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Introducing a New Form Request Experience in CU Marketplace [1]

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We're excited to share that a refreshed Form Request experience will be launching in CU Marketplace on **Monday, March 30**.

This update brings a more intuitive, modern look and feel to key forms, along with targeted usability improvements designed to make your workflow smoother and more efficient. While the interface is getting an upgrade, the **core functionality remains the same**, so you can continue completing your tasks as usual without disruption.

The new Form Request UI will be available for:

- Purchase Requisition Form
- Payment Voucher
- Supplier Request
- Contract Request
- Bid Request

It's important to note that this enhancement is limited to the Form Request experience. There will be **no changes to the Requisition, Purchase Order, or Invoice pages**.

We believe this update will make navigating and completing forms easier and more streamlined. See below for a visual comparison of the current and new experience to help you get familiar with the changes.

Click **here** [3] to view the current UI.

Click **here** [4] to view the new UI.

1. **Enter request information in tabs/pages**
    a. Requests are filled out in a wizard-like interface. Information that needs to be entered for a request are displayed in tabs/pages along the top of the request. Numbered icons next to each tab show the order in which to move through the tabs to complete a request. A green checkmark is displayed if all the information has been filled out for a tab.
2. **Enter request information in sub-tabs/pages**
    a. Additional pages that are required will appear below the main tabs/pages along the top of the page. A red highlight indicates that there is missing or incomplete information that is required on that page/tab. Once all required fields are captured, the red highlight will no longer be visible.
3. **Instructions and Actions menu**

    a. While on any tab/page in the new UI, you can click the document icon to access the form instructions. The instructions page will appear on the right-hand side of the page.
    b. The three-dot icon will expand additional menu options where you can Add to Favorites, Discard Request, or view the History tab.
    c. The discussion thread icon will allow you to start a discussion thread to communicate additional information to the reviewer. Click **here to view** [5] the new UI. Note: the discussion feature is only available for Payment Voucher and Small Dollar Contract Request forms. If additional information needs to be added to a Purchase Requisition Form, continue to use the normal comments tab on the cart/checkout page.
4. **Save and navigation options in the header**
    a. You can click Save Progress after entering information in a tab to save changes. Click Next and Previous to move between tabs and save any updates captured on the current tab.
5. **Summary information**
    a. The Summary section will display general information about the request (the created date, the form number, and the type of request).

If you have any questions, feel free to reach out to us at PSC@cu.edu [6].

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