CUBuyplusSM

Approver’s Guide

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

Logging into CUBuyplusSM

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 CUBuyplusSM home page will appear.

Approval Process

The approval process in CUBuyplusSM 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 CUBuyplusSM. 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.

<table>
<thead>
<tr>
<th>Description</th>
<th>Account Code</th>
<th>Qty</th>
<th>Distribution</th>
<th>Percentage</th>
<th>Unit Price</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unisex Lab Coat M</td>
<td>C-200600-455110-7560-110</td>
<td>20,000</td>
<td>$101,000.00</td>
<td>(20.61%)</td>
<td>$24.50</td>
<td>$490,000.00</td>
</tr>
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<td>Unisex Lab Coat M</td>
<td>C-200600-455120-7560-110</td>
<td>20,000</td>
<td>$99,000.00</td>
<td>(20.20%)</td>
<td>$24.50</td>
<td>$490,000.00</td>
</tr>
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<td>C-200600-455130-7560-110</td>
<td>20,000</td>
<td>$105,000.00</td>
<td>(21.43%)</td>
<td>$24.30</td>
<td>$490,000.00</td>
</tr>
<tr>
<td>Unisex Lab Coat M</td>
<td>C-200600-455140-7560-110</td>
<td>20,000</td>
<td>$185,000.00</td>
<td>(37.76%)</td>
<td>$24.50</td>
<td>$490,000.00</td>
</tr>
</tbody>
</table>

Subtotal $490,000.00
Shipping $0.00
TOTAL $490,000.00

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.

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</tr>
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</table>

Subtotal $490,000.00
Shipping $0.00
TOTAL $490,000.00
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.

Approval/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.
2. The Approve/Decline ALL ITEMS screen will appear.

![Approve/Decline ALL ITEMS screen]

3. 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.

4. 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**.

   a. 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.
   
   b. 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.

1. To approve/decline individual items in the requisition from the approval screen, click **Approve/Decline** for the individual item.
2. The Approve/Decline Item x screen will appear.

3. 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.

4. 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.

5. Repeat steps #1 – 4 for each item in the requisition.

Viewing and Editing a Requisition Prior to Approval

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

2. 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.
3. 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.

4. 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.

5. To approve/decline an individual item, click **App/Dec** at the end of the row for the item.
   a. The Approve/Decline Item x 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**.

6. To approve or decline the entire requisition, click **Approve/Decline** in the upper right corner of the screen in the Actions section.
   a. 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](image)

   **Editable fields for approvers**

   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.

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

After all changes have been made, click **Save** at the bottom of the screen. To cancel without saving changes, click **Cancel**.

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

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\textsuperscript{SM}. 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\textsuperscript{SM} 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.
   - Click the **CheckBox** to enable the out of office settings.
3. 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.

![Unavailable from:](https://creighton.unimarket.com/app/login)

### 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.