M@rketplace Quick Reference Guide: *Approver*

About Approving

Financial approval is required for every requisition over $5,000, and for every Payment Voucher regardless of amount. It is given by an individual with a fiscal role on the SpeedType (except Officer or Fiscal Staff-Report Recipient), who also has been granted CU Marketplace Approver access by his or her department.

You will receive an email from CU Marketplace when a requisition is pending your approval.

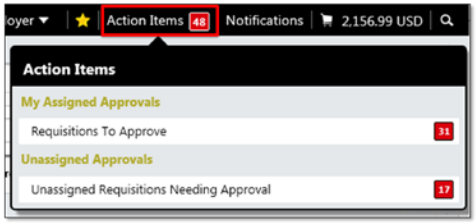
Are you also an Invoice/Match Exception Approver? Refer to the Quick Reference Guide Invoice/Match Exception Approver.

Accessing CU Marketplace

1. Log into your campus portal.
2. Locate your **CU Resources** section and, under the **Business Applications** area, select the **CU Marketplace** link.

Using Your Action Items List

Your Action Items list is one way to navigate to requisitions pending your approval. Click **Action Items** at the top of your screen and select the appropriate list.



Assigning Requisitions to Yourself

Do this step if the requisition is not already assigned to you – i.e., the requisition doesn't appear under your **My PR Approvals** folder.

1. Using your Action Items list (see above), click Unassigned Requisitions Needing Approval.
2. If needed, use the **Type** dropdown on the left side of your screen and select *Requisition*.
3. Locate the requisition you wish to assign.
4. Click the Assign button under the **Action** column to the right of the requisition. Note: If the Assign link is missing, the requisition has already been assigned to someone.
5. The requisition will appear under your **My PR Approvals** folder.



Returning Requisitions to Shared Folders

Do this step if the requisition is already assigned to you – i.e., the requisition appears under your **My PR Approvals** folder – and it shouldn't be.

1. Navigate to your **My PR Approvals** folder. One way to do this is using your Action Items list (see left) and clicking Requisitions To Approve.
2. Locate the requisition you want to return to the shared folder.
3. Check the checkbox to the right of the requisition.
4. Using the dropdown located in the upper right corner of the page, select *Return to Shared Folder* and click the Go button.
5. The requisition will disappear from your **My PR Approvals** folder and only appear under the shared SpeedType folder.

Approving Requisitions

1. Navigate to your **My PR Approvals** folder. One way to do this is using your Action Items list (see left) and clicking Requisitions To Approve.
2. If the requisition doesn't appear in your **My PR Approvals** folder, assign it to yourself (steps are on the left).
3. Click the requisition number to open the requisition. Review the requisition information.
4. Use the **Available Actions** dropdown, located in the upper right corner of the page, and select *Approve/Complete & Show Next*. Click the Go button.

Rejecting Requisitions

Rejected requisitions are cancelled and therefore cannot be resubmitted.

1. Navigate to your **My PR Approvals** folder. One way to do this is using your Action Items list (see left) and clicking Requisitions To Approve.
2. If the requisition doesn't appear in your **My PR Approvals** folder, assign it to yourself (steps are on the left).
3. Click the requisition number to open the requisition. Review the requisition information.
4. Use the **Available Actions** dropdown, located in the upper right corner of the page, and select *Reject Requisition*. Click the Go button.
5. Enter a reject reason and click the Reject Requisition button.

Returning Requisitions

Returned requisitions are sent back to the Requestor for revision and resubmission.

1. Navigate to your **My PR Approvals** folder. One way to do this is using your Action Items list (see left) and clicking Requisitions To Approve.
2. If the requisition doesn't appear in your **My PR Approvals** folder, assign it to yourself (steps are on the left).
3. Click the requisition number to open the requisition. Review the requisition information.
4. Use the **Available Actions** dropdown, located in the upper right corner of the page, and select *Return to Requisitioner*. Click the Go button.
5. Enter a return reason and click the Return to Requisitioner button.

Sending Comments without Returning Requisitions

1. Navigate to the requisition. One way to do this is by using your Action Items list (see previous page).
2. Click the requisition number to open the requisition.
3. Click the Comments tab and then the Add Comment button.
4. Enter your comments. Select the appropriate individual(s) to receive email notification of your comment: check the box next to the email recipient or search to add one.
5. Click the Add Comment button.

Adding Requisition Notes and Attachments

- Internal Notes and Attachments and External Notes and Attachments may be added to the requisition during the approval process.
- All attached documentation will remain with the requisition and Purchase Order indefinitely.
- Some suppliers have the ability to accept external notes and attachments with a Purchase Order. Notifications will indicate if notes and attachments are accepted.

1. Navigate to your My PR Approvals folder. One way to do this is using your Action Items list (see previous page) and clicking Requisitions To Approve.
2. If the requisition doesn't appear in your My PR Approvals folder, assign it to yourself (see previous page).
3. Click the requisition number to open the requisition.
4. Click the Requisition page tab, Summary page sub-tab.
5. Click the add attachment... link. Add the file or URL. Click the Save button.

Assigning Substitute Approvers

You might not need to assign a substitute approver if the SpeedType has additional Approvers with CU Marketplace Approver access.

1. Using your side navigation bar, go to Orders & Documents > Approvals > Assign Substitute Approvers.
2. If needed, use the Type dropdown on the left side of your screen and select *Requisition*.
3. Determine the folder(s) for which you would like to set up a substitute approver and click the Assign button…or, to set up a substitute for all of your folders, click the Assign Substitute to All Requisition Folders button.
4. Search for and select the appropriate individual from the resulting list.

Removing Substitute Approvers

1. Using your side navigation bar, go to Orders & Documents > Approvals > Assign Substitute Approvers.
2. If needed, use the Type dropdown on the left side of your screen and select *Requisition*.
3. Determine the folder(s) for which you would like to remove the substitution.
4. Click the Remove button...or, to remove the substitution for all of your folders, click the End Substitute for All Requisition Folders button.

Upon Completion of the Approval Process…

- The requisition becomes a Purchase Order which automatically distributed to the supplier via the supplier's preferred method.
- Some forms will ***not*** dispatch an order to the supplier, such as the After the Fact and Payment Voucher forms.
- Suppliers are provided with the Requestor's contact information, as supplied within CU Marketplace, and will contact the Requestor directly with questions or concerns.

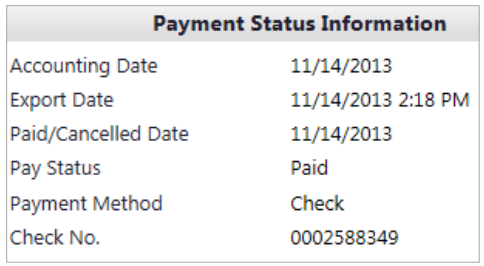
Requisition & Purchase Order History

- All requisitions and Purchase Orders are permanently stored within CU Marketplace.
- To locate a requisition you approved: Using your side navigation bar, go to Orders & Documents > Approvals > My Recent Approvals.
- To locate a requisition or Purchase Order using the Document Search:
  1. Using your side navigation bar, go to Orders & Documents > Document Search > Search Documents.
  2. If needed, click the advanced search link.
  3. Use the Search dropdown to search by *Requisition* or *Purchase Order*.
  4. Enter your search criteria and click the Go button.
  5. A list of results will appear. Use the left side of your screen to refine your search by options such as date range, supplier, user, or status.
  6. Click the requisition or Purchase Order number to view the document.

Voucher History & Payment Information

All invoices and credit memos are entered as vouchers into CU Marketplace.

1. Using your side navigation bar, go to Orders & Documents > Document Search > Search Documents.
2. If needed, click the advanced search link.
3. Use the Search dropdown to search by *Invoice/Voucher*.
4. Enter your search criteria and click the Go button.
5. A list of results will appear. Use the left side of your screen to refine your search by options such as date range, supplier, user, or status.
6. Click the voucher number to open the voucher.
7. The Payment Status Information section is located under the Buyer Invoice page tab, Summary page sub-tab in the upper right corner of the page.



Payment Status Information	
Accounting Date	11/14/2013
Export Date	11/14/2013 2:18 PM
Paid/Cancelled Date	11/14/2013
Pay Status	Paid
Payment Method	Check
Check No.	0002588349