

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 notification from CU Marketplace will be sent to the Requestor and the appropriate Approver(s) when an SPO voucher is entered.

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

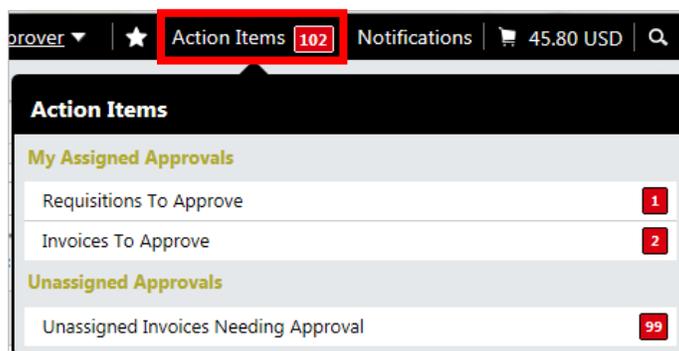
- ✓ Locating vouchers pending approval
- ✓ Approving SPO vouchers for payment

Who can approve SPO vouchers?

Those with the Invoice/Match Exception Approver role can approve SPO vouchers. (This role also approves match exceptions on vouchers, as detailed in the Step-by-Step Guide [Approving Match Exceptions](#).) An Invoice/Match Exception Approver is an individual with a fiscal role on the SpeedType (except Officer) who also has been granted CU Marketplace Approver Invoice access by his or her department.

Approving SPO Vouchers

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



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

Step-by-Step Guide

Approving SPO Vouchers within CU Marketplace

- 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**.

The screenshot shows the 'My Invoice Approvals' page in the CU Marketplace. On the left sidebar, the 'Type' dropdown is set to 'Invoice', and the 'Current Workflow Step' filter is set to 'SPO Voucher Approval (4)'. The main content area shows a table of invoice approvals with the following data:

Voucher No.	Supplier Invoice No.	Supplier Name	Assigned Approver
S100783	Test_2_matching1108	CD Biosciences Inc - Creative Diagnostics/Creative BioMart	Kyle Approver
S101927	AG_test02072013	CD Biosciences Inc - Creative Diagnostics/Creative BioMart	Kyle Approver

What if the SPO voucher has a match exception?

SPO vouchers will have a match exception when the invoiced amount is greater than the SPO's remaining balance. They will appear under the Current Workflow Step of **Match Exceptions** and cannot be approved at this time. Refer to the Step-by-Step Guide [Approving Match Exceptions](#) for further information.

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

Step-by-Step Guide

Approving SPO Vouchers within CU Marketplace

7. If you would like to let other Approvers know you are working on this SPO voucher, assign the voucher to yourself by clicking the **Assign** button. (If the **Assign** button doesn't appear, the voucher has already been assigned to someone for approval.)
8. Review the voucher information to determine whether this SPO voucher should pay.

9. For additional information regarding this voucher – including an image of the invoice – click the voucher number. (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.

10. *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.

11. *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.