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

Colleagues with a CU Marketplace Shopper role or other Requesters can assign you a Shopping Cart so that you can submit it as a Requisition into approval workflow.

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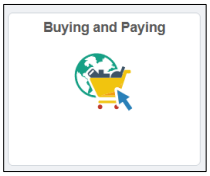
Accessing the CU Marketplace

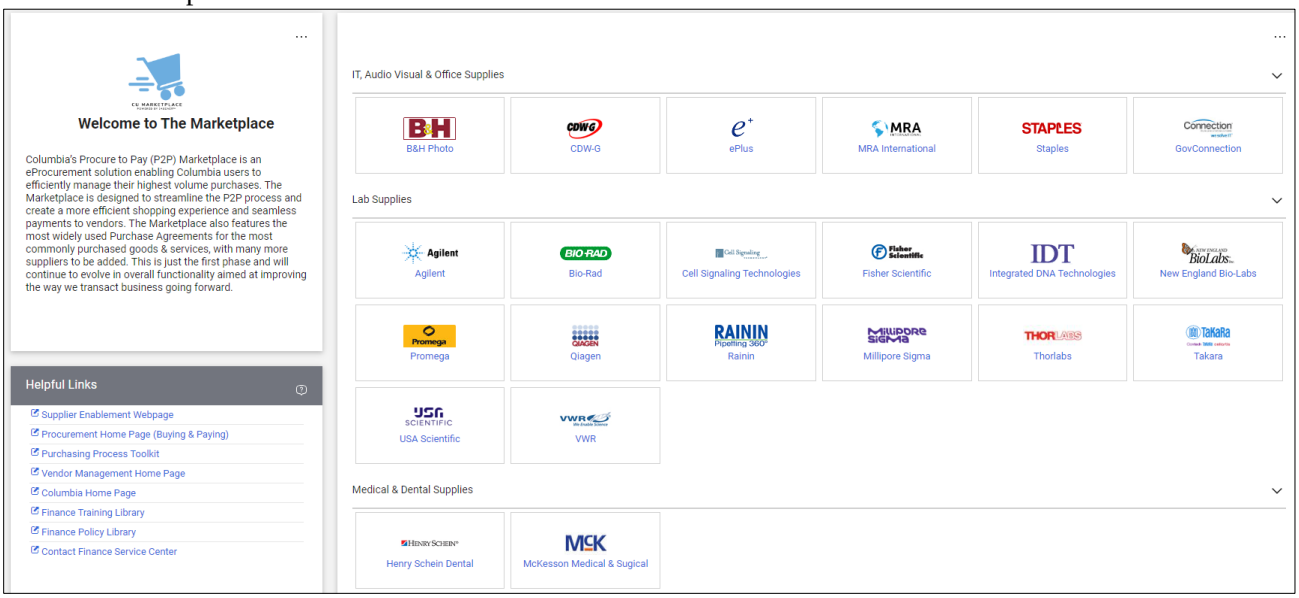
Navigate to the Finance Buying and Paying website, click the **CU Marketplace** logo, and login using your Single Sign On.

OR

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



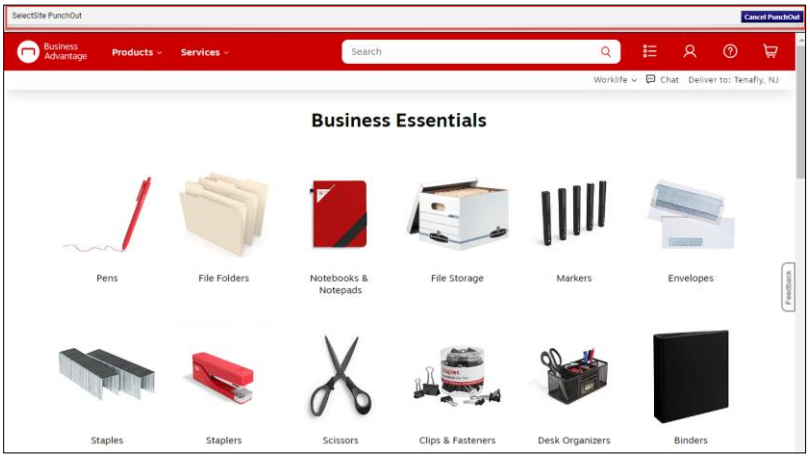
Note: *The CU Marketplace will automatically timeout after thirty minutes of inactivity, consistent with other University Enterprise Systems.*

Shopping for Items

Please browse and shop for your items in the CU Marketplace from any of the **Enabled Suppliers**. For more information about each enabled vendor, visit the Enabled Suppliers webpage. If you are purchasing from a vendor that is not enabled in the CU Marketplace, you must create a non-catalog requisition in ARC.

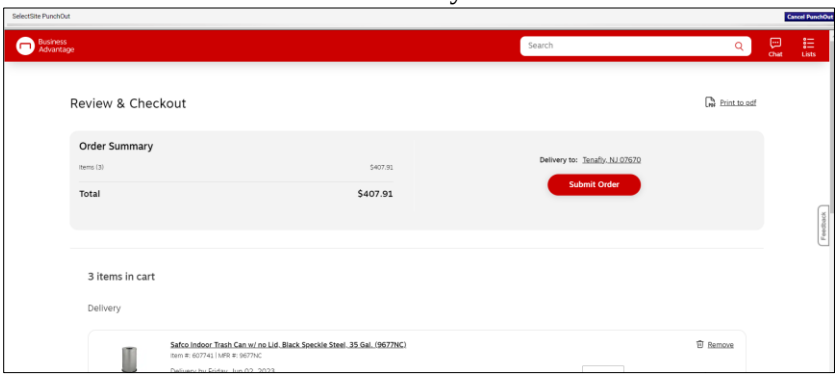
1. In the **Showcases** section on the Home page, click the tile for the vendor you wish to shop from.

You will then "PunchOut" to the vendor website.

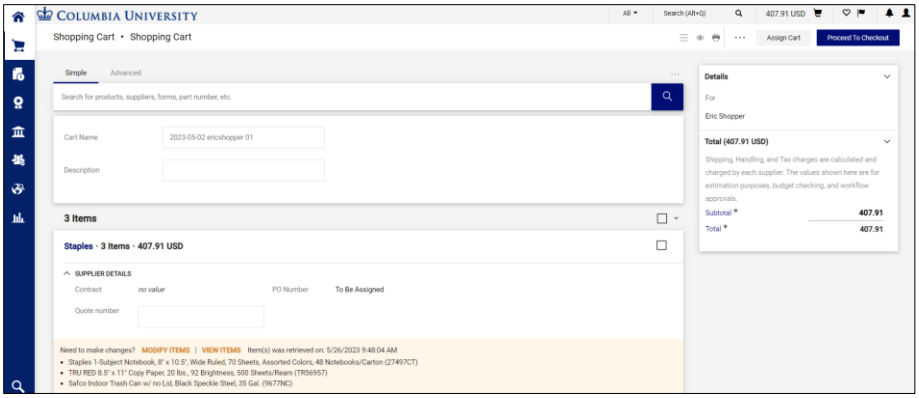


Notice the gray bar at the top of the vendor website which indicates you are punched out from the Marketplace. You can click the **Cancel PunchOut** button to retun to the Marketplace, if needed.

2. Shop the vendor website for the item(s) you want to purchase and add your desired items to the vendor's cart.
3. View the vendor site cart and **Submit** your order. Each vendor will use different terms to submit your order.



The items you selected appear in your Marketplace Shopping Cart.



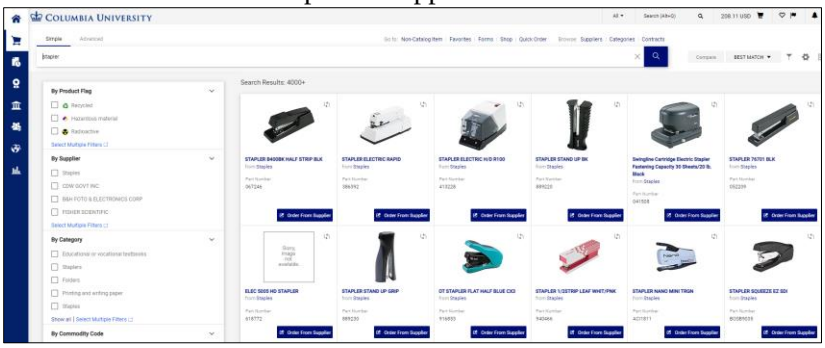
You can visit other vendor PunchOut sites and add items from multiple vendors to your Marketplace Cart.

Using Search to Shop

You can also use the Search field to find products across the Marketplace vendors. Note that not all Marketplace vendors support the Search to Shop functionality. If you do not find a result, you may need to search directly within the appropriate vendor's PunchOut.

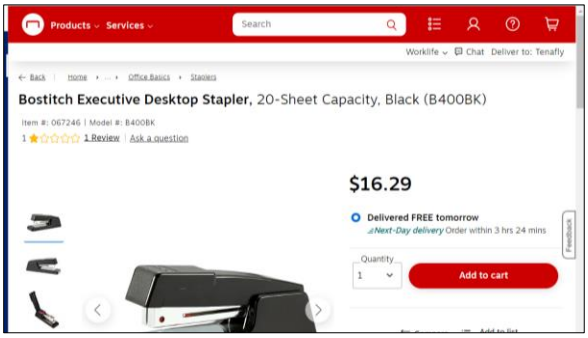
1. Type the desired product in the **Search** field and click the **Search** icon. You can also use the Advanced search to enter more specific search criteria.

The search results for the product appear.



You can use the **Filters** from the panel on the left to narrow your results.

2. Click the **Order From Supplier** button for the desired item. You will PunchOut to the vendor's website to complete the order.



3. Add the item to the vendor cart and Checkout/Submit. The item you selected appears in your Marketplace Shopping Cart.

Quote-to-PunchOut

If you do not see your desired item in the Marketplace from a particular supplier, review the vendor information from the Enabled Suppliers webpage to check their **Quote-to-PunchOut** availability. If the supplier supports Quote-to-PunchOut, contact the supplier directly for a quote. If the supplier offers a quote, retrieve your quote from inside the vendor's PunchOut. Most vendors that offer Quote-to-Punchout have provided a guide that is available on the Enabled Suppliers webpage on how to retrieve quotes from their site.

If a supplier does not support Quote-to-PunchOut, you must create a non-catalog requisition in ARC.

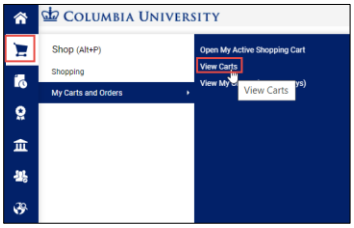
Viewing a Shopping Cart Assigned to You by a Shopper or other Requester

Shoppers who are not Requesters cannot submit the Cart as a requisition into the approval workflow, but they can assign their cart to a Requester. In addition, Requesters can also assign other Requesters to a cart. 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.

1. Click the **Actions Items** icon and click **Carts Assigned to Me**.

OR

Mouse over the **Shop** icon and **My Carts and Orders** and then click **View Carts**.

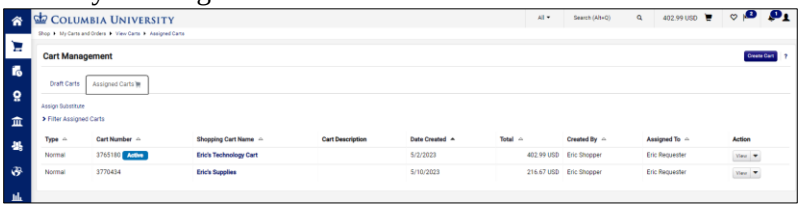


You can also view:

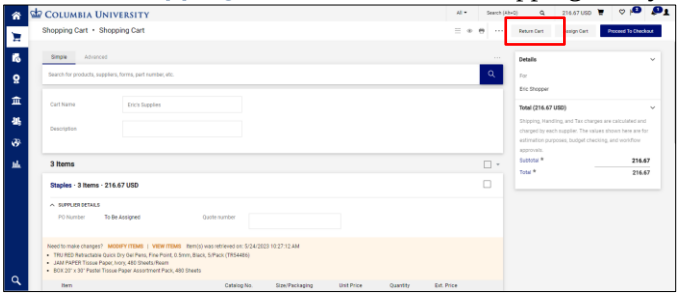
Open My Active Shopping Cart – Navigate to the Shopping Cart page you are currently using for shopping,

View My Orders (Last 90 Days) – Displays a table listing the Shopping Carts from the past 90 days and their status.

The Cart Management screen and Assigned Carts list appears. The cart labeled Active is the cart that you are currently working.



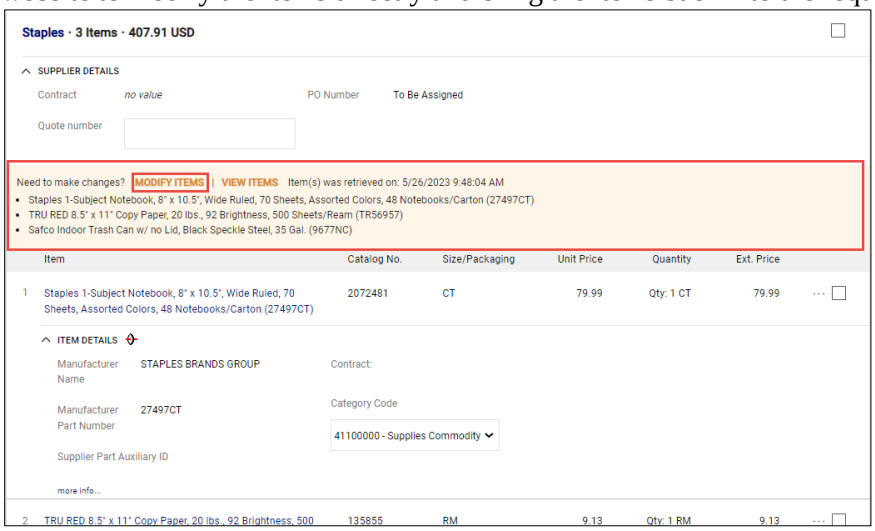
2. Click the **Assigned Carts** tab to view carts assigned to you.
Note: *The* Assigned Carts *tab will also show carts you assigned to other Requesters.*
3. Click the **Shopping Cart Name** for the Shopping Cart you want to view. The Shopping Cart screen appears.



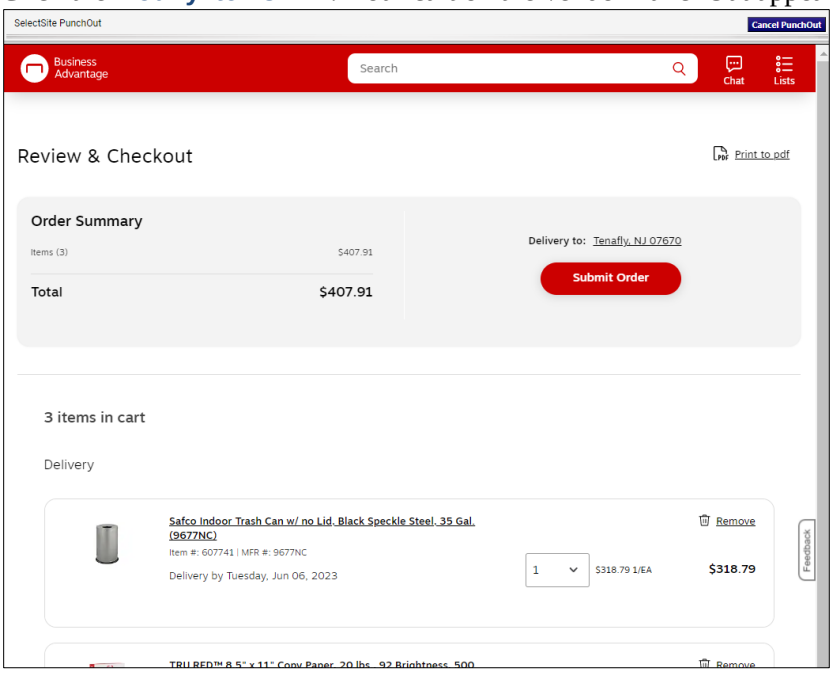
If necessary, you can click the **Return Cart** button to return the cart back to the person who assigned it to you.

Modifying Items in a Cart

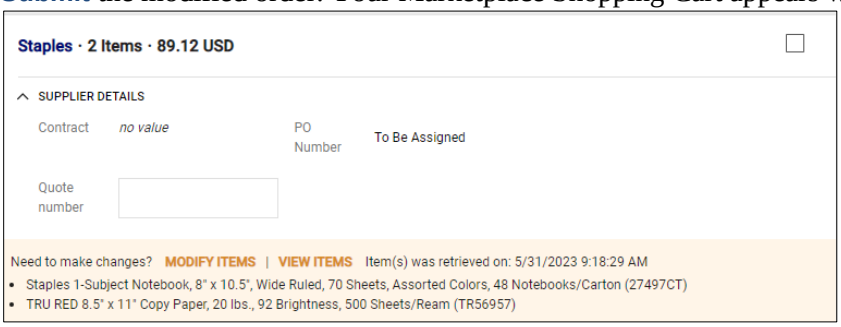
Marketplace vendors require you to modify items in your Shopping Cart by returning to PunchOut to the vendor's website to modify the items directly and bring the items back into the requisition.



1. Click the **Modify Items** link. Your cart on the vendor PunchOut appears.



2. You can increase or decrease the number of items, remove items, or add additional items. Adjust the cart as desired.
3. **Submit** the modified order. Your Marketplace Shopping Cart appears with your changes.

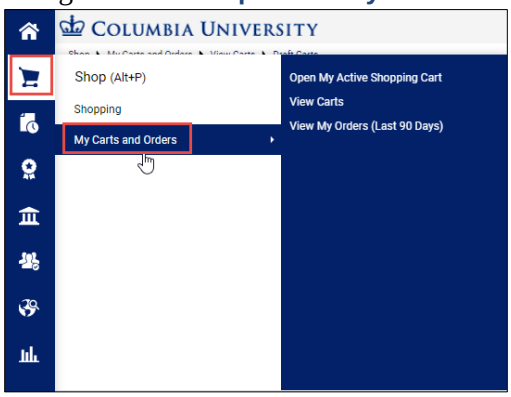


Managing Carts

When you select items when shopping, you are adding items to your **Active** Shopping Cart. If you should end your CU Marketplace session and resume shopping at a later time, you will resume adding items to the same Active cart. If needed, you can create a new cart and begin adding new items (and assign it to a different Requester). You can also switch between different Carts.

Viewing Your Carts and Orders

Navigate to the **Shop** icon > **My Carts and Orders**.



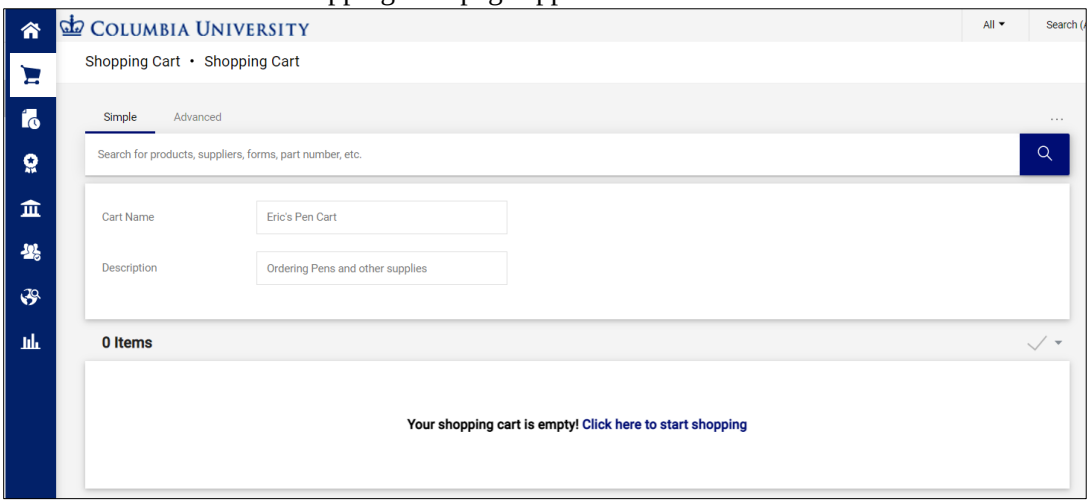
You can view:

- **Open My Active Shopping Cart** – Navigate to the Shopping Cart page you are currently using for shopping,
- **View Carts** - Display a table of all of your Shopping Carts and switch between your Active Cart and others listed.
- **View My Orders (Last 90 Days)** – Display a table listing the Requisitions you have submitted and view their status.

Creating a New Cart

1. Navigate to the **Shop** icon > **My Carts and Orders** > **View Cart**. The Cart Management screen appears.

2. Click **Create Cart**. The Shopping Cart page appears for the new cart.



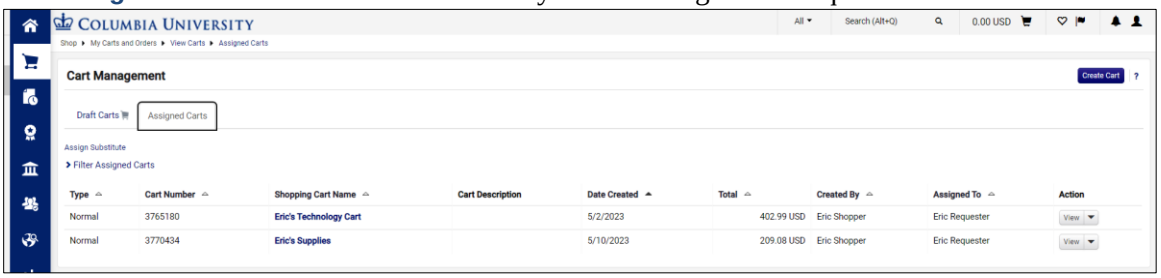
3. Enter a **Cart Name** and **Description**. You can begin shopping to add items to the cart.

Switching Between Carts

1. Navigate to the **Shop** icon > **My Carts and Orders** > **View Cart**. The Cart Management screen appears.

The **Draft Carts** tab displays the carts that you have not yet assigned to a Requester.

The **Assigned Carts** tab shows the carts that you have assigned to Requesters.

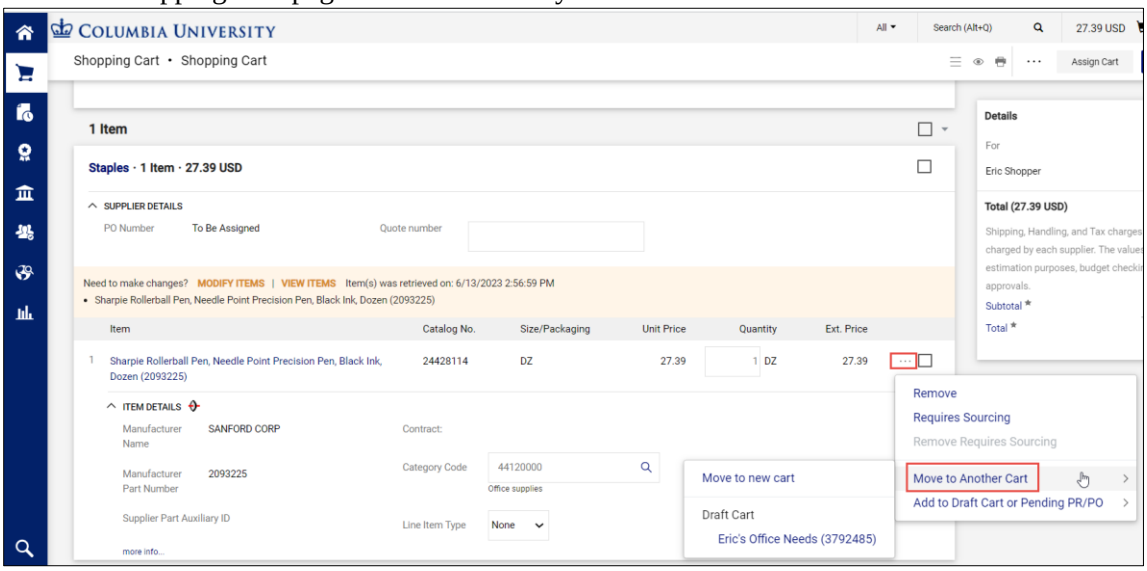


The **Active** tag indicates the cart that is currently active and any new items you select while shopping will be added to that cart.

2. Click the **Shopping Cart Name** for the cart you want to view. If it's a Draft Cart, it will display the Shopping Cart page and this cart will become your Active cart. If it's an Assigned Cart, it will display the Draft Requisition Summary page.

Moving an Item from One Cart to Another

1. View the Shopping Cart page that has the item you want to move to another cart.



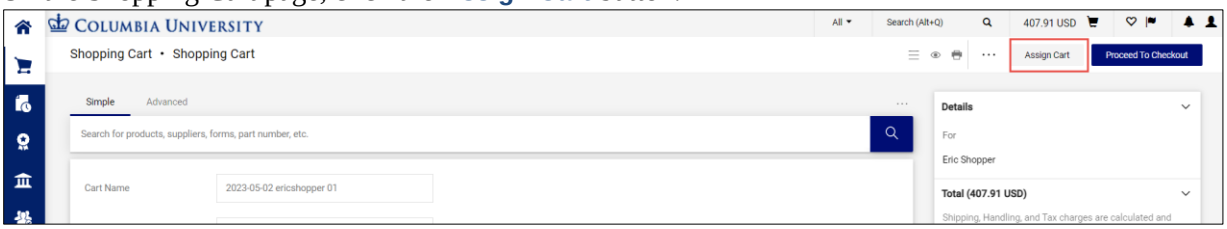
2. Click the **Line Item Actions** ··· icon for the item you want to move and select **Move to Another Cart**.
3. Select **Move to a new cart** to create a new cart with that item or select one of the **Draft Carts** listed to move the item to that cart.

Assigning a Cart to Another Requester

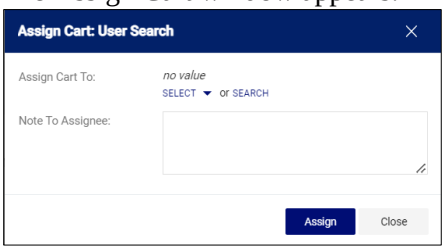
You have the ability to assign a Cart that you created, or one that has been assigned to you, and assign it to another Requester. This may be useful if you will be out of the office and you need a colleague to submit a Requisition on your behalf.

Assigning a Requester from the Shopping Cart Page

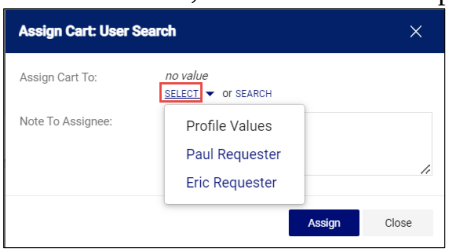
1. On the Shopping Cart page, click the **Assign Cart** button.



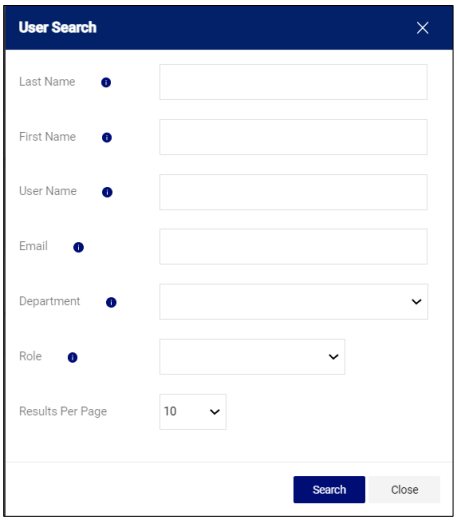
The Assign Cart window appears.



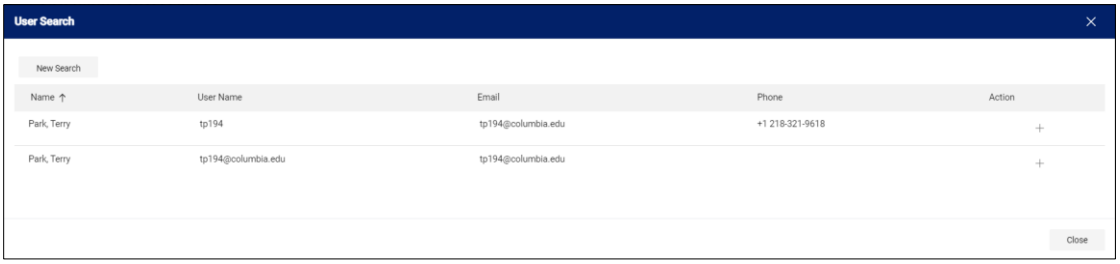
2. You can **Select** a Requester from Favorites you created in your Profile **or Search** for any Requester that is setup in the Marketplace.
   Select a favorite, click the **Select** dropdown and click the desired Requester.



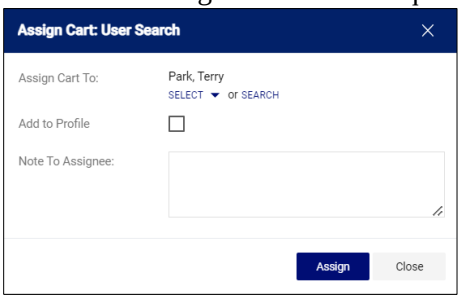
   Or, to search and select a non-favorite Requester, click the **Search** link.



   Enter the search criteria and click the **Search** button to view results.



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

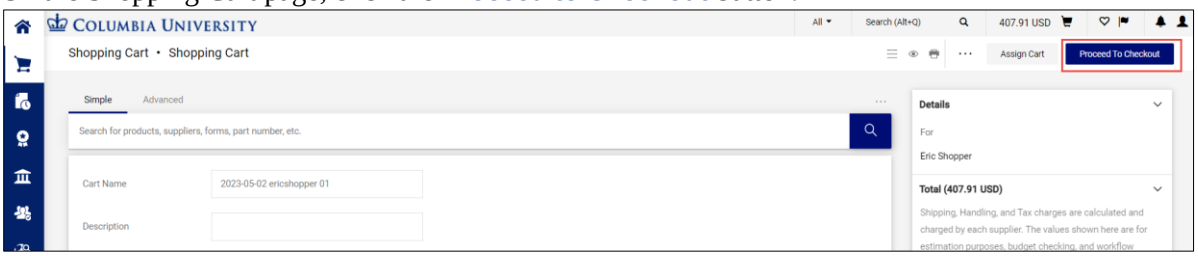


3. If the Requestor is not a favorite, you have the option to select **Add to Profile** if you want to make them a favorite. Type a **Note to Assignee**, if needed. Click the **Assign** button.
   The assigned Requester will receive an email alerting them that your Cart has been assigned to them and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

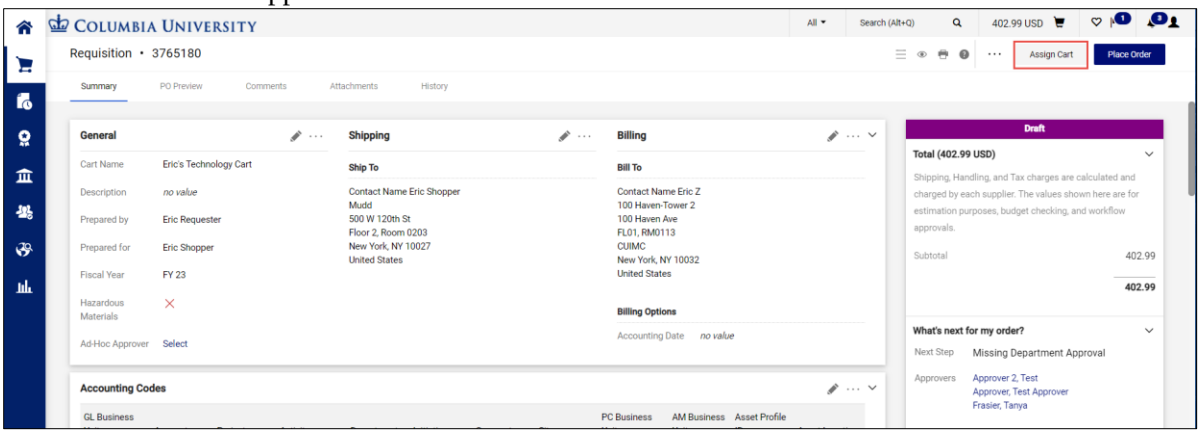
Assigning a Requestor at Checkout

When you Proceed to Checkout, you have the option to update the Ship To/Bill To Addresses and the ChartString. If you are assigning the cart to another requester, you are not required to enter this information, but you may want to complete it for your assigned Requestor to simplify their task.

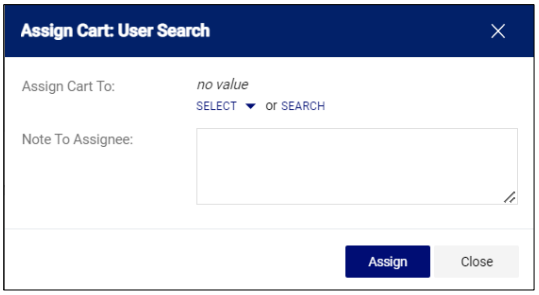
1. On the Shopping Cart page, click the **Proceed to Checkout** button.



The Checkout screen appears.



2. If desired, update **Ship To**, **Bill To**, and **Accounting Codes**, See the sections on Updating Ship To and Bill To and Updating ChartString (Accounting Codes) at Checkout.
3. Click the **Assign Cart** button. The Assign Cart window appears.



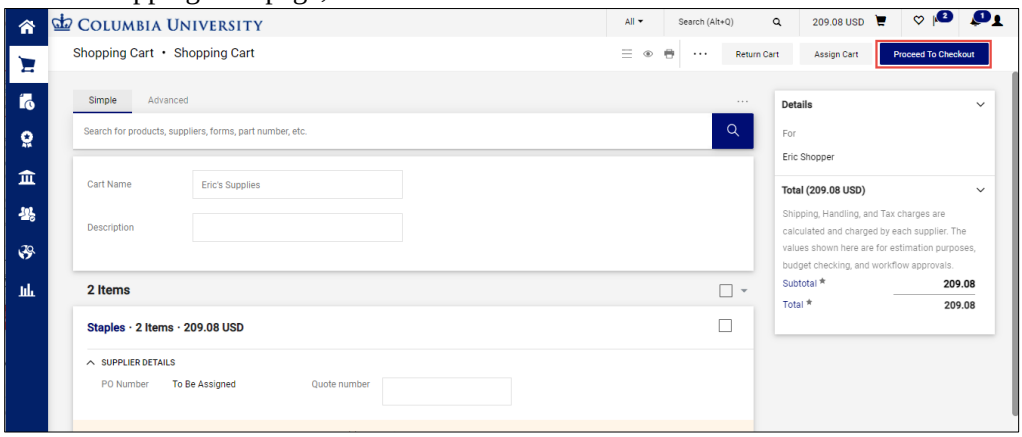
4. Follow steps 2 and 3 from the previous section.

Checking Out

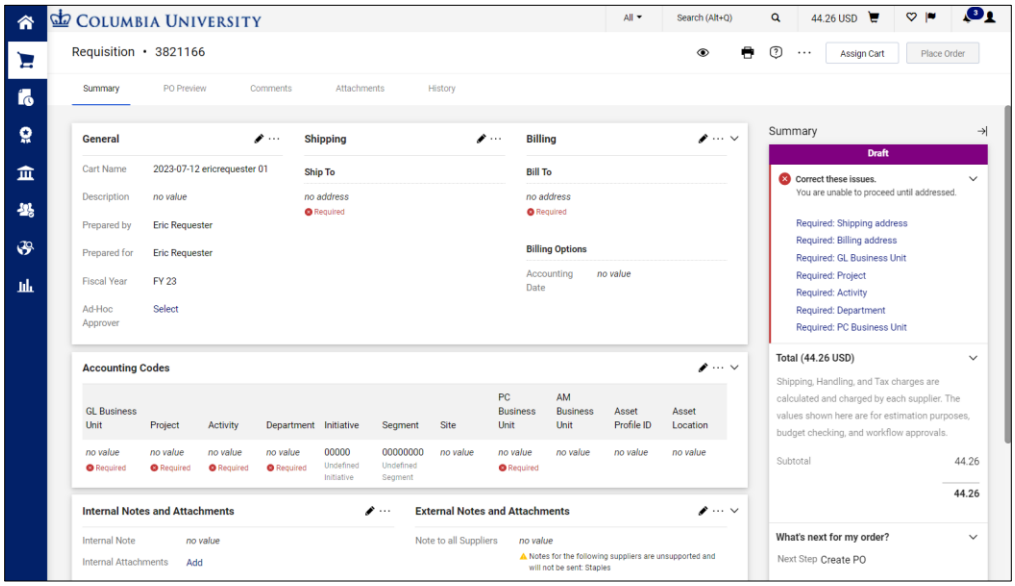
At checkout you must ensure that the Ship To/Bill To Addresses and the ChartString information is complete and correct. Shoppers have the option to enter this information but are not required to do so. You can update the information entered by the Shopper, if necessary.

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 JAGGAER job aid), those values will be populated.

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



The Checkout screen appears.

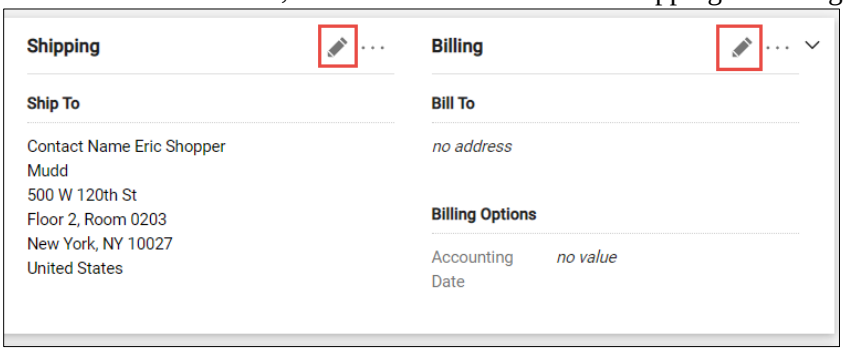


The **Status** panel on the right indicates all the required information that you must complete. You can click the link to access the field to update it. Fields within the form that require completion will be labeled **Required**.

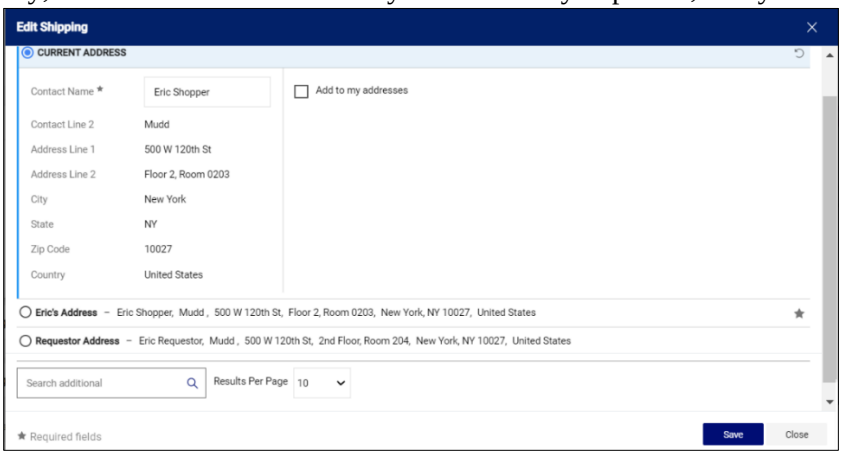
Updating Ship To and Bill To Addresses

You can search for on-campus addresses to use as your Ship To and Bill To addresses. If you cannot find a campus address, you can submit a Ship To/Bill To Address request via ServiceNow.

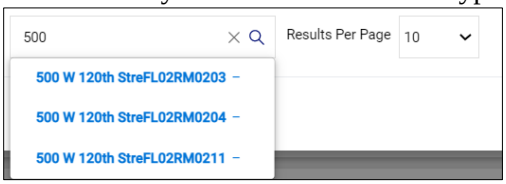
1. On the Checkout screen, click the **Edit** icon for Shipping or Billing.



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.



2. Enter a **Contact Name**. This is a required field.
3. Select one of your Profile favorites or type in the **Search additional** field to find and select an address.



4. Click the **Save** button.

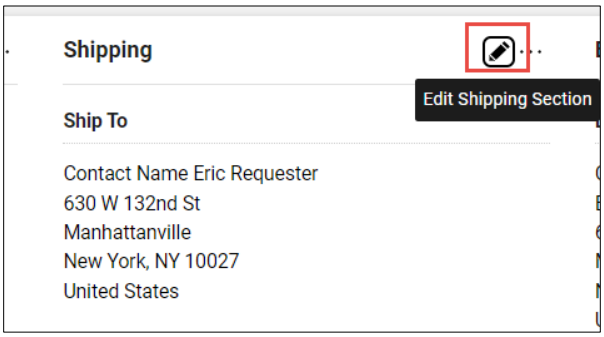
Using an Ad Hoc Ship To Address

You are able to enter Ad Hoc Ship-To locations for off-campus addresses for orders up to $1,000 for the following Marketplace vendors:

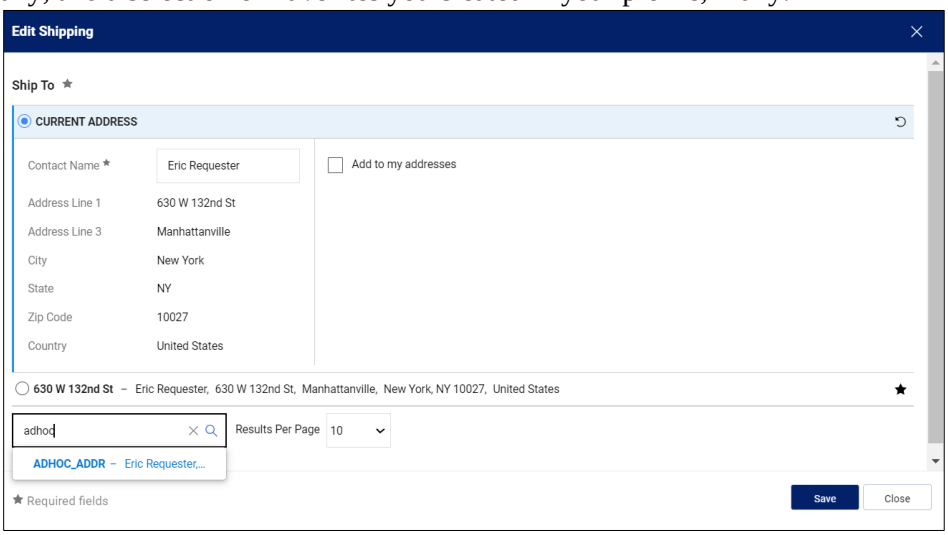
- Staples
- B&H
- CDW
- Connection (formerly Gov Connection)
- MRA International

If you are using an Ad Hoc Ship To Address, your Requisition will require departmental approval regardless of your approval role.

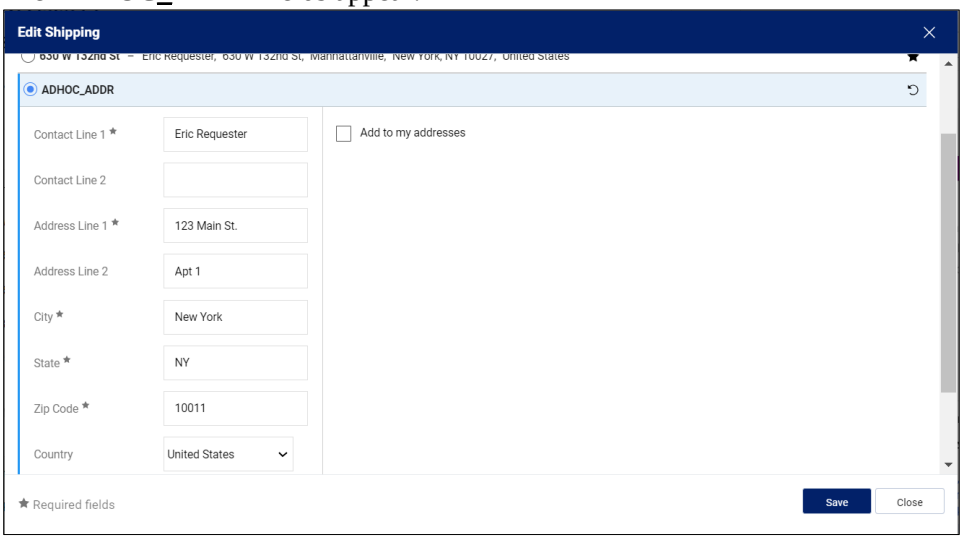
1. On the Checkout screen, click the **Edit** icon for Shipping or Billing.



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.



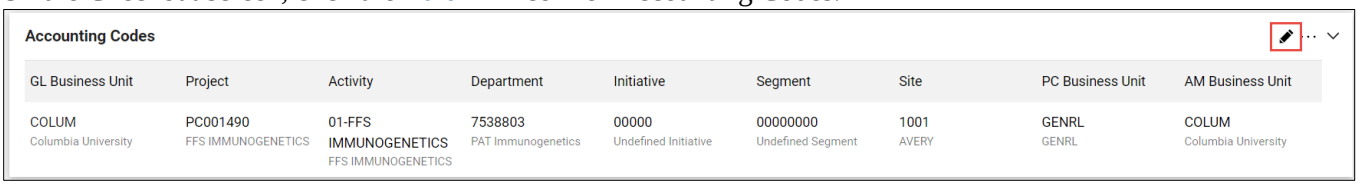
2. In the **Search additional** field, type "adhoc" (no space) to search for the Ad Hoc option and select **ACHOC_ADDR**. The ADHOC_ADDR fields appear.



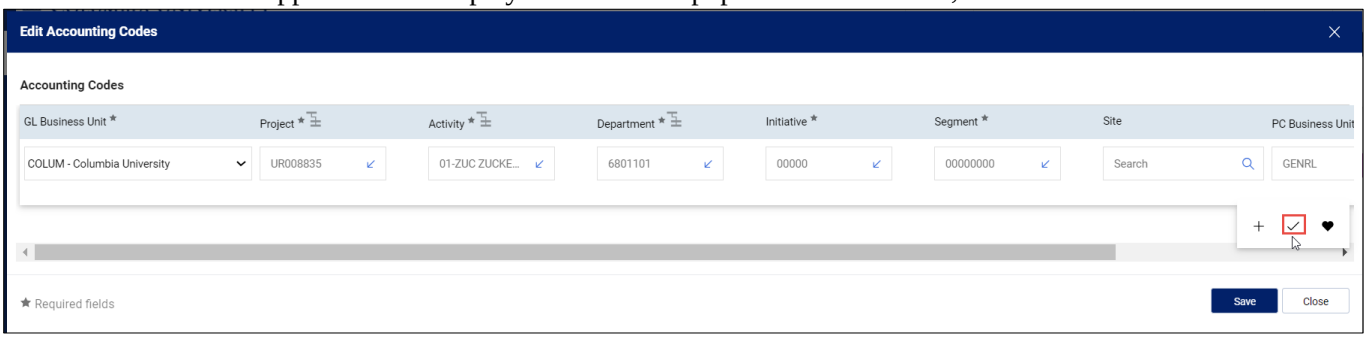
3. Complete the address information. You can optionally select **Add to my addresses** and give this address a Nickname to use this address again in the future.
4. Click the **Save** button.

Updating the ChartString (Accounting Codes)

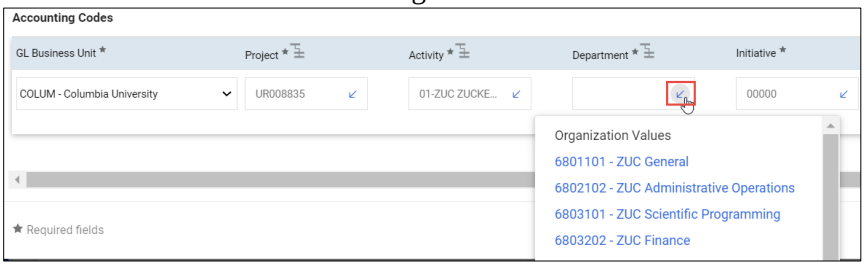
1. On the Checkout screen, click the **Edit** icon for Accounting Codes.



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. Click the matching value.



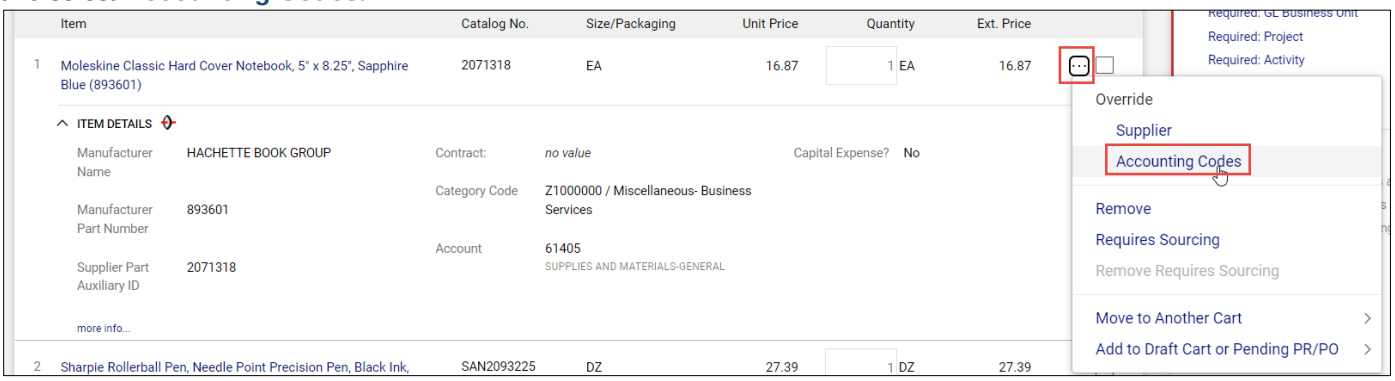
3. Click the **Validate** icon to ensure your ChartFields were entered correctly. If you corrected a ChartField and it still appears as Required , click the Validate icon again.

   You can click the **Add Split** icon to add an additional ChartString line and indicate **% of Price** or **Amount of Price** for each line.

   You can click the **Code Favorites** icon to select a favorite ChartString you created in your Profile.

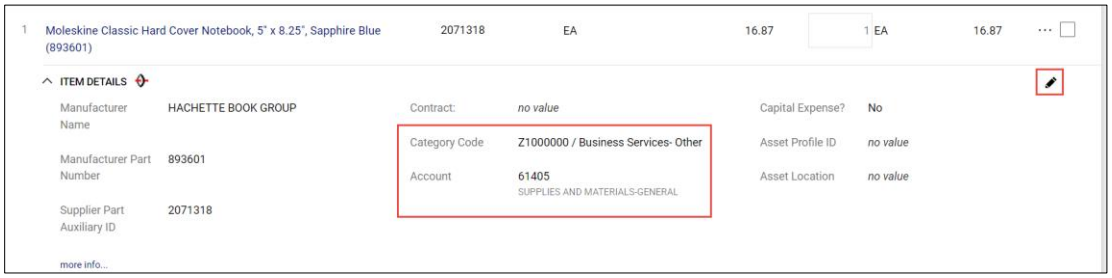
4. Click the **Save** button.

Each item in your Cart can also be updated with different ChartStrings. Click the **Line Item Actions** icon for the item and select **Accounting Codes**.

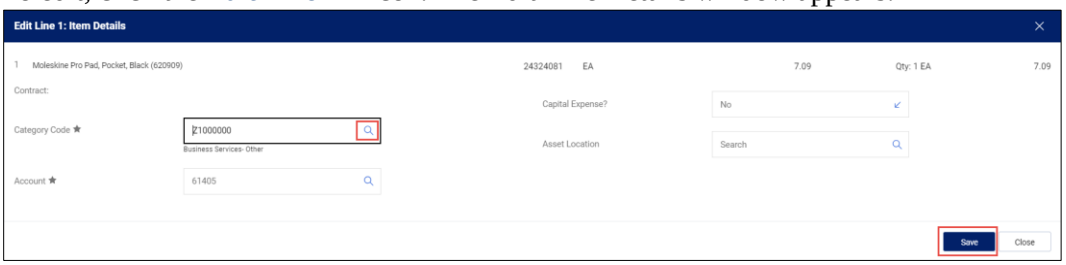


Category Codes and Natural Accounts

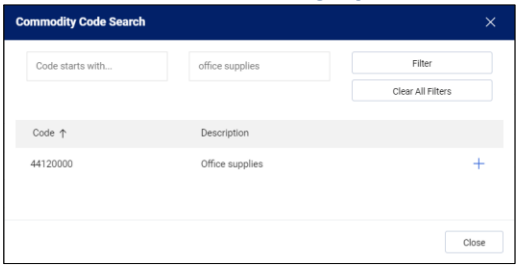
As you select items from the Marketplace, the Category Codes are automatically associated with the product and appears with each item in your cart. In addition, the Natural Account for each item is automatically mapped to the Category Code. You should ensure that the Category and associated Account are correct and, if necessary, edit the Category Code and/or Account. Refer to the Procurement Category Codes and Natural Accounts job aid.



1. To edit, click the **Edit Line** icon. The Edit Line Details window appears.



2. Search and select the **Category Code**.



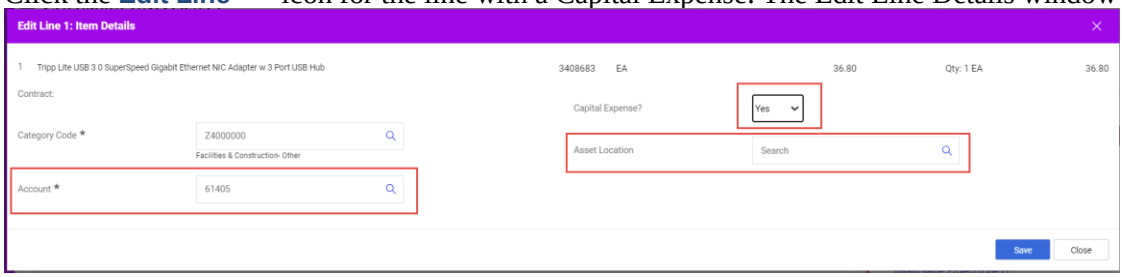
After you enter or select the new Category Code, the Account field will initially appear to not update, but will update after saving with the default Account associated with the new Category Code.

3. Click **Save**. The Category Code and the Account field will be updated.
If you need to change the **Account** from the default, reopen the Edit Line Details window to select from the Accounts mapped to the Category Code.

Capital Expense

If you are purchasing an item that should be categorized as a Capital Expense, you can designate it as needed. Capital Expense items should be on their own Requestion and not on the same Requisition as non-Capital Expense items.

1. Click the **Edit Line** icon for the line with a Capital Expense. The Edit Line Details window appears.

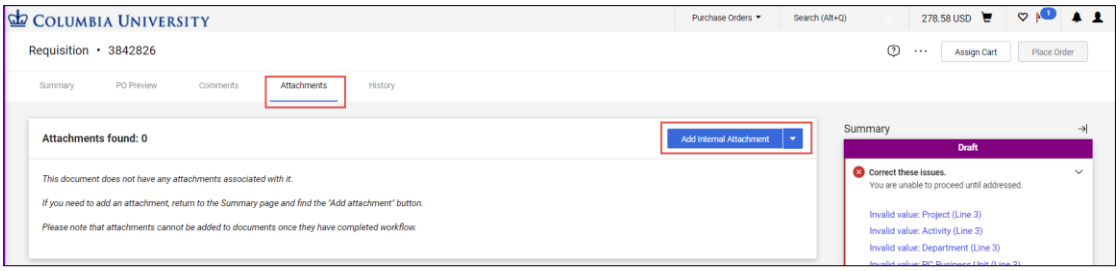


2. Select **Yes** from the **Capital Expense?** dropdown.
3. Update the **Account** for the Capital Expense and populate the **Asset Location** for the asset being purchased.

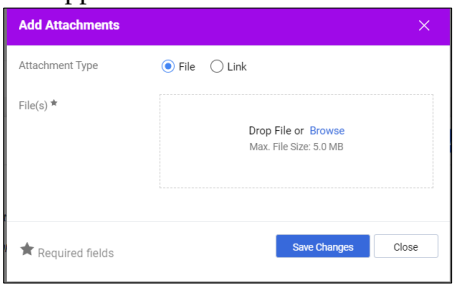
Adding Attachments

If required by your school or department, you can attach additional documentation to support your transaction.

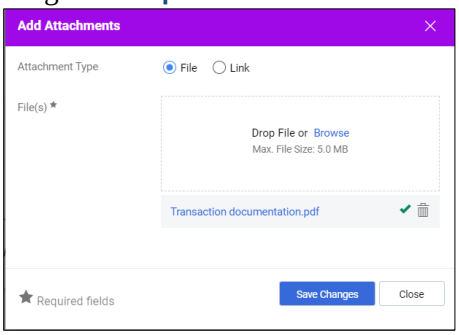
1. Click the **Attachments** tab.



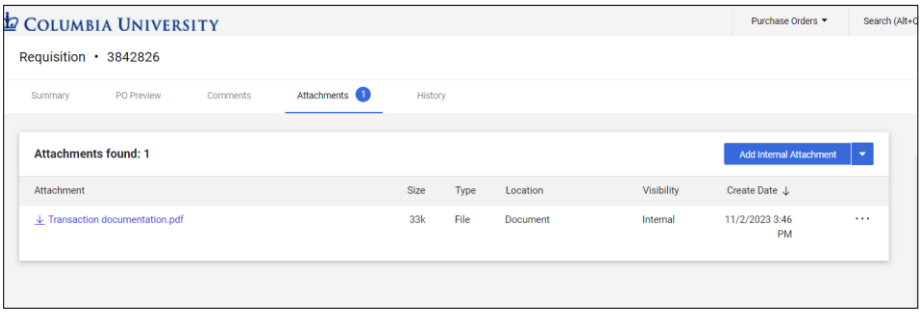
2. Click the **Add Internal Attachment** button (do not select Add External Attachment). The Add Attachments dialog box appears.



3. Drag and **Drop File** or **Browse** for the file.



4. Click the **Save Changes** button. Attachments are indicated on the Attachments tab and listed on the Attachments screen.

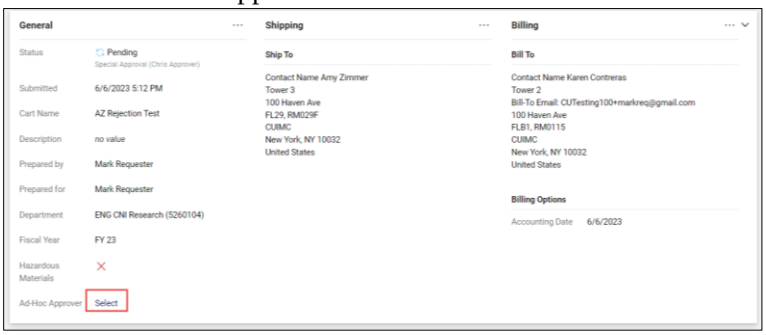


Inserting an Ad-Hoc Approver into Workflow

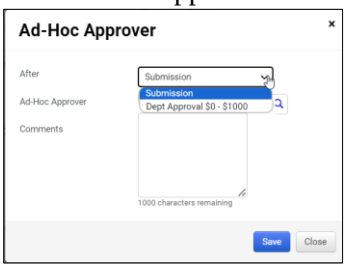
You can insert an additional approver into the workflow to review the Requisition.
Note: *An Ad-Hoc Approver must have the Department Requisition Approver role. You can only add one Ad-Hoc Approver. Other Approvers can also add an Ad-Hoc Approver.*

Before inserting an Ad-Hoc Approver, you must ensure that the Accounting Codes (ChartString) are complete for the Requisition.

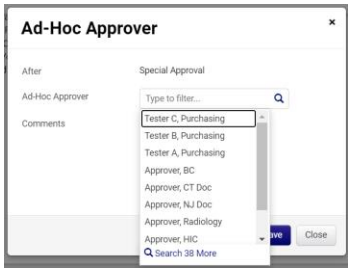
1. Click the Ad-Hoc Approver **Select** link at the bottom of the General section.



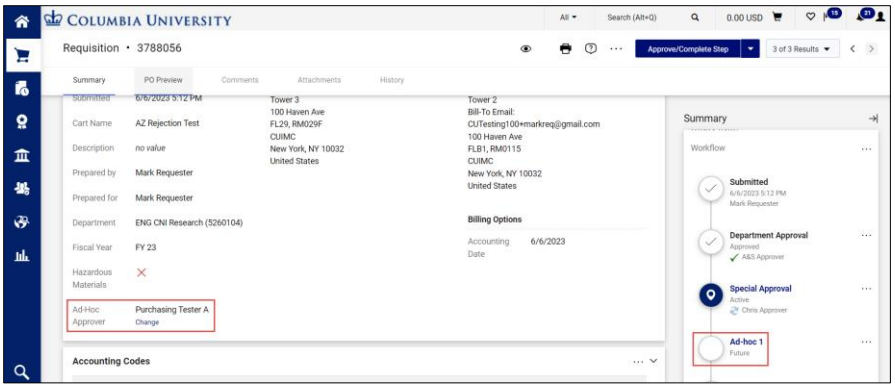
The Ad Hoc Approver window appears.



2. Click into the **After** field and select the approval workflow step where the Approver will be inserted.



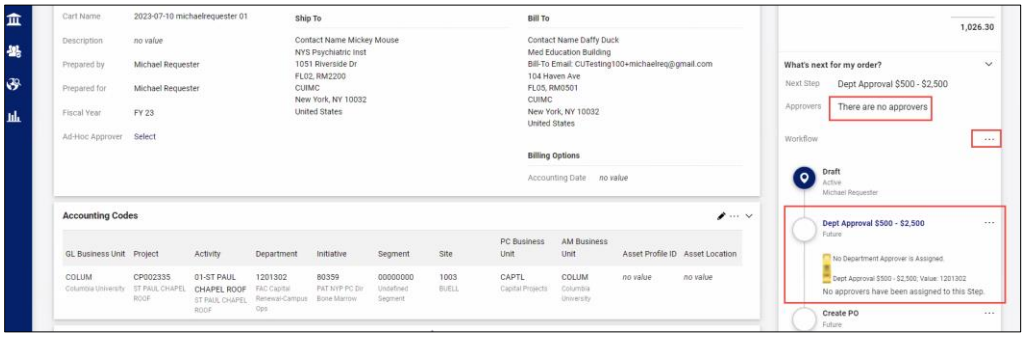
2. Click into the **Ad-Hoc Approver** field and select the Approver from the list. You can type to filter the list of names. If an Approver is already included in the approval workflow for the Requisition, their name will not appear on the list.
3. Click **Save**. The Requisition will indicate the Ad-Hoc Approver, which can be changed, if necessary, and the Summary panel will indicate the extra approval workflow step.



Placing Your Order

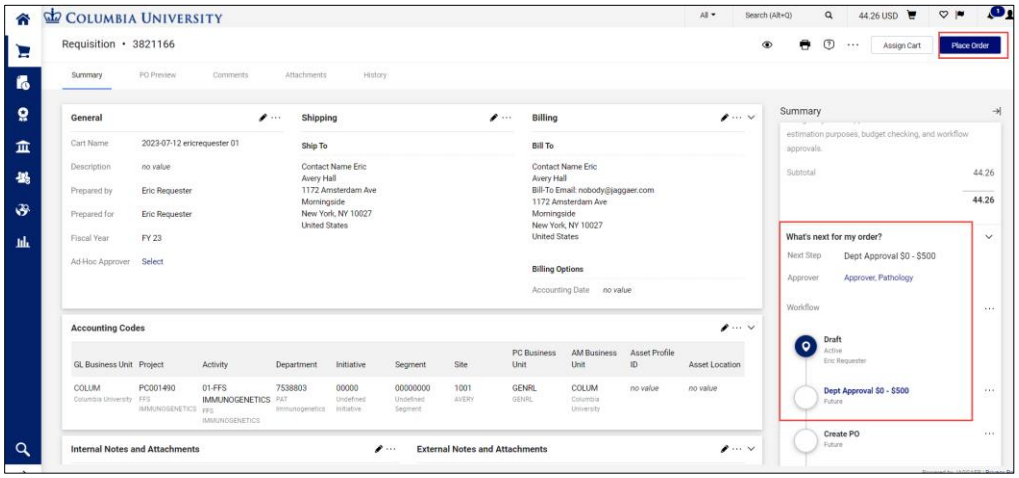
After ensuring that all required fields are populated, the Status pane will not list any further requirements.

Check to make sure there is a departmental approver as the Next Step before placing the order. If the Status panel indicates there are no approvers, contact your DAF to ensure there is an approver assigned for your department. After an approver is set up you can open your Requisition and place the order.

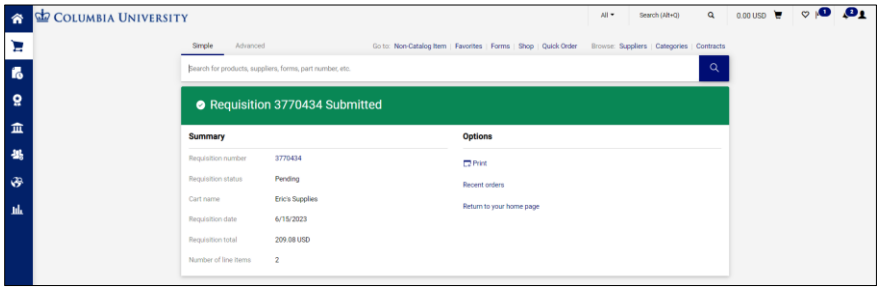


If you place the order when there is no approver, you will need to withdraw it from workflow. Withdrawing will terminate the Requestion and you will need to create a new cart and resubmit once s departmental approver is in place.

If there are no further requirements and the approval step is indicated, click the **Place Order** button.



The Requisition Confirmation page appears.



If the Requisition is auto-returned, refer to the Viewing Requisition History section of this guide.

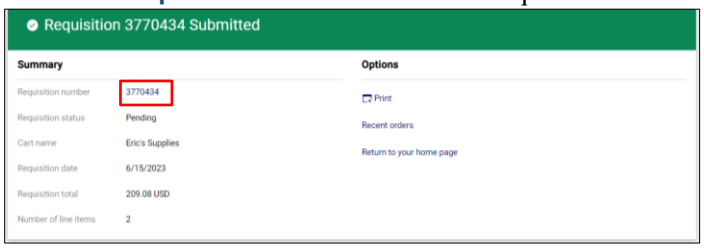
Note: *If you have both the Requisition Initiator and a Level 1 ($0 - $1,000) Department Requisition Approver roles, you do not need departmental approval for purchases of $1,000 or less if your purchase is being shipped to a campus address.*

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.

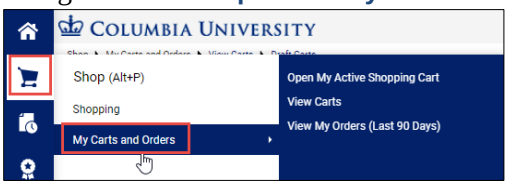
Viewing Requisition (and Purchase Order) Status

Click the **Requisition number** from the Requisition Confirmation page.

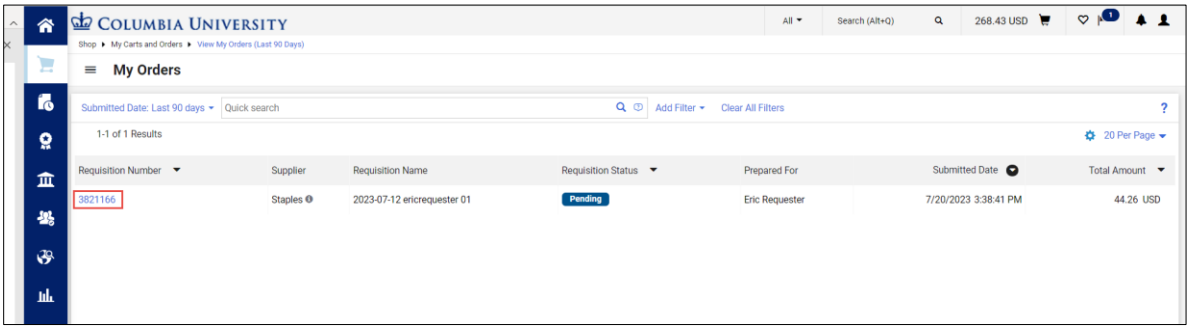


OR

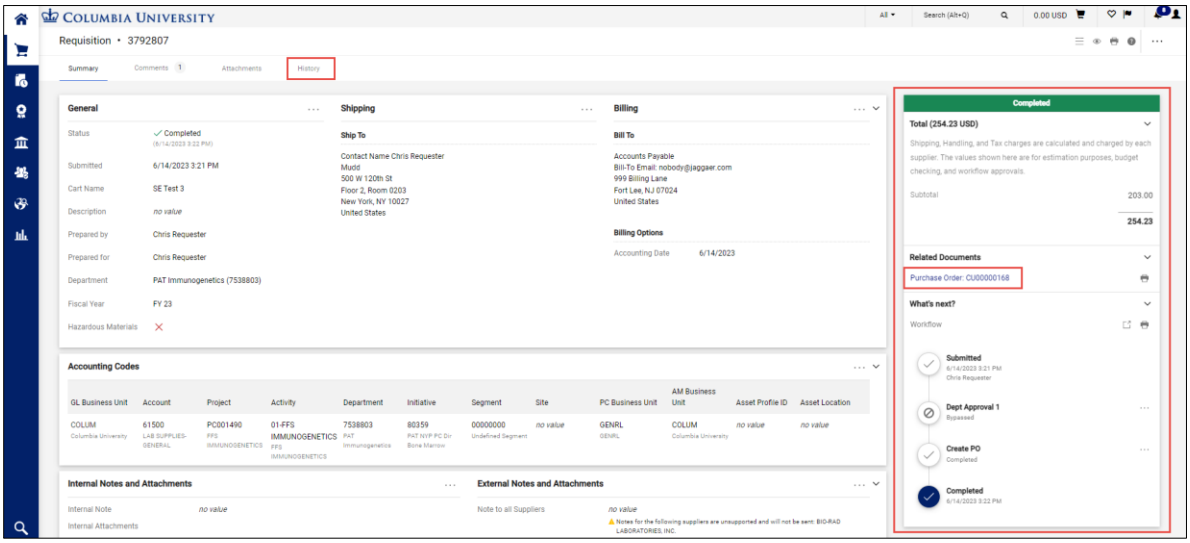
1. Navigate to the **Shop** icon > **My Carts and Orders**.



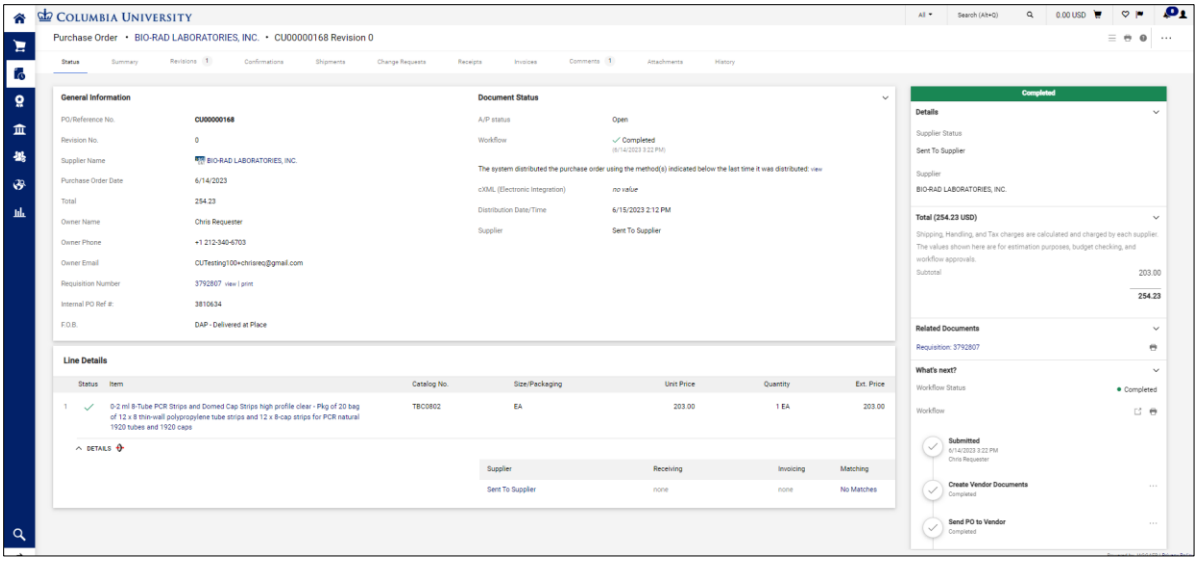
2. Click **View My Orders (Last 90 Days)**. The My Orders screen displays a table listing the Requisitions you have submitted and their status.



3. Click a Requisition **Number** to view the Requisition page. The Status Pane will indicate the approval workflow status.



If the Requisition status is complete, you can click the **Purchase Order Number** under Related Documents to display the Purchase Order page and view the status of the Purchase Order.

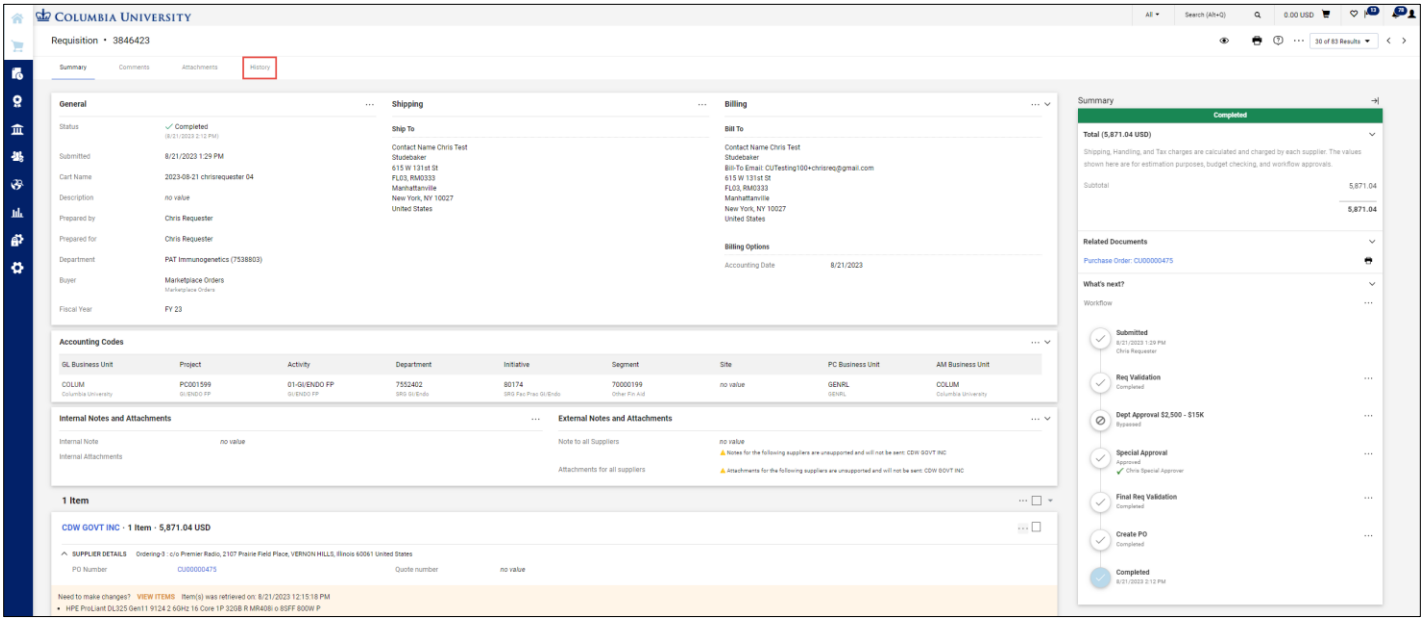


Note: *If a Purchase Order is not fulfilled within 90 days, the Procurement team will determine if the Purchase Order should remain open. If it is determined that it should be closed, the Procurement team will reach out to you before closing it.*

Viewing Requisition History

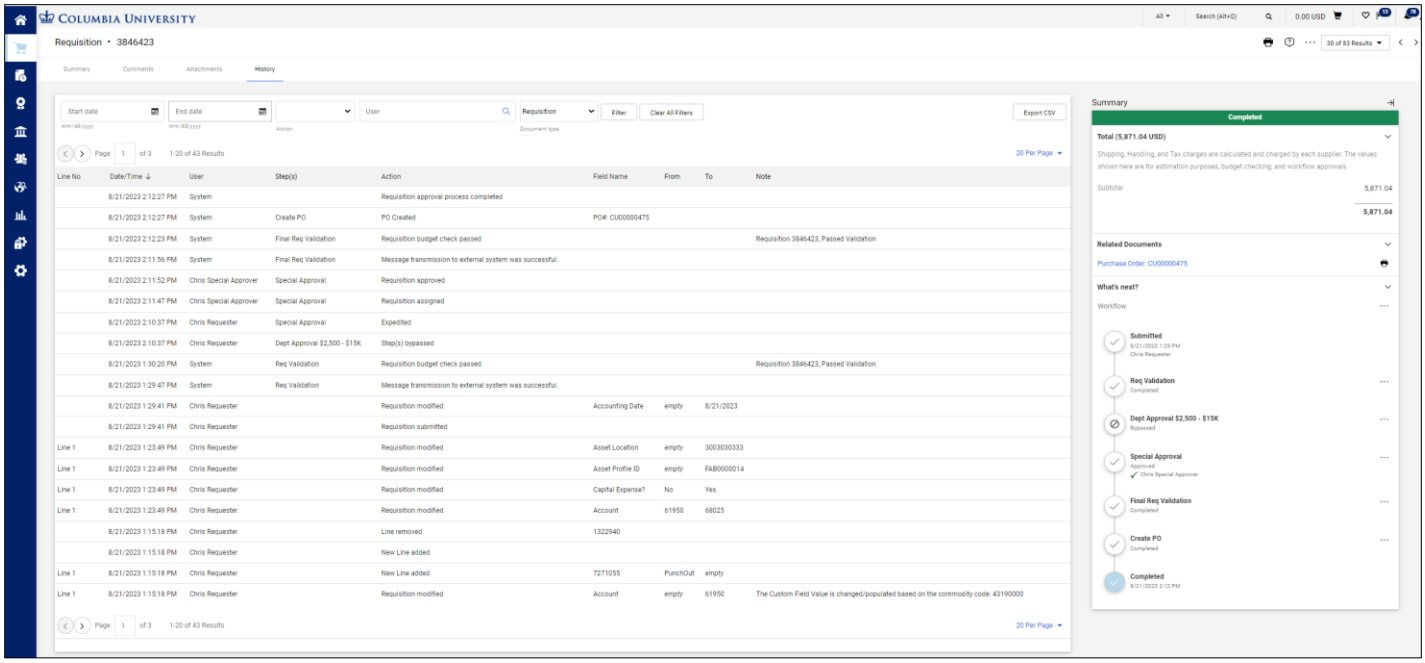
If your Requisition was automatically returned, or you received notifications or alerts regarding the Requisition, you can view the History tab to view the complete history of the Requisition, including a date and time of each action, the user that took action, and what the action was.

Click the **History** tab.



The History tab displays what was modified, the action, by whom, the date and time of the action, and other information or notes. If a Requisition was returned or other actions occurred that affected the processing of the Requisition, the Note will provide details.

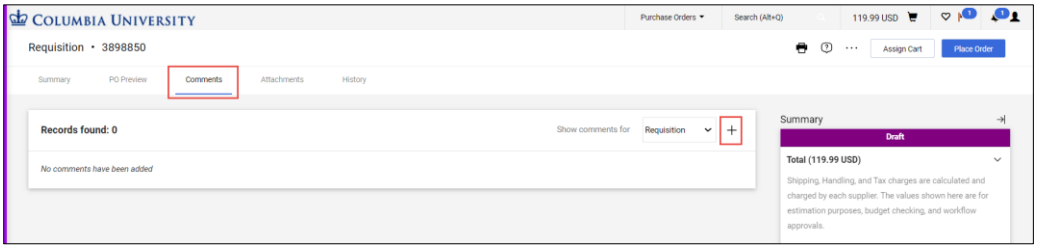
Note: *It is possible that your Requisition may have been returned because you are missing your Admin Department information in ARC. Refer to the* Entering Your Admin Department in ARC Requester Defaults *job aid for details and instructions*.



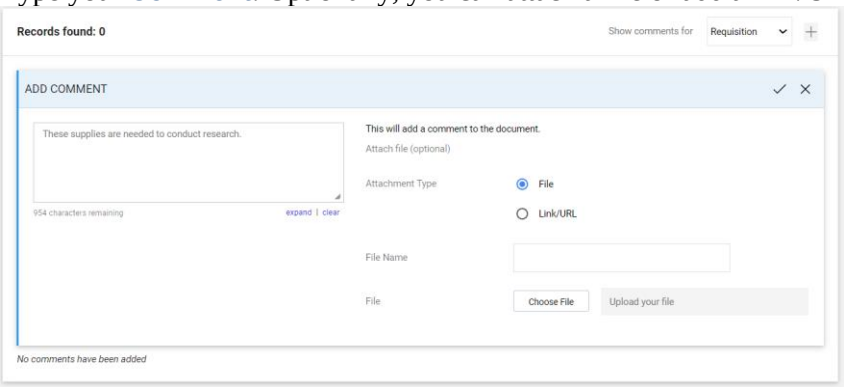
Adding Comments and Notifying Approvers

After you submit a Requisition for approval and add Comments that can be emailed to selected Approvers or other colleagues to notify them that the Requisition is awaiting approval. If the Requisition is not yet in approval workflow, the Comment cannot be sent as an email notification and can only viewed in the Comments tab when colleagues open and view the Requisition.

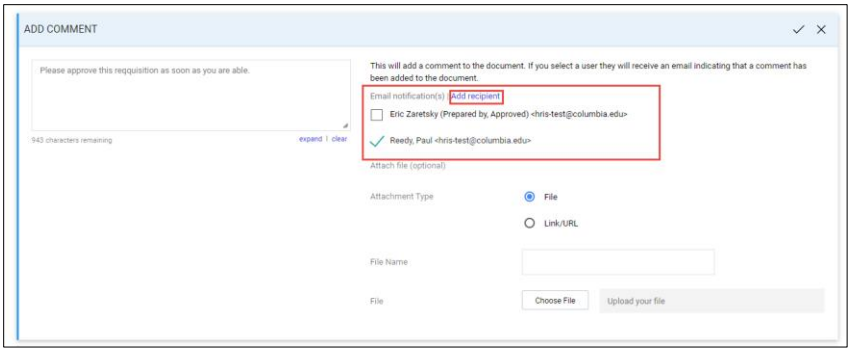
1. Click the **Comments** tab.



2. Click the **New Comments** + icon. The Add Comment screen appears.
3. Type your **Comment**. Optionally, you can attach a file or add a link/URL.



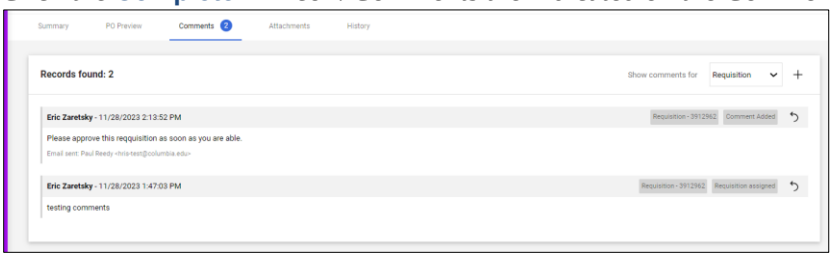
If your Requisition has already been submitted into workflow, you can open and view the Requisition to add a Comment. In the Add Comments screen, you can select the individuals listed who have worked with your requisition to receive your comment as an Email Notifications.



Or, you can click **Add recipients** to search for Approvers or individuals. This is a good way to notify an Approver that you have a Requisition in Workflow.

Note: *If you add Comments before submitting the Requisition into workflow, you will not be able to select recipients and the Comment cannot be sent as an email notification. Colleagues can only view in the Comments tab when colleagues open and view the Requisition.*

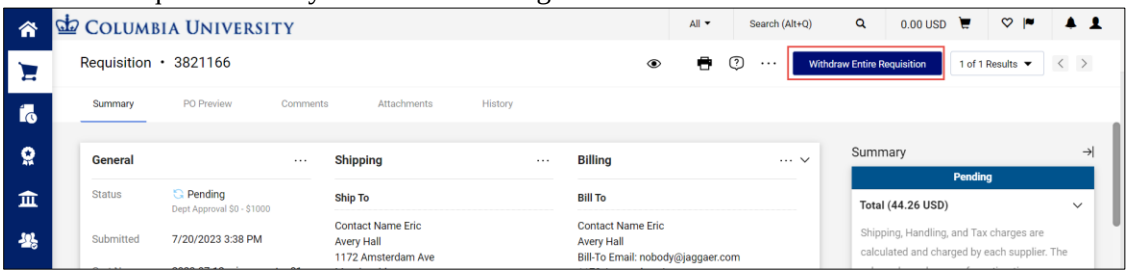
4. Click the **Complete** icon. Comments are indicated on the Comments tab and listed on the Comments screen.



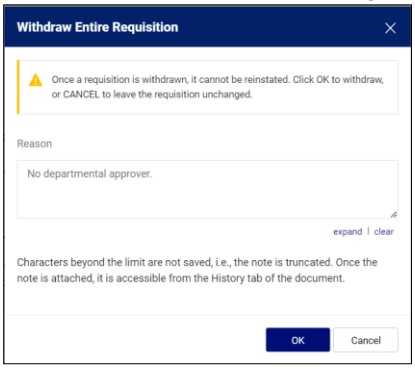
Withdrawing a Requisition from Approval Workflow

If the Requisition you submitted is still pending approval, you can withdraw it, if needed. Withdrawing will terminate the Requisition and you'll need to create a new cart if you want to resubmit the order. If you see that there is no departmental approver as the Next Step in the Status pane, you should withdraw the order and speak with your DAF about assigning an Approver for your department.

1. View the Requisition that you are withdrawing.



2. Click the **Withdraw Entire Requisition** button. The Withdraw Entire Requisition window appears.



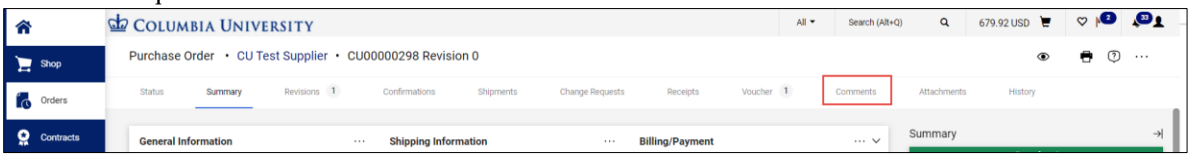
3. Type a **Reason** for withdrawing the Requisition and click **OK**.

Canceling Orders

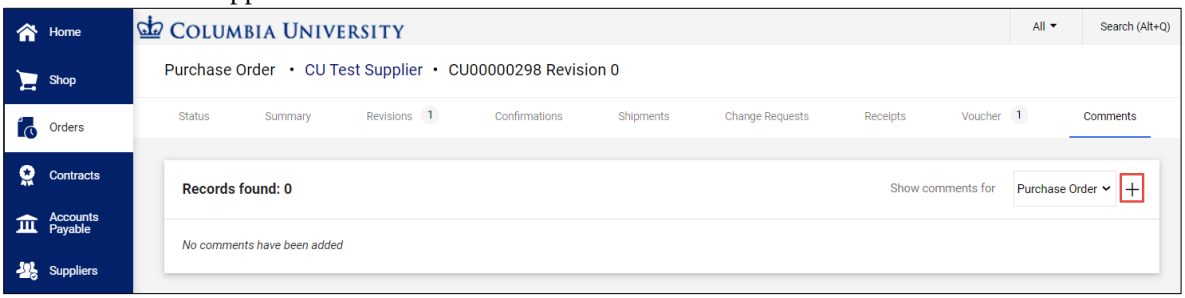
If items from your Requisition/Purchase Order are backordered or you need to cancel your order for any reason, you should enter a request via a comment to the Procurement team to cancel the order with the vendor. Contact the vendor for any delivery issues.

Note that Change Orders cannot be entered in the CU Marketplace. Enter Journal Entries or Journal Vouchers in ARC to correct ChartStrings

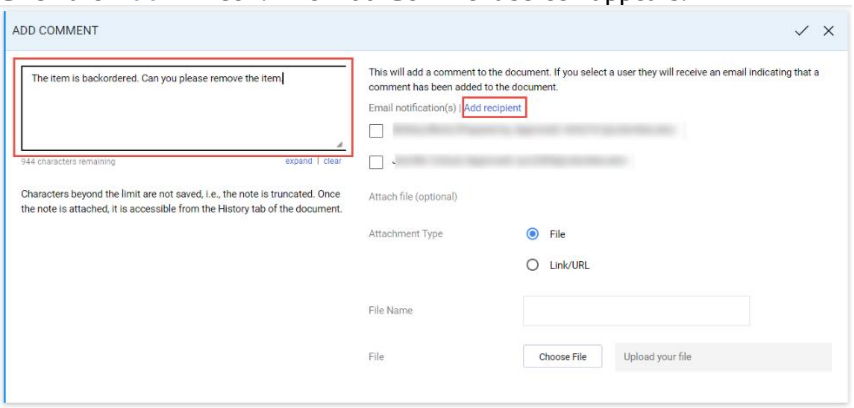
1. View the Requisition or Purchase Order and click the **Comments** tab.



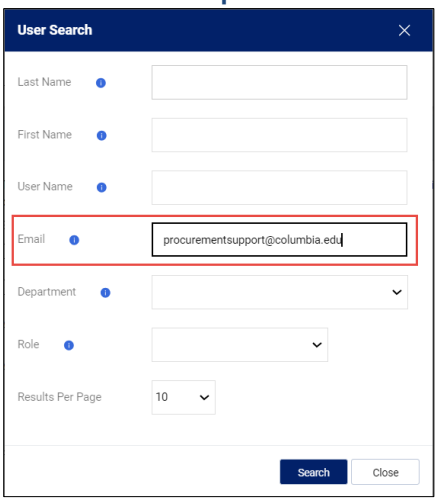
Comments screen appears.



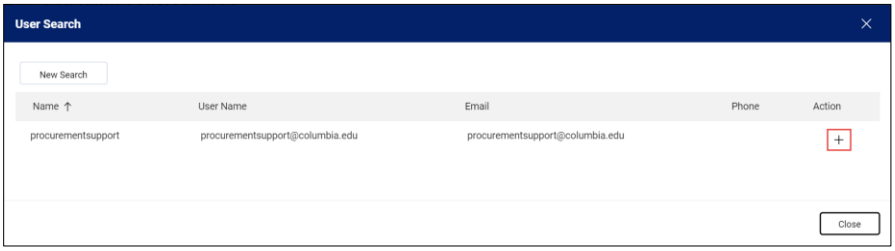
2. Click the **Add** + icon. The Add Comment screen appears.



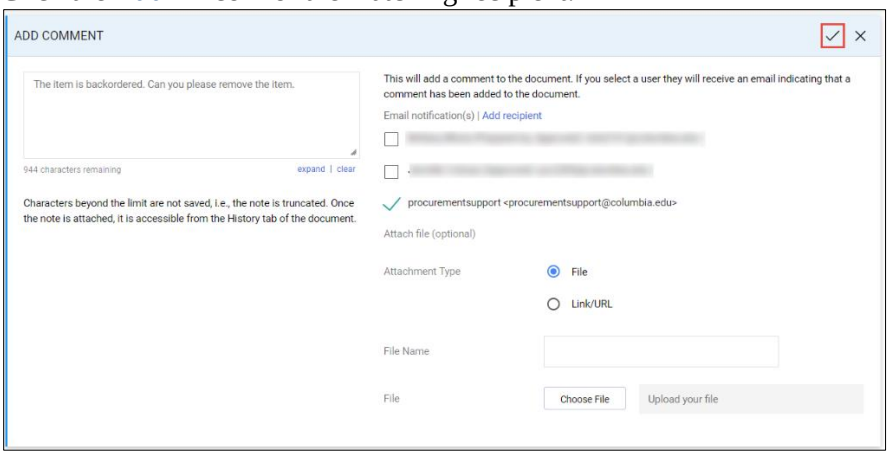
3. Type your **Comment** with instructions to the Purchasing team to cancel the order.
4. Click the **Add recipient** link. The Search dialog appears.



5. Type "procurementsupport@columbia.edu" in the **Email** field and click **Search**.



6. Click the **Add** + icon for the matching recipient.



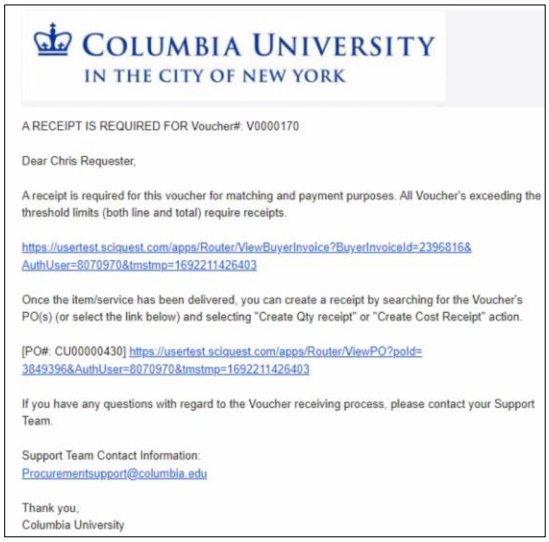
7. If desired, select the **check boxes** for other recipients to receive an **Email notification** of the comment.
8. Click the **Complete** ✓ icon at the top right of the Add Comment screen.

Issues or Returns

If there are issues with your order, such as damages, an incomplete order, or you need to make a return, consult the CU Marketplace Vendors page for specific guidance.

Receiving for Line Items over $5000

Receiving for CU Marketplace orders is required when a line amount is equal to or greater than $5000. It is recommended that you place line items of $5000 or more in their own Cart/Requisition/Purchase Order, although this not required. Once your Purchase Order has been electronically invoiced, you will receive an e-mail notification to alert you when an item you ordered requires a receipt.


COLUMBIA UNIVERSITY
IN THE CITY OF NEW YORK

A RECEIPT IS REQUIRED FOR Voucher#: V0000170

Dear Chris Requester,

A receipt is required for this voucher for matching and payment purposes. All Voucher's exceeding the threshold limits (both line and total) require receipts.

https://usertest.sciquest.com/apps/Router/ViewBuyerInvoice?BuyerInvoiceId=2396816&AuthUser=8070970&tmstmp=1692211426403

Once the item/service has been delivered, you can create a receipt by searching for the Voucher's PO(s) (or select the link below) and selecting "Create Qty receipt" or "Create Cost Receipt" action.

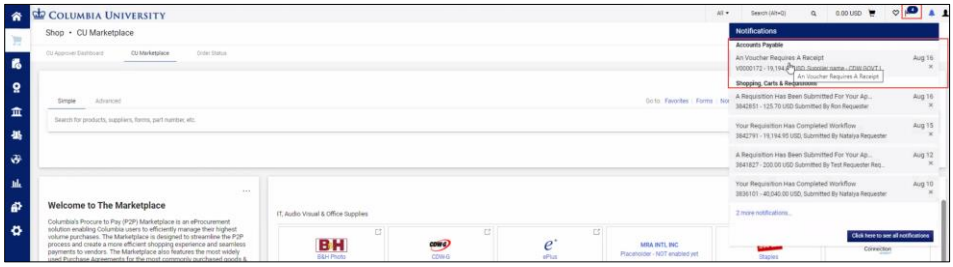
[PO#: CU00000430] https://usertest.sciquest.com/apps/Router/ViewPO?poId=3849396&AuthUser=8070970&tmstmp=1692211426403

If you have any questions with regard to the Voucher receiving process, please contact your Support Team.

Support Team Contact Information:
Procurementsupport@columbia.edu

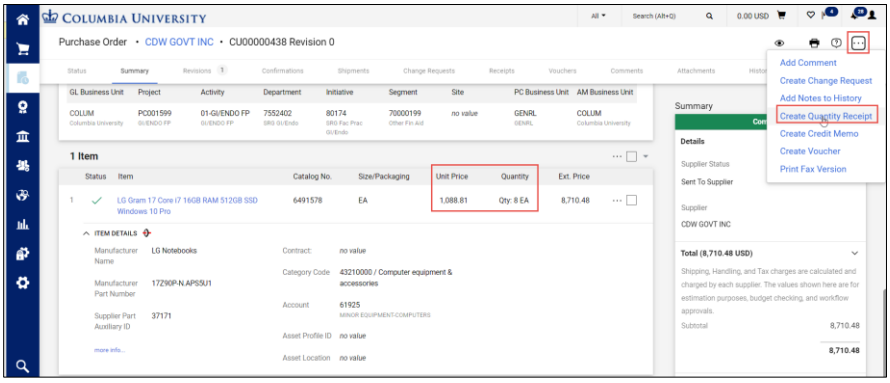
Thank you,
Columbia University

You will also receive a notification within the CU Marketplace to alert you when a receipt is required.

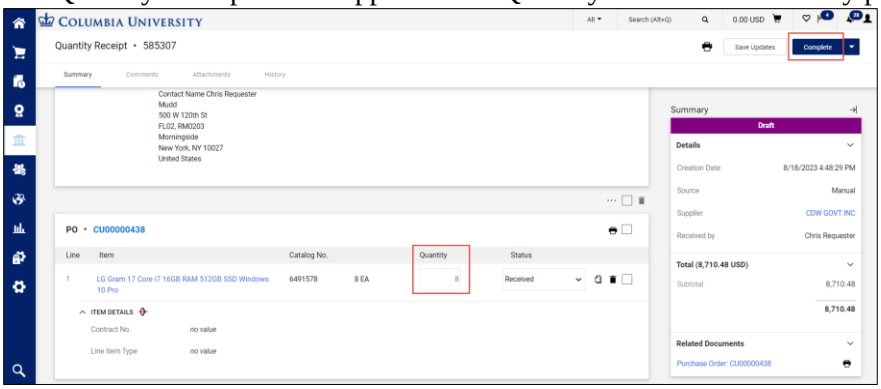


1. Open the Purchase Order that requires receiving:
   You can click the Purchase Order from the email alert or from the notification in the CU Marketplace.
   Or,
   You can select the Purchase Order by navigating to **Orders** > **My Orders** > **My Purchase Orders**.

The Purchase Order Summary screen appears. In the example below, a line item requires receiving because the total amount has a quantity of 8 items that totals over $5000. There are other line items on this Purchase Order that do not require receiving.

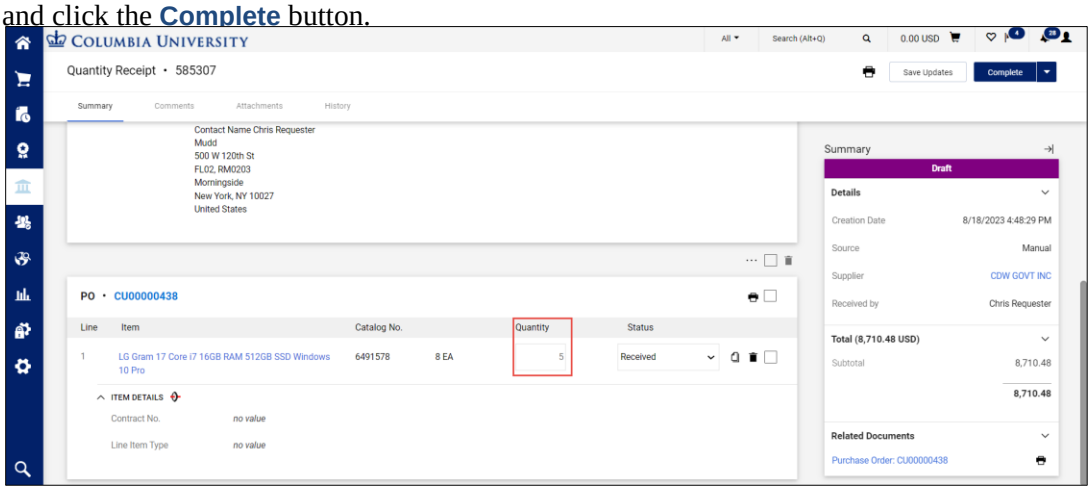


2. Click the **Actions** ⋯ icon and click **Create Quantity Receipt**.
   The Quantity Receipt screen appears. The Quantity field is automatically populated with total quantity ordered.

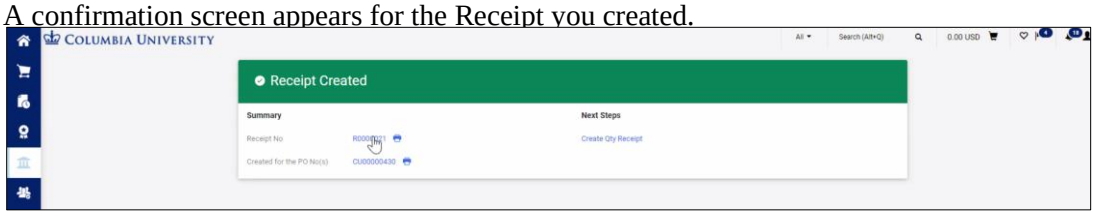


Note: *If your Purchase Order and Receipt contains line items that do not require receiving, you can either fully receive those line items or click the* Trash 🗑 *icon to remove those items from the Receipt.*

3. If you **fully received** the total quantity of your line item, you can just click the **Complete** button.
   Or,
   If you **partially received** the total quantity, enter the number in the **Quantity** field for what you actually received and click the **Complete** button.



A confirmation screen appears for the Receipt you created.



The quantity indicated on the receipt(s) must match the quantity indicated on the electronic invoice in order for the invoice to be paid.
If you created a partial receipt, you will need to create a new receipt for the additional quantity when you receive it.

Getting Help

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

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