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.
Ship To Field

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

![Diagram showing fund/organization/account information fields with arrows and notes]
**Information for Approvers**

Special Delivery Instructions
Justification / Accounting Instructions

<table>
<thead>
<tr>
<th>Financial Year</th>
<th>Order Receiving</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 2015</td>
<td>Receive Manually</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Justification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office Supplies for HS-MACA 101000-701300-7650</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Justification Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
</tr>
</tbody>
</table>
Reassign to BSC Specialists
Viewing Incomplete Requisitions (saved)
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 30th
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**

![Image of receiving menu with item details and actions]
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\textsuperscript{nd}
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

<table>
<thead>
<tr>
<th>Payee Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Payee Name</td>
</tr>
<tr>
<td>Payee Net ID</td>
</tr>
<tr>
<td>SSN with no dashes</td>
</tr>
<tr>
<td>* Description of Work being Performed</td>
</tr>
<tr>
<td>* Is the service one of the following: Honorarium/Guest Speaker If you are unsure, please contact Jason E. Gerit at 402-280-2790.</td>
</tr>
<tr>
<td>* Payment Fund</td>
</tr>
<tr>
<td>Should payment amount be grossed up to cover taxes</td>
</tr>
<tr>
<td>Payment Delivery Method</td>
</tr>
<tr>
<td>Check Needed By Date</td>
</tr>
</tbody>
</table>
• Watch for Year End Memo – Coming Soon
• Next Meeting - Mid June
• Questions/Discussion

Thank You for Attending