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.

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 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.

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.
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.
2. **Checking Out**

**Updating Shipping and Billing**

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

![Edit window for Shipping and Billing](image)

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](image)

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

![Search results](image)

3. Click the Save button.
2. **Checking Out**

**Updating the ChartString (Accounting Codes)**

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

   ![Accounting Codes](image1)

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

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](image2)

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.

![Requisition](image3)

The Cart is now entered as a Requisition into approval workflow.