



SEARCHING FOR DOCUMENTS IN CU MARKETPLACE

Presented by:
Kristina Mendez
Training Program Manager
Office of University Controller
kristina.mendez@cu.edu



Agenda

- Marketplace Access
- Quick Search vs Advanced Search
- Using Advanced Document Search
- Customizing Searches
- Saving Searches
- Exporting Results

MARKETPLACE ACCESS

Access & Training Requirements

Each course listed is required for access unless otherwise noted.

Training courses are available in **Skillsoft** unless otherwise noted. Log in to [your campus portal](#) and on the **CU Resources tab**, click the **Skillsoft** tile, then search by course name. To launch a course from this page, use the direct links in the **Course column** below.

Terminating access: Portal access will be shut off within hours of employee termination being recorded in HCM. Roles are removed on a weekly basis. To terminate access immediately, contact your [campus security coordinator](#).

Concur Travel & Expense	CU-Data	CU Marketplace	PeopleSoft Finance (FIN)	Gift Fund (Fund 34)
Procurement Card	Travel Card			

Employees and Type 15 POIs can request access. As detailed below, certain roles (Fiscal Approver, Invoice Approver, and Fiscal Approver IA) require that you have a fiscal role on a SpeedType, for more information see the PeopleSoft Finance tab.

To approve Fund 34 expenses in CU Marketplace: Also see the Gift Fund tab.

Complete the required trainings then log in to [CU Identity Manager \(OIM\)](#) to request access to CU Marketplace.

<https://www.cu.edu/controller/training/access-training-requirements>

Common Searches

- Open POs or SPOs for a SpeedType or Org
- POs created by an individual
- Invoices that require receiving or some other action to pay
- Previous department orders from a supplier



System Demo

Tips

- Start with a specific document type
- Verify the date range
- Start by applying filters, then refine results using Quick Filters or Quick Search, if needed
- Save time by pinning filters and columns
- Save your frequently (and infrequently) used searches

Resources

- CU Marketplace How-to: Using Advanced Document Search

<https://www.cu.edu/psc/training/cu-marketplace/cu-marketplace-how-using-advanced-document-search>

- Need Access? <https://www.cu.edu/controller/training/access-training-requirements>

- For additional training, visit the CU Marketplace Training page

<https://www.cu.edu/psc/training/cu-marketplace-training>

- For one-on-one assistance with your questions, contact FinProHelp:

303.837.2161

FinProHelp@cu.edu

A dark blue, irregularly shaped graphic with a splatter effect, containing the word "Questions?" in white text. The graphic has a rough, hand-painted appearance with various shades of blue and white splatters around its edges. The text is centered within the dark blue area.

Questions?