

CU Marketplace Approvers Quick Guide



The CU Marketplace powered by JAGGAER provides access to negotiated contracts and pricing with Columbia's preferred suppliers. This Quick Guide covers how to assign a Requisition to your yourself in order to review it and how to approve or return a Requisition .

For detailed instruction on using the CU Marketplace, including how to manage approvals, refer to the [CU Marketplace for Approvers Training Guide](#). For instructions on modifying your Profile settings, refer to the [Modifying Profile Settings in the CU Marketplace job aid](#).

1. Assigning a Requisition to Yourself

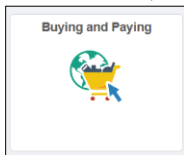


You do not need to assign a Requisition to yourself in order to only approve it. However, if you need to take any other action on a Requisition, such as inserting an Ad-Hoc Approver, returning the Requisition to the Requester, or rejecting it, you must first assign it to yourself.

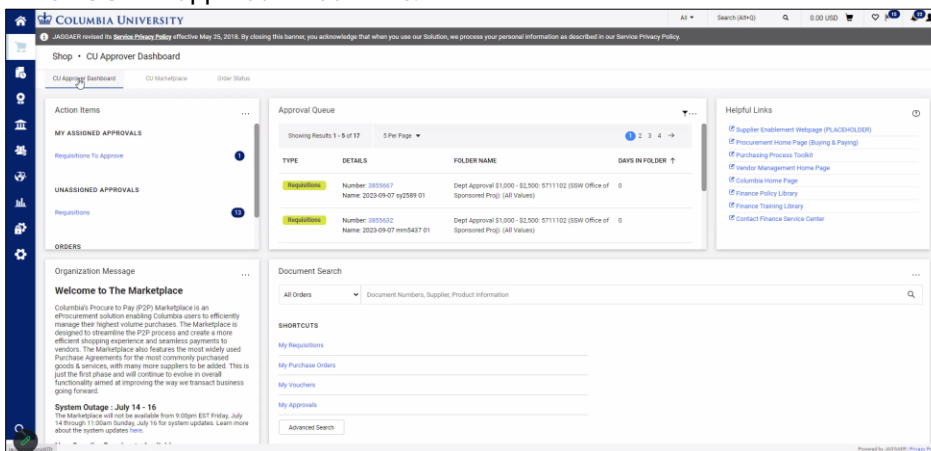
1. Navigate to the [Finance Buying and Paying](#) website, click the **CU Marketplace** logo, and login using your Single Sign On.



OR, you can log into ARC via [My.Columbia](#), click on the **ARC** tab and then **Go to ARC**. Once in ARC, click the **Buying and Paying** tile and then click the **CU Marketplace** tile.

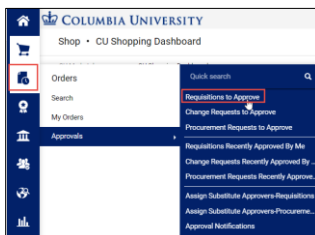


The JAGGAER application launches.



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

3. Mouse over the **Orders** icon and **Approvals** and then click **Requisitions to Approve**.



The Requisitions tab on the Approvals screen appears.

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1. Assigning a Requisition to Yourself

Approvals

Requisitions 16 Change Requests 1 Contracts Procurement Requests Contract Requests AP Requests Sourcing Event Requests

Your Selections

Date Range: All Dates

Filters

SUPPLIER

- SIGMA ALDRICH INC 12
- CDW GOVT INC 3
- RESONON INC 2
- BIO-RAD LABORATORIES, INC. 2

Select Multiple

Total Results 16 Display 20 per folder

MY PR APPROVALS 3

DEPARTMENT: 0503104 (ATH CLUB SPORTS): (0.00 - 500.00) USD 12

GENERAL CAPITAL EQUIPMENT (ASSET MGMT) 2

REQUISITION NO.	SUPPLIERS	ASSIGNED APPROVER	PR DATE/TIME	REQUISITIONER	A
3792744	CDW GOVT INC	Chris Approver	6/14/2023 12:50 PM	Tanya Requester	13,780.

Requisition Name: Asset Management Overview Folders: 0 Days in folder [My PR Approvals]

No. of line items: 2 Folders: 13 Days in folder [General Capital Equipment (Asset Mgmt)]

13 Days in folder [Prior Approval 2]

4. Click the Requisition for the Requisition you want to view. The Requisition screen appears.

Requisition - 3796189

Summary PO Preview Comments Attachments History

General

Status: Pending (Special Approval)

Submitted: 6/19/2023 11:22 AM

Cart Name: TM - Scenario 2

Description: no value

Prepared by: Natalya Requester

Prepared for: Natalya Shopper

Fiscal Year: FY 23

Hazardous Materials: X

Shipping

Ship To

Contact Name: Test Ship-to 2

100 Haven Tower 2

100 Haven Ave

FLO1, RM0110

CUIMC

New York, NY 10032

United States

Billing

Bill To

Contact Name: NV

100 Haven Tower 2

100 Haven Ave

FLO1, RM0111

CUIMC

New York, NY 10032

United States

Billing Options

Accounting Date: 6/19/2023

Accounting Codes

Business Unit	Account	Project	Activity	Department	Initiative	Segment	Site	PC Business Unit	AM Business Unit	Asset Profile ID	Asset Location
COLUM	65145	G6015816	01-SR01HL143424-04	7519103	70003	RR3036	no value	SPONS	COLUM	no value	no value

Internal Notes and Attachments

Internal Note: no value

Internal Attachments: no value

External Notes and Attachments

Note to all Suppliers

Notes for the following suppliers are unsupported and will not be sent: CDW GOVT INC

Attachments for all suppliers

Attachments for the following suppliers are unsupported and will not be sent: CDW GOVT INC

74 Items

CDW GOVT INC - 74 Items - 23,467.54 USD

SUPPLIER DETAILS

Ordering 3 - c/o Premier Radio, 2107 Prairie Field Place, VERNON HILLS, Illinois 60061 United States

PO Number: To Be Assigned Quote number: no value

Summary

Pending

Total (23,467.54 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal: 23,467.54

Total: 23,467.54

What's next?

Workflow

Submitted: 6/19/2023 11:22 AM

Dept Approval \$15K - \$30K

Special Approval

Create PO

Finish

5. When viewing the Requisition screen, click the Assign to Myself button.

Requisition - 3795934

Summary PO Preview Comments Attachments History

General

Status: Pending (Special Approval)

Submitted: 6/18/2023 10:38 AM

Cart Name: 2023-06-17 tmcbride 02

Description: no value

Prepared by: Tonya McBride

Prepared for: Tonya McBride

Fiscal Year: FY 23

Hazardous Materials: X

Shipping

Ship To

Contact Name: Tonya

100 Haven Tower 2

100 Haven Ave

FLO1, RM0110

CUIMC

New York, NY 10032

United States

Billing

Bill To

Contact Name: tonya

100 Haven Tower 2

100 Haven Ave

FLO1, RM0110

CUIMC

New York, NY 10032

United States

Billing Options

Accounting Date: 6/18/2023

Accounting Codes

Business Unit	Account	Project	Activity	Department	Initiative	Segment	Site	PC Business Unit	AM Business Unit	Asset Profile ID	Asset Location
COLUM	65145	G6015816	01-SR01HL143424-04	7519103	70003	RR3036	no value	SPONS	COLUM	no value	no value

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74 Items

CDW GOVT INC - 74 Items - 23,467.54 USD

SUPPLIER DETAILS

Ordering 3 - c/o Premier Radio, 2107 Prairie Field Place, VERNON HILLS, Illinois 60061 United States

PO Number: To Be Assigned Quote number: no value

Summary

Pending

Total (43,644.70 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal: 43,644.70

Total: 43,644.70

What's next?

Workflow

Submitted: 6/18/2023 10:38 AM

Dept Approval \$15K - \$30K

Special Approval

Create PO

Finish

The Requisition will be ready for you take action and lock it so that other Approvers cannot work with it.

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2.

Reviewing and Processing a Requisition



In order to take actions on a Requisition, such as inserting an Ad-Hoc Approver, returning the Requisition to the Requester, or rejecting it, you must first assign it to yourself.

Refer to the [CU Marketplace for Approvers Training Guide](#)., for more details

Inserting an Ad-Hoc Approver into Workflow

You can insert an additional approver into the workflow to review the requisition, if needed. The Ad-Hoc Approver you insert will review the Requisition after you approve it.

Note: An Ad-Hoc Approver must have the CU Marketplace Approver role.

1. Click the Ad-Hoc Approver **Select** link at the bottom of the General section.

The Ad Hoc Approver window appears.

2. Click into the **Ad-Hoc Approver** field and select the Approver from the list. You can type to filter the list of names.
3. Click **Save**. The Requisition will indicate the Ad-Hoc Approver, which can be changed, if necessary, and the Summary panel will indicate the extra approval workflow step.

Approving the Requisition

After assigning the Requisition to yourself and reviewing it, click the **Approve/Complete Step** button.

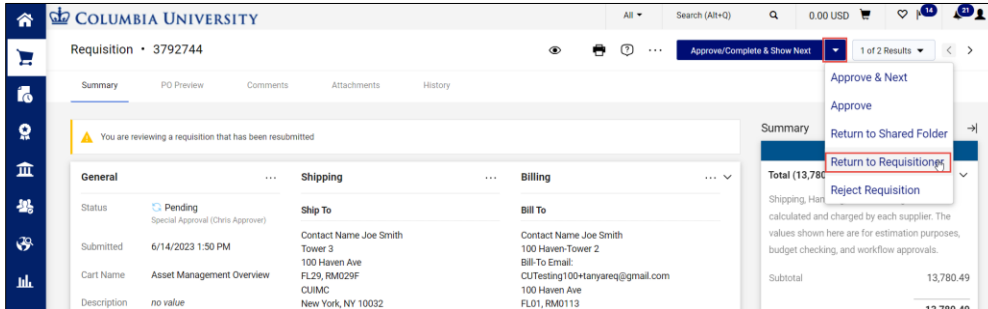
The Summary panel will indicate that you have approved the Requisition and will show the next Active step in the approval workflow.

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2. Reviewing and Processing a Requisition

Returning the Requisition to the Requester

1. Click the **dropdown** arrow next to the **Approve/Complete & Show Next** button and click **Return to Requisitioner**.



The Return to Requisitioner window appears.

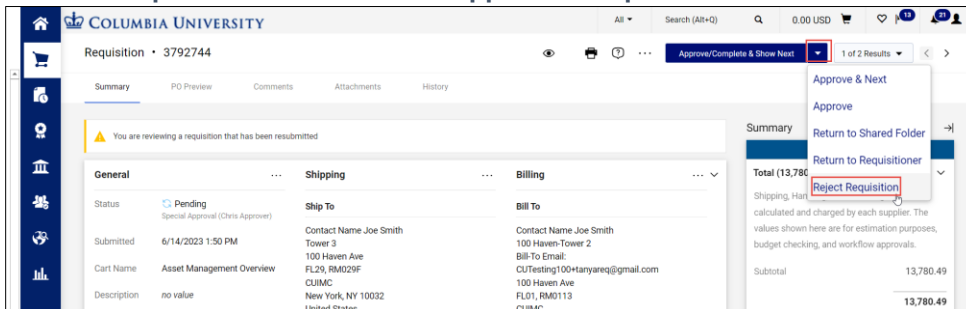
The 'Return To Requisitioner' window has a text area for entering a note. Below the text area, it says: 'Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.' At the bottom, there are 'Save Changes' and 'Cancel' buttons.

2. Type a **Note** informing the Requester why you are returning the Requisition to them so the Requester can address the issue. Click **Save Changes**.

Rejecting a Requisition

Reject a Requisition only when you want to terminate it and prevent the Requisition from being processed. The Requester will not be able to make changes and resubmit it into workflow.

1. Click the **dropdown** arrow next to the **Approve/Complete & Show Next** button and click **Reject Requisition**.



The Reject Requisition window appears.

The 'Reject Requisition' window shows a warning: 'WARNING: You are about to reject ALL lines on this requisition. Once a PR is rejected, it cannot be reinstated. Click Reject Requisition or Cancel to leave the PR unchanged.' Below the warning is a text area for 'PR Reject Reason' with a '1000 characters remaining' indicator. At the bottom, there are 'Reject Requisition' and 'Close' buttons.

2. Type a **PR Reject Reason** informing the Requester of why you are rejecting the Requisition. Click **Reject Requisition**.