

# CU Marketplace Requesters 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 open a Shopping Cart assigned to you by a Shopper (or another Requester) and to submit the Cart as a Requisition in approval.

For detailed instruction on using the CU Marketplace, including how to shop and create your own Carts, refer to the [CU Marketplace for Requesters Training Guide](#). For instructions on modifying your Profile settings, refer to the [Modifying Profile Settings in the CU Marketplace job aid](#).

## 1.

## Viewing a Shopping Cart Assigned to You



Shoppers who do not have a Requisition Initiator role cannot submit the Cart as a requisition into the approval workflow but they can assign their Cart to a Requester. In addition, Requesters can assign Carts to other Requesters. As the assigned Requester, you can submit the Cart as a Requisition into workflow. Before doing so, you must ensure that all required details are entered. If necessary, you can send it back to the Shopper (or originating Requester) to modify items in the Cart or do so yourself.

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

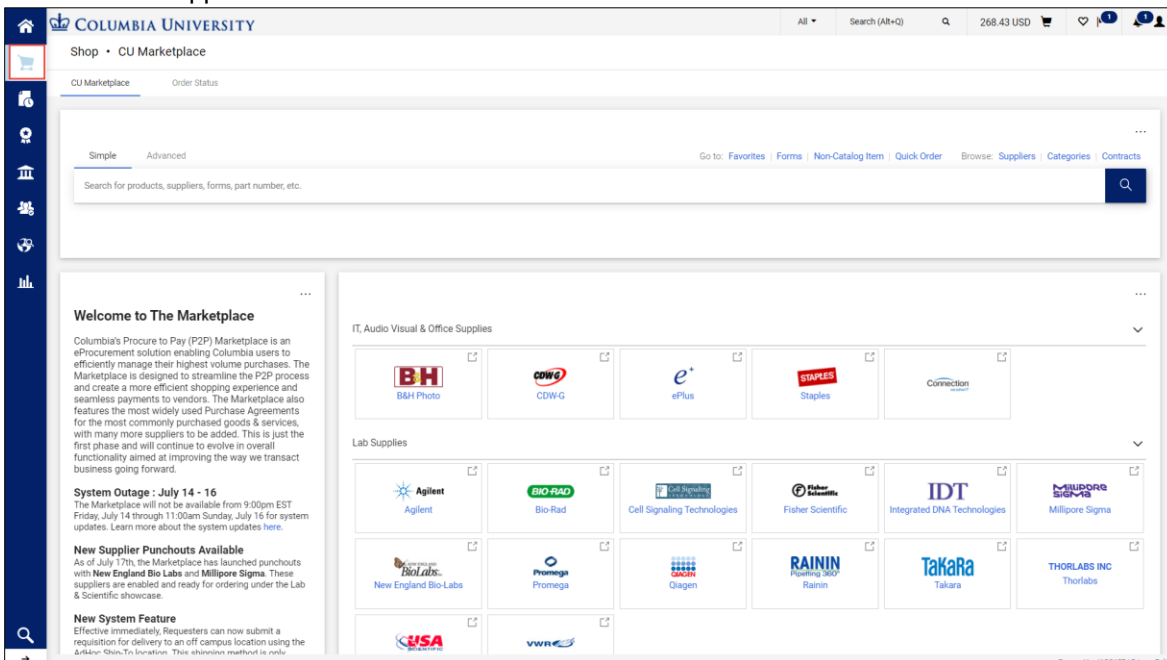


CU MARKETPLACE  
POWERED BY JAGGAER™

**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.



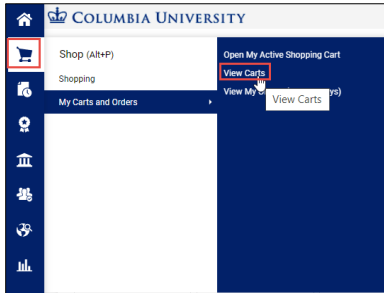
**Note:** The CU Marketplace will automatically timeout after thirty minutes of inactivity, consistent with other University Enterprise Systems.

# CU Marketplace Requesters Quick Guide

## 1.

## Viewing a Shopping Cart Assigned to You

3. Mouse over the **Shop** icon and **My Carts and Orders** and then click **View Carts**.

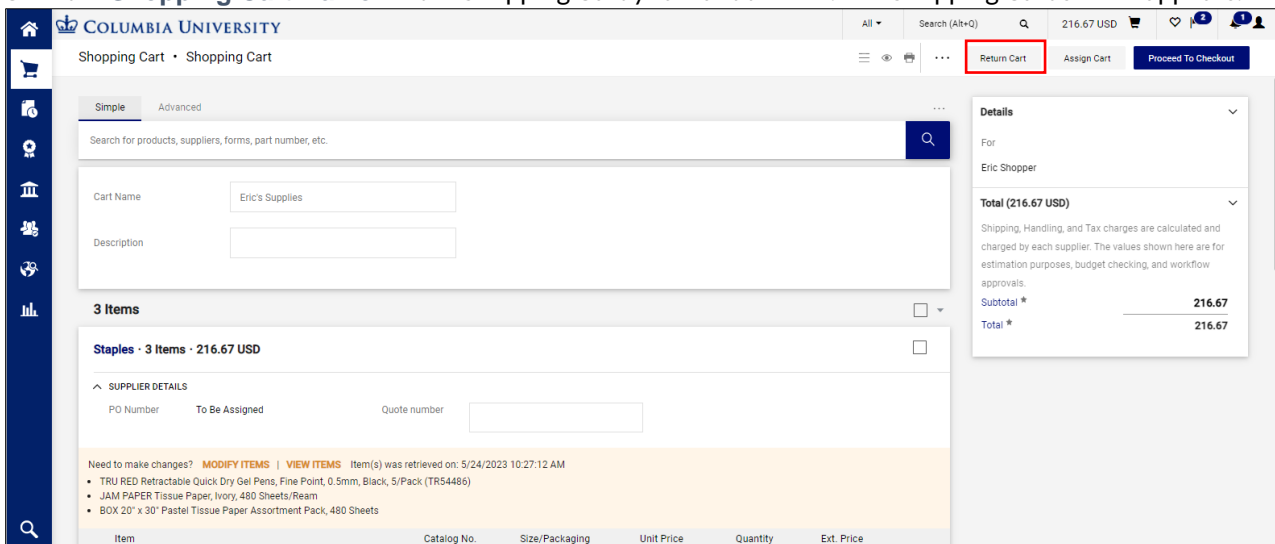


The Cart Management screen and Assigned Carts list appears. The cart labeled Active is the Cart that you are currently working.

Type	Cart Number	Shopping Cart Name	Cart Description	Date Created	Total	Created By	Assigned To	Action
Normal	3765180	Eric's Technology Cart		5/2/2023	402.99 USD	Eric Shopper	Eric Requester	View
Normal	3770434	Eric's Supplies		5/10/2023	216.67 USD	Eric Shopper	Eric Requester	View

You can also view:

- **Open Active Shopping Cart** – Navigate to the Shopping Cart page you are currently using for shopping,
  - **View My Orders (Last 90 Days)** – Display a table listing the Shopping Carts from the past 90 days and their status.
4. Click the **Assigned** tab to view carts assigned to you.  
**Note:** *The Assigned tab will also show carts you assigned to other Requesters.*
  5. Click the **Shopping Cart Name** for the Shopping Cart you want to view. The Shopping Cart screen appears.



If necessary, you can click the **Return Cart** button to return the cart back to the person who assigned it to you.

# CU Marketplace Requesters Quick Guide

## 2.

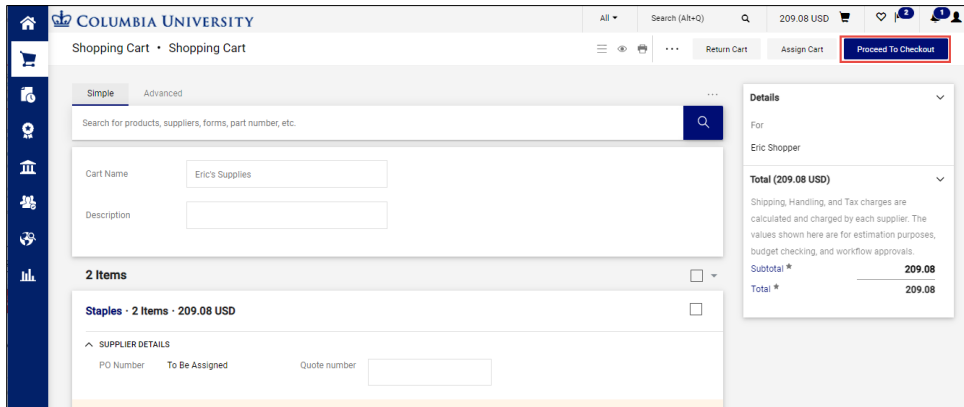
## Checking Out



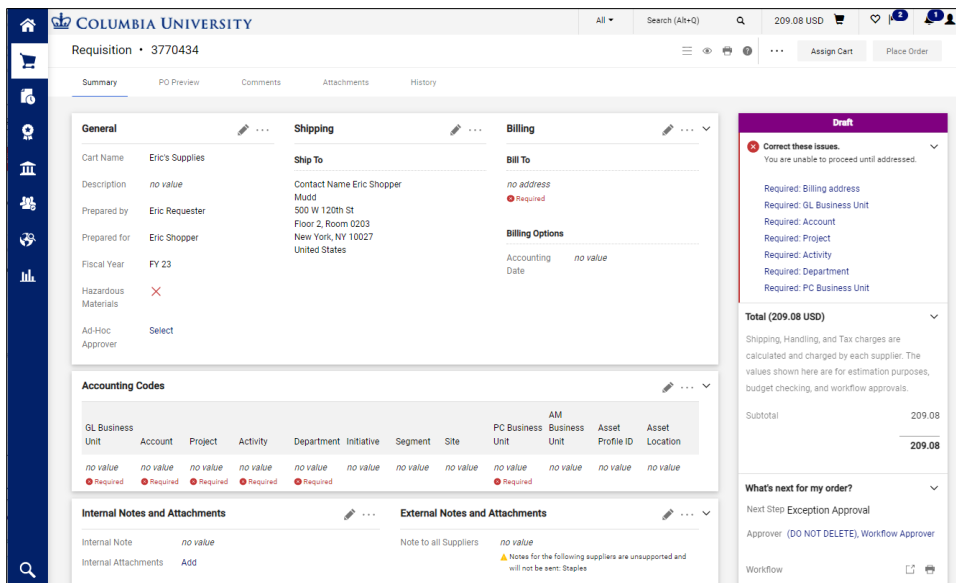
At checkout you must ensure that the Ship To/Bill To Addresses and the ChartString information is complete and correct. Shoppers have the option to enter this information but are not required to do so. You can update the information entered by the Shopper, if necessary.

If this information is not complete, you must enter it before checking out. If you created default values in your Profile (refer to the [Modifying Profile Settings in the CU Marketplace job aid](#)), those values will be populated.

On the Shopping Cart page, click the **Proceed to Checkout** button.



The Checkout screen appears.



The **Status** panel on the right indicates all the required information that you must complete. You can click the link to access the field to update it. Fields within the form that require completion will be labeled Required.

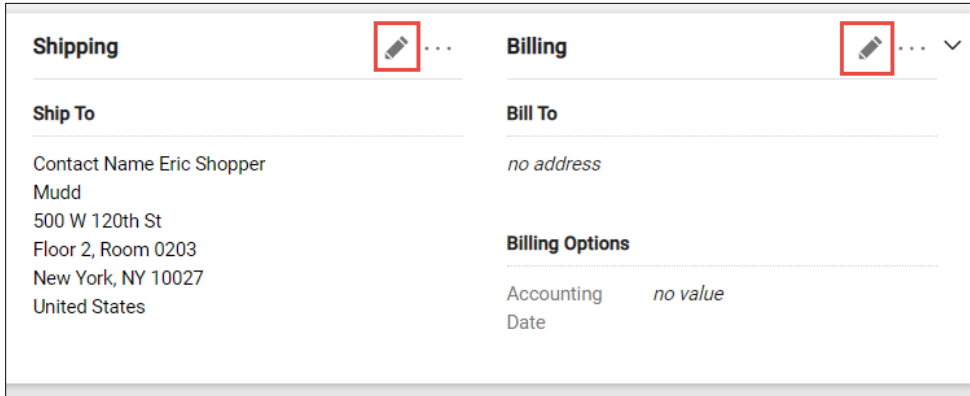
# CU Marketplace Requesters Quick Guide

## 2.

## Checking Out

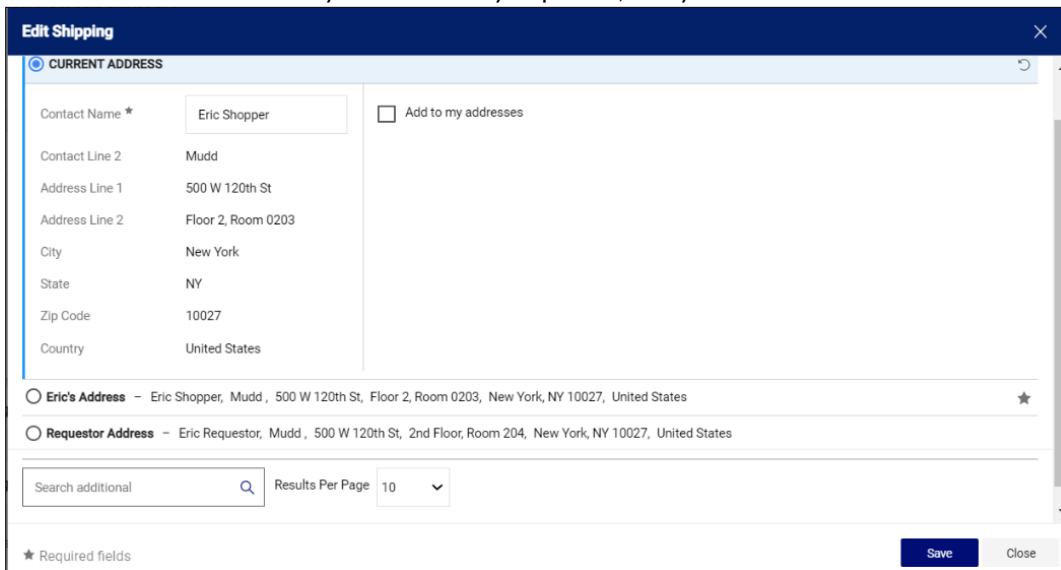
### Updating Shipping and Billing

1. On the Checkout screen, click the **Edit**  icon for Shipping or Billing.



Shipping	Billing
<b>Ship To</b>	<b>Bill To</b>
Contact Name Eric Shopper Mudd 500 W 120th St Floor 2, Room 0203 New York, NY 10027 United States	<i>no address</i>
	<b>Billing Options</b>
	Accounting <i>no value</i> Date

The Edit window will appear for the respective item you selected. It will display the Current Address populated, if any, and a selection of Favorites you created in your profile, if any.



**Edit Shipping**

**CURRENT ADDRESS**

Contact Name \* Eric Shopper  Add to my addresses

Contact Line 2 Mudd

Address Line 1 500 W 120th St

Address Line 2 Floor 2, Room 0203

City New York

State NY

Zip Code 10027

Country United States

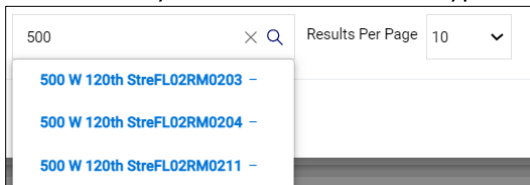
**Eric's Address** - Eric Shopper, Mudd, 500 W 120th St, Floor 2, Room 0203, New York, NY 10027, United States

**Requestor Address** - Eric Requestor, Mudd, 500 W 120th St, 2nd Floor, Room 204, New York, NY 10027, United States

Search additional  Results Per Page 10

★ Required fields Save Close

2. Select one of your Profile favorites or type in **Search additional** to find and select an address.



500  Results Per Page 10

- 500 W 120th StreFL02RM0203 -
- 500 W 120th StreFL02RM0204 -
- 500 W 120th StreFL02RM0211 -

3. Click the **Save** button.

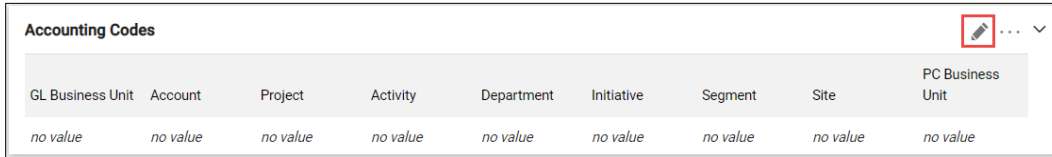
# CU Marketplace Requesters Quick Guide

## 2.

## Checking Out

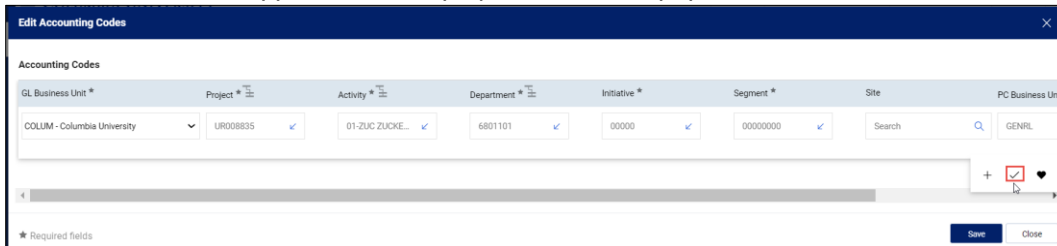
Updating the ChartString (Accounting Codes)

1. On the Checkout screen, click the **Edit**  icon for Accounting Codes.



GL Business Unit	Account	Project	Activity	Department	Initiative	Segment	Site	PC Business Unit
no value	no value	no value	no value	no value	no value	no value	no value	no value

The Edit window will appear. It will display the default or populated ChartFields,




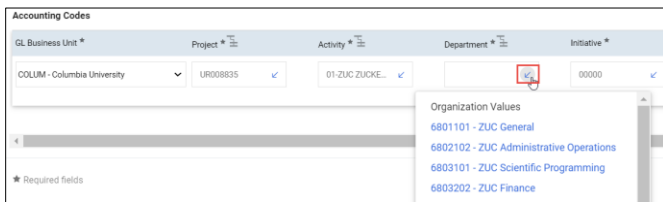
Accounting Codes

GL Business Unit *	Project *	Activity *	Department *	Initiative *	Segment *	Site	PC Business Unit
COLUM - Columbia University	UR008835	01-ZUC ZUCKE...	6801101	00000	00000000	Search	GENRL

\* Required fields

Save Close

2. Update the ChartFields as needed. They must be entered in order left to right as the available values are dependent on the value in the previous field. You can click the **Dropdown**  arrow in the field you are populating to view the available values.





Accounting Codes


GL Business Unit *	Project *	Activity *	Department *	Initiative *
COLUM - Columbia University	UR008835	01-ZUC ZUCKE...	6801101	00000

Organization Values

- 6801101 - ZUC General
- 6802102 - ZUC Administrative Operations
- 6803101 - ZUC Scientific Programming
- 6803202 - ZUC Finance

\* Required fields

3. Click the **Validate**  icon to ensure your ChartFields were entered correctly. If you corrected a ChartField and it still appears as Required , click the Validate icon again.

You can click the **Add Split**  icon to add an additional ChartString line and indicate a percent distribution.

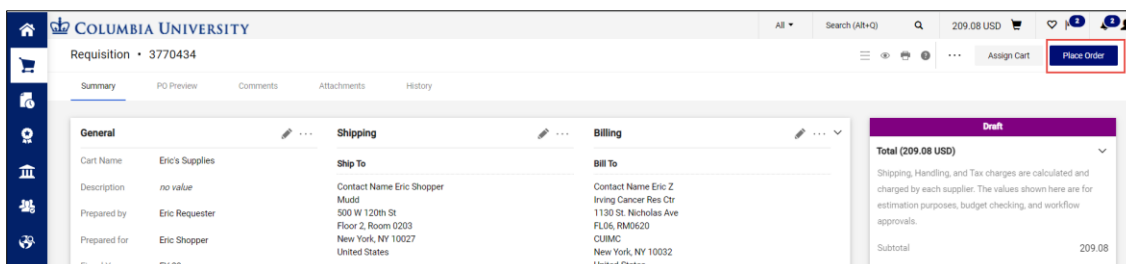
You can click the **Code Favorites**  icon to select a favorite ChartString you created in your Profile.

4. Click the **Save** button.

**Note:** Each item in your Cart can also be updated with different ChartStrings. Click the Edit icon in the ChartString section for the item. Some product Categories map to multiple Accounts. If that is the case, you will be required to select the appropriate Account number from a dropdown in the Account field.

### Placing Your Order

After ensuring that all required fields are populated, the Status pane will not list any further requirements. Click the **Place Order** button.



COLUMBIA UNIVERSITY

Requisition • 3770434

Assign Cart Place Order

Summary PO Preview Comments Attachments History

General	Shipping	Billing
Cart Name: Eric's Supplies Description: no value Prepared by: Eric Requester Prepared for: Eric Shopper Fiscal Year: FY 23	Ship To: Contact Name Eric Shopper Mudd 500 W 120th St Floor 2, Room 0203 New York, NY 10027 United States	Bill To: Contact Name Eric Z Irving Cancer Res Ctr 1130 St. Nicholas Ave FL06, RM0620 CUMC New York, NY 10032 United States

**Draft**

Total (209.08 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 209.08

The Cart is now entered as a Requisition into approval workflow