒


Related Invoice Number




Order Submission 

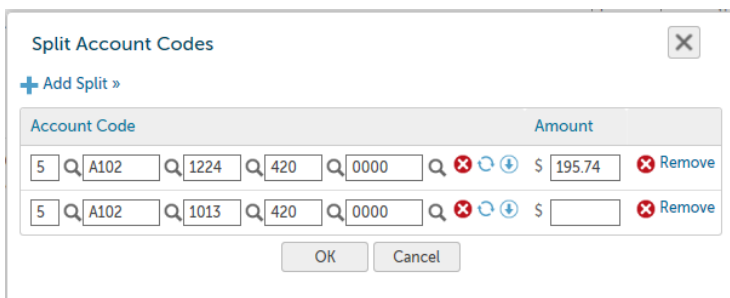
- Tick '**Retrofit Order**' and enter your invoice number.
- In most cases you will not want an order to go to the supplier so the default is '**Do Not Send**' – do not change this.
- For **Retrofit Orders** - Once you have finished your Requisition and it is approved, you will receive a Purchase Order Number by e-mail. Receive the Order. Send the invoice to by email it to [accountspayable@csu.edu.au](mailto:accountspayable@csu.edu.au), noting the Supplier Name, invoice number and Purchase Order in the subject line of the e-mail.

## Delivery Date and Account Code (FOAP)

Delivery Date   :   

Account          Split

- 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.
- The exception to this is 'Retrofit Orders' where the goods/services have already been received so this field can be left blank.
- Once you have entered your delivery date in the first line you can click on the 'copy down' symbol  to repeat this for each line.
- In the '**Account**' section you will need to enter the appropriate Ledger Account Codes for this item to be costed against. You will need to enter the appropriate **Fund**, **Organisation**, **Account** and **Program** 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  Split button.
- Click on '**Add Split**' to view additional 'Account Code' lines.




Split Account Codes

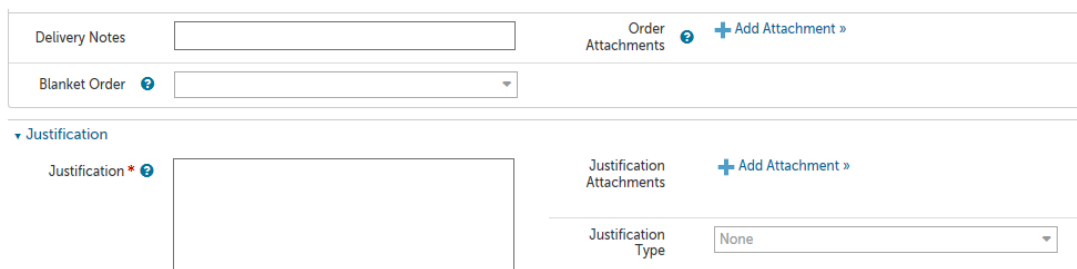
+ Add Split »

Account Code						Amount	
5	A102	1224	420	0000		\$ 195.74	Remove
5	A102	1013	420	0000		\$	Remove


OK Cancel


- You will need to manually calculate the '**Amount**' for each 'Account Code'. Ensure that these balance with the total of your purchase.
- Once you have entered your Account information in the first line you can click on the 'copy down' symbol  to repeat this for each line, if they are to be the same.


## Delivery Notes and Order Attachments




Delivery Notes

Blanket Order 

Order Attachments  + Add Attachment »

Justification 

Justification Attachments  + Add Attachment »

Justification Type

- '**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 »

- 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).


## Applying a Blanket Order

Blanket Order 

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

## Justification

▼ Justification

Justification \* 

Justification Attachments [+ Add Attachment »](#)

Justification Type


- '**Justification**' field is compulsory, this is where you enter the reason for the purchase, the who asked you to raise the Requisition or who the goods or service is for, what activity the purchase is associated with, why the purchase/service is required. If you have used a converted amount from a foreign currency you are to enter the original currency and price here in the justification.


Justification Attachments [+ Add Attachment »](#)

- 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. If you have used a converted amount from a foreign currency you are to attach a screen shot of the converter you used as well as any other supporting documentation.

## On Behalf Of

▼ Organisation

On Behalf Of \* 

Organisation Unit \* 

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

## Reassign a Requisition

- If required, a Buyer can '**Reassign**' the incomplete requisition to another Buyer, for review and/ or amendment and '**Checkout**'


- If you need to add more information or cannot finish the requisition to '**Checkout**' you can '**Save**' the requisition.
- When you click on the Reassign button you will be presented with a screen for you to choose a Buyer to reassign it to. The list will be the Buyers for the Organisational Unit the requisition has been raised for.
- If a requisition has been reassigned to you, you will receive an email that will include the requisition number, any comment the Browser made and a link to the requisition.
- These reassigned requisitions will appear in your Tasks on the toolbar as 'Incomplete Requisitions'.

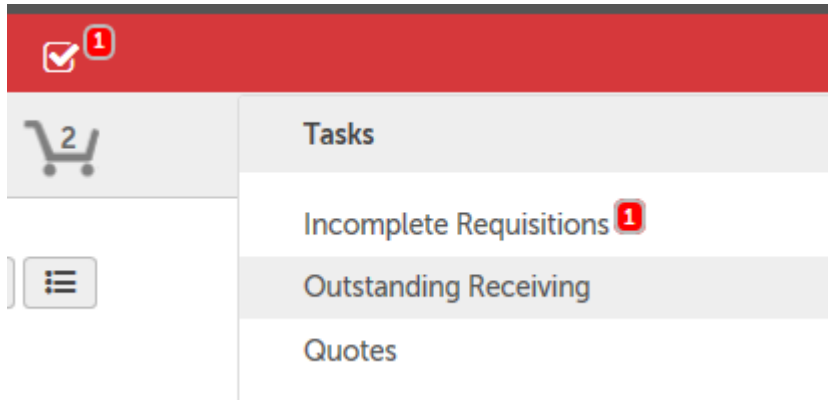
## Saving a Requisition



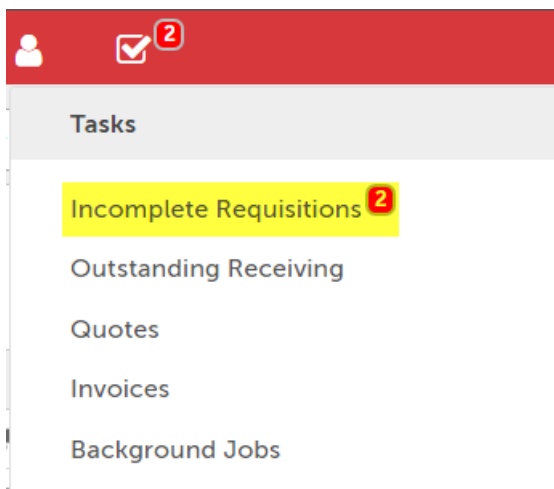
- If you need to add more information or cannot finish the requisition to '**Checkout**' you can '**Save**' the requisition.
- This then becomes an 'Incomplete Requisition'.

## Incomplete Requisitions

- 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.



- Buyers are not to communicate Requisition Numbers to Suppliers.
- If you are a Buyer for your Organisation Unit, Browsers will reassign incomplete requisitions to you for your action. These assigned requisitions will appear in your '**Tasks**' in '**Incomplete Requisitions**'




## Approval and Purchase Order Creation

- Once you have Checked Out your 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.
- Comments will be notified via an e-mail and can also be viewed within the requisition by clicking on the Comments tab.

[Items](#)
[Justification](#)
[Approvals](#)
[Comments \(1\)](#)

Officemax AU

- Once the requisition is approved the Buyer will receive an e-mail advising the Purchase Order Number for their requisition. The Purchase Order will be sent to the Supplier from the system.
- See '**Approver User Guide**' for more information.
- If your requisition is '**Declined**' you will receive an email notifying you and you will need to make a copy of the original requisition, amend any issues raised by the Approver and re-submit.
- Go into the requisition and then go to the Actions button in the top right of the screen.
- Click '**Copy**' and a new requisition will be created for you to amend any details then '**Checkout**' as normal.


**Requisition 394**  
Charles Sturt University > Bio-Rad Laboratories Australia

Actions

Copy

[Supplier](#)
[Ship To](#)
[Bill To](#)


Bio-Rad Laboratories Australia  
Level 5, 446 Victoria Road  
Gladesville  
2111  
Australia

**Requisition**

Requisition Number	394	Order	
Buyer	Carolyn Mazzocchi	Originators	
Requisition Date	10/03/2017 2:22 PM Approval begun on 10/03/2017 2:22 PM	Order Date	
State	Declined	Order Submission	Send Electronically
Organisation Unit	Fin, Op Serv, Procurement & Travel	Edit	Approval Chain

[Items](#)
[Justification](#)
[Approvals](#)
[Comments](#)

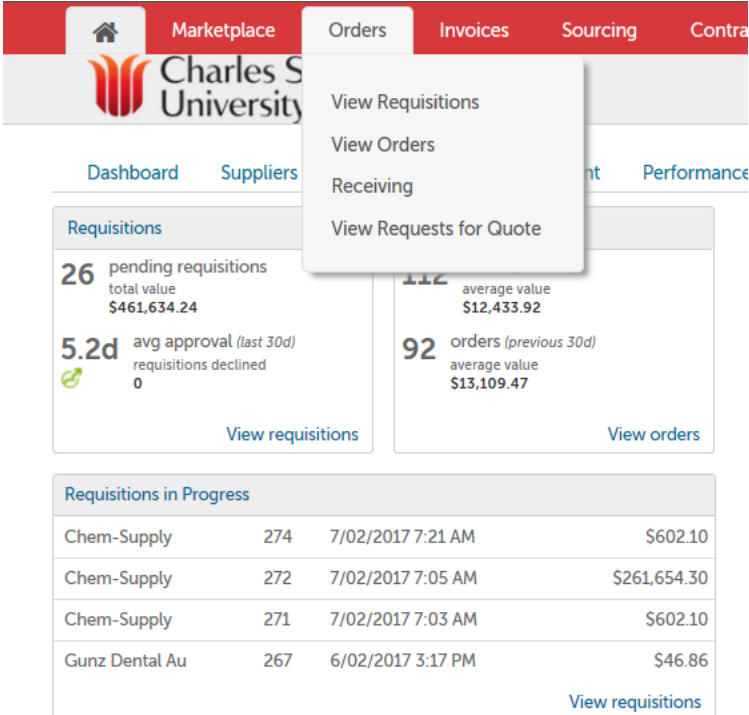
**Bio-Rad Laboratories Australia**

Product	State	Qty.	Price	Subtotal	Tax
 <b>0.2 ml 12-Tube Strips and Domed Cap Strips (TBC1202)</b> Pkg of 20, bag of 8 x 12 thin-wall polypropylene tube strips and 8 x 12-cap strips for PCR, natural (1,920 tubes and 1,920 caps) Account 5-A102-6341-420-0000	Declined	1	\$276.00 / Each	\$276.00	GST
				Subtotal	\$276.00
				Shipping	\$0.00
				Tax	\$27.60
				Total	\$303.60

Details

## Track a Requisition

- After you have successfully created a requisition you can monitor its progress from your Dashboard on Unimarket.
- To track a requisition, click:
  - 'Home' Icon on the toolbar and then the 'Transactions' tab to see '**Requisitions in Progress**' on the Dashboard and click on the requisition number.
  - 'Orders' then click '**View Requisitions**'



The screenshot shows the Charles Sturt University Unimarket dashboard. The top navigation bar includes 'Marketplace', 'Orders', 'Invoices', 'Sourcing', and 'Contracts'. The 'Orders' menu is open, showing options: 'View Requisitions', 'View Orders', 'Receiving', and 'View Requests for Quote'. The dashboard displays two summary cards: 'Requisitions' (26 pending, total value \$461,634.24) and 'Orders' (92 orders, average value \$13,109.47). Below these is a table titled 'Requisitions in Progress' with columns for Supplier, Requisition Number, Date/Time, and Value.

Supplier	Requisition Number	Date/Time	Value
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

- When selecting the '**View Requisitions**' screen, the top portion of the screen allows you to search for a requisition. To refine your search click on '**More Options**' for more parameters to search by.
- If you are looking for requisitions raised by others in your 'Organisation', ensure the 'Buyer' box does not have a name in it (click on the X to remove your name). Then select from one or more of the options and then click the '**Search**' button.

Requisitions

Requisition Number  Supplier  Last 90 Days  [Fewer Options](#)

☒ Connected Suppliers Only ☐ Customise Dates

State  Buyer  Organisation Unit

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

- The Requisition displays as below;

## Requisition 432

Charles Sturt University > Milly Molly Mandy Florists

⚙️ Actions ▾ ☰

### Requisition

Requisition Number	432	Order	PU001383
Buyer	Generic User	Originators	
Requisition Date	20/03/2017 12:02 PM Approval begun on 20/03/2017 12:02 PM	Order Date	
State	Approved	Order Submission	Send Electronically
Organisation Unit	Division of Finance <a href="#">Edit</a>	Approval Chain	

Supplier Ship To Bill To

Milly Molly Mandy Florists  
100 Main Road  
Wagga Wagga  
2650  
Australia

Items Justification Approvals Comments

### Milly Molly Mandy Florists

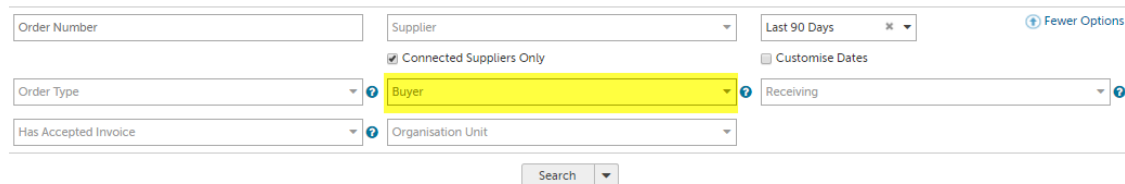
Product	State	Qty.	Price	Subtotal	Tax
 <b>flower</b> Flower Arrangement for retirement function Account 5-A102-6341-420-0000	Released	1	\$35.00 / Each	\$35.00	GST
				Subtotal	\$35.00
				Shipping	\$0.00
				Tax	\$3.50
				Total	\$38.50

- 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 may also receive a confirmation email from the supplier once they process the order.

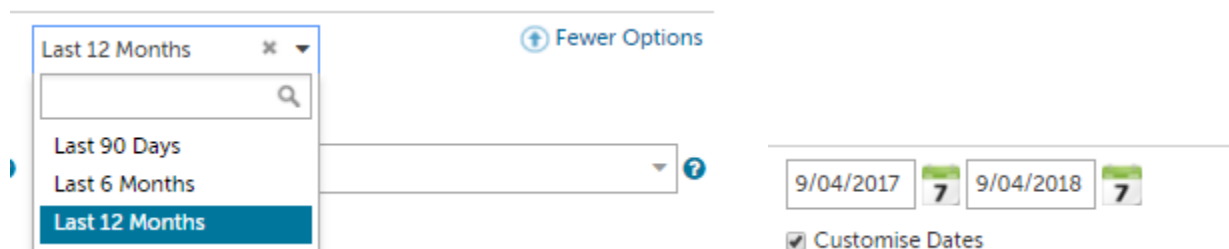
## Review a Purchase Order

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

### Orders



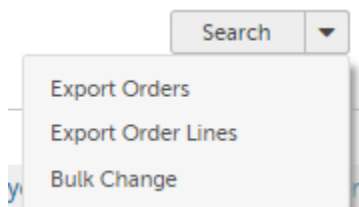
- As for searching 'Requisitions', if you are looking for Purchase Orders created by someone else in your organization, ensure the 'Buyer' field does not have a name in it.
- The time for the search defaults to 90 days, you can change this to last 6 or 12 months or customise the search to dates you want.




- Once you have entered your search criteria, select 'Search'.

## Purchase Order Reporting

- You can produce a report that lists information from the 'View Order' screen, as an Excel document.
- Once you have executed your search, click on the arrow head beside the 'Search' button.



- 'Export Orders' will report the order header information like, order total, supplier, date, requisition number and order state.
- 'Export Order Lines' will report the order detail for every line item on the purchase orders you have searched for.
- 'Bulk Change' is for updating Organisational units and is only used by the eProcurement Admin team.
- Unimarket will e-mail you a link to your report once it has run or you can see your report in your 'Tasks'  under 'Background Jobs'.

## Receiving Orders

- Once the goods or services are received, you will need to go into Unimarket and acknowledge that the goods/service has been received. Receiving the goods/services on the order allows the payment of any invoices for the items ordered. See the **'Receiving>Returns User Guide'**

## Need Support?

- If you experience any issues, please contact the Unimarket Administrator on Int; 34444, Ext; (02) 6933 4444 or by email at [eProcurementAdmin@csu.edu.au](mailto:eProcurementAdmin@csu.edu.au)
- Information can also be found at <http://finance.csu.edu.au/purchasing-procurement>