Job Aid: Modifying CU Marketplace Profile Settings in the CU Marketplace

This job aid covers how to modifying your Profile settings in the CU Marketplace. The CU Marketplaces powered by JAGGAER provides access to negotiated contracts and pricing with Columbia's preferred suppliers. You are not required to enter Profile settings in order to begin using the CU Marketplace. However, you have the option to set Favorites and Defaults for ChartStrings, Ship To and Bill To Addresses, and Assignees (Requestors) in order to accelerate your purchases.

In order for Requesters to submit Requisitions, ensure that your Admin Department is indicated in the ARC Requester Defaults screen. In most cases, this information is automatically imported from PAC. If so, no action is required. Refer to the <u>Entering Your Admin Department in ARC Requester Defaults</u> job aid for details and instructions.

In addition, your email address is fed from PAC, while your phone number is fed from the ARC Requester Defaults screen.

Accessing the CU Marketplace

Navigate to the <u>Finance Buying and Paying</u> website, click the **CU Marketplace** logo, and login using your Single Sign On.



OR If you have access to Buying and Paying in ARC:

- 1. Log into My.Columbia <u>http://www.my.columbia.edu</u>, click on the **ARC** tab and then **Go to ARC**.
- 2. Once in ARC, click the Buying and Paying tile and then click the CU Marketplace tile.



The CU Marketplace launches.

Columbia University				A/I -	Search (Alt+Q) Q, 44.60	a uso 🗑 🗢 🍽
Shop · CU Marketplace						
CU Marketplace Order Status						
Simple Advanced				n In: Exercites Exercis Non-C	atalog Bern Ouick Onler - Drowner Se	unilers Categories Cost
					and and a second second of	
Search for products, suppliers, forms, part number, etc.						
Welcome to The Marketplace						
Columbia's Procure to Pay (P2P) Marketplace is an	IT, Audio Visual & Office Supplies					
eProcurement solution enabling Columbia users to efficiently manage their highest volume purchases. The Markatolace is	G	G				
designed to streamline the P2P process and create a more efficient shopping experience and seamless payments to	BH	COWG	Connection	e^{\cdot}	MRA INTL INC Placeholder - NOT enabled	STAPLES
vendors. The Marketplace also features the most widely used	B&H Photo	CDW-6	yet	ePlus	yet	Staples
goods & services, with many more suppliers to be added. This is but the function and with continue to continue to control.						
functionality aimed at improving the way we transact business oping forward.	Lab Supplies					
System Outage : July 14 - 16		G	ß		C	
The Marketplace will not be available from 9:00pm EST Friday, July 14 through 11 Claim Sunday, July 16 for system undates. Learn more	🔆 Agilent	BIO FAD	2 Cell Speiding	(C) Litteren.	IDT	SIGMA
about the system updates here.	Aglent	Bio Rad	Cell Signaling Technologies	Fisher Scientific	Integrated DNA Technologies	Millipore Sigma
New Supplier Punchouts Available As of July 17th the Marketolace has launched sunchouts with New	rê.	F.8	E ²	rð.	P ²	
England Dio Labs and Millipore Bigma. These suppliers are enabled and ready for ordering under the Lab & Scientific showcase.	Bellen mannet	0		RAININ	TaKaRa	THORLABS INC
New System Feature	INOLARS New England Bio-Labs	Promega	Giagen	Pipeting 350* Rainin	Takara	Thorlabs
Effective immediately, Requesters can now submit a requisition for delivery to an off campus location using the AdMoc Ship. To location.						
This shipping method is only available for Marketplace orders up to \$1,000. Learn more about the policy change here.	8	C				
	NSA	VWN				
	USA Scientific	VWR / Avantor				
	Medical & Dental Supplies					
		C				
	SHORESORD	MCK				
	Henry Schein Dental	McResson Medical & Surgical				
Helptul Links						
Supplier Enablement Webpage (PLACEHOLDER)						
C Procurement Home Page (Buying & Paying)						
Vender Management kinne Page						
Columbia Home Page						
C Finance Training Library						

Note: *The CU Marketplace will automatically timeout after thirty minutes of inactivity, consistent with other University Enterprise Systems.*

Q. 4 **COLUMBIA UNIVERSITY** IN THE CITY OF NEW YORK

Job Aid: Modifying CU Marketplace Profile Settings in the CU Marketplace

Setting Profile Favorites and Defaults

1. Click the **Profile** icon in the upper right corner of the JAGGAER screen.



- 2. Click View My Profile.
- 3. Click Default User Settings.



Setting ChartString Favorites and Default

1. Under Default User Settings, click Custom Field and Code Defaults.

ñ	My Profile COLUMBIA UNIVERSITY My Profile Custom Field and Accounting Code Defaults		
	Eric Requester	Custom Field and Accounting Code Defaults	
0	User Name ericrequester	Header (Int.) Codes Code Favorites	?
¥ غ	User Profile and Preferences	Use Code Favorites for quick access to accounting code combinations saved to your profile during checked. You may create a new Code Favorite by clicking the 'Add' button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed auring checkout by editing the codes section or by selecting it as your default accounting codes in your profile.	
사	Default Addresses Cart Assignees Checkout Settings	Add Accounting Codes	?

- 2. Click the **Code Favorites** tab,
- 3. Click the Add button. The Accounting Codes window appears.

			0	1					
Accounting Cod	es								? X
Nickname	De	fault							
GL Business Unit	Project	Activity	Department	Initiative	Segment	Site	PC Business Unit	AM Business Unit	add split
COLUM Select from profile values	Select from all values			00000 Select from profile values Select from all values	00000000 Select from profile values Select from all values	Select from all values	no value	COLUM	
				Save Cancel					

- 4. Enter a **Nickname** for the ChartString so that you can easily access it when shopping. You can click the *Default* checkbox to indicate that this will be your default ChartString.
- 5. Enter the ChartField values. They must be entered in order left to right as the available values are dependent on the value in the previous field. You can leave fields blank.

You can click the Select from all values link to use the Custom Field Search for field you are populating.



6. Click the **Save** button.

You can click Add again for additional ChartString favorites.

COLUMBIA UNIVERSITY IN THE CITY OF NEW YORK

Job Aid: Modifying CU Marketplace Profile Settings in the CU Marketplace

Setting Default Ship To and Bill To Addresses

Â	My Profile Default Addresses	SITY		
-	Eric Shopper		Default Addresses	
Ō	User Name ericshopper		O No addresses defined in profile.	
2	User Profile and Preferences	>	Ship To Bill To	
血	Default User Settings Custom Field and Accounting Code D	<	Select an address to edit	Select Addresses for Pro
-125	Default Addresses	Gradita	No addresses defined in profile.	
	Cart Assignees		Shipping Addresses	
39	Checkout Settings		A	
	User Roles and Access	>		
յլի	Ordering and Approval Settings	>		
	Permission Settings	>		
	Notification Preferences	>		
	User History			

- 2. Select either the **Ship To** or **Bill To** tab to set the default for the desired address type.
- 3. Click the Select Addresses for Profile button. The Select Address Template dropdown appears.

Default Addresses							
Ship To Bill To Select an address to edit		? Select Addresses for Denfile					
Shipping Addresses		Address Search					
Fric's Address	_	Nickname / Address Text Text Results Per Page 10 v Search					
	-						

4. Enter an address Nickname / Address to search for a matching address and click Search. A list of matches appear.

Ship To Bill To			
Select an address to edit			Select Addresses for Profile
Shipping Addresses		Address Search	
Eric's Address Requestor Address	^	Nickname / Address Text Results Per Page	б30 w 132 10 ♥ Search
		Addresses Found Name	d: 1 Address
	•	O 630 W 132nd St	Contact Name Eric Shopper 630 W 132nd St Manhattanville New York, NY 10027 United States

- 5. Select the desired matching address. You can enter a **Nickname**, select if this address will be your **Default**, or change the **Contact Name**.
- 6. Click Save. The Address you saved will appear in the Addresses list.

Job Aid: Modifying CU Marketplace Profile Settings in the CU Marketplace

🖆 COLUMBIA UNIVER	SITY			
My Profile 🕨 Default Addresses				
Eric Shopper		Default Addresses		
User Name ericshopper		Ship To Bill To		
Liear Brofile and Brofaranasa		Select an address to edit		? Select Addresses for Profile
Default Uses Optimizes		Shipping Addresses		
Custom Field and Accounting Code D	< Defaults	Eric's Address	*	
Default Addresses				
Cart Assignees				
Checkout Settings				
User Roles and Access	>			
Ordering and Approval Settings	>			
Permission Settings	>		_	
Notification Preferences	>		· · ·	
User History				

You can click the Select Addresses for Profile button again within the Ship To or Bill To tabs to add additional addresses.

You can click an address from the Addresses list to edit the settings or delete it.

Creating Requester Favorites (Adding Assignees)

As Shopper, you must assign a Requester who has been approved to submit your Cart into approval workflow in order to create a requisition. You can create favorite Requesters that are available when you assign your Cart.

- 1. Under Default User Settings, click **Cart Assignees**.
- 2. Click the Add Assignee button. The User Search window appears.

User Search	
Last Name	
First Name	
User Name 😧	
Email 😧	
Department 😧	~
Role 🕑	~
Results Per Page	10 🗸
Search	

3. Use any of the available fields to search for a colleague and click the **Search** button. Your colleague must have the Requester role for you to add them as an assignee. The search results appear.

S User Search - Google Chrome	—		\times				
● usertest.sciquest.com/apps/Router/GenericUserSearch?returnFunction=setUserFromPopupSearch&permissions=P							
New Search							
Name 🔺	User Name	Email 🗠	Phone	Action			
Requester, Paul	paulrequester	nobody@jaggaer.com		[select]			

4. Click the **Select** link in the Action column to select the colleague. You can click Add Assignee again for additional Requesters.

Job Aid: Modifying CU Marketplace Profile Settings in the CU Marketplace

Setting Notification Preferences

The Notifications defaults are set so that you receive system notifications, email alerts, or both when key events occur or milestones are reached. You have the ability to edit these settings to remove notifications, change the notification type for some triggers, or add notifications settings for additional trigger events.

1.	Click the Profile	icon in the upper right con	rner of the JAGGAER screen.

â	🖆 Columbia University		All 👻	Search (Alt+Q)	۹	559.40 USD	Ξ.	♡ •	41
	Shop • CU Shopping Dashboard			Eric Shopper					
				View My Profile	.				
F 0	 Welcome to Columbia's eProcurement Marketplace	Snop	ale Adv	Manage Searche	View N	Ay Profile			
e E	Columbia's Procure to Pay (P2P) Marketpiace is an eProcurement solution enabling Columbia users to efficiently manage their highest volume purchases. The Marketpiace is designed to steamilise the P2P process and create a more efficient shoping experience and semiles payments to the most commonly purchased goods & services, with many more Purchase Agreements for the most commonly purchased goods a services, with many more	Searc	h for products	My Pending Req , S	uisitions				Logout

- 2. Click View My Profile.
- 3. Click **Notification Preferences** and select the menu item for the category of notifications you want to edit. The page for the selected notification category appears.

Ξ	Eric Shopper		Notification Preferences:	Edt Sector 7	
	User Name ericshopper		Shopping, Carts & Requisitions		
•			The in-application notifications are not yet avail		
•	User Profile and Preferences	5			
盦	Default User Settings	- 5	Prepared By - Cart Assigned Notice \varTheta	None	
	User Roles and Access	>		1000	
44	Ordering and Approval Settings	2	Prepared by - Pit one item(s) rejected	Note	
	Permission Settings	>	Prepared By - PR rejected/returned	Email & Notification	
8	Notification Preferences	<	Cart Assigned Notice	None	
	Administration & Integration	-			
1th	Shopping, Carts & Requisitions		Receive PR and PO notifications for Carts	Notification	
	Purchase Orders		Assigned to Mile		
	Accounts Payable		Assigned Cart Processed Notification •	None	
	Receipts		Assigned Carl Deleted Notification	Email & Notification	
	Contracts		and the second se		
	Sounding Director		PR submitted into Workflow O	Notification	
	Supplier Management		PR pending Workflow approval O	Note	
	Form Requests			1000 C	
	User History	5	PR Worknow Notification available 😧	ryone	

4. Click the Edit Section link. The Notification Preferences appear ready to be edited.

hopping, Carts & Requisitions				
The in-application notifications are not yet availa	able for all Email No	tifications.		
Prenared Ry - Cart Assigned Notice	Default	O Override	None	
Prepared By - PR line item(s) rejected 0	Default	O Override	None	
Prepared By - PR rejected/returned \varTheta	Default	O Override	Email & Notification	
Cart Assigned Notice	Default	O Override	None	
Receive PR and PO notifications for Carts Assigned to Me	Default	O Override	Notification	
Assigned Cart Processed Notification \varTheta	Default	O Override	None	
Assigned Cart Deleted Notification	Default	O verride	Email & Notification	
PR submitted into Workflow \varTheta	Default	O Override	Notification	
PR pending Workflow approval 😧	Default	O Override	None	
PR Workflow Notification available	Default	O Override	None	
PR Workflow complete / PO created 😜	🖲 Default	O Override	Notification	
PR line item(s) rejected	Default	O Override	None	
Cart/PR rejected/returned 😧	Default	O Override	Email & Notification	
Sourcing Event created from Requisition 😜	Default	O Override	None	
PR created from an awarded Sourcing Event 😜	Default	Override	None	
Cart created from an awarded Sourcing Event	🖲 💿 Default	O Override	None	
				Save Changes Cancel

5. To change a Notification Preference, select the **Override** option for the desired setting, and select the desired choice from the setting dropdown.

Assigned Cart Processed Notification 🤤	⊖ Default	Override	None
Assigned Cart Deleted Notification 😧	💿 Default	Override	None Email
PR submitted into Workflow	Default	O Override	Email & Notification

6. Click the **Save Changes** button after you have made all the desired changes within the section.

```
COLUMBIA UNIVERSITY
IN THE CITY OF NEW YORK
```

Job Aid: Modifying CU Marketplace Profile Settings in the CU Marketplace

Getting Help

Please contact the Finance Service Center http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now <u>https://columbia.service-now.com</u>