

November 5, 2012

## CU Marketplace Updates

Effective 11/5/12, an upgrade to the Marketplace procurement system produces some changes in the interfaces and display of information related to approval and matching. We think the upgraded elements are helpful and that you'll like the new functionality and detail. A brief synopsis is provided below. For additional information, refer to our [Marketplace Learning Resources](#).

### Approval Process: What Hasn't Changed

For both requisitions and invoice exceptions, the review and approval process itself has **not** changed.

### Invoice Match Exception: Additional Detail

The **matching** tab now directly identifies the issue(s) that caused the invoice to fail the match process, for example, "No receipt has been entered."

### Approval Navigation and Displays

The interface for reviewing and approving requisitions and invoice match exceptions has been revised to make the process more efficient and user friendly.

- Under the approvals tab, the streamlined my approvals sub-tab now resembles the Document Search screen.
- The requisition and invoice tabs are now consolidated: the my approvals tab contains both types of documents.
- Filters are available on the left side of the screen to filter approvals. Filter options depend upon the type of document (requisition or invoice).
- Records can be viewed through Folders (which offer the same view as before) or a List (which displays all documents pending approval).
- We like the new Sort by capability, especially for its option Submit date oldest first – so approvers can highlight older items awaiting action. Aging information (how long a document has been awaiting approval in a folder) is now also available on the document line.
- Last but not least, the Assign button is much easier to see, thanks to its new teal color.

### Updating Substitute Approvers

The new **manage substitutions** sub-tab consolidates this information on a separate screen, making it easier for approvers to assign substitutes by document type (requisition or invoice) for all or some of their folders

**Questions?** Contact the Finance & Procurement Help Desk at 303.837.2161 or [FinProHelp@cu.edu](mailto:FinProHelp@cu.edu).

## Concur Travel & Expense Survey

Help us in our goal of continuous improvement for the University's travel program and travel-processing tools. The Concur Travel & Expense System survey is available on the [PSC home page](#) through Fri, Nov 9, 2012.

This is your opportunity to tell us what you think about booking trips in Concur Travel, working with Christopher-son Business Travel, and reconciling trip costs and requesting reimbursement in Concur Expense.

**Questions?** Contact Michael Fox at 303.764.3457 or [michael.fox@cu.edu](mailto:michael.fox@cu.edu).

## Notes from Payable Services

The PSC Payable Services staff would like to highlight some frequent questions and common confusion points for campus departments.

### Communicating to the PSC

Use [APIInvoice@cu.edu](mailto:APIInvoice@cu.edu) when you want to email an invoice (PO/SPO invoice, Payment Authorization, Study Subject Payment, Non-Employee Reimbursement) or a Warrant Adjustment request to the PSC.

Use [ChangeOrder@cu.edu](mailto:ChangeOrder@cu.edu) when you need to request a change or cancellation on a purchase order.

### Completing Payment Vouchers in the Marketplace

Review the options on the PV form under the Payment is being Authorized for dropdown. Select the option that really describes the payment.

### Correct the problem before you approve the invoice

You need to resolve whatever caused the match exception before you approve an invoice for re-processing. This means waiting until the change order is complete ... or online receiving has been done ... and so forth.

### Select the appropriate expense type for each transaction on your expense report

Be sure you've correctly categorized each line on your Procurement Card or Employee Reimbursement report.

### Don't use the Group Meals expense type for per diem meals.

Group Meals transactions require special documentation. Your expense report will be returned to you if you use this expense type inappropriately or without proper substantiation.

**Questions?** Contact [FinProHelp@cu.edu](mailto:FinProHelp@cu.edu).