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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 <u>CU Marketplace for Requesters Training Guide</u>. For instructions on modifying your Profile settings, refer to the <u>Modifying Profile Settings in the CU Marketplace job aid</u>.



Viewing a Shopping Cart Assigned to You



Shoppers who do not have a Requisition Inititiator 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.



OR, you can log into ARC via <u>My.Columbia</u>, 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

🖆 Columbia University				All • Search	(Alt+Q) Q 268.43 U	ISD 📜 🗢 🏴
Shop • CU Marketplace						
CU Marketplace Order Status						
Simple Advanced Search for products, suppliers, forms, part number, etc.			Go to: Favorite	s Forms Non-Catalog Iter	m Quick Order Browse: Supp	oliers Categories Contrac
Welcome to The Marketplace	IT, Audio Visual & Office Supplies					
Columbia's Procure to Pay (P2P) Marketplace is an effocurement solution enabling Columbia users to efficiently manage their highest volume purchases. The Marketplace is designed to atreamline the P2P process and create a more efficient stopping experience and seamless payments to vendors. The Marketplace also features the most widely used Purchase Acreements	BBH Photo	CDW-G	ePlus □	STAPLES Staples	Connection	
for the most commonly purchased goods & services, with many more suppliers to be added. This is just the first phase and will continue to evolve in overall functionality aimed at improving the way we transact	Lab Supplies					
business going forward. System Outage : July 14 - 16 The Markelpace will not be available from 9:00pm EST Friday, July 14 through 11:00am Sunday, July 16 for system updates. Learn more about the system updates here.	Agilent	E ¹ BIO-RAD Bio-Rad	Cell Signaling Technologies	Elektric Selentific Fisher Scientific	IDT Integrated DNA Technologies	Millipore Sigma
	Ľ	•	C	RAININ	TaKaRa	(THORLABS INC
New Supplier Punchouts Available As of July 17th, the Marketplace has Isunched punchouts with New Forgland Bio Laba and Millipore Sigma. These suppliers are enabled and ready for ordering under the Lab & Scientific showcase.	New England Bio-Labs	Promega Promega	Qiagen	Rainin	Takara	Thorlabs

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

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.

<u>ہ</u>		MBIA UNIVERSITY	Y			All 👻	Search (Alt+Q)	Q 402.99 USD	v 🍋 🔎
	Shop 🕨 My Carts a	and Orders 🕨 View Carts 🕨 Assigned	l Carts						
-	Cart Mana	agement							Create Cart
0	Draft Carts	Assigned Carts							
<u>9</u>	Assign Substitute								
Ω	> Filter Assigne	ed Carts							
	Туре 🗠	Cart Number 🗠	Shopping Cart Name	Cart Description	Date Created	Total 🗠	Created By	Assigned To	Action
01.							Frie Oberner	Eric Requester	
l,	Normal	3765180 Active	Eric's Technology Cart		5/2/2023	402.99 USD	Enc Snopper	Enc Requester	View 💌
\$ 9	Normal	3765180 Active 3770434	Eric's Technology Cart Eric's Supplies		5/2/2023		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.
- 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.

*		All 🕶	Search (Alt	-	216.67 USD	₩ ♥ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽
E	Shopping Cart • Shopping Cart	∃ ⊛ €	• •••	Return Cart	Assign Cart	Proceed To Checkout
6	Simple Advanced			Details		~
<u>o</u>	Search for products, suppliers, forms, part number, etc.		Q	For		
血				Eric Shopper		
	Cart Name Eric's Supplies			Total (216.67	USD)	~
섊	Description					es are calculated and Jes shown here are for
- 39-				estimation purp	ooses, budget chec	king, and workflow
հե	3 Items		□ •	Subtotal *		216.67
				Total *		216.67
	Staples · 3 Items · 216.67 USD					
	PO Number To Be Assigned Quote number					
	Need to make changes? MODIFY ITEMS VIEW ITEMS Item(s) was retrieved on: 5/24/2023 10:27:12 AM					
	TRU RED Retractable Quick bry Gel Pens, Fine Point, 0.5mm, Black, 5/Pack (TR54486) JAM PAPER Tissue Paper, Ivory, 480 Sheets/Ream Box 207 v 30 Prastel Tissue Paper Assortment Pack, 480 Sheets					
٩		Price				

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



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 <u>Modifying Profile Settings in the CU Marketplace job aid</u>), those values will be populated.

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

🖆 Columbia Un	VERSITY	All 👻	Search (Alt+Q)	Q 209.08 USD 🗮	♥ 🔁 💄
Shopping Cart • Sho	pping Cart	∃ ⊛ ⊜	· · · Return	Cart Assign Cart	roceed To Checkout
Simple Advanced				Details	,
Search for products, suppli	ers, forms, part number, etc.		٩	For	
Cart Name	Eric's Supplies			Total (209.08 USD)	
Description				Shipping, Handling, and Tax calculated and charged by e- values shown here are for es budget checking, and workfi	ach supplier. The timation purposes,
2 Items				Subtotal *	209.08
Staples · 2 Items · 20	9.08 USD			Total *	209.08
∧ SUPPLIER DETAILS					
PO Number To Be	Assigned Quote number				

The Checkout screen appears.

COLUMI	BIA UNIVERSI	ТҮ					All 👻	Search (Alt+Q)	۹	209.08	usd 📜	♡ 🔁 🎍
Requisition	• 3770434							≣ ⊛	. 0		Assign Cart	Place Order
Summary	PO Preview	Comments	Attachments	History								
General		<i>"</i>	Shipping		ø	Billing		ø v			Draft	
Cart Name	Eric's Supplies		Ship To			Bill To			8	You are un		until addressed.
Description	no value		Contact Name Eric Shop	pper		no address				Required:	Billing address	5
Prepared by	Eric Requester		Mudd 500 W 120th St			Required					GL Business U	nit
Prepared for	Eric Shopper		Floor 2, Room 0203 New York, NY 10027			Billing Options				Required: Required:		
Fiscal Year	FY 23		United States			Accounting Date	no value			Required:	1 A A A A A A A A A A A A A A A A A A A	
Hazardous	×					Date					Department PC Business U	Init
Materials									Tota	al (209.08	USD)	
Ad-Hoc Approver	Select										lling, and Tax o	harges are
Approver												ch supplier. The
Accounting	Codes							ø v			here are for es ing, and workflo	timation purposes, w approvals.
						AM			Sub	ototal		209.
GL Business Unit	Account Project	Activity	Department Initiative	Segment	Site	PC Business Busin Unit Unit	ess Asset Profile ID	Asset Location				209.
no value	no value no value	no value	no value no value	no value	no value	no value no va	ue no value	no value				209.
Required	Required Required	Required	Required			Required			Wha	at's next fo	r my order?	
Internal Not	es and Attachments		ø ····	External	Notes and	Attachments		ø v	Nex	d Step Exc	eption Appro	val
Internal Note	no value			Note to all	Suppliers	no value			App	prover (DO	NOT DELETE),	Workflow Approve
Internal Attac	ments Add					Notes for the follow will not be sent: Sta		nsupported and				Ľ? €

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.

Checking Out

Updating Shipping and Billing

2.

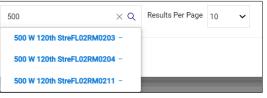
1.

Shipping	<i>"</i>	Billing		<i>∳</i> · · · ×
Ship To		Bill To		
Contact Name Eric Shopper Mudd		no address		
500 W 120th St Floor 2, Room 0203		Billing Options	3	
New York, NY 10027 United States		Accounting Date	no value	

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 you profile, if any.

CURRENT ADDRES	S		Ċ
Contact Name *	Eric Shopper	Add to my addresses	
Contact Line 2	Mudd		
ddress Line 1	500 W 120th St		
ddress Line 2	Floor 2, Room 0203		
ity	New York		
tate	NY		
ip Code	10027		
ountry	United States		
		; Floor 2, Room 0203, New York, NY 10027, United States	*
Requestor Address	 Eric Requestor, Mudd , 500 W 1 	20th St, 2nd Floor, Room 204, New York, NY 10027, United States	
arch additional	Q Results Per Pag	je 10 V	

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



3. Click the **Save** button.

Checking Out

Updating the ChartString (Accounting Codes)

2

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

Accounting Code	es							<i>» »</i>
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,

Edit Accounting Codes							×
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	Q 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** ^{*c*} 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 🖌	C.	00000	ĸ
<			Organization Values 6801101 - ZUC General 6802102 - ZUC Administ 6803101 - ZUC Scientific 6803202 - ZUC Finance		

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

, CIICK 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** *ticon 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.

â 🕯		A UNIVERSITY	,				All 🕶	Search (Alt+	a) Q	209.08 USD 崔	V 😼 🚺	
1	Requisition •	3770434						=	• • •	Assign Cart	Place Order	
6	Summary	P0 Preview Co	mments At	achments History								
<u>e</u>	General		ø	Shipping	ø	Billing	1	🗸		Draft		
血	Cart Name	Eric's Supplies		Ship To		Bill To			Total (209.08) Shipping, Hand	USD) lling, and Tax charges are (calculated and	
	Description	no value		Contact Name Eric Shopper		Contact Name Eric Z Irving Cancer Res Ctr			charged by each supplier. The values shown here are for			
北	Prepared by	Eric Requester		Mudd 500 W 120th St Floor 2. Room 0203		1130 St. Nicholas Ave FL06. RM0620			estimation purp approvals.	poses, budget checking, ar	nd workflow	
₿	Prepared for	Eric Shopper		New York, NY 10027 United States		CUIMC New York, NY 10032			Subtotal		209.08	
	Fiscal Year	FY 23				United States						

The Cart is now entered as a Requisition into approval workflow