Reviewing Incompatible Access Purchases

In This Guide

In CU Marketplace, users with Incompatible Access can enter requisitions over $10,000, and then proceed to approve them.

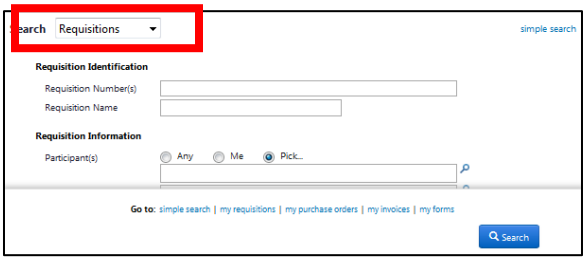
This guide discusses:

- ✓ Inquiring on requisitions over $10,000 that were created and approved by the same individual

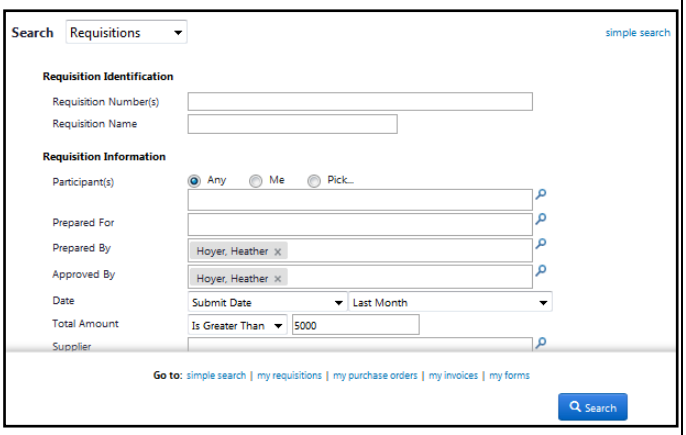
> The inquiries described in this Step-by-Step Guide cannot be performed by individuals with the Shopper role in CU Marketplace, as Shoppers can only view their own information.

Procedure

1. Log in to your campus portal and on the CU Resources tab, select **Quick Links**, **CU Marketplace**.
2. Perform a Document Search. Use your side navigation bar and go to **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:
   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.



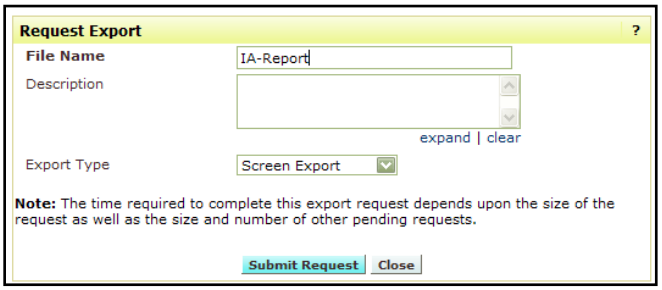
f. Use the **Date** dropdowns to enter the time period for which you want to review data.

g. Use the **Total Amount** dropdown to select *Is Greater Than* and enter "5000" in the next field.

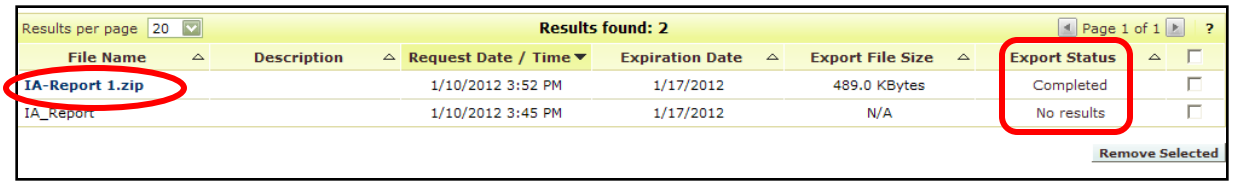
6. Click the **Search** button (located at the top or bottom of the page) for a list of requisitions over $10,000 that were created and approved by the specified individual.

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 **Documents** > **Document Search** > **Download Export Files**.
6. The **Export Status** will show whether or not your file is ready.



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.