

Step-by-Step Guide

Approving Requisitions within CU Marketplace

In This Guide

After the Requestor submits a shopping cart as a requisition, CU Marketplace will route the requisition for financial approval. Financial approval 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. In order to approve the requisition's line(s) using your SpeedType, you will need to give approval for the entire requisition. The Approvers for any other SpeedTypes are responsible for approving their own SpeedType use.

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

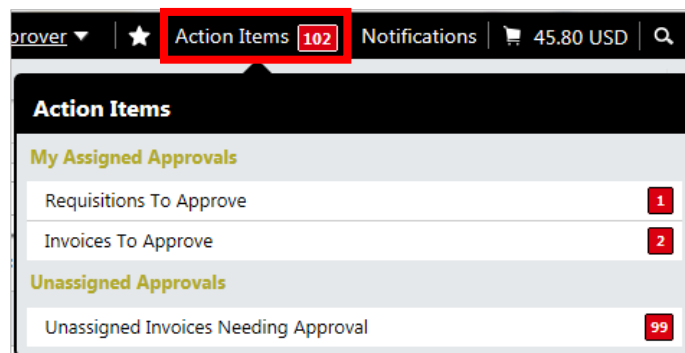
This guide discusses the requisition approval process. Topics covered are:

- ✓ Locating requisitions pending approval
- ✓ Reviewing requisitions for approval
- ✓ [Approving requisitions by email](#)
- ✓ Assigning requisitions to yourself
- ✓ [Approving requisitions in CU Marketplace](#)

Financial approval is required for requisitions over \$5,000, and for Payment Vouchers (PVs) regardless of dollar amount.

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. Access your pending invoice approvals by using your Action Items list. Click **Action Items** at the top of your screen and select the appropriate list.

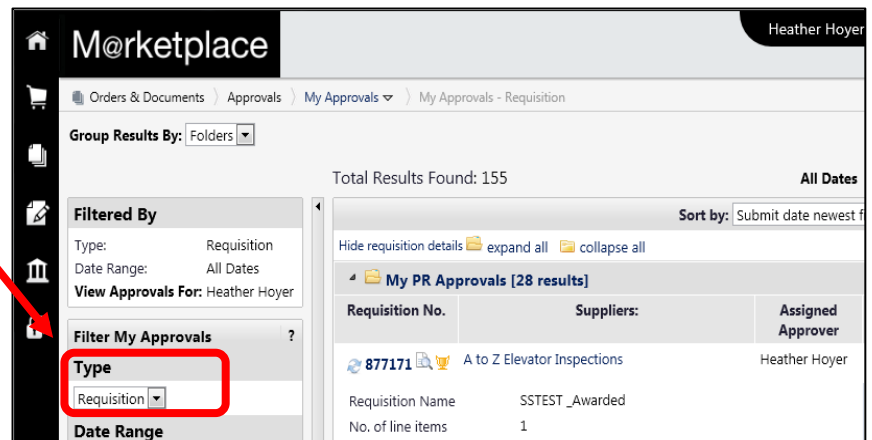


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Alternately, you can use the navigation bar on the left side of your screen and go to **Orders & Documents > Approvals > My Approvals**.

- 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 *Requisition*.



- Requisitions pending your approval are organized into folders. Each folder is a SpeedType on which you have a fiscal role other than Officer. If a single requisition 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 requisitions pending approval.

- Additionally, you can use the filters on the left side of your screen to narrow the list of requisitions pending approval that is currently visible to you. For example, you can refine your list by Form Type and view only the Payment Vouchers (PVs) or Standing Purchase Orders (SPOs) pending approval.
- Assign the requisition to yourself by clicking the **Assign** button. (If the **Assign** button doesn't appear, the requisition has already been assigned to someone for approval.)




When you assign a requisition to yourself that is pending approval from other SpeedTypes on which you are also an approver, a pop-up message gives you the option to approve for all of your SpeedTypes at once. Click **Yes** to do so...or, click **No** to only approve for this SpeedType.

- Click the requisition number to begin your review. (If working within the Folder view, the requisition will now appear in your **My PR Approvals** folder.)
- Review the requested items and accounting information; ask yourself:

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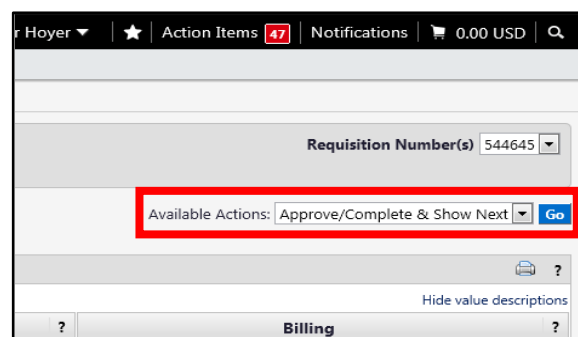
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- Are the requested items appropriate for purchase? (Do they comply with the PSC Procedural Statement [Sensitive Expenses](#) and, within the Administrative Policy Statement [Propriety of Expenses](#), the Tests of Propriety?)
 - If a Payment Voucher is being used, can the requested item be purchased on a [Payment Voucher](#)?
 - Is the accounting information appropriate for this purchase?
9. If a form – such as the Standing Purchase Order form or Payment Voucher form – is associated with the request, a form image  appears next to the production description. Click the description to access the form and review the additional data.
10. After reviewing the requisition, you have three options:



- **Approve Requisition As Is**

To approve the entire requisition as is, use the **Available Actions** dropdown (located in the upper right corner of the page) to select *Approve/Complete & Show Next*. Click the **Go** button.

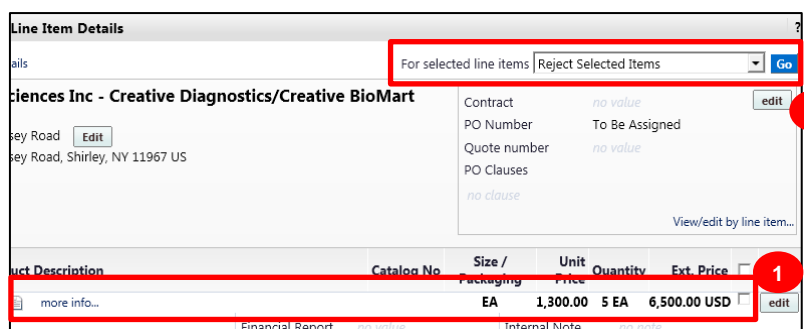


- **Approve Some Line Items But Not Others**

To partially approve a requisition, begin by rejecting the line(s) you do not want to approve.

(1) Reject a line by checking the checkbox to the right of the line.

(2) Then, use the **For selected line items** dropdown to select *Reject Selected Items*. (You can mark multiple lines for rejection at once.) Click the **Go** button. A pop-up window will appear to enter a reject reason for the line(s). This note will be sent as an email notification to the Requestor.



Once the appropriate lines have been rejected, approve the remaining line(s). Use the **Available Actions** dropdown (located in the upper right corner of the page) to select *Approve/ complete step & show next*. Click the **Go** button.

- **Not Approve The Requisition**

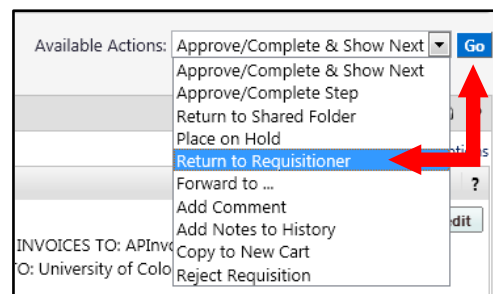
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To deny the requisition as is, you will either return or reject the requisition.

- **Returned requisitions** are sent back to the Requestor. The Requestor can then update and resubmit the requisition.
- **Rejected requisitions** are cancelled and therefore cannot be updated. If appropriate, the Requestor can create and submit a new requisition for processing.

Both actions are available in the **Available Actions** dropdown located in the upper right corner of the page. Also, both actions result in an email notification to the Requestor.



11. The next requisition pending your approval will appear.

Approving Requisitions by Email

Another way to approve requisitions is by email. You will receive an email from cumarketplace@cu.edu when a requisition 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 Approvals** to learn how.

Once your approval code is set...

1. Open the email.
2. Review the requisition's details in the email, such as supplier, goods/services being requested, dollar amount, 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 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 requisition 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: No
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**