CUBuyplus® User Group Meeting
December 11, 2014

Welcome!
CUBuyplus® User Group Meeting Agenda

• New Features
  – Attachment Changes
  – E-Invoicing
  – Receiving

• Receiving

• Orders with Deposits or Pre-Payments

• Supplier highlights - Ed DuPree
  – Added Review of RFQ
  – Regal Awards

• Feedback session
Attachments

• Previously, attachments could only be added to requisitions

• New Features
  – **Attachments can now be added** to an order by users associated with the order (buyer, browser, on behalf of, system administrator)
  – **Attachments may be removed** from an order by system administrator only
  – Users associated with an order will be able to see the audit trail
Adding An Attachment

- Pop-up window will appear with warning message
- Attachments added to an order will need to be sent to supplier, if applicable
Adding An Attachment, cont’d

Order 740229
Creighton University > Roche Diagnostics

.pdf files require Adobe Reader. If you do not have it then click here to install it.

<table>
<thead>
<tr>
<th>Purchase Order</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Number</td>
<td>740229</td>
</tr>
<tr>
<td>Requisition</td>
<td>R115111</td>
</tr>
<tr>
<td>Buyer</td>
<td>Kelly Sand</td>
</tr>
<tr>
<td>Originators</td>
<td>Browser: Suzanne Samuelson</td>
</tr>
<tr>
<td>Order Date</td>
<td>11/7/2014 4:21 PM</td>
</tr>
<tr>
<td>State</td>
<td>Open</td>
</tr>
<tr>
<td>Created Date</td>
<td>11/7/2014 4:21 PM</td>
</tr>
<tr>
<td>Receiving State</td>
<td>Open</td>
</tr>
<tr>
<td>Order Submission</td>
<td>Send Electronically</td>
</tr>
<tr>
<td>Documents</td>
<td></td>
</tr>
<tr>
<td>Financial Year</td>
<td>FY 2015</td>
</tr>
<tr>
<td>Organization Unit</td>
<td></td>
</tr>
<tr>
<td>Attachments</td>
<td></td>
</tr>
<tr>
<td>Add Attachment</td>
<td></td>
</tr>
<tr>
<td>Receive Manually</td>
<td></td>
</tr>
<tr>
<td>Admin Admin (admin)</td>
<td></td>
</tr>
<tr>
<td>attached Testing Attachments.xlsx</td>
<td></td>
</tr>
<tr>
<td>This is a private attachment that is not visible to the supplier.</td>
<td></td>
</tr>
</tbody>
</table>
Removing An Attachment

• Removing an attachment can only be done by a system administrator (Linda Penland or Suzanne Samuelson)
• Send requests in an email and include the reason
Removing An Attachment, cont’d

Order 740229
Creighton University > Roche Diagnostics

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<td><strong>Order Date</strong></td>
</tr>
<tr>
<td><strong>State</strong></td>
</tr>
<tr>
<td><strong>Created Date</strong></td>
</tr>
<tr>
<td><strong>Receiving State</strong></td>
</tr>
<tr>
<td><strong>Order Submission</strong></td>
</tr>
</tbody>
</table>

- Admin Admin (admin) attached Testing Attachments.xlsx at 12/10/2014 6:33 AM.

- Deleted by Admin Admin (admin) at 12/10/2014 6:41 AM
  Reason: Incorrect documentation was attached to this order.
E-Invoicing

• New Feature
  – Registered suppliers may now submit invoices to Creighton electronically
  – Order to Invoice

• Rollout to registered suppliers will begin in March/April timeframe
Receiving Update

• New Features – in test
• Receive vs. Manual Close
• Receiving timeliness
Receiving

• New Features
  – Testing new functionality
  – Anticipate rollout by next meeting
Receive Versus Manual Close

- Receive
- Manual Close
  - Remainder of order will not be received
# Manual Close Example

## Receiving History for Item 1 - House of Doolittle 3-Month Vertical Compact Wall Calendar

<table>
<thead>
<tr>
<th>User</th>
<th>Action</th>
<th>Created Date</th>
<th>Receiving Date</th>
<th>Number</th>
<th>Delivered</th>
<th>Received</th>
<th>Returned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lee Taylor</td>
<td>Receive</td>
<td>5/28/2014 9:22 AM</td>
<td>5/14/2014 12:00 AM</td>
<td>170349</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

**Note:** Payless called and said they were out of stock on this calendar and so this order was cancelled. We will not be receiving this calendar.

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Received</strong></td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Returned</strong></td>
<td>0</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[Close Button]
Receiving Timeliness

- 175 orders with outstanding receiving prior to 12/1 order date
- 52 of these have an invoice pending payment
Receiving Timeliness

• Open Receiving reminder is sent out once or twice per month

• Suggestions?
Order Guidance

• Order with **multiple payments on a single order**, i.e. down payment for piece of equipment

• Include need for initial payment and payment timing in ‘Instructions to Buyer’

• Enter multiple line items
  – Line 1 down payment
  – Line 2 remaining cost of equipment

• Include documentation for down payment, i.e. contract, invoice, email
  – Documentation will be added as attachment and utilized by A/P for payment
Order Guidance, cont’d

• Order with **multiple payments on a single order**, i.e. consulting where there’s an initial retainer with progress billings of unknown amounts

• Recommend a Blanket Order for the full estimated engagement expense
  – Retainer and progress billings will be entered as ‘order to invoice’
  – One assignee from the Blanket Order will need to approve each invoice for payment

• Submit the Blanket Order template located on the CUBuyplus® dashboard to the BSC
  – Include documentation for down payment, i.e. contract, invoice, email
  – Documentation will be added as attachment and utilized by A/P for payment
Order Guidance, cont’d

• Next meeting
  – Multi-year service/software agreements
  – Construction projects with progress billings

• Contact the BSC if assistance is needed now
Purchasing Updates

Process Review – Ed DuPree
Holiday Reminders

• BSC and Accounting Services will be closed December 24<sup>th</sup> – January 2<sup>nd</sup>
  – Responding to urgent items only prior to return January 5<sup>th</sup>.
  – Payments prior to Jan. 5<sup>th</sup> need to be received by December 16<sup>th</sup>.
  – P-Card Dates
    • Cycle Closes December 24<sup>th</sup>
    • Receipts Due January 6<sup>th</sup>
    • Review By January 7<sup>th</sup>
    • Approved By January 8<sup>th</sup>
Purpose of Meeting

• Discuss new/improved processes, receive feedback, continuous improvement
• Questions/Discussion

Thank You for Attending