

## Step-by-Step Guide

### Initiating Email Approvals within CU Marketplace

#### In This Guide

The approval process, for both requisitions and SPO vouchers, can be performed either within CU Marketplace or via email. Before you can approve by email, you need to set your email approval code in your CU Marketplace profile. You only need to set your approval code once – however, you will enter this code every time you use the email to approve.

This guide discusses:

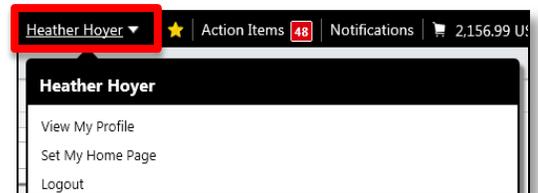
- ✓ Initiating email approvals by setting your email approval code

You will still be able to approve requisitions and SPO vouchers within the CU Marketplace system once you have set your email approval code.

#### Procedure

1. Begin by accessing CU Marketplace via [your campus portal](#). Locate your **CU Resources** section and, under the **Business Applications** area, select the **CU Marketplace** link.

2. Access your profile by using your name dropdown along the top of your screen and selecting **View My Profile**.



3. Under the **User Information and Settings** section, click **User's Name, Phone Number, Email, etc.**

4. Create and enter your own **Email Approval Code**. You will use this code when you approve requisitions via email.

Your code must be at least four characters long and may contain letters, numbers, and special characters.

5. Click the **Save** button.

A screenshot of the 'User's Name, Phone Number, Email, etc.' profile form. The form contains several fields: 'First Name' (Heather), 'Last Name' (Hoyer), 'Phone Number' (with country code, area, and extension fields), 'E-mail Address' (heather.hoyer@cu.edu), 'Department' (52005-Procurement Service Center), 'Position', 'User Name' (R01030), and a 'Question' field. At the bottom, there is an 'Email Approval Code' field, which is highlighted with a red box. Below the code field is a blue 'Save' button, also highlighted with a red circle.

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- Now that you have an Email Approval Code, you will have the ability to take action via email (see sample below) whenever there is a requisition or SPO voucher pending your approval.

To take action on the document, select the "Take Action" button in the email message.

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

*Sample email:*

#### **Speedtype: 1108888 for Requisition# 33991587**

Dear Jane Doe,

The requisition listed below has been submitted for your approval.

#### **Summary**

Folder: Purchasing CPO Review SPO  
Prepared by: Mike Smith  
Cart Name: 2012-10-16 SMITH  
Requisition No.: 33991587  
Priority: Normal  
No. of line items: 1

**TOTAL: 10,850 USD**

#### **Details**

#### **Centrillion Biosciences Inc**

#### **Standing Purchase Order - Sole Source Request**

Form Type: SPO-Encumbered

#### **Item 1**

Description: Standing Purchase Order  
Begin Date: 11/13/2012  
End Date: 5/31/2013  
Catalog Number:  
Quantity: 10,850  
Unit Price: 1.00 USD  
Ext. Price: 10,850.00 USD  
Size/Packaging:  
Commodity Code: 15  
Financial Report  
Comments:

**FORM TOTAL: 10,850 USD**

**TOTAL: 10,850 USD**

*(sample email continued on next page)*

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### *Initiating Email Approvals within CU Marketplace*

#### Accounting Codes

Business Unit: UCOLO - The University of Colorado  
Speedtype: 1108888 - Translational [Stu](#)die  
Fund: 30 - Sponsored Projects- Fed & Priv  
Org: 10000 – Biology  
Program:  
Project\_code: 154444 - Translational Studie  
Subclass:  
Account: 530102 - Lab & Tech Shop Services

Ready to approve, reject or assign this document to yourself? [Take Action](#)

#### Additional Information

##### Summary Details

F.O.B.: FOB DT PPA - FOB Dest/Prepay&Add  
Campus: Boulder – Boulder  
Campus Box: 447 B – Boulder  
Handling Code:  
Payment Message:  
Buyer Name: Stuart Littlefield - (303) 764-3414 [Stuart.Littlefield@cu.edu](mailto:Stuart.Littlefield@cu.edu)  
Comments: (4)

##### Internal Attachments

CU-SL91587-Q.xls  
Price Cost Analysis Checklist Centrillion Biosciences P.R. # 33991587.docx  
P.R. # 33991587 Internal Backup.pdf  
SAM Search for Centrillion Biosciences.pdf

##### Attachments for all suppliers

CU-SL91587-Q Centrillion Biosciences Response.pdf

##### Shipping Address

ATTN: Mike Smith  
RM/FLR/STE 101  
1233 30th St  
Biology  
Boulder, CO 80303  
United States

If you have any questions with regard to reviewing/approving this requisition, please contact --

+1 (303) 837-2161  
[FinProHelp@cu.edu](mailto:FinProHelp@cu.edu)

Thank you,  
University of Colorado – CU Marketplace