

## **Step-by-Step Guide**

### *Approving SPO Vouchers within CU Marketplace*

#### **In This Guide**

When an invoice is entered into CU Marketplace, it becomes a voucher. Standing Purchase Order (SPO) vouchers require approval – no matter the amount of the voucher – in order to pay. An email from CU Marketplace will be sent to the Requestor and the appropriate Invoice/Match Exception Approver(s) when an SPO voucher is entered.

This guide discusses the SPO voucher approval process. Topics covered are:

- ✓ [Approving SPO vouchers for payment by email](#)
- ✓ [Approving SPO vouchers in CU Marketplace](#)
- ✓ Locating vouchers pending approval

#### **Who can approve SPO vouchers?**

Invoice/Match Exception Approvers can approve SPO vouchers. (This role also ensures resolution of invoice match exceptions, as detailed in the Step-by-Step Guide [Resolving Match Exceptions](#).) An Invoice/Match Exception Approver is an individual with a fiscal role on the SpeedType (except Officer or Fiscal Staff – Report Recipient) who also has been granted CU Marketplace Approver Invoice access by his or her department.

#### **Approving SPO Vouchers by Email**

One way to approve SPO vouchers is by email. You will receive an email from [cumarketplace@cu.edu](mailto:cumarketplace@cu.edu) when an SPO voucher 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 Email Approvals within CU Marketplace](#) to learn how.


#### **Once your approval code is set...**

1. Open the email.
2. Review the SPO voucher's details in the email, such as supplier, dollar amount, who initiated the SPO, SPO begin and end dates, 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 Invoice/Match Exception 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 voucher 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

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**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

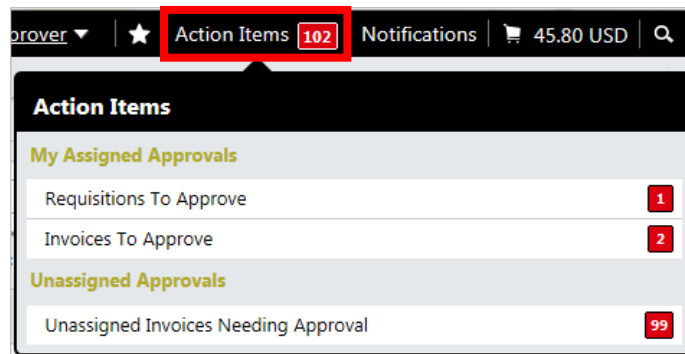
### Approving SPO Vouchers in CU Marketplace

Another way to approve SPO vouchers is within CU Marketplace.

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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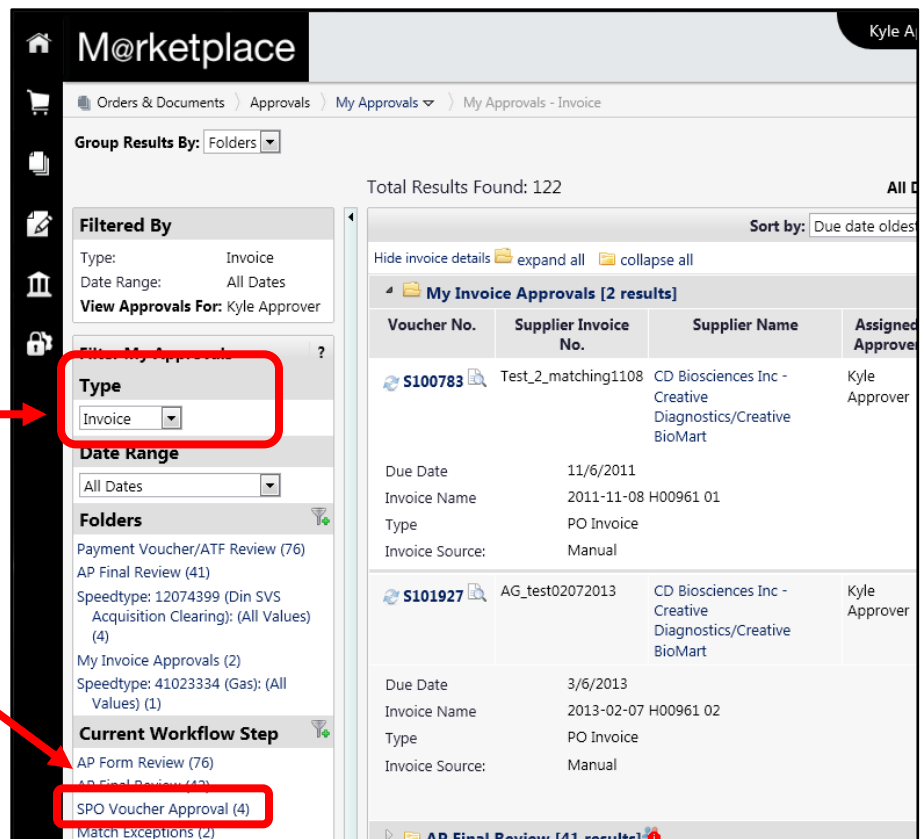
### Approving SPO Vouchers within CU Marketplace



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 *Invoice*.

- Use the Current Workflow Step filter to only see those pending **SPO Voucher Approval**.



- Vouchers pending approval are organized into folders. Each folder is a SpeedType on which you have a fiscal role other than Officer or Fiscal Staff – Report Recipient. If a single voucher uses multiple SpeedTypes, it will appear in each applicable SpeedType folder for which you are an Approver.

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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 vouchers pending approval.

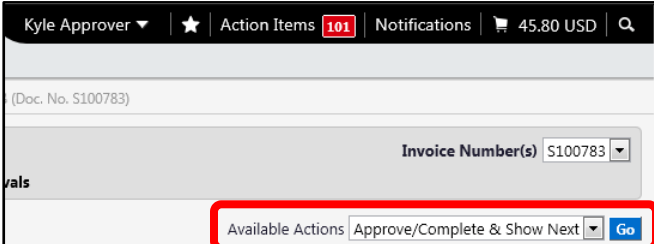
- To further narrow the list of vouchers pending approval that is currently visible to you, use the filters on the left side of your screen.
- Click the voucher number and then review the voucher information to determine whether this SPO voucher should pay. (Refer to the Quick Reference Guide [Voucher Information](#) for further details.)

#### SpeedType Changes for SPO Vouchers

SpeedType changes can be made to SPO vouchers that are pending approval, as long as there is a single SpeedType on the SPO line. Use the [SPO Invoice Allocation](#) form to submit the change. Approve the SPO voucher only **after** the SpeedType is changed.

- To approve this individual voucher:**

Click the voucher number – if not already reviewing the voucher details – and use the **Available Actions** dropdown (located in the upper right corner of the page) to select *Approve/Complete & Show Next*. Click the **Go** button.



Kyle Approver | ★ | Action Items 101 | Notifications | 45.80 USD | 🔍

(Doc. No. S100783)

Invoice Number(s) S100783

vals

Available Actions Approve/Complete & Show Next Go

- To approve multiple vouchers simultaneously:**

Review each voucher to determine whether it should be paid. Then, from the list of vouchers pending approval, check the box to the right of each SPO voucher that you are approving for payment. Once the appropriate vouchers are selected, use the **Available Actions** dropdown (located in the upper right corner of the page) to select *Approve/Complete*. Click the **Go** button.