

The CU Marketplace powered by JAGGAER provides powerful search functionality with results that can be filtered and refined. You can save and organize Searches so that you can easily run them again in the future to get the most up to date information regarding transactions and document status. In addition, Search results can be exported to Excel for further analysis.

Table of Contents

Accessing the CU Marketplace	2
Using Quick Search	2
Using the Orders Menu Search.....	4
Configuring Search List Columns	6
Exporting Your Search List.....	7
Saving Your Searches.....	9
Managing Searches.....	9
Navigating to the Manage Searches Screen and Managing Searches	9
Creating a Personal Folder	10
Getting Help	11

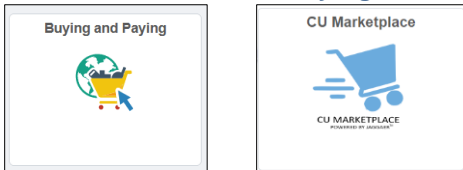
Accessing the CU Marketplace

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

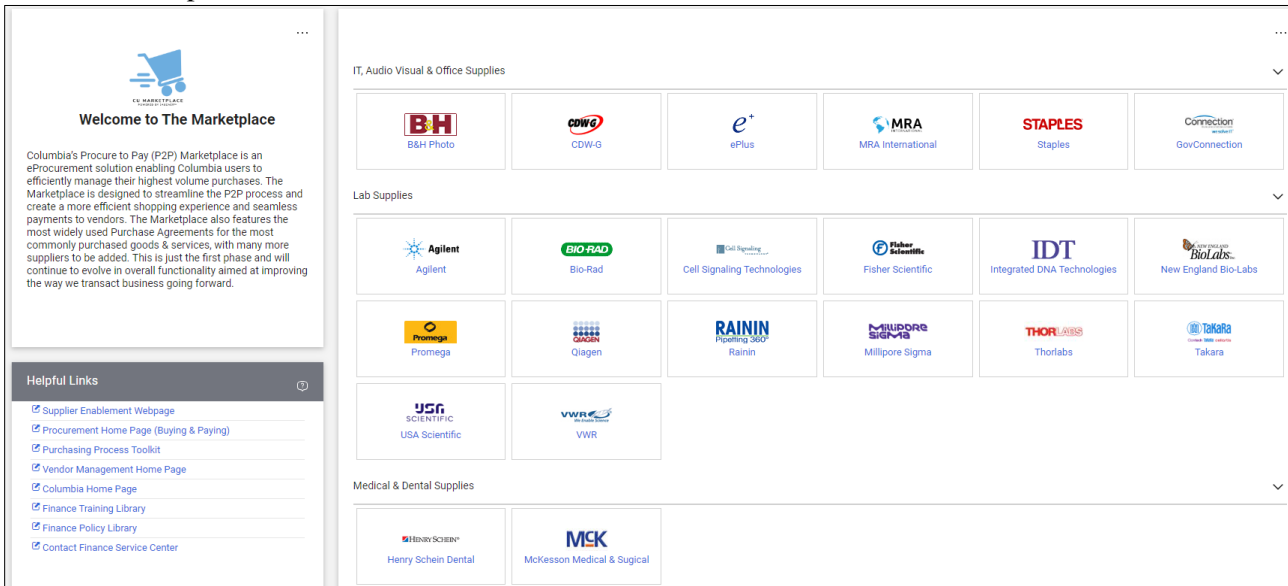


OR, if you have access to Buying and Paying in ARC:

1. Log into My.Columbia <http://www.my.columbia.edu>, click on 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.



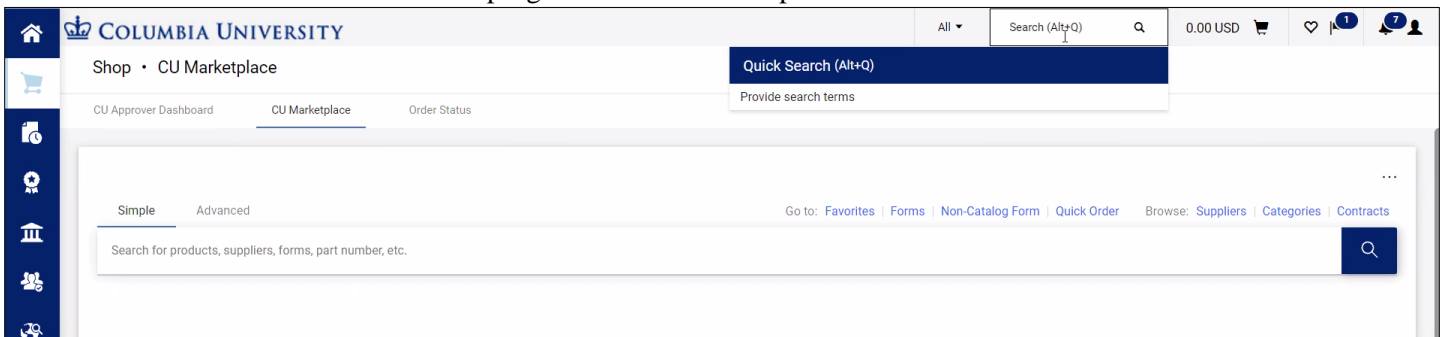
The CU Marketplace launches.



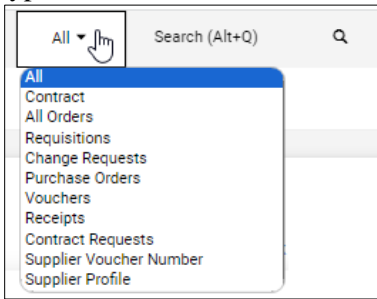
Using Quick Search

You can use the Quick Search to find documents related to your CU Marketplace transactions. The Quick Search can be set to find all related documents or you can choose to search among specific types of documents.

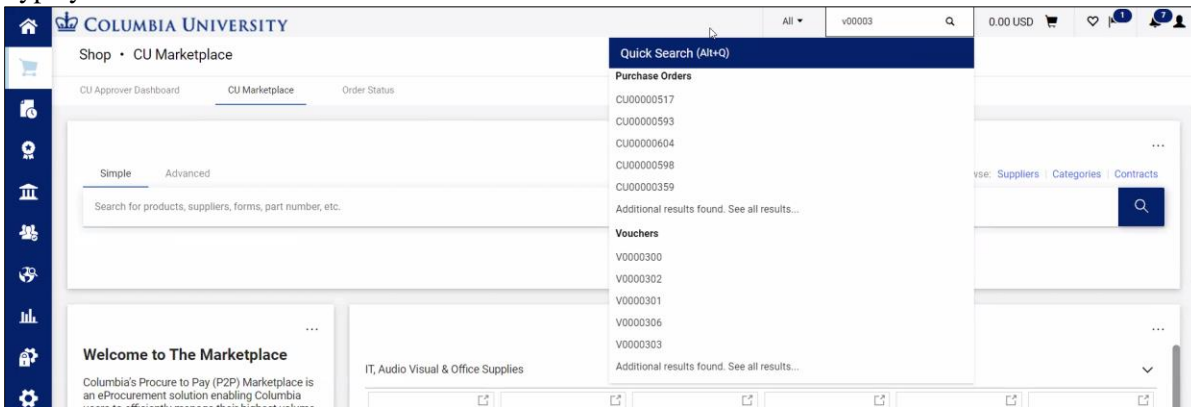
1. Click in the **Quick Search** field on the top right of the CU Marketplace window.



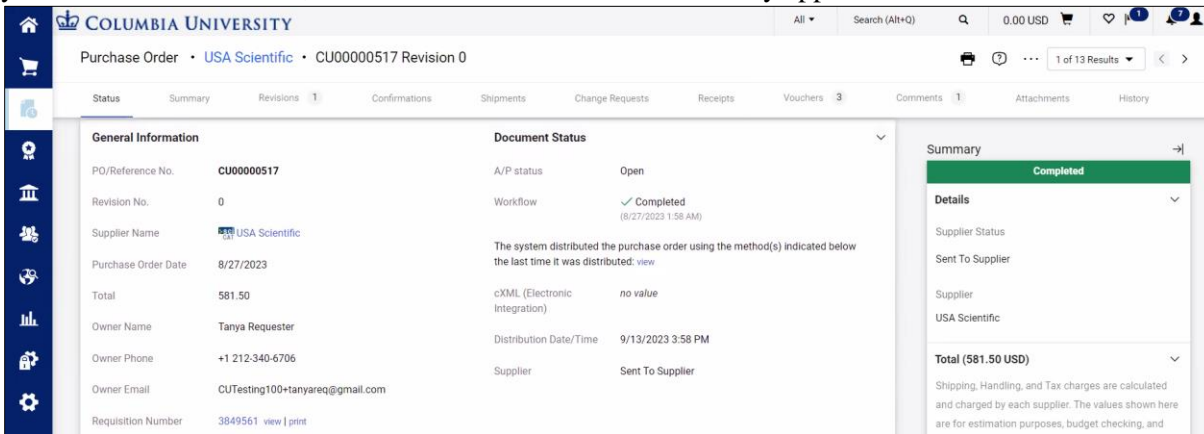
Optionally, you can click the dropdown next to the Quick Search field to narrow your search to a specific document type.



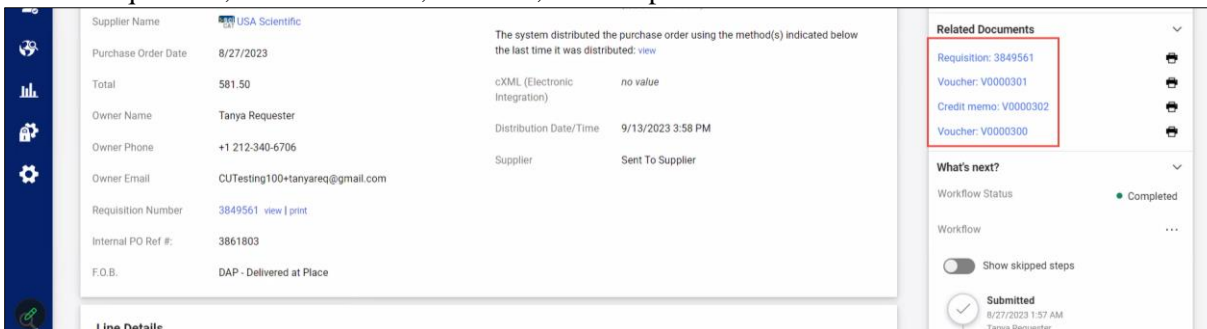
2. Type your search criteria.



3. You can click the matching document number that appears as you type or press Enter to view a list of matches. If you select an exact match, the document screen will automatically appear.

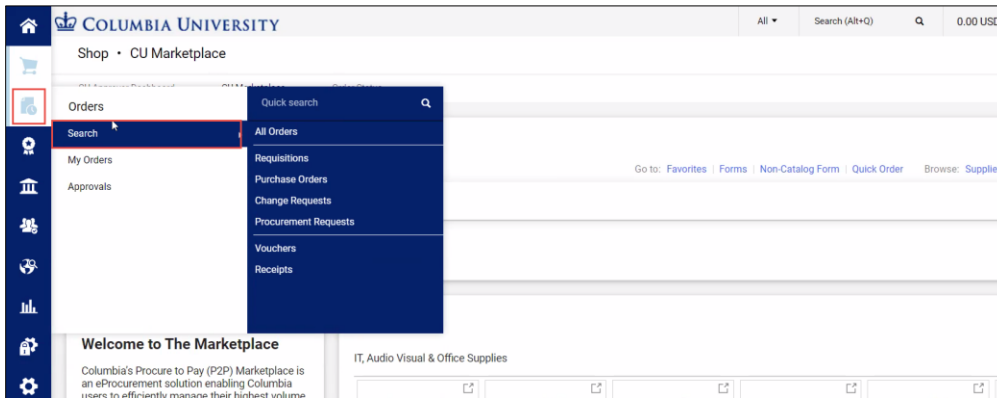


The **Summary Panel** of the document contains links to **Related Documents** so that you can easily navigate to related Requisition, Purchase Order, Voucher, or Receipt documents.

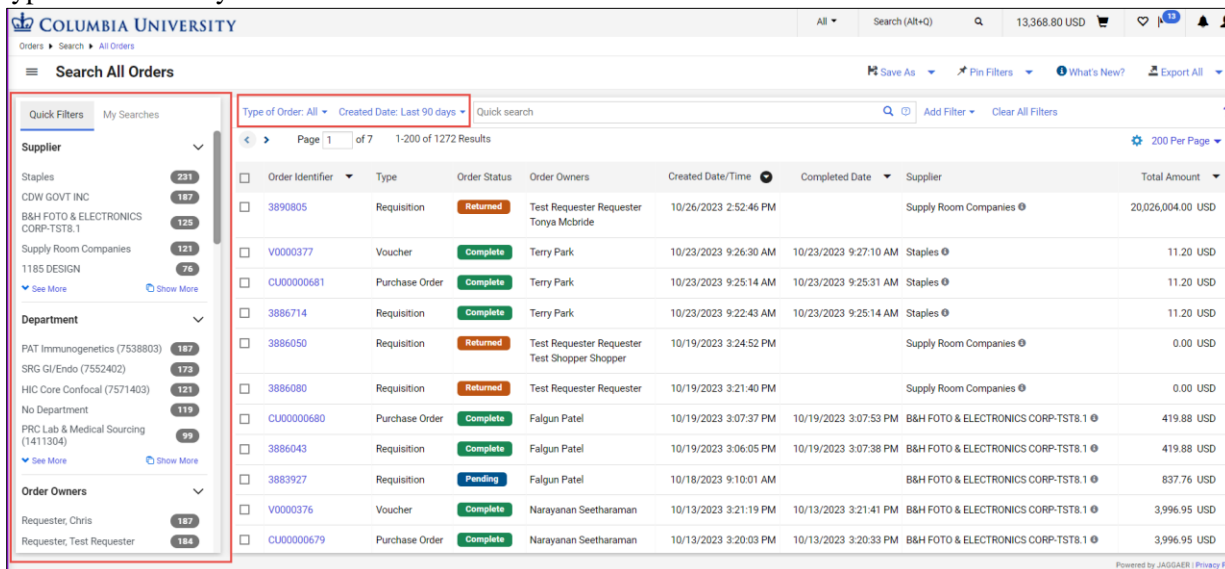


Using the Orders Menu Search

The **Orders** menu also contains a **Quick Search** field to search for documents. In addition, you can navigate directly to lists containing all of your **Requisitions**, **Purchase Orders**, **Vouchers** or **All Orders**.

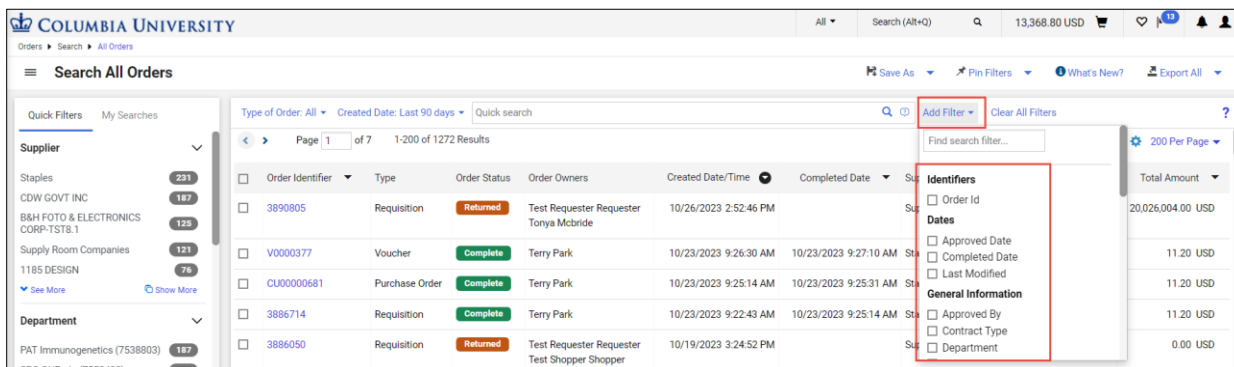


1. Click the **Orders** icon then **Search** menu then select type of document to view. The Search screen appears for the type of document you selected.



You can use the **Quick Filters** section on the left or the filters above the list to narrow the list to those documents that contain specific attributes.

2. Click the **Add Filter** button and select **Search Filters** to add to the top of your list that you can use to find specific documents.



The Filter(s) you added appear above the list column headers.

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Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount
3886714	Requisition	Complete	Terry Park	10/23/2023 9:22:43 AM	10/23/2023 9:25:14 AM	Staples	11.20 USD
3886050	Requisition	Returned	Test Requester Requester Test Shopper Shopper	10/19/2023 3:24:52 PM		Supply Room Companies	0.00 USD

3. Enter or select the desired values in the Filters you added and click **Apply** for each filter.

Order Status: All x Supplier: All x

- Cancelled
- Complete
- Pending
- Rejected
- Returned
- Withdrawn

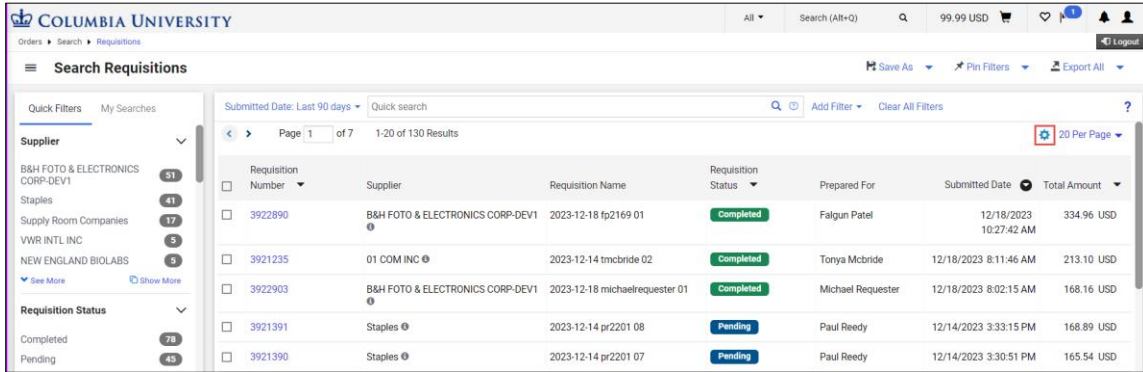
Apply Cancel

The list will be filtered based on your desired values,

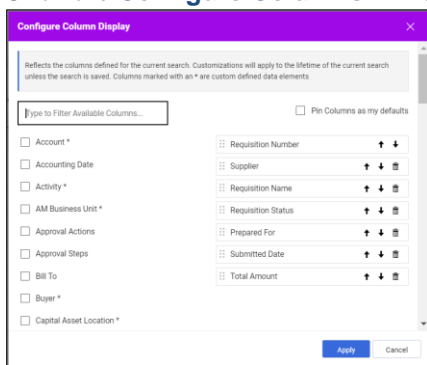
Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount
3876665	Requisition	Returned	Narayanan Seetharaman	10/11/2023 3:46:12 PM		B&H FOTO & ELECTRONICS CORP-TST8.1	4,699.00 USD
3865912	Requisition	Returned	Christopher Moran Natalya Vasilyeva	9/21/2023 2:37:24 PM		B&H FOTO & ELECTRONICS CORP-TST8.1 NEW ENGLAND BIOLABS	1,894.91 USD
3858420	Requisition	Returned	Terry Park	9/12/2023 12:05:57 PM		B&H FOTO & ELECTRONICS CORP-TST8.1	399.00 USD
3855948	Requisition	Returned	Chris Requester	9/7/2023 3:54:42 PM		Staples	500.45 USD
3855843	Requisition	Returned	Natalya Requester	9/7/2023 2:32:23 PM		Staples	1,930.87 USD
3855664	Requisition	Returned	Maribel Pachay	9/7/2023 9:49:04 AM		Staples	1,248.30 USD
3853749	Requisition	Returned	Owen Powell	9/5/2023 12:20:11 PM		B&H FOTO & ELECTRONICS CORP-TST8.1	311.45 USD

Configuring Search List Columns

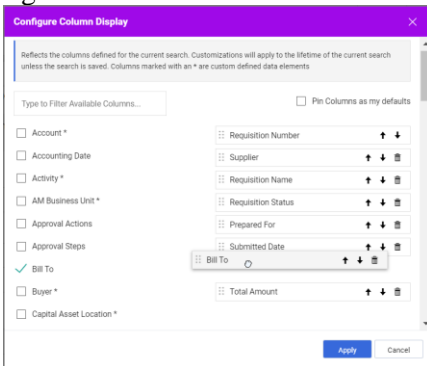
You can choose the columns that display in the search results and the order in which they display.



1. Click the **Configure Columns** icon above the document list. The Configure Column Display screen displays.

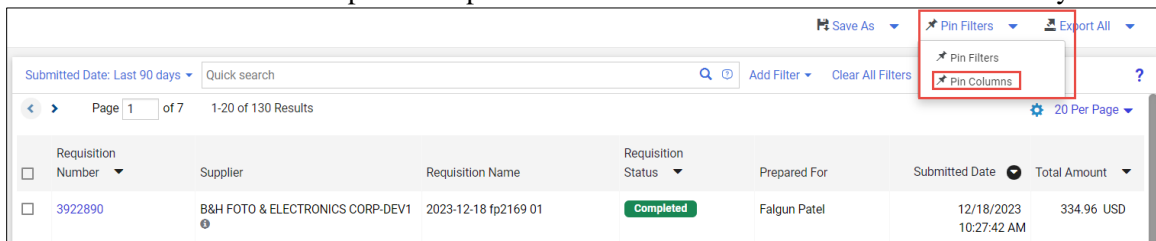


2. Select from the list of **Available Columns** on the left side of the window. The selected columns will appear on the right side of the window.



3. Drag and drop the selected columns on the right side of the window up or down depending on your desired order.
3. If desired, you can select **Pin Columns as my default** so that your selected column configuration is the default each time you search.
4. Click **Apply**.

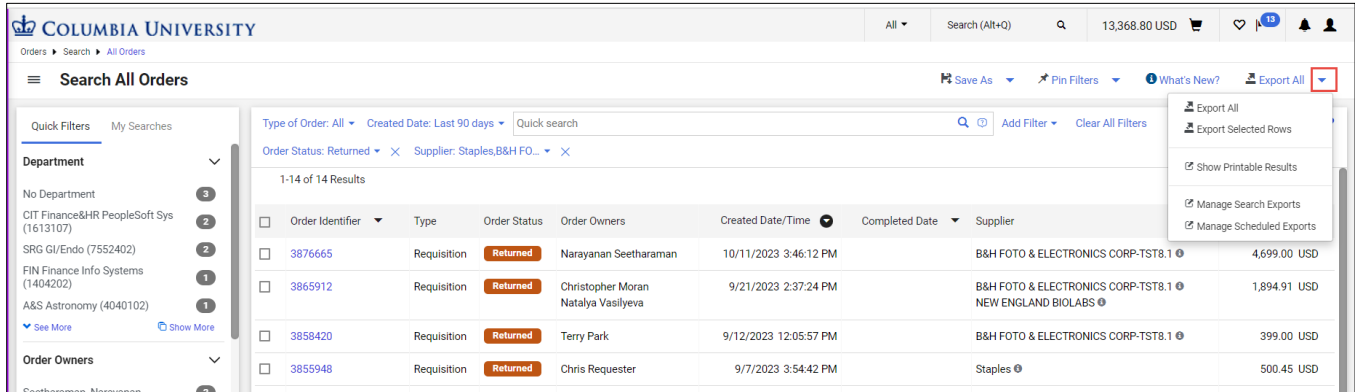
You can also select the Pin Options dropdown on the Search List screen to **Pin Columns** you selected.



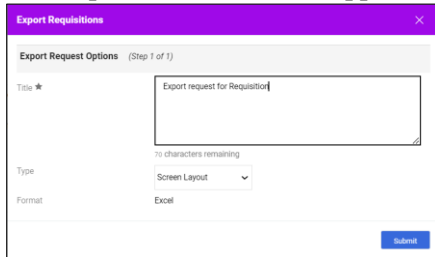
Exporting Your Search List

After your Search list contains the desired information, you can export the whole list or select individual rows to export to Excel.

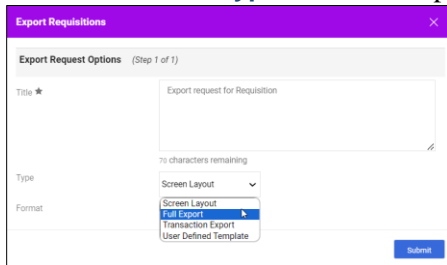
1. Click the dropdown menu next to the **Export All** button. If you selected the checkboxes for individual rows to be exported, you can select **Export Selected Rows**. If you want to export all rows, select **Export All**.



The Export Orders window appears.



2. The **Title** field can be edited to reflect the data you are exporting.
3. Select the desired **Type** from the dropdown.



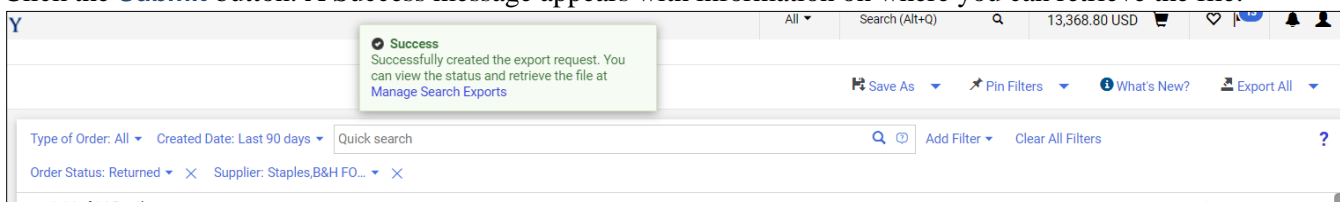
Screen Layout - Exports the search results as an Excel file exactly as they appear on the screen with no additional data.

Full Export - Exports all information available about the transaction associated with each document in CSV format. Full exports also include document history such as approvals, comments and more.

Transaction Export – Exports all information available about the transaction associated with each document in CSV format.

User Defined Templates - Access to custom templates that are configured to export specific fields and files.

4. Click the **Submit** button. A Success message appears with information on where you can retrieve the file.



- Click the dropdown next to **Export All** and select **Manage Search Exports**.

The screenshot shows the 'Search All Orders' interface. At the top right, there is an 'Export All' dropdown menu. A red box highlights this menu, which contains the following options: 'Export All', 'Export Selected Rows', 'Show Printable Results', 'Manage Search Exports' (highlighted with a red box), and 'Manage Scheduled Exports'. The main table below shows search results for orders, with one row highlighted: Order Identifier 3876665, Type Requisition, Status Returned, Order Owners Narayanan Seetharaman, Created Date/Time 10/11/2023 3:46:12 PM, Supplier B&H FOTO & ELECTRONICS CORP-TST8.1, and Amount 4,699.00 USD.

The Manage Exports screen appears.

The screenshot shows the 'Manage Search Exports' screen. It features a table with the following columns: Title, Status, Search Type, Export Output, Created, Completed, Available Until, Details, and Actions. The first row is 'Test Export request for All Orders' with a status of 'Completed'. A red box highlights the title of this row. The table also includes a 'Click to Filter' link and a 'Refresh this Page' button.

- Click the Title of the file to export. The file will be available to download from your browser.

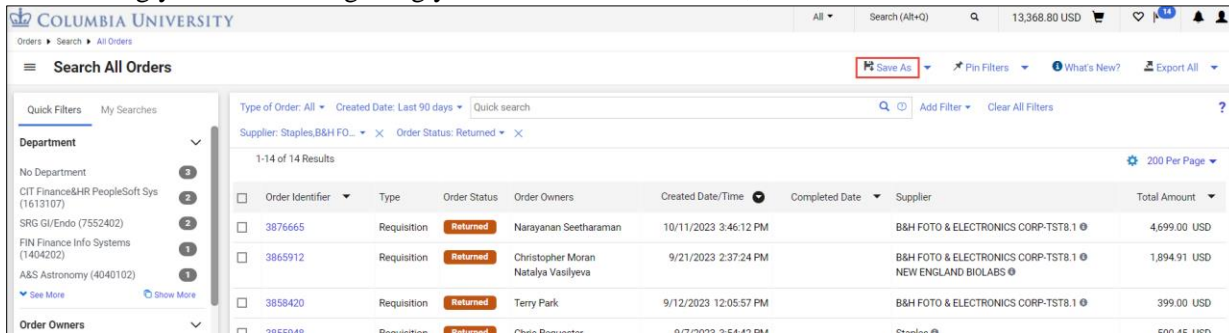
The screenshot shows an Excel spreadsheet titled 'Export request for All Orders'. It contains a table with the following columns: Order Identifier, Type, Order Status, Order Owners, Created Date/Time, Completed Date, and Supplier. The table lists 23 rows of order data. The first row is highlighted in green.

Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier
3876665	Requisition	Returned	Narayanan Seetharaman	10/11/2023 3:46 PM		B&H FOTO & ELECTRONICS CORP-TST8.1
3865912	Requisition	Returned	Christopher Moran, Natalya Vasilyeva	09/21/2023 2:37 PM		B&H FOTO & ELECTRONICS CORP-TST8.1, NEW ENGLAND BIOLA
3858420	Requisition	Returned	Terry Park	09/12/2023 12:05 PM		B&H FOTO & ELECTRONICS CORP-TST8.1
3855948	Requisition	Returned	Chris Requester	09/07/2023 3:54 PM		Staples
3855843	Requisition	Returned	Natalya Requester	09/07/2023 2:32 PM		Staples
3855664	Requisition	Returned	Maribel Pachay	09/07/2023 9:49 AM		Staples
3853749	Requisition	Returned	Owen Powell	09/05/2023 12:20 PM		B&H FOTO & ELECTRONICS CORP-TST8.1
3852033	Requisition	Returned	Narayanan Seetharaman	08/31/2023 2:20 PM		B&H FOTO & ELECTRONICS CORP-TST8.1
3847914	Requisition	Returned	Mudhu Kommineni	08/24/2023 2:45 PM		CDW GOVT INC, Staples
3842731	Requisition	Returned	Michael Requester	08/15/2023 3:32 PM		B&H FOTO & ELECTRONICS CORP-TST8.1
3837320	Requisition	Returned	Terry Requester Park	08/07/2023 2:38 PM		B&H FOTO & ELECTRONICS CORP-TST8.1
3833823	Requisition	Returned	Mudhu Kommineni	08/01/2023 2:22 PM		Staples
3833715	Requisition	Returned	Michael Requester	08/01/2023 12:00 PM		B&H FOTO & ELECTRONICS CORP-TST8.1
3833709	Requisition	Returned	Mark Requester	08/01/2023 11:29 AM		Staples

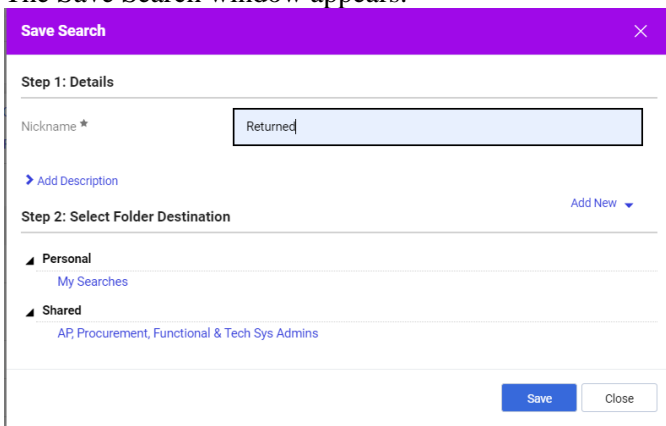
Saving Your Searches

After setting your desired Search criteria and filters, you can save the Search so that you can run it again in the future.

1. After setting your filters and getting your desired search results, click the **Save As** button.



The Save Search window appears.



2. Enter a **Nickname** for your Search.
3. Select the **Folder Destination**. If you have previously created **Personal** folders, they will be available to select here. Refer to [Creating a Personal Folder within the Managing Searches section](#) in this document on how to create a Personal folder. You can also select a **Shared** folder to share your Search settings with colleagues.
4. Click the **Save** button.

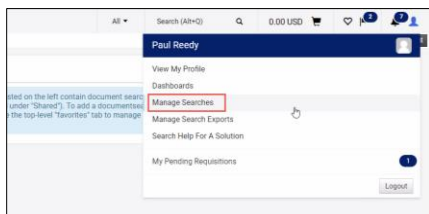
Managing Searches

Your saved Searches can be accessed via the Manage Searches screen in the CU Marketplace. From there, you can organize them, run, edit, or export them, among other tasks.

Navigating to the Manage Searches Screen and Managing Searches

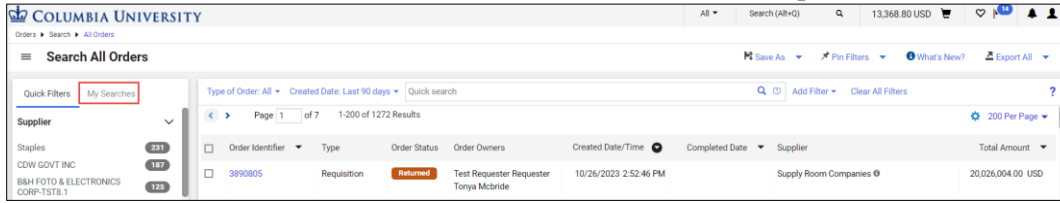
You can access Manage Searches from several places within the CU Marketplace. The two quickest methods are described below:

Click the **Profile**  icon at the top right corner of the CU Marketplace screen and select **Manage Searches**.

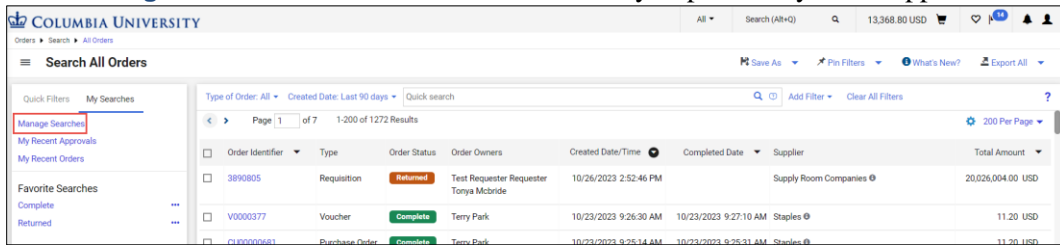


OR...

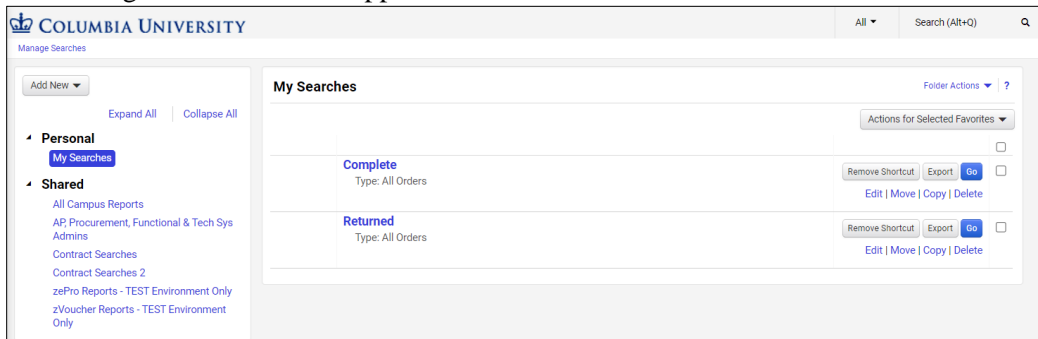
1. From the Search screen, click **My Searches** from the Quick Filters panel on the left side of the screen.



2. Click **Manage Searches**. Note that the Searches that you previously saved appear under Favorite Searches.



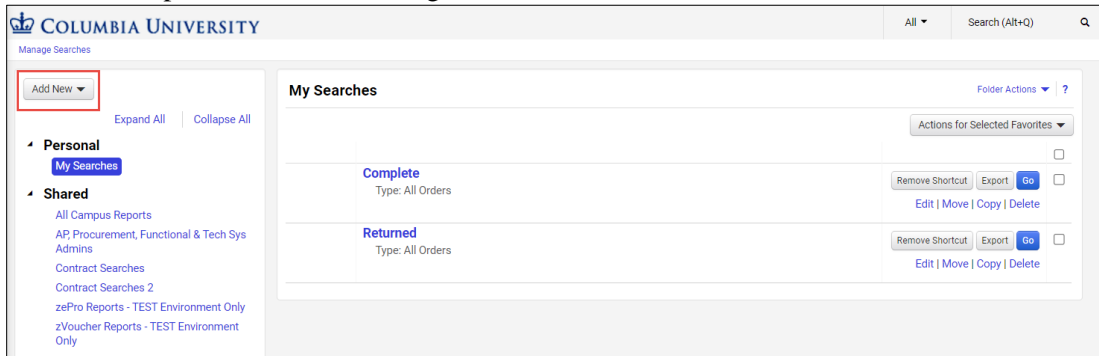
The Manage Searches screen appears.



- You can select Folders from the left panel to view the saved Searches in that folder.
- For each Search listed, you can click **Remove Shortcut** to remove the Search from the Folder, click **Export** to export the latest Search results to Excel, or click **Go** to view the latest Search results on screen.
- Links are also provided to **Edit**, **Move**, **Copy** or **Delete** the Search.

Creating a Personal Folder

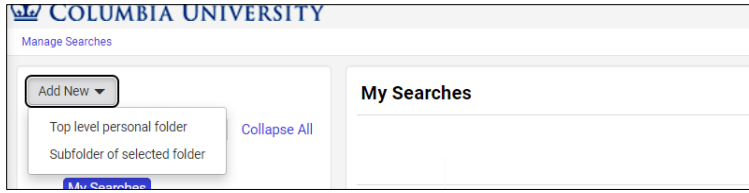
1. From the left panel within the Manage Searches screen, click the Add New button



2. Select either **Top level personal folder** or select a previously created personal folder from your list and select **Subfolder of selected folder**. The option to select Subfolder of selected folder is only available if you have previously created at least one Top level personal folder.

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Training Guide: Searching for Documents and Running Reports in the CU Marketplace



3. Enter a **Name** for the Personal Folder. Optionally, you can enter a Description.

A screenshot of a 'Create Personal Folder' dialog box. The dialog has a purple header with the title 'Create Personal Folder' and a close button (X). Inside the dialog, there are two input fields: 'Name *' and 'Description'. The 'Name *' field contains the text 'My Searches'. Below the 'Description' field, it says '254 characters remaining'. At the bottom of the dialog, there is a '★ Required' label, a 'Save Changes' button, and a 'Close' button.

4. Click the **Save Changes** button.

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 Service Now

<https://columbia.service-now.com>