

# CUBuyplus®



## Approver's Guide

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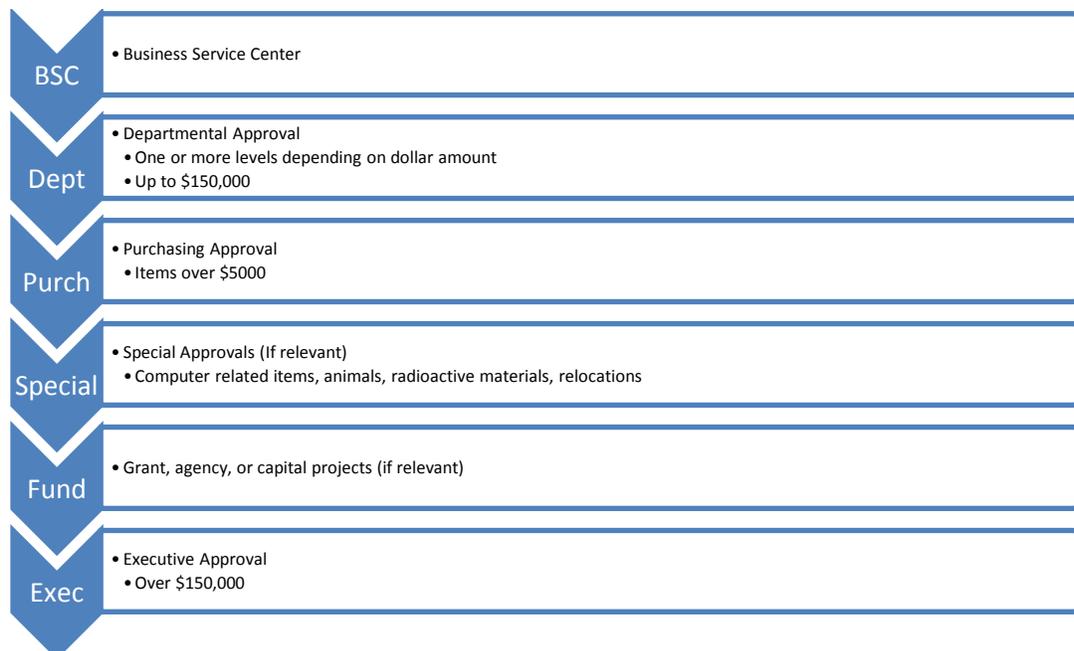
This guide will outline the procedures involved in approving or declining requisitions as well as explaining the approval process in CUBuyplus®.

### Logging into CUBuyplus®

1. Open your web browser.
2. In the address field, type: <https://creighton.unimarket.com/app/login>.
3. The login page will appear.
4. From the Username field, type your **NetID**.
5. From the Password field, type the **password** you created.
6. Press **Enter** or click **Login**.
7. The CUBuyplus® home page will appear.

### Approval Process

The approval process in CUBuyplus® will work similar to how it does in Banner. The general flow is displayed below. Depending upon dollar amounts, special departmental requirements, etc., certain approval queues may be skipped. Email notices are sent to all approvers. If action is not taken within 72 hours from the first notice, a reminder email will be sent out.





## **Approval Notifications**

You will know that you have approvals waiting for your review when a red number appears next to Tasks in the menu bar of CUBuyplus®. In addition, you would have received an email notifying you of the request. An example of the email that will be received is shown below.

### Approval Required

Creighton University

**Requisition R90041 (Alamar Uniforms) for Linda Penland**

The following highlighted requisition lines require your approval.

Description	Account Code	Qty	Distribution	Percentage	Unit Price	Subtotal	
Unisex Lab Coat M	C-200600-455110-7560-110-	20,000	\$101,000.00	(20.61%)	\$24.50	\$490,000.00	Approve
Unisex Lab Coat M	C-200600-455120-7560-110-	20,000	\$99,000.00	(20.20%)	\$24.50	\$490,000.00	Approve
Unisex Lab Coat M	C-200600-455130-7560-110-	20,000	\$105,000.00	(21.43%)	\$24.50	\$490,000.00	Approve
Unisex Lab Coat M	C-200600-455140-7560-110-	20,000	\$185,000.00	(37.76%)	\$24.50	\$490,000.00	Approve
						Subtotal	\$490,000.00
						Shipping	\$0.00
						<b>TOTAL</b>	<b>\$490,000.00</b>

[Please login to approve or decline this requisition.](#)

If another individual within your approval queue has responded to the approval request, you will receive another email notifying you that your approval is no longer needed. An example of this type of email is shown below.

### Approval No Longer Required

Creighton University

**Requisition R90041 (Alamar Uniforms) for Linda Penland: No further action required.**

Your approval is no longer required because the requisition has already been Approved or Cancelled. The approval task has been removed from your approval queue.

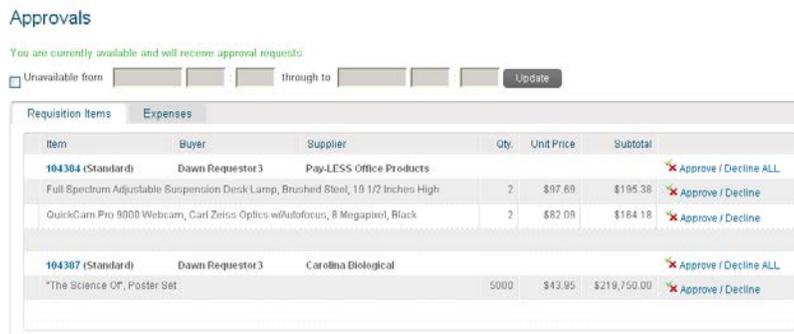
Description	Account Code	Qty	Distribution	Percentage	Unit Price	Subtotal	
Unisex Lab Coat M	C-200600-455110-7560-110-	20,000	\$101,000.00	(20.61%)	\$24.50	\$490,000.00	
Unisex Lab Coat M	C-200600-455120-7560-110-	20,000	\$99,000.00	(20.20%)	\$24.50	\$490,000.00	
Unisex Lab Coat M	C-200600-455130-7560-110-	20,000	\$105,000.00	(21.43%)	\$24.50	\$490,000.00	
Unisex Lab Coat M	C-200600-455140-7560-110-	20,000	\$185,000.00	(37.76%)	\$24.50	\$490,000.00	
						Subtotal	\$490,000.00
						Shipping	\$0.00
						<b>TOTAL</b>	<b>\$490,000.00</b>



1. Hover over Tasks in the menu bar and select **Approvals**.



2. The Approvals screen will appear.

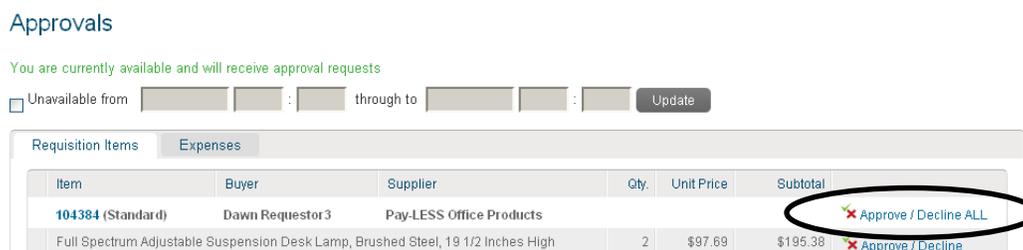


3. All approvals that you have to review will be listed.

## Approving/Declining All Items in a Requisition

Once a requisition has been processed, the approval routing will begin. Individuals with approver access have the ability to approve or decline the entire requisition or individual line items. Complete the steps listed below to approve or decline all items in the requisition.

1. To approve/decline the entire requisition from the approval screen, click **Approve/Decline ALL**.





- The Approve/Decline ALL ITEMS screen will appear.

- If you desire to enter a reason for the action you are taking, type that *justification* into the Reason textbox.

**NOTE:** If you are declining the requisition, it is recommended that you add a reason for why you are taking that action.

- To approve the requisition, click **Approve**. To decline the requisition, click **Decline**. If you do not wish to take action at this time, click **Cancel**.
  - If the requisition is approved, it will go to the next level of approval or if this is the final level, a purchase order will be generated. The requestor will also receive notification that the requisition has been approved.
  - If the requisition is declined, the requestor will receive notification that the requisition has been declined and can take follow up action.

## Approving/Declining Individual Items in a Requisition

If all items within a requisition will not be approved, you can approve or decline individual items. Complete the steps listed below to approve or decline individual items in the requisition.

- To approve/decline individual items in the requisition from the approval screen, click **Approve/Decline** for the individual item.

Approvals

You are currently available and will receive approval requests

Unavailable from [ ] : [ ] through to [ ] : [ ]

Item	Buyer	Supplier	Qty.	Unit Price	Subtotal	
104384 (Standard)	Dawn Requestor 3	Pay-LESS Office Products				Approve / Decline ALL
Full Spectrum Adjustable Suspension Desk Lamp, Brushed Steel, 19 1/2 Inches High			2	\$97.69	\$195.38	Approve / Decline



- The Approve/Decline Item x screen will appear.

- If you desire to enter a reason for the action you are taking, type that *justification* into the Reason textbox.  
**NOTE: If you are declining the requisition, it is recommended that you add a reason for why you are taking that action.**
- To approve the item, click **Approve**. To decline the item, click **Decline**. If you do not wish to take action at this time, click **Cancel**.
- Repeat steps #1 – 4 for each item in the requisition.

## Viewing and Editing a Requisition Prior to Approval

- To view the requisition prior to taking action, click the **Requisition Number**.

Item	Buyer	Supplier	Qty.	Unit Price	Subtotal	
<b>104384 (Standard)</b>	Dawn Requestor3	Pay-LESS Office Products				✖ Approve / Decline ALL
Monochrom Spectrum Adjustable Suspension Desk Lamp, Brushed Steel, 19 1/2 Inches High			2	\$97.69	\$195.38	✖ Approve / Decline

- The Requisition screen will appear. The transaction details will be listed along with each item being ordered. A requisition can be approved or declined from this screen or the previous approval form. Certain changes can also be made to the requisition from this screen.



Approve/Decline here

PayLESS Requisition 104384  
Creighton > Pay-LESS Office Products

Actions: Approve / Decline Edit

Requisition			
Requisition Number	104384	Buyer Name	Dawn Requestor3
Requisition Date	1/31/2012 10:54 AM	Buyer Email	brian.sweeney@unimarket.com
Payment	On Account - Net 30 Day	Buyer Phone	
Order		On Behalf Of	Dawn Requestor3
State	Pending	Organization Unit	Business Service Center
Shipping	Manual Order Delivery	Currency	USD
Order Submission	Send Electronically	Attachments	

Supplier	Ship To	Bill To
Pay-LESS Office Products 13467 Chandler Road Omaha, NE 68138 United States		

Items

Product	State	Qty.	Price	Subtotal	
<b>Full Spectrum Adjustable Suspension Desk Lamp, Brushed Steel, 19 1/2 Inches High (LEDL9096)</b> Full Spectrum Adjustable Suspension Desk Lamp, Brushed St... Account 1-188001-732100-1704-HI01 Approvers Dan Approver, John Approver, Jan Approver, Joe Purchasing, Mary Approver, Tim Approver	Pending History	2	\$97.69 / Each	\$195.38	Cancel App / Dec
<b>QuickCam Pro 9000 Webcam, Carl Zeiss Optics w/Autofocus, 8 Megapixel, Black (LOG960000048)</b> QuickCam Pro 9000 Webcam, Carl Zeiss Optics w/Autofocus, ... Account 1-188001-732100-1704-HI01 Approvers Dan Approver, John Approver, Jan Approver, Joe Purchasing, Mary Approver, Tim Approver	Pending History	2	\$82.09 / Each	\$164.18	Cancel App / Dec
				Subtotal	\$359.56
				Shipping	\$0.00
				Total	\$359.56

Note next approvers

Cancel here

Approve/Decline here

- To review the next level of approval for the requisition, check the Approvers list below each item. To review the history of approvals for this requisition, click **History** in the State column of the individual item. This screen will display the approval history and path that it will take.
- To cancel an individual item, click **Cancel** at the end of the row for the item. This action will cancel the individual item from the requisition. A confirmation message will appear. Click **OK** to proceed.
- To approve/decline an individual item, click **App/Dec** at the end of the row for the item.
  - The Approve/Decline Item x screen will appear.
  - If you desire to enter a reason for the action you are taking, type that **justification** into the Reason textbox.  
**NOTE: If you are declining the requisition, it is recommended that you add a reason for why you are taking that action.**
  - To approve the item, click **Approve**. To decline the item, click **Decline**. If you do not wish to take action at this time, click **Cancel**.
- To approve or decline the entire requisition, click **Approve/Decline** in the upper right corner of the screen in the Actions section.
  - The Approve/Decline Requisition screen will appear.



- b. If you desire to enter a reason for the action you are taking, type that **justification** into the Reason textbox.  
**NOTE: If you are declining the requisition, it is recommended that you add a reason for why you are taking that action.**
  - c. To approve the item, click **Approve**. To decline the item, click **Decline**. If you do not wish to take action at this time, click **Cancel**.
7. To edit the requisition, click **Edit** in the upper right corner of the screen in the Actions section. You have the ability to edit the shipping address, accounting (FOAPAL) information, and delivery notes.

**Requisition 104399**  
CREIGHTON > Carolina Biological

Requisition		Buyer Name	
Requisition Number	104399	Buyer Name	Dawn Requestor3
Requisition Date	2/16/2012 3:24 PM	Buyer Email	brian.sweeney@unimarket.com
Payment	On Account - Default	Buyer Phone	
Order		On Behalf Of	Dawn Requestor3
State	Pending	Organization Unit	Business Service Center
Shipping	Manual Order Delivery	Currency	USD
Order Submission	On - Electronic only	Attachments	
Delivery Notes	<input type="text"/>		

Supplier **Ship To** Bill To

Carolina Biological  
93 Main St  
Suite 200  
Annapolis, MD 21401  
United States

**Editable fields for approvers**

**Items**

Product	State	Qty.	Price	Subtotal
<p><b>Beaker, Polymethylpentene, Graduated, 1,000 mL (721516)</b></p> <p>Straight-sided, 1,000 mL graduated beaker has excellent transparency, heat resistant up to 180° C. Graduated.</p> <p>Account <input type="text"/> <input type="text"/></p> <p>Approvers Joe Purchasing, Mary Approver</p>	Pending History	100	\$11.50 / Each	\$1,150.00
				Subtotal \$1,150.00
				Shipping \$0.00
				Total \$1,150.00

Save Cancel

- a. To edit the shipping information, click the **Ship To tab** in the upper right corner of the screen. Click on the **Ship To** drop down arrow to select a different ship to address. To change the Attn information, click in the **Attn** field and type a **new name**.
- b. To enter/edit delivery notes, type **information** about the delivery of the order in the Delivery Notes field found in the Requisition section. These notes will stay with the purchase order, but if the supplier has order integration enabled they may not see the notes. A call to the supplier may be necessary to confirm the receipt of information within the delivery notes.
- c. To edit the accounting (FOAPAL) information of each item, type or select the **codes** by clicking the **magnifying glass** for each code.  
**NOTE: When clicking the magnifying glass to search, delete the code that appears and then click the Search button. All codes will now appear and you can select the correct**



one by clicking on the code in the list or typing a portion of the description in the search field.

Account

C 101000 350101 7501 191

Split

COAS FUND # ORG # ACCOUNT CODE PROGRAM # ACTIVITY CODE (optional)

- d. After all changes have been made, click **Save** at the bottom of the screen. To cancel without saving changes, click **Cancel**.
- e. A warning message or messages may appear. If the message is orange in color, it is a soft edit that can be overridden. However, you may need to take action depending on the message that appears. If the message is red in color, you cannot continue as is. Click **Save** again to override the soft edit.
  - WARNING : Budget is exceeded for item 1,sequence 1
  - WARNING : Budget is exceeded for item 2,sequence 1
  - Insufficient budget for item 2,sequence 2, suspending transaction.
  - WARNING : Budget is exceeded for item 3,sequence 1
- f. Complete the approve/decline process as listed in steps #5 or 6.

## Setting Approvals Out of Office

As an approver, it is important that when you are not available to review approval requests that your out of office is set within CUBuyplus®. Setting the out of office will skip you in the approval chain and move the review onto the next person in the group. Failure to set the out of office within CUBuyplus® can result in delays in the approval of the requisition.

1. Hover over Tasks in the menu bar and select **Approvals**.
2. The out of office information appears at the top of the screen.

Out of Office Settings

Item	Buyer	Supplier	Qty.	Unit Price	Subtotal	
104399 (Standard)	Dawn Requestor 3	Carolina Biological				Approve / Decline ALL
Beaker, Polymethylpentene, Graduated, 1,000 mL			100	\$11.50	\$1,150.00	Approve / Decline

3. Click the **checkbox** to enable the out of office settings.
4. Click on the **From calendar** to select the beginning date.



5. Type the **From time** in the From time field.
6. Click on the **To calendar** to select the ending date.
7. Type the **To time** in the To time field.
8. Click **Update**.
9. A message regarding your availability will appear above the out of office section.

You are currently NOT available and you will not receive any approval request

Unavailable from    :  through to    :

## **Approvals on Mobile Devices**

Approvals in CUBuyplus® can be completed from mobile devices such as a Smartphone or iPad. Simply go to a web browser on your device and enter the CUBuyplus® website URL (<https://creighton.unimarket.com/app/login>). If you anticipate accessing CUBuyplus® from your mobile device on a regular basis, you may want to add it as a bookmark. Look for the option to Add Bookmark or something similar on your particular device.

Upon successful login to CUBuyplus®, you can complete the steps as outlined in this document to respond to the approval request.