

# CUBuyplus® User Group Meeting April 30, 2015

Welcome!



# Today's Agenda

- CUBuyplus® Enhancement Review
- Blanket Orders
- Receiving Review
- End of Year Timeline
- ICE Enhancements
- Questions & Follow Up



# CUBuyplus® Enhancement Review

- **Security Verification**
- **“Ship To” field**
- **“FOAPAL” field**
- **“Reassign” to BSC**



# Security Verification


## Login

✖ The Username/Password entered is incorrect.

Username \*

jjk30749

Password \*



Please enter the characters in the image above \*

[New image](#)

Login

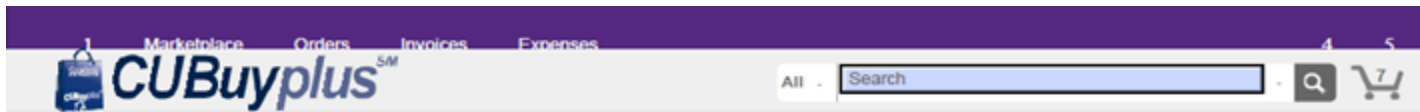
Forgotten Password? [Click here.](#)

?

Need help logging in? Click [here](#) to contact your administrator.

A horizontal collage of five photographs showcasing different parts of the Creighton University campus. From left to right: a close-up of a large stone clock face with a shadow; a tall, multi-story brick building with many windows; a Gothic-style church with a prominent steeple; a modern building with large glass windows; and a statue of a person, possibly a religious figure, in an outdoor setting.

# Ship To Field



## Checkout

**Locations** Business Service Center / Creighton University Accounts Payable

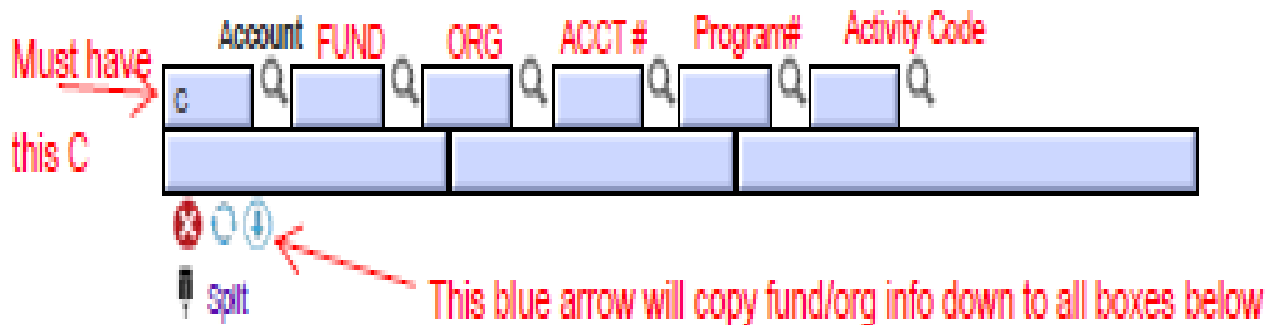
<b>Ship To *</b> <input type="text" value="Choose One"/>	<b>Bill To *</b> <input type="text" value="Creighton University Accounts Payable"/>
<b>Attn *</b> <input type="text" value="B Browser2"/>	<i>Attn:Accounts Payable</i>
Business Service Center [001153]	Creighton University Accounts Payable [001312]
723 N 18th Street	2500 California Plaza
Business Service Center	Creighton University
Creighton University	Omaha, NE 68178
Omaha, NE 68178	United States
United States	

*You must choose a ship to location.*





# Fund/Org/Account Information

- Users have option – include accounting in notes or justification section, **or** complete FOAPAL (Accounting) fields
- Activity Codes
- Facility fields
- BSC will populate program number



# Information for Approvers

Special Delivery Instructions  
Justification / Accounting Instructions

Delivery Notes	<input type="text"/>	Order Attachments  <a href="#">+ Add Attachment »</a>
Financial Year *	<input type="text" value="FY 2015"/>	Order Receiving * <input type="text" value="Receive Manually"/>
<b>▼ Justification</b>		
Justification 	<div>Office Supplies for <u>HS-MACA</u> 101000-701300-7650</div>	Justification Attachments <a href="#">+ Add Attachment »</a>
		Justification Type <input type="text" value="None"/>

[Save](#) [Reassign](#) [Cancel](#)





# Reassign to BSC Specialists

The screenshot displays a procurement system interface. At the top, a header bar shows the Creighton University logo. The main content area is a form for a purchase order. The item being ordered is '8.5X11 92 Bright Multi-use Copy Paper (LOP20000)' with a unit price of \$29.99 / Carton. The quantity is 2, and the total price is \$59.98. The delivery date is set for 7/12/20 at 12:00 PM. A 'Split' button is visible. A 'Reassign' dialog box is open in the center, allowing the user to assign the order to a specific person (Jennifer Worl) and add a note (101000-701300-7650). The note text is 'The items are needed no later than Friday.' Below the dialog box, there is a 'Justification' section with a text area for justification and a 'Justification Type' dropdown menu. The bottom of the screen features 'Save', 'Reassign', and 'Cancel' buttons.

8.5X11 92 Bright Multi-use Copy Paper (LOP20000)  
Unit Price: \$29.99 / Carton

2 \$59.98 \$0.00 Remove

Delivery Date 7/12/20 12:00 PM

Account

Split

Reassign

Assign To \* Jennifer Worl

Note \* 101000-701300-7650  
The items are needed no later than Friday.

OK Cancel

Delivery Notes

Financial Year \* FY 20

Justification Office Supplies for HS-MACA  
101000-701300-7650

Justification Attachments + Add Attachment >

Justification Type None

Save Reassign Cancel



# Viewing Incomplete Requisitions (saved)

The screenshot shows a web application interface with a purple header bar. On the right side of the header, there is a notification icon with a red '1' and a user profile icon. Below the header, there is a search bar with a dropdown menu set to 'All'. A purple dropdown menu is open, showing three options: 'Incomplete Requisitions' with a red '1' next to it, 'Quotes', and 'Invoices'. To the right of the dropdown menu is a shopping cart icon with a '0' inside. Below the search bar, there is a section for filters. The 'Created Date To' field is set to '3/23/2015' with a calendar icon and the number '7' next to it. A 'Search' button is located at the bottom left of the filter section.

All

Incomplete Requisitions <sup>1</sup>

Quotes

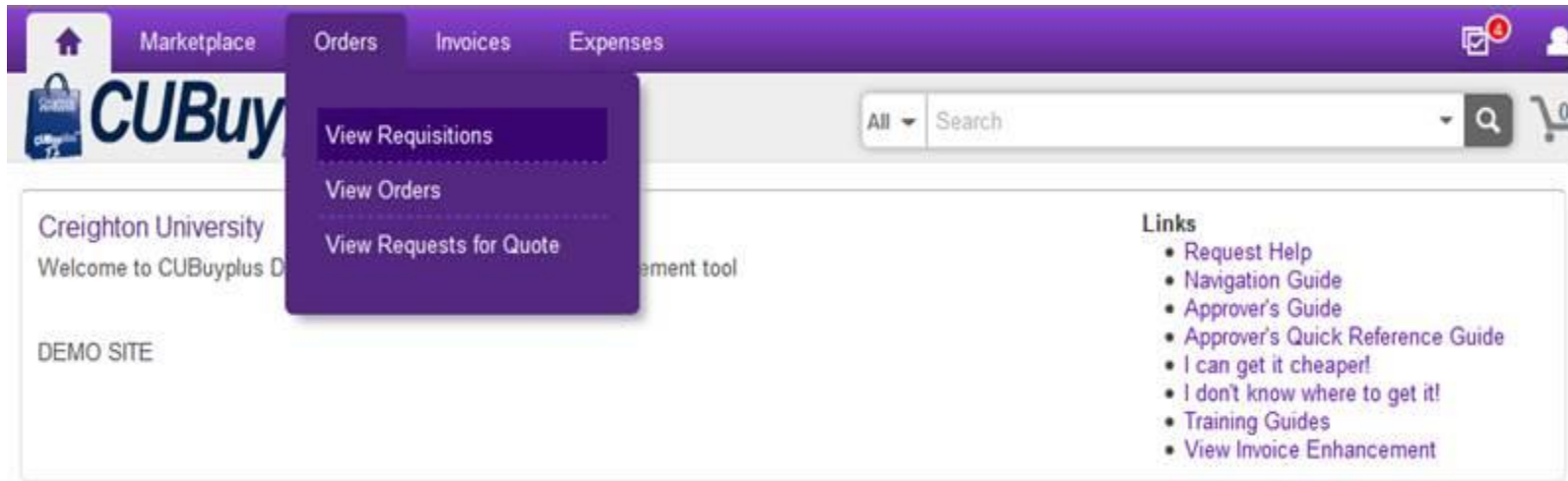
Invoices

Created Date To \* 3/23/2015 7

Search



# Viewing Incomplete Requisitions (Reassigned)



# Blanket Orders

- [Blanket Order template](#)



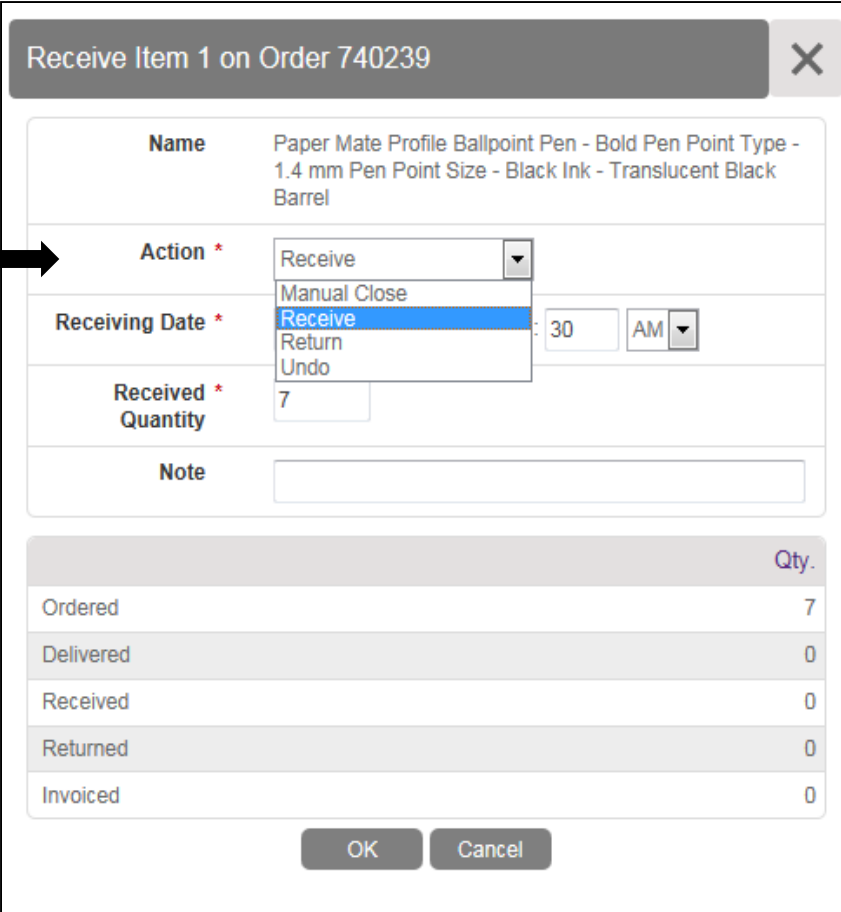
# Blanket Orders

- Start planning now for new blanket orders
- BSC will contact if renewal is needed from last year
- May is preferred time for blanket submissions
- Old blankets will be closed June 30<sup>th</sup>



# Receiving Review

- **Four receiving options**
  - Manual Close – use when item is no longer available and/or when the supplier has been notified item is no longer needed
  - Receive – use to document quantity that has been received
  - Return – use when an item has been returned
  - Undo – use when quantity received was entered incorrectly
- **Receiving sub-menu now shows an accounting of activity for an item**



Receive Item 1 on Order 740239

Name	Paper Mate Profile Ballpoint Pen - Bold Pen Point Type - 1.4 mm Pen Point Size - Black Ink - Translucent Black Barrel		
Action *	Receive		
Receiving Date *	30	AM	
Received Quantity *	7		
Note			

	Qty.
Ordered	7
Delivered	0
Received	0
Returned	0
Invoiced	0

OK Cancel



# End of Year Timeline

- End of Fiscal Year Orders
  - Must be submitted no later than June 19
  - Cannot guarantee will arrive within fiscal year
- Retrofits (DPRs), TERs, and PO Invoices – to BSC by June 25
  - Allow 2 days for intercampus mail





# Key Dates

- Open/Standing Purchase Orders – batch close process on June 30
- Receiving in CUBuyplus® completed by July 2
  - Receiving date in CUBuyplus® must reflect actual date goods received on campus or services were performed





# Key Dates

- P-Card
  - Receipts due to BSC no later than June 26
    - Ongoing send timely to BSC
    - Any postings after June 24 will appear FY16
  - Approvals completed by June 30
  - Unapproved items will post to default fund/org on July 2<sup>nd</sup>









# Accruals

Department to accrue if:

- Delivered to campus by June 30 and not received in CUBuyplus® by July 2
- Invoice has not been sent to BSC
- Service has been provided and not yet invoiced



# BSC

- Invoices received by BSC and not entered into CUBuyplus® - BSC will accrue
- Have retrofits entered into CUBuyplus® by June 30
- TERs entered into Banner by June 30



# ICE Enhancements

## Payee Info

\* Payee Name

Payee Net ID

SSN with no dashes

\* Description of Work being Performed

\* Is the service one of the following:  If you are unsure, please contact Jason E. Gerit at 402-280-2790.

\* Payment Fund  \* Org  \* Account

Should payment amount be grossed up to cover taxes

Payment Delivery Method

Check Needed By Date





- Watch for Year End Memo – Coming Soon
- Next Meeting - Mid June
- Questions/Discussion

Thank You for Attending

