

Step-by-Step Guide

Approving SPO Vouchers within CU Marketplace

In This Guide

When an invoice is entered into CU Marketplace, it becomes a voucher. Standing Purchase Order (SPO) vouchers require approval – no matter the amount of the voucher – in order to pay. An email from CU Marketplace will be sent to the Requestor and the appropriate Invoice/Match Exception Approver(s) when an SPO voucher is entered.

This guide discusses the SPO voucher approval process. Topics covered are:

- ✓ [Approving SPO vouchers for payment by email](#)
- ✓ [Approving SPO vouchers in CU Marketplace](#)
- ✓ Locating vouchers pending approval

Who can approve SPO vouchers?

Invoice/Match Exception Approvers can approve SPO vouchers. (This role also ensures resolution of invoice match exceptions, as detailed in the Step-by-Step Guide [Resolving Match Exceptions](#).) An Invoice/Match Exception Approver is an individual with a fiscal role on the SpeedType (except Officer or Fiscal Staff – Report Recipient) who also has been granted CU Marketplace Approver Invoice access by his or her department.

Approving SPO Vouchers by Email

One way to approve SPO vouchers is by email. You will receive an email from cumarketplace@cu.edu when an SPO voucher is pending your approval.

Before you can approve by email, you will need to set your email approval code in your CU Marketplace profile. You only need to set your approval code once – refer to the Step-by-Step Guide [Initiating Email Approvals within CU Marketplace](#) to learn how.

Once your approval code is set...

1. Open the email.
2. Review the SPO voucher's details in the email, such as supplier, dollar amount, who initiated the SPO, SPO begin and end dates, and accounting information.
3. Click the **Take Action** button within the email.

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4. You will be prompted to select an action – such as approve the voucher – and enter your approval code.
5. If you are an Invoice/Match Exception Approver for multiple SpeedTypes associated with the voucher, you will receive a separate email for each SpeedType. When taking action via email, each email must be approved for the entire voucher to be approved; repeat steps 1-4 for each email.

Wed 6/24/2015 7:44 AM
CU Marketplace
New Pending Approval for Invoice# S0857215
To: Sarah Rowe

SPO Voucher Approval Catch Approval Request for Invoice# S0857215

Dear Sarah Rowe,

The invoice listed below has been submitted for your approval.

Summary

Folder: SPO Voucher Approval Catch
Invoice Owner: Mark Mundt
Invoice No.: S0857215
No. of line items: 1
TOTAL: 80,214.99 USD

Details

SPO - Sponsored Project Subcontract
Form Type: SPO-Spons Proj Subcontract

Item 1 PO Number: 1000378506
Description: SPO - Sponsored Project Subcontract
Begin Date: 7/1/2014
End Date: 6/30/2015
Supplier: State of Colorado
Quantity: 80,214.99
Unit Price: 1.00 USD
Ext. Price: 80,214.99 USD
Size/Packaging:
Taxable: No
Capital Expense: No
Commodity: 17
Code:
Financial Report
Comments:
Campus Box: C234H - Denver
Serial Number:
FORM TOTAL: 171,147.00 USD
TOTAL: 80,214.99 USD

Codes

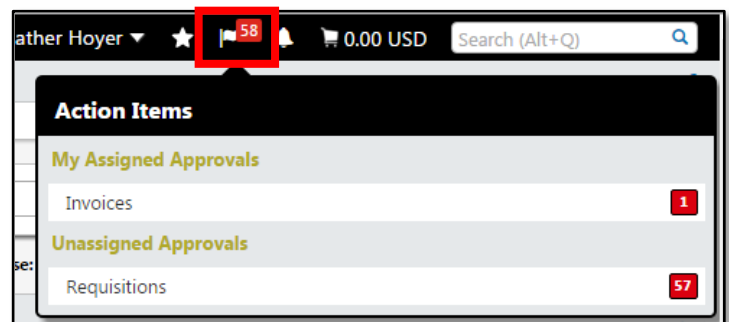
Business Unit: UCOLO : The University of Colorado
Fund: 30 : Sponsored Projects- Fed & Priv
Speedtype: 63007919 : CDC CADDRE II PSYCH
Org: 21259 : SOM-PSYCH JFK SPR/GIFT
Program:
Project_code: 2574875 : CDC CADDRE II PSYCH
Account: 492611 : Subcontract 1 -> \$25000
Subclass:

Ready to approve, reject or assign this document to yourself **Take Action**

Approving SPO Vouchers in CU Marketplace

Another way to approve SPO vouchers is within CU Marketplace.

1. Begin by accessing CU Marketplace via [your campus portal](#). Within your portal's top navigation bar, use the **Business Tools** dropdown menu to select **CU Marketplace**.
2. Access your pending invoice approvals by using your Action Items list. Click **Action Items** (flag icon) at the top of your screen and select the appropriate list.



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Alternately, you can use the navigation bar on the left side of your screen and go to **Orders & Documents > Approvals > My Approvals**.

- If you have roles that allow you to approve both requisitions (requisition Approver role) and vouchers (Invoice/Match Exception Approver role), use the **Type** dropdown (left side of your screen) to select *Invoice*.

- Use the Current Workflow Step filter to only see those pending **SPO Voucher Approval**.

The screenshot shows the 'My Approvals' page in the CU Marketplace. The left sidebar has a 'Type' dropdown set to 'Invoice' and a 'Current Workflow Step' filter set to 'SPO Voucher Approval (4)'. The main area displays a table of vouchers pending approval, with details for two vouchers: S100783 and S101927. Both are PO Invoices from CD Biosciences Inc - Creative Diagnostics/Creative BioMart. The first voucher is due 11/6/2011 and the second is due 3/6/2013. Both are assigned to Kyle Approver.

- Vouchers pending approval are organized into folders. Each folder is a SpeedType on which you have a fiscal role other than Officer or Fiscal Staff – Report Recipient. If a single voucher uses multiple SpeedTypes, it will appear in each applicable SpeedType folder for which you are an Approver.

You can work within the Folder view, or you can use the **Group Results By** dropdown (upper left corner of your screen) to instead view a list of all vouchers pending approval.

- To further narrow the list of vouchers pending approval that is currently visible to you, use the filters on the left side of your screen.
- Click the voucher number and then review the voucher information to determine whether this SPO voucher should pay. (Refer to the Quick Reference Guide [Voucher Information](#) for further details.)

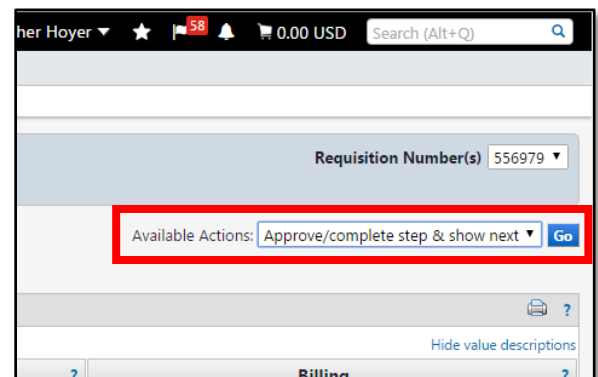
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SpeedType Changes for SPO Vouchers

SpeedType changes can be made to SPO vouchers that are pending approval, as long as there is a single SpeedType on the SPO line. Use the [SPO Invoice Allocation](#) form to submit the change. Approve the SPO voucher only **after** the SpeedType is changed.

- To approve this individual voucher:*
Click the voucher number – if not already reviewing the voucher details – and use the **Available Actions** dropdown (located in the upper right corner of the page) to select *Approve/Complete & Show Next*. Click the **Go** button.



- To approve multiple vouchers simultaneously:*
Review each voucher to determine whether it should be paid. Then, from the list of vouchers pending approval, check the box to the right of each SPO voucher that you are approving for payment. Once the appropriate vouchers are selected, use the **Available Actions** dropdown (located in the upper right corner of the page) to select *Approve/Complete*. Click the **Go** button.