

CU Marketplace Shopping Quick Guide

for Shoppers and Requesters



The CU Marketplace powered by JAGGAER provides access to negotiated contracts and pricing with Columbia's preferred suppliers. This Quick Guide covers how to create a Shopping Cart in the CU Marketplace and assign the cart to a colleague who has the Requester role.

For a detailed instruction on using the CU Marketplace, refer to the [CU Marketplace for Shoppers Training Guide](#) or the [CU Marketplace for Requesters Training Guide](#). For instructions modifying your Profile settings, refer to the [Modifying Profile Settings in the CU Marketplace job aid](#).

1. Shopping for Items

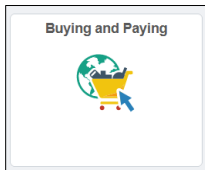


You can create a Shopping Cart with items provided by the enabled vendors in the CU Marketplace. Shoppers must then assign their Cart to a colleague who has a Requester role in order to have it submitted as a Requisition into workflow. Requesters can shop and submit their Cart as a Requisition into workflow but also have the option of assigning their Cart to another Requester, if needed.

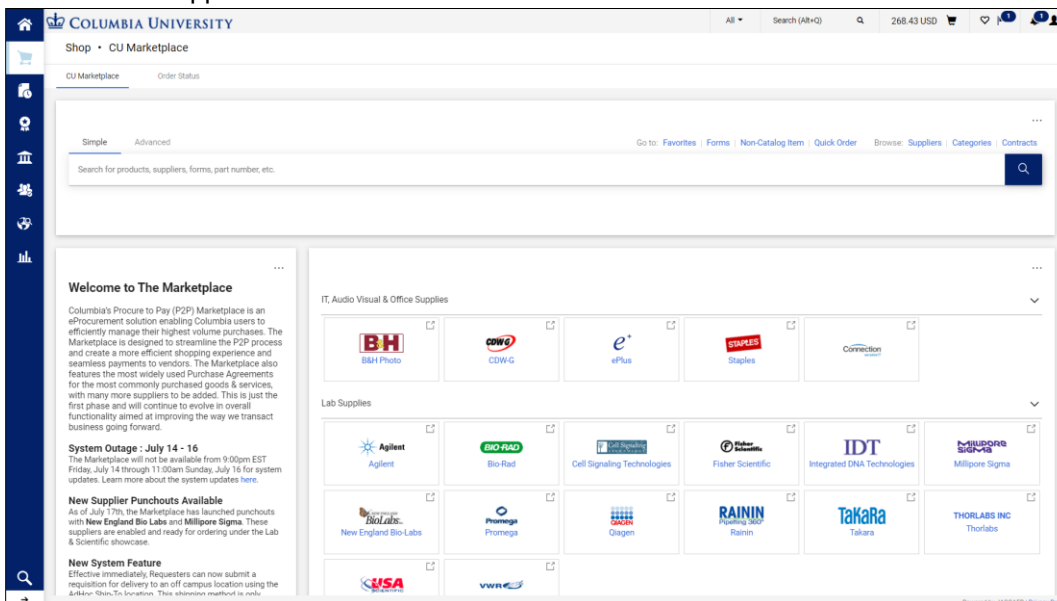
1. Navigate to the [Finance Buying and Paying](#) website, click the **CU Marketplace** logo, and login using your Single Sign On.



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.



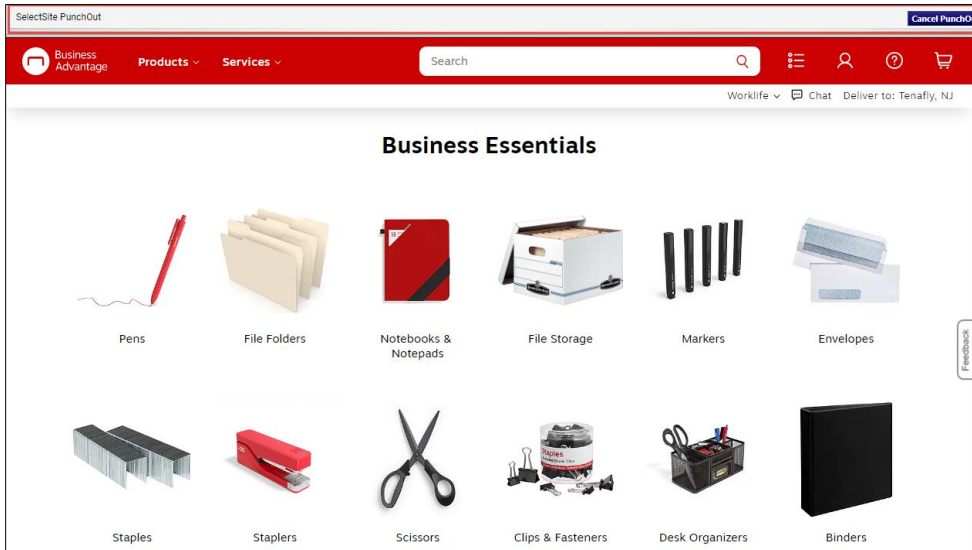
Note: The CU Marketplace will automatically timeout after thirty minutes of inactivity, consistent with other University Enterprise Systems.

3. In the **Showcases** section on the Home page, click the tile for the vendor you wish to shop from the **Enabled Vendors**.

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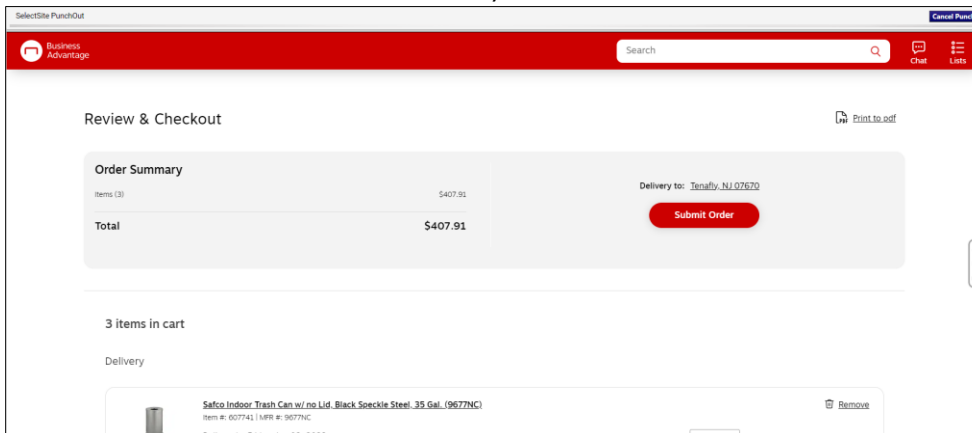
1. Shopping for Items

You will then “PunchOut” to the vendor website.

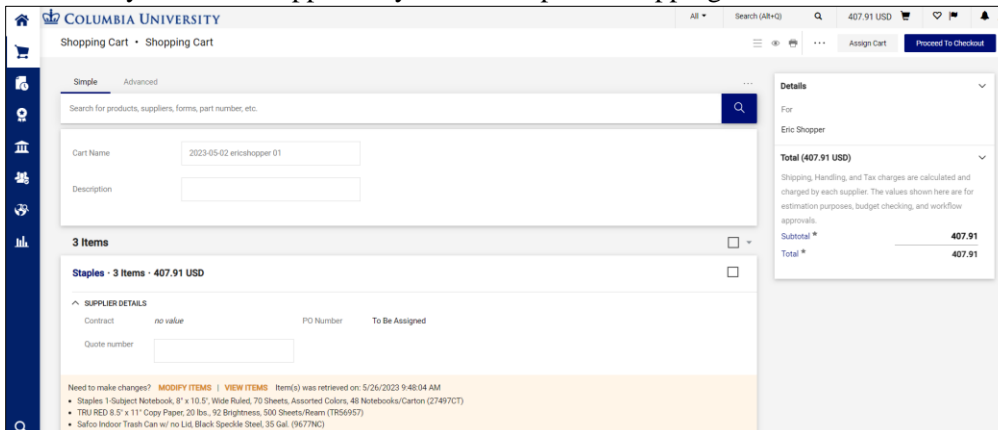


Notice the gray bar at the top of the vendor website which indicates you are punched out from the Marketplace. You can click the **Cancel PunchOut** button to return to the Marketplace, if needed.

- Shop the vendor website for the item(s) you want to purchase and add your desired items to the vendor’s cart.
- View the vendor site cart and **Submit** your order.



The items you selected appear in your Marketplace Shopping Cart.



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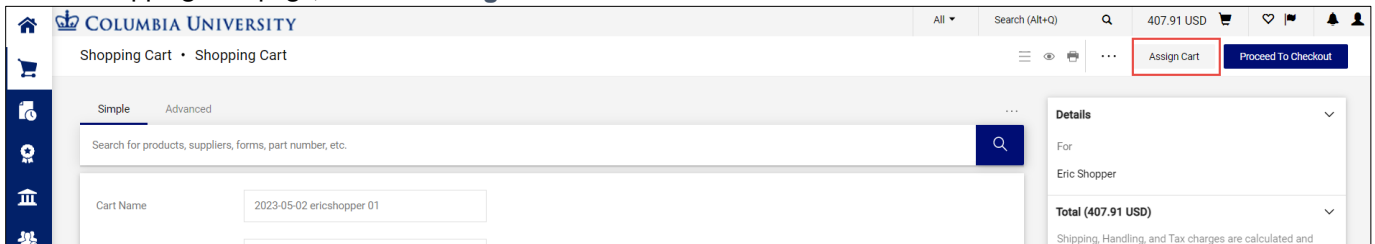
Assigning a Requester



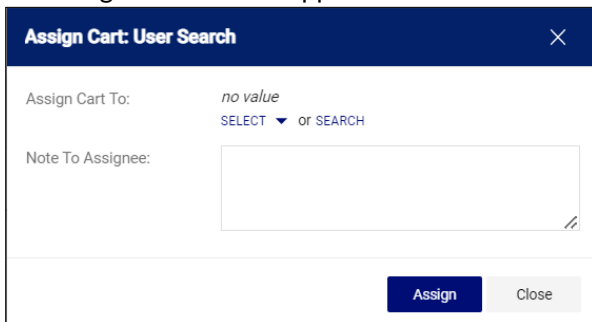
If you are a Shopper who does not have a Requisition Initiator role, you must assign your Cart to a Requester so they can submit it into workflow for approval. Requesters can submit their own Cart into workflow but can also assign their Cart to another Requester. Requesters should refer to [CU Marketplace Requesters Quick Guide](#) or the [CU Marketplace for Requesters Training Guide](#) for instructions on viewing a Shopping Cart assigned to you and submitting it into workflow.

Shoppers can enter Ship To/Bill To Addresses and ChartString information before assigning their Cart to a Requester, but are not required to do so. Refer to the [CU Marketplace for Shoppers Training Guide](#) for detailed instruction. The Requester that submits the Cart must ensure that the Ship To/Bill To and ChartString information is entered at checkout before submitting into workflow.

1. On the Shopping Cart page, click the **Assign Cart** button.

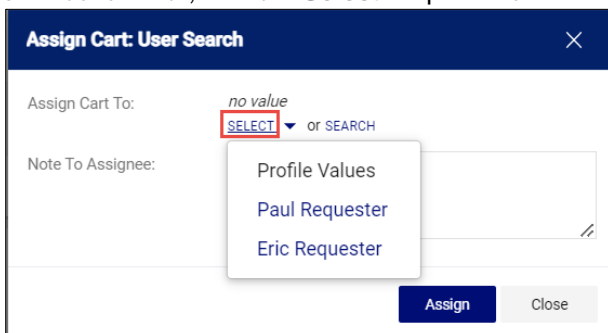


The Assign Cart window appears.



2. You can **Select** a Requester from Favorites you created in your Profile or Search for any Requester that is setup in the Marketplace.

Select a favorite, click the **Select** dropdown and click the desired Requester.

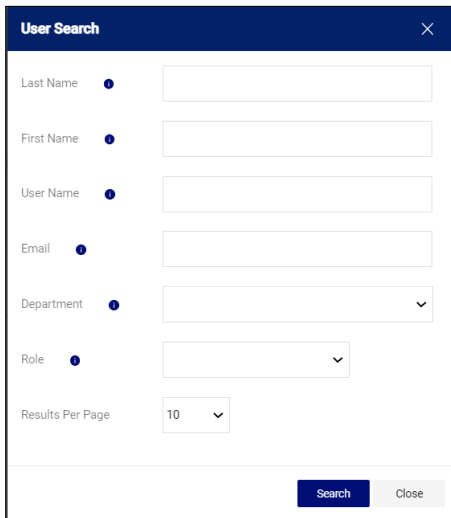


Or, to search and select a non-favorite Requester or click the **Search** link.

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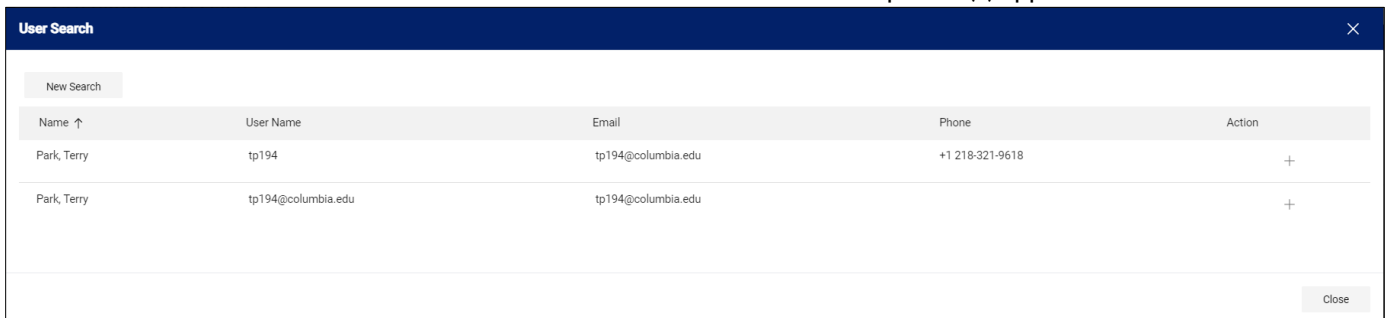
Assigning a Requester



The 'User Search' form contains the following fields and controls:

- Last Name:
- First Name:
- User Name:
- Email:
- Department:
- Role:
- Results Per Page:
- Search button (blue)
- Close button (grey)

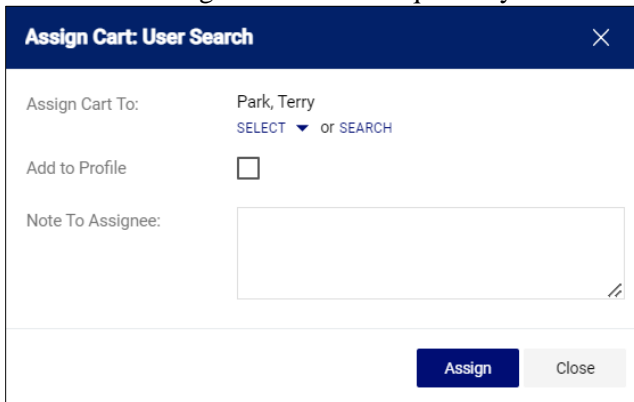
Enter the search criteria and click the **Search** button to view results. The Requester(s) appear in the search results.



The 'User Search' results window displays a table with the following data:

Name ↑	User Name	Email	Phone	Action
Park, Terry	tp194	tp194@columbia.edu	+1 218-321-9618	+
Park, Terry	tp194@columbia.edu	tp194@columbia.edu		+

3. Click the **Plus sign** $+$ for the Requestor you are assigning.



The 'Assign Cart: User Search' form contains the following fields and controls:

- Assign Cart To: Park, Terry
SELECT ▼ or SEARCH
- Add to Profile:
- Note To Assignee:
- Assign button (blue)
- Close button (grey)

4. If the Requestor is not a favorite, you have the option to select **Add to Profile** if you want to make them a favorite. Type a **Note to Assignee**, if needed, and click the **Assign** button. The assigned Requester will receive an email alerting them that your Cart has been assigned to them and will include your Note, which contains a direct link to the Requisition .