

Step-by-Step Guide

Reviewing Incompatible Access Purchases

In This Guide

In CU Marketplace, users with Incompatible Access can enter requisitions over \$5,000, and then proceed to approve them.

This guide discusses:



- ✓ Inquiring on requisitions over \$5,000 that were created and approved by the same individual

The inquiries described in this Step-by-Step Guide cannot be performed by individuals with the Shopper role in CU Marketplace, as Shoppers can only view their own information.

Procedure

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. Perform a Document Search. Use your side navigation bar and go to **Orders & Documents > Document Search > Search Document**.
3. If the simple search appears, click the **advanced search** link.
4. Use the **Search** dropdown to select *Requisition*.
5. Enter your search criteria:

The screenshot shows the top of the CU Marketplace search interface. A red box highlights the 'Search' dropdown menu, which has 'Requisition' selected. To the right of the dropdown is a 'Go' button. Below the dropdown, there are input fields for 'Requisition Identification' (Requisition Number(s) and Requisition Name) and 'Requisition Information' (Participant(s)). A 'simple search' link is visible in the top right corner.

- a. Click the magnifying glass  to the right of the **Prepared By** field to search for the Requestor.
- b. The User Search pop-up window appears. Search for the Requestor by last name, first name, email address, and/or department.
- c. Select the appropriate Requestor(s) from the list of results. To select additional Requestors, click the **Search for Another User** button and repeat steps b and c.
- d. Click the **Add Selected Users** button.
- e. Click the magnifying glass  to the right of the **Approved By** field and search for the same individual(s) as the Requestor(s) in step c.

The screenshot shows the CU Marketplace search interface with the 'Search' dropdown menu set to 'Requisition'. The 'Go' button is highlighted. Below the dropdown, there are input fields for 'Requisition Identification' (Requisition Number(s) and Requisition Name) and 'Requisition Information' (Participant(s), Prepared For, Prepared By, Approved By, Date, Total Amount, Supplier, and Department). The 'Prepared By' field is highlighted with a yellow background, and a magnifying glass icon is visible to its right. A 'simple search' link is visible in the top right corner.

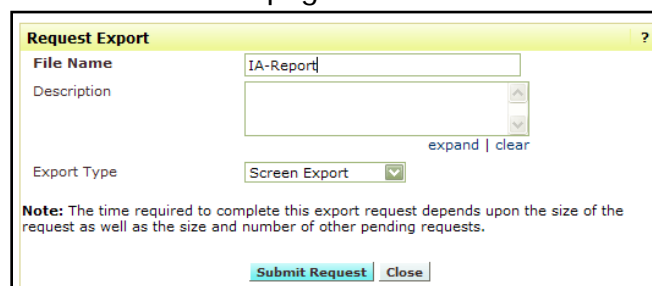
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- f. Use the **Date** dropdowns to enter the time period for which you want to review data.
- g. Use the **Total Amount** dropdown to select *Is Greater Than* and enter "5000" in the next field.
6. Click the **Go** button (located at the top or bottom of the page) for a list of requisitions over \$5,000 that were created and approved by the specified individual.

Export your list into Excel to print a copy or edit...

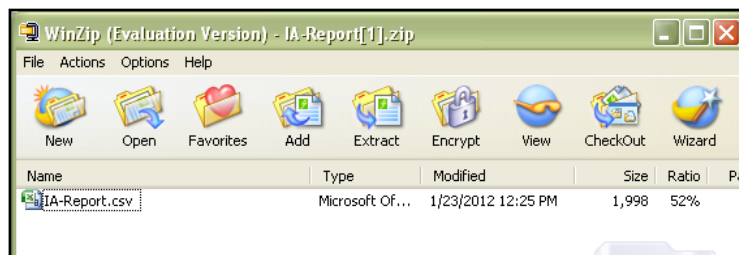
1. Click the **Export Search** button located at the left side of the page.
2. The **Request Export** pop-up window will appear. Enter a **File Name** and select *Screen Export* as the **Export Type**.
3. Click the **Submit Request** button, then close the pop-up window.
4. You may receive an email notification from CU Marketplace once your export is ready. (This will depend on how you have set your email preferences in your CU Marketplace profile.)
5. Use your side navigation bar to go to **Orders & Documents > Document Search > Download Export Files**.
6. The **Export Status** will show whether or not your file is ready.



The 'Request Export' window has a yellow header with a question mark icon. It contains a 'File Name' text box with 'IA-Report' entered, a 'Description' text box, and an 'Export Type' dropdown menu set to 'Screen Export'. There are 'expand' and 'clear' links next to the description box. A 'Note' at the bottom states: 'The time required to complete this export request depends upon the size of the request as well as the size and number of other pending requests.' At the bottom are 'Submit Request' and 'Close' buttons.

Results found: 2					
File Name	Description	Request Date / Time	Expiration Date	Export File Size	Export Status
IA-Report 1.zip		1/10/2012 3:52 PM	1/17/2012	489.0 KBytes	Completed
IA_Report		1/10/2012 3:45 PM	1/17/2012	N/A	No results

7. Select the name of your export and open the .zip file.
8. Open the CSV file.



9. Your list now appears as an Excel spreadsheet. You may want to resize some of the columns before printing.