

Step-by-Step Guide

Initiating Email Requisition Approvals within CU Marketplace

In This Guide

The requisition approval process can be performed within CU Marketplace or via email. With either method, you must first review the requisition to determine if approval is appropriate. Email approval allows you to use email (including using email on your smartphone or other mobile device) to approve or reject requisitions.

Note: After you have initiated your ability to approve requisitions by email, you will still be able to approve requisitions within the CU Marketplace system.

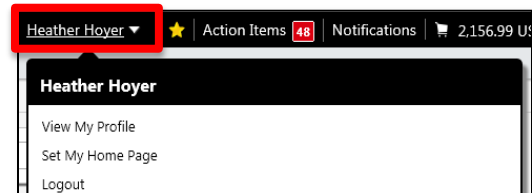
This guide discusses:

- ✓ Initiating requisition approvals by email

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.

A screenshot of the 'User's Name, Phone Number, Email, etc.' form in CU Marketplace. The form contains several fields: 'First Name' (Heather), 'Last Name' (Hoyer), 'Phone Number' (with a country code dropdown and area/extension boxes), 'E-mail Address' (heather.hoyer@cu.edu), 'Department' (52005-Procurement Service Center), 'Position', 'User Name' (R01030), 'Question' (a dropdown menu), 'Authentication Method' (Local), and 'Email Approval Code' (a text box). The 'Email Approval Code' field is highlighted with a red rectangle. At the bottom right of the form, there is a 'Save' button, also highlighted with a red circle.

5. Click the **Save** button.

6. Now that you have an Email Approval Code, you will receive an email (see sample below) whenever there is a requisition pending your approval.

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To take action on the requisition, select the "Take Action" button in that 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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Accounting Codes

Business Unit: UCOLO - The University of Colorado
Speedtype: 1108888 - Translational Studie
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
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

Thank you,
University of Colorado - CU Marketplace