

Unimarket Approver 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

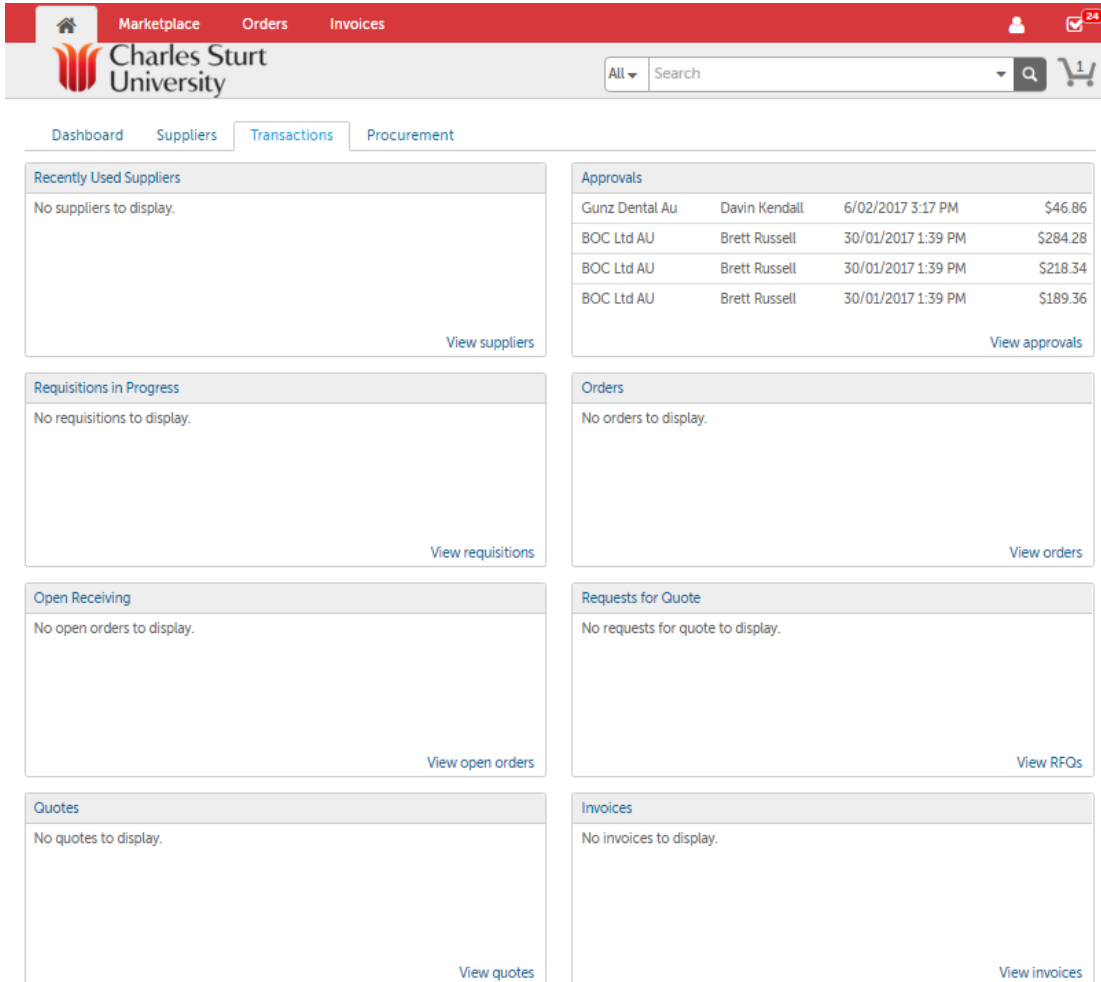
1. Open a web browser.
2. From the CSU Finance Page click on the Unimarket link in “Systems & Software”.
3. A login page will appear.
4. Enter your CSU user name and password. Press Enter or click Login.
5. The Unimarket home page will open.

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

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,
 - 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 catalogs. 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.
- 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



The dashboard interface includes a top navigation bar with 'Marketplace', 'Orders', and 'Invoices' tabs. Below this is a search bar and a shopping cart icon. The main content area is divided into several sections:

- Recently Used Suppliers:** No suppliers to display. [View suppliers](#)
- Approvals:**

Gunz Dental Au	Davin Kendall	6/02/2017 3:17 PM	\$46.86
BOC Ltd AU	Brett Russell	30/01/2017 1:39 PM	\$284.28
BOC Ltd AU	Brett Russell	30/01/2017 1:39 PM	\$218.34
BOC Ltd AU	Brett Russell	30/01/2017 1:39 PM	\$189.36

[View approvals](#)
- Requisitions in Progress:** No requisitions to display. [View requisitions](#)
- Orders:** No orders to display. [View orders](#)
- Open Receiving:** No open orders to display. [View open orders](#)
- Requests for Quote:** No requests for quote to display. [View RFOs](#)
- Quotes:** No quotes to display. [View quotes](#)
- Invoices:** No invoices to display. [View invoices](#)

- From the **'Transactions'** Dashboard, you can view information about recent transactions and outstanding tasks, such as **'Approvals'**, **'Requisitions in Progress'**, or **'Open Receiving'** etc.
- 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.



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



'Tasks' – this is where you will find tasks awaiting your action i.e. Requisitions awaiting approval.



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

Approve a Requisition

- When the requisition is routed for delegated approval the approver will receive an email requesting their approval and prompt them to log in to the system.
 - It is possible to change your availability to approve requisitions by clicking the **'Change Availability'**. N.B. This will result in all requisitions moving up the Delegations to the next Approver. You will need to set an **'Unavailable From'** and an **'Unavailable to'** date and time range.
 - This is not to be used to accommodate long term changes, or changes to the Delegations. If another employee is appointed to your role under an HDA then this process will be managed via the Delegations.

Approvals

i You are currently available and will receive approval requests.

Change Availability »

Requisition Number: Buyer: Last 90 Days: [More Options](#)


Requisition	Buyer	Supplier	Total	
410	Ian Lloyd	ALS W	\$2,750.00	<input checked="" type="checkbox"/> Approve / Decline

Change Availability ✕

I am unavailable

Unavailable From * :

Unavailable To * :

- Once logged in the approver can click the 'Tasks'  menu on the top right of the screen and either, select the specific approval from the menu that appears or, select **'Approvals'** from the menu then click **'Approve/Decline'** next to the requisition they want to approve.

Marketplace Orders Invoices Sourcing Contracts

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Tasks

- Incomplete Requisitions
- Outstanding Receiving
- Quotes
- Invoices
- Contracts
- Supplier Requests
- Background Jobs
- Approvals ¹⁵**

Approvals

You are currently available and will receive approval requests.

Change Availability »

Requisition Number: Buyer: Last 90 Days: [More Options](#)

Requisition	Buyer	Supplier	Type	Created Date	Total	
285	John Jones	Endeavour Consulting Group	Standard	8/02/2017 9:22 AM	\$110,110.00	✓ Approve / Decline
282	John Jones	Endeavour Consulting Group	Standard	8/02/2017 9:19 AM	\$100,000.01	✓ Approve / Decline
276	Ian Lloyd	Inlogik Pty Ltd	Standard	7/02/2017 12:53 PM	\$192,500.00	✓ Approve / Decline
273	Carolyn Mazzocchi	Chem-Supply	Standard	7/02/2017 7:18 AM	\$287,302.95	✓ Approve / Decline

Approvals ¹⁵

R	265.2	DENTSPLY Ltd	8/02/2017 11:58 AM	\$109.80
		Emma Brown		
R	265.1	DENTSPLY Ltd	8/02/2017 11:58 AM	\$195.74
		Emma Brown		
	285	Endeavour Consult		

- Alternatively, they can do the same from the 'Approvals' section of the 'Transactions' Dashboard.

Marketplace Orders Invoices Sourcing

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Dashboard **Suppliers** Transactions Procurement Performance

Recently Used Suppliers

Blackwoods GUNZ dental Billy Jo's Cakes Reliable Farming

BIO-RAD OfficeMax

[View suppliers](#)

Approvals

DENTSPLY Ltd	Emma Brown	8/02/2017 11:58 AM	\$109.80
DENTSPLY Ltd	Emma Brown	8/02/2017 11:58 AM	\$195.74
Endeavour Consu...	John Jones	8/02/2017 9:22 AM	\$100,100.00
Endeavour Consu...	John Jones	8/02/2017 9:20 AM	\$100,000.01

[View approvals](#)

Approvals

You are currently available and will receive approval requests.


Change Availability »

Requisition Number: Buyer: Last 90 Days: [More Options](#)

Requisition	Buyer	Supplier	Type	Created Date	Total	
398	David Hawke	Gunz Dental Au	Standard	10/03/2017 2:42 PM	\$16,118.31	✓ Approve / Decline
396	David Hawke	Billy Jo's Cakes	Standard	10/03/2017 2:39 PM	\$4,950.00	✓ Approve / Decline


- From this list select the Requisition you wish to review

- It will display allowing you to review the Buyer, the item/s, the FOAP codes and supplier.

 **Requisition 267** Approval ⚙️ Actions ☰

Charles Sturt University > Gunz Dental Au

Requisition Supplier ▾ Ship To ▾ Bill To ▾

Requisition Number	267	Order
Buyer	Davin Kendall 	Originators
Requisition Date	6/02/2017 3:17 PM <small>Approval begun on 6/02/2017 3:17 PM</small>	Order Date
State	Pending	Order Submission Send Electronically
Organisation Unit	Fin, Op Serv, Campus Logistic Services	Approval Chain

Items Comments

Supplier
 Gunz Dental Au
 34 Douglas Street
 Brisbane
 Australia

Gunz Dental Au

Product	State	Qty.	Price	Subtotal	Tax
Bianco Whitening 6% Hydrogen Peroxide Kit, Mint With Case (BIA... <small>Take Home Tooth Whitening Patient Kit. 10% Mint Carbamide peroxide. Each Patient Kit contains 10g gel, 3 g soothing gel, 2ml Touch Up Pen of 6% HP, Tray Case... More...</small>	Pending Approval History	1	\$46.86 / Each	\$46.86	GST ⊗ Cancel ✓ App / Dec
Account 5-A108-6329-430-0000 Approvers Davin Kendall, Paul Dowler					ⓘ Details
				Subtotal	\$46.86
				Shipping	\$0.00
				Tax	\$4.69
				Total	\$51.55

- If you have a question or want further clarification select the 'Comments' tab

Items Comments

+ Add Comment »

- Select 'Add Comment'

Add Comment ✕

• Comments added here will be sent to the buyer (Davin Kendall).

Send Cancel

- A popup will appear where you can type in your question and then select the 'Send' button.
- When the Buyer responds to your question you will receive an e-mail.
- Once the Requisition is approved a Purchase Order is created and automatically sent to the supplier (there is no need to print and send).

The Buyer will receive a copy of the Purchase Order via email The Buyer will receive an email if the Requisition is declined.

Need Support?

- If you experience any issues, please contact the Unimarket 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>