The CU Marketplace, powered by JAGGAER, provides access to negotiated contracts and pricing with Columbia's preferred suppliers. You can access items in the CU Marketplace by using the tiles for the vendors that appear in the Showcases pane of CU Marketplace.

This Training Guide details the process of how those with an Approver role in the CU Marketplace approve Requisitions.

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COLUMBIA UNIVERSITY
IN THE CITY OF NEW YORK

Accessing the CU Marketplace

Navigate to the Finance Buying and Paying website, click the **CU Marketplace** logo, and login using your Single Sign On.

OR

1. Log into My.Columbia **http://www.my.columbia.edu**, click the **ARC** tab and then **Go to ARC**.
2. Once in ARC, click the **Buying and Paying** tile and then click the **CU Marketplace** tile.
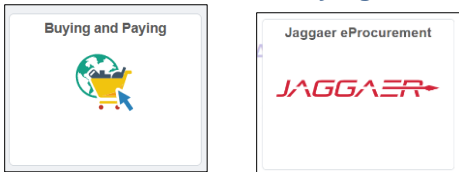
The JAGGAER application launches. The first time you log on, you will land on the CU Approver Dashboard. If you are viewing different tab when you log out, that will be the tab you land on the next time you log on.
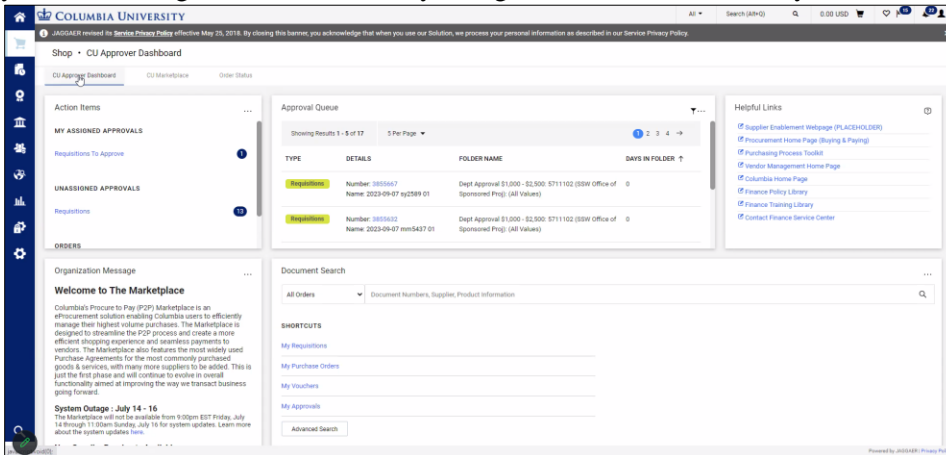
Note: *The CU Marketplace will automatically timeout after thirty minutes of inactivity, consistent with other University Enterprise Systems.*
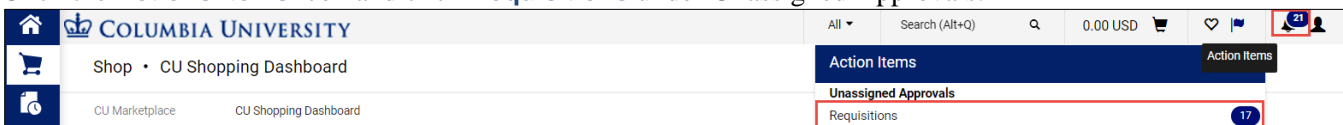
Viewing Requisitions Awaiting Approval

1. From the **CU Approval Dashboard**, click the **Requisition Number** from the **Approval Queue**. The Requisition screen appears (see screenshot after step 2)
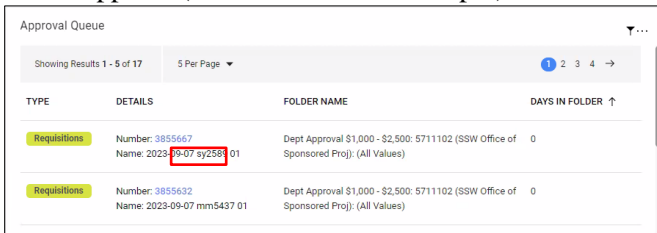
OR

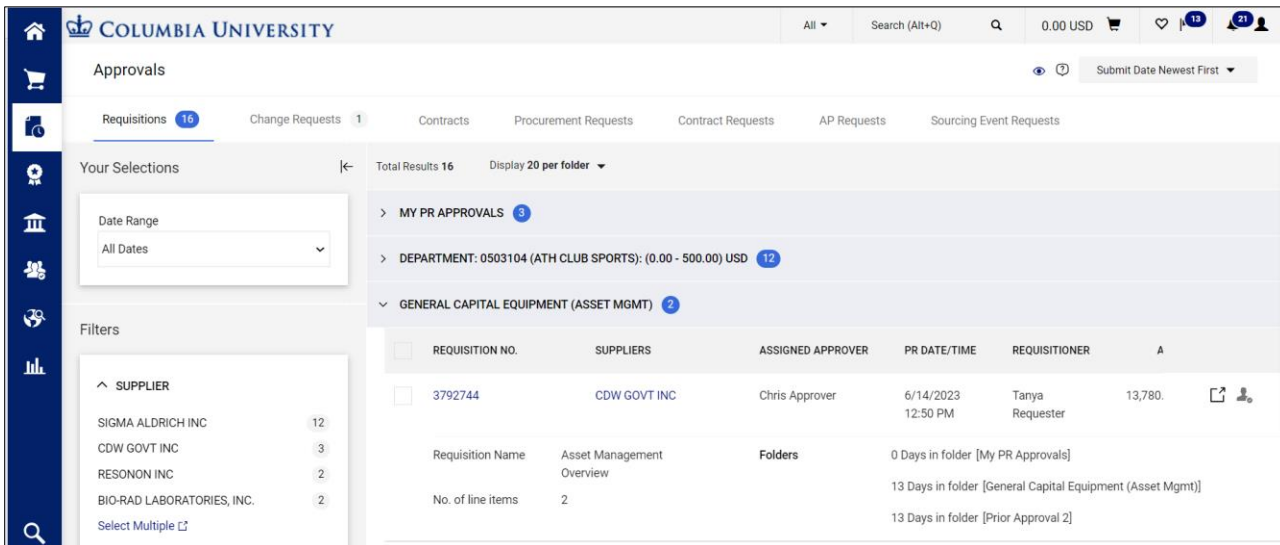Click the **Actions Items** icon and click **Requisitions** under Unassigned Approvals.

OR

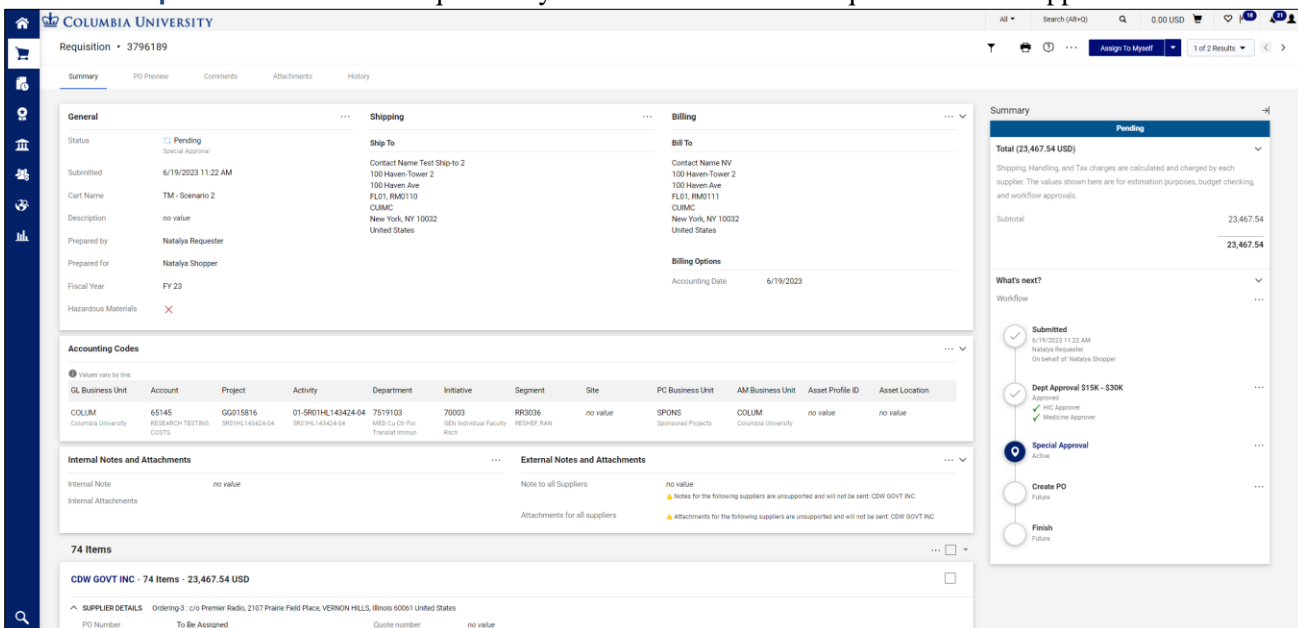Mouse over the **Orders** icon and **Approvals** and then click **Requisitions to Approve**.

The Requisitions tab on the Approvals screen appears.

The Requisitions are organized into accordion folders that you can expand to view.

2. Click the **Requisition No** for the Requisition you want to view. The Requisition screen appears.

## Accessing a Requisition for Approval from an Email Alert (Ad Hoc Approvers)

If you were inserted into the approval workflow as an ad hoc approver, you will receive email alerts informing you of Requisitions requiring your attention. Click the link in the email to take you directly to the Requisition screen.
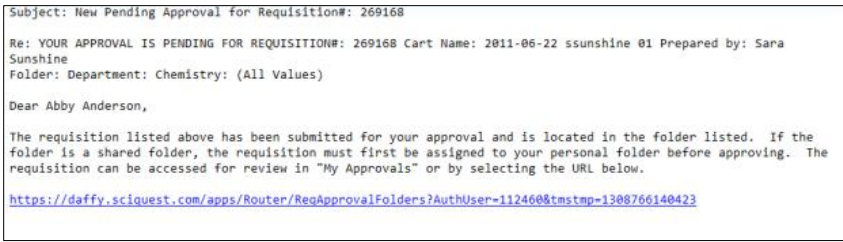
Approving a Requisition without Assigning to Yourself

After viewing the Requisition page, you can approve it without assigning it to yourself. However, if you do need to take other actions, such as inserting an Ad-Hoc Approver, returning the Requisition to the Requester, or rejecting it, you must assign it to yourself before taking action.

Click the **dropdown** arrow next to the **Assign to Myself** button and click **Approve**.
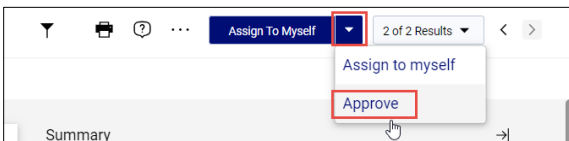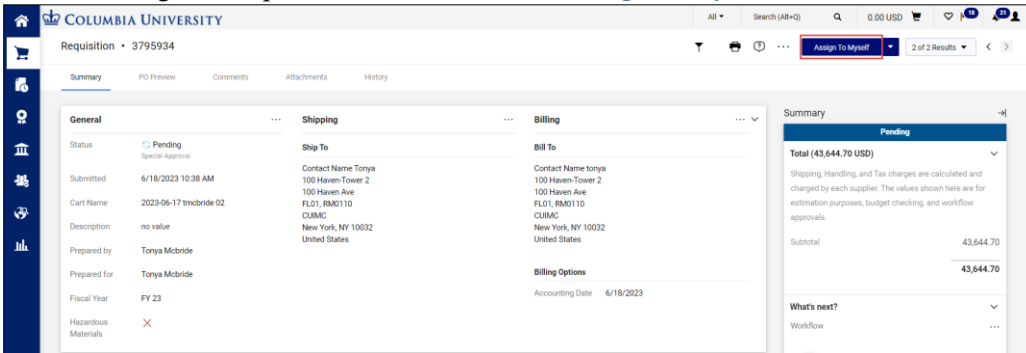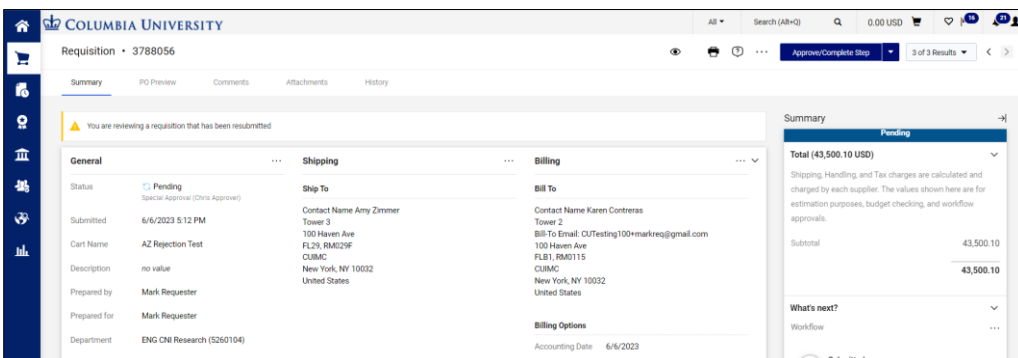

Processing a Requisition

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.

Assigning the Requisition to Yourself from the Requisition Screen

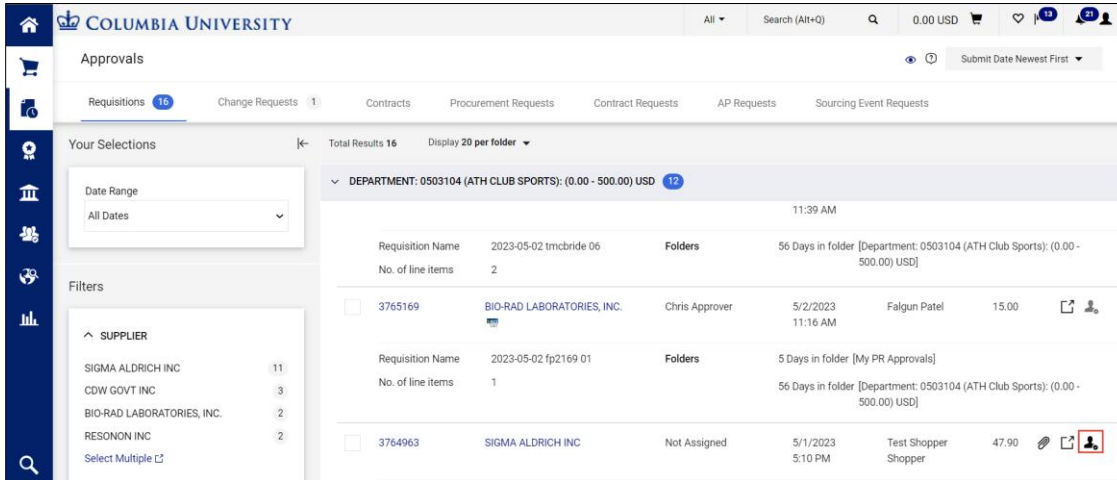When viewing the Requisition screen, click the **Assign to Myself** button.

The Requisition will be ready for you take action and lock it so that other Approvers cannot work with it.
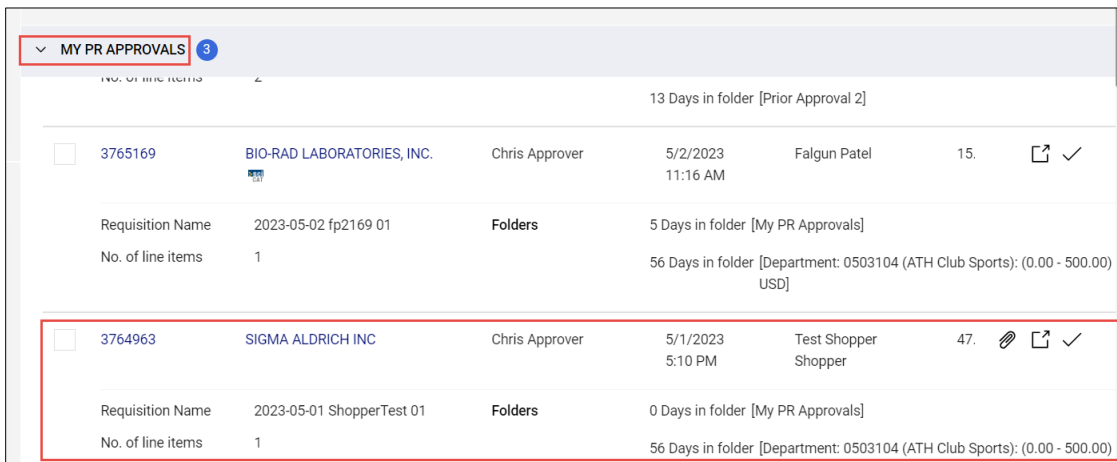
Assigning a Requisition to Yourself from the Approvals List Screen

From the Approvals List screen, click the **Assign** 🔖icon for the Requisition that you want to assign to yourself.


The Requisition will be moved to your My PR (Purchase Requestion) Approvals folder and other approvers will not be able work with it.

Returning the Requisition to the Shared Folder

If you are not able to continue reviewing and working with the Requisition after assigning it to yourself, you can return it to the shared approval folder so that another Approver can process it.

From the Requisition screen, click the **dropdown** arrow next to the **Approve/Complete & Show Next** button and click **Return to Shared Folder**.
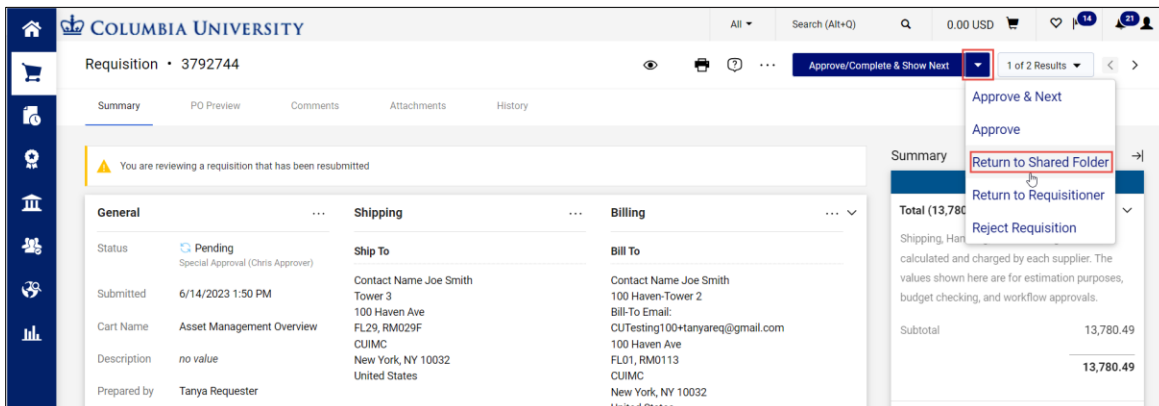

The Requisition will no longer be assigned to you and will be available for other Approvers to process.

Inserting an Ad-Hoc Approver into Workflow

If you need to insert an additional approver into the workflow to review the requisition, you can select one after assigning the Requisition to yourself. The Ad-Hoc Approver you insert will review the Requisition after you approve it. **Note**: *An Ad-Hoc Approver must have a CU Marketplace Approver role. You can only add one Ad-Hoc Approver. Other Approvers in the approval workflow can also add an Ad-Hoc Approver.*
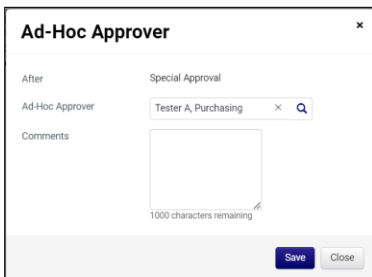
1. Click the Ad-Hoc Approver **Select** link at the bottom of the General section.
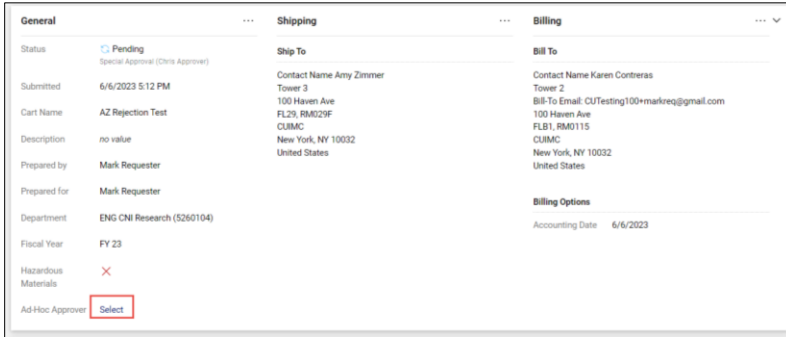
The Ad Hoc Approver window appears.
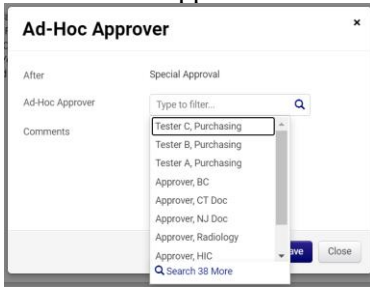
2. Click into the **Ad-Hoc Approver** field and select the Approver from the list. You can type to filter the list of names.

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.
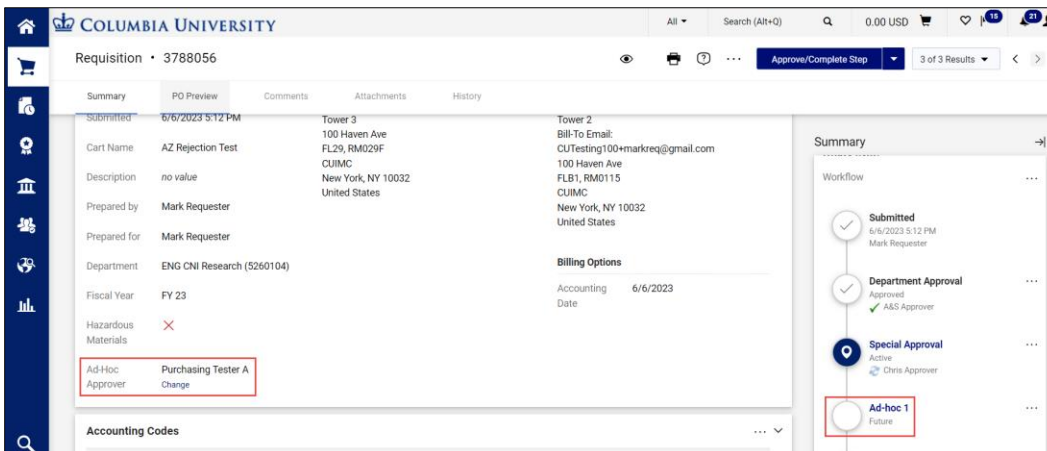
Viewing Comments and Attachments

If any Comments or Attachments have been added to the Requisition you can view them as part of your review process. The **Comments** and **Attachments** tabs will display the number of items in the folder, if any. Click the tab to view.

The Comments tab will display any added Comments.

The Attachments tab will display any attached documents. Click the link to download and view the document.

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.
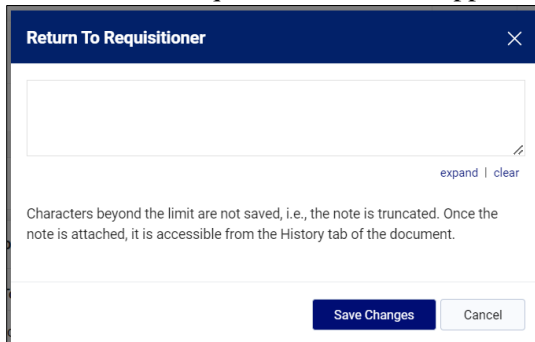
Returning the Requisition to the Requester

If the Requisition does not meet your approval requirements, you can return it to the Requestor so they can make any necessary changes. After making the necessary changes or providing additional information, the Requester will resubmit the Requisition back into workflow.

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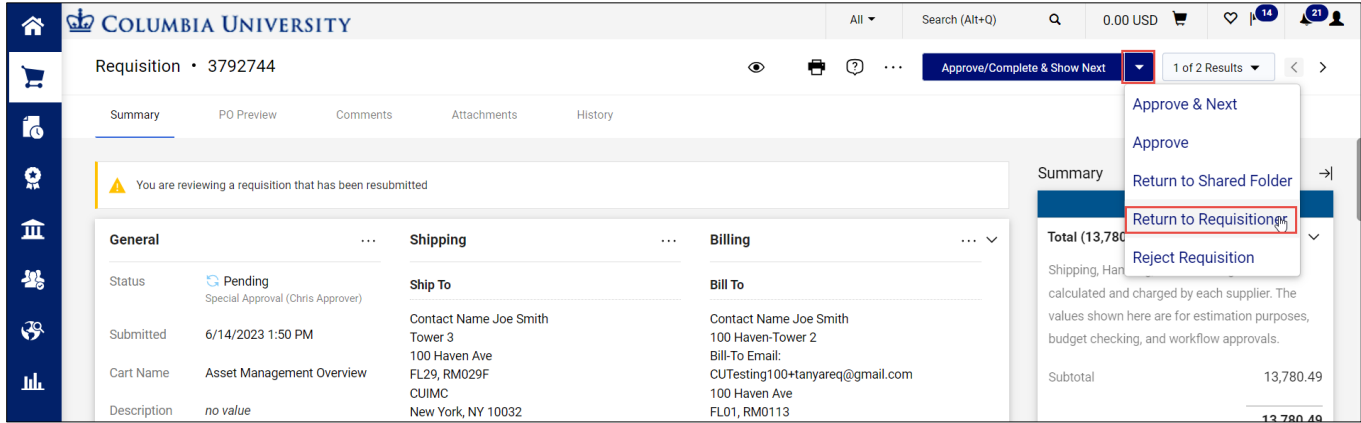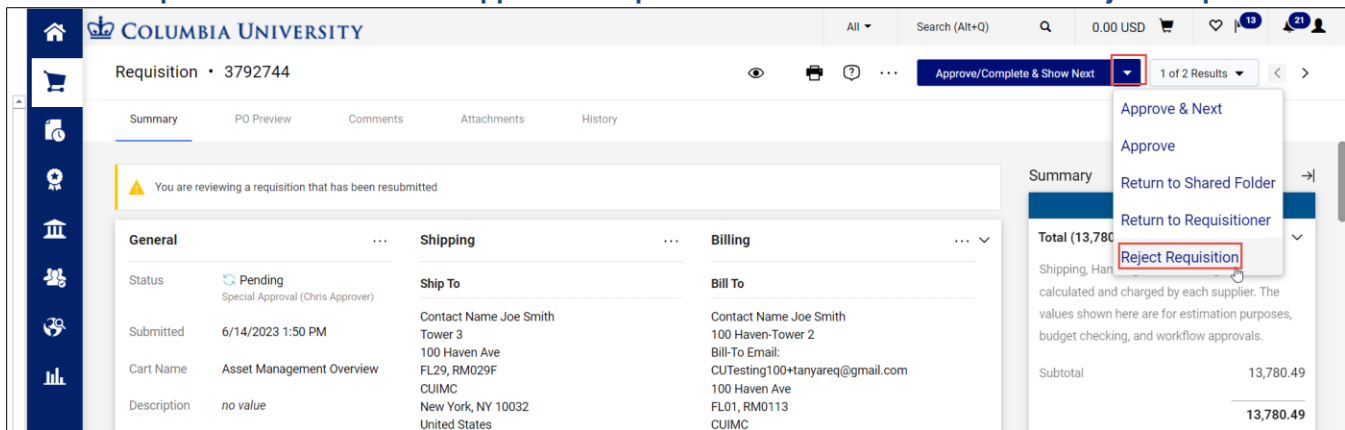

The Return to Requisitioner window appears.

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 the 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.

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

Approvers who are also Requesters

If you have both the CU Marketplace Requester Requisition Initiator and a Level 1 ($0 - $1,000) Department Requisition Approver roles, you do not need departmental approval for purchases of $1,000 or less if your purchase is being shipped to a campus address.

If you have the Department Requisition Approver role for higher Levels (2 and up), but not Level 1, your Requisition will require departmental approval even if you have an approval role.

If your purchase is greater than $1,000 and/or you are shipping to an Ad-Hoc Ship-To address, your Requisition will require departmental approval even if you have a Level 1 approval role.

Getting Help

Please contact the Finance Service Center
http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via ServiceNow
https://columbia.service-now.com