Columbia University Finance Training

Training Guide: CU Marketplace for Shoppers

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. As a Shopper, you can create a Shopping Cart that you can then assign to a colleague who has a Requester role in JAGGAER.

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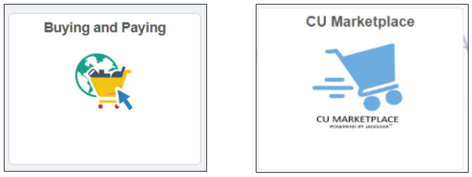
Accessing the CU Marketplace

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

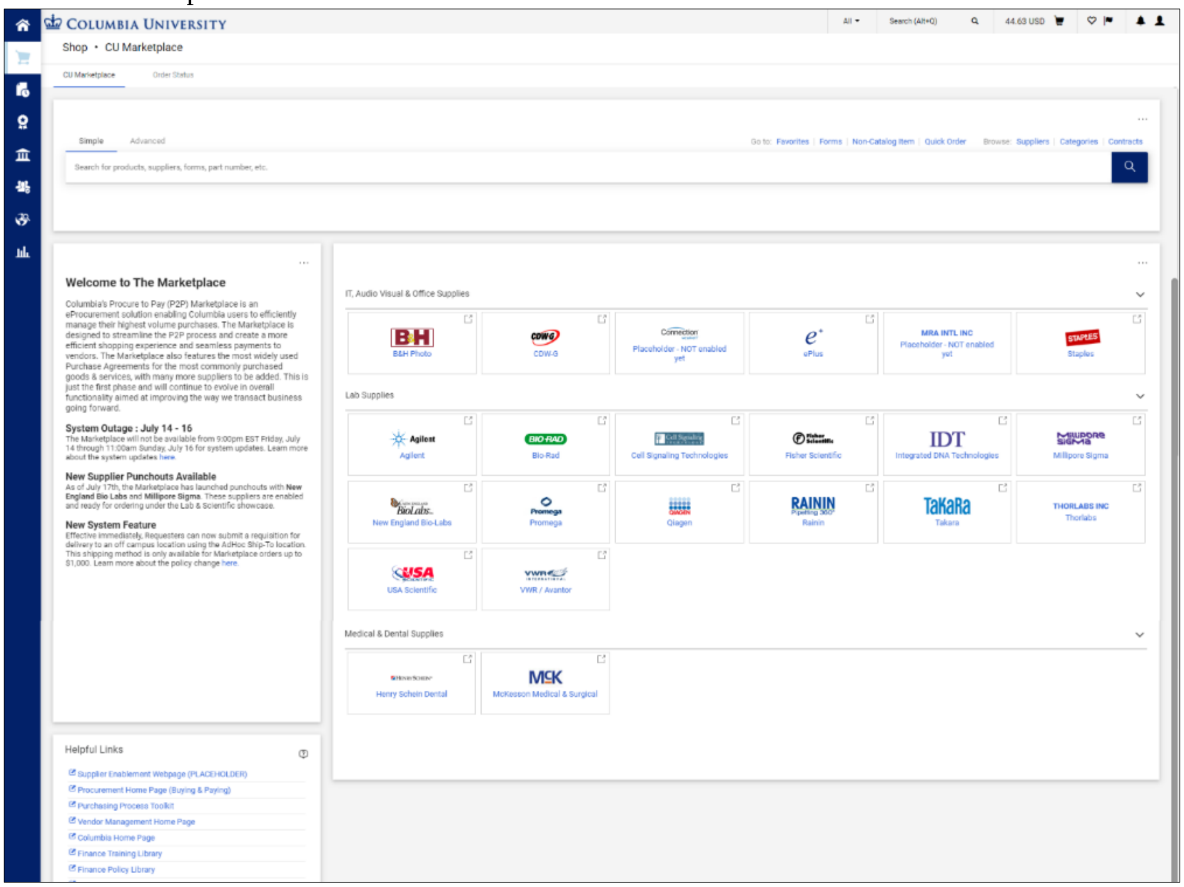
CU MARKETPLACE
POWERED BY JAGGAER

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.

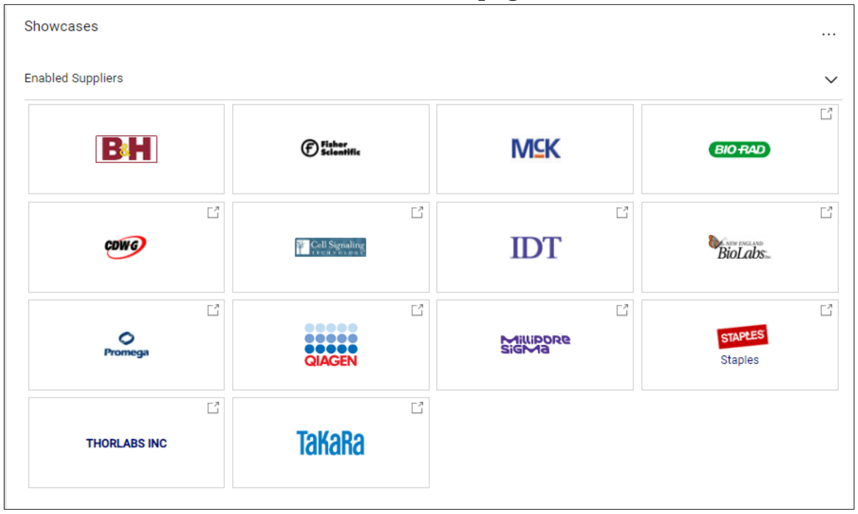


Note: *The CU Marketplace will automatically timeout after thirty minutes of inactivity, consistent with other University Enterprise Systems.*

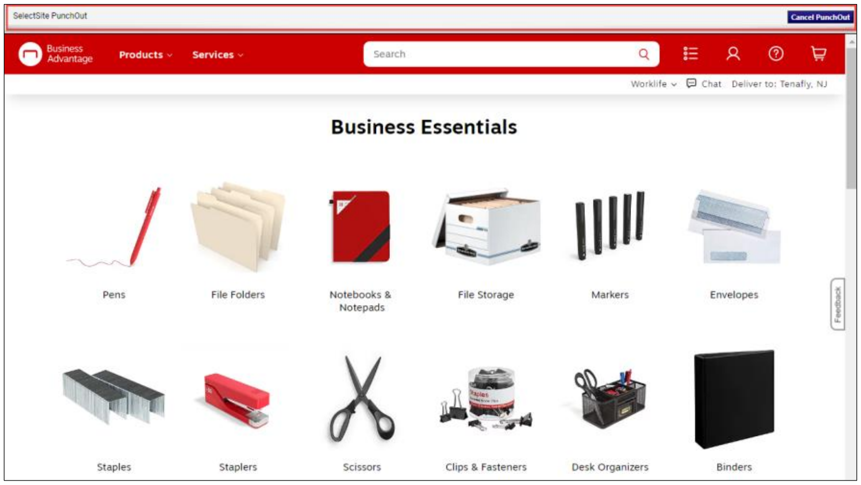
Shopping for Items

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.

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

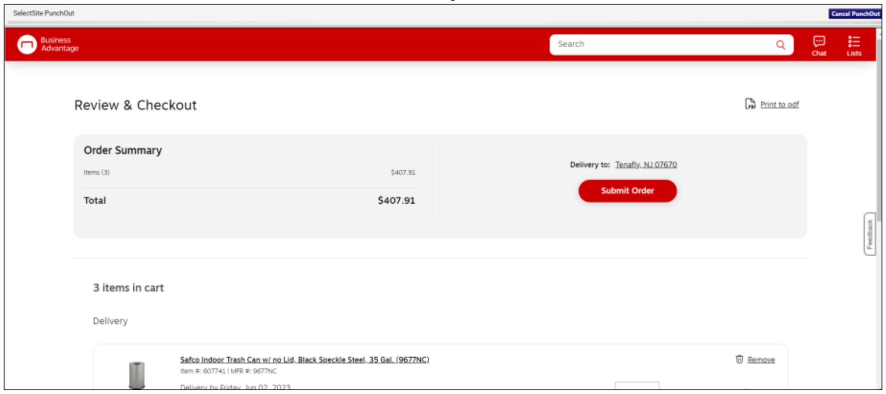


You will then "PunchOut" to the vendor website.

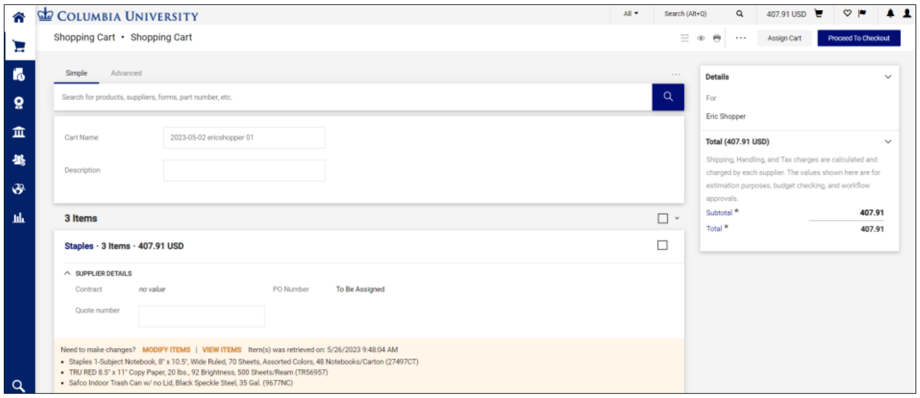


Notice the gray bar at the top of the vendor website which indicates you are punched out from the Marketplace. You can click the **Cancel PunchOut** button to retun to the Marketplace, if needed.

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.

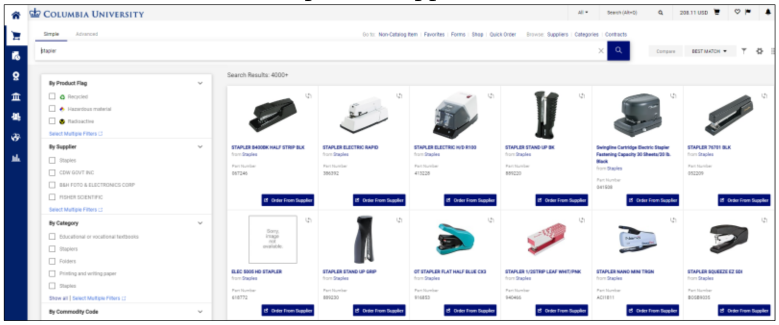
Using Search to Shop

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.

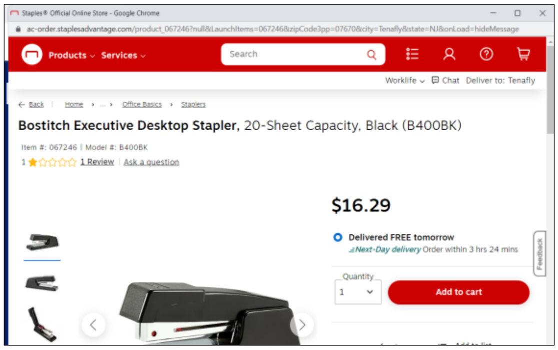
   

   The search results for the product appear.

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

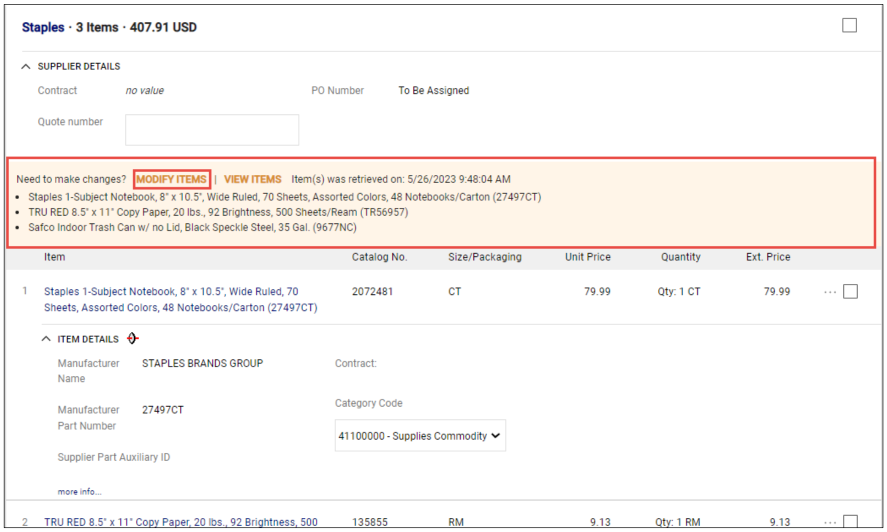
2. Click the **Order From Supplier** button for the desired item. You will PunchOut to the vendor's website to complete the order.

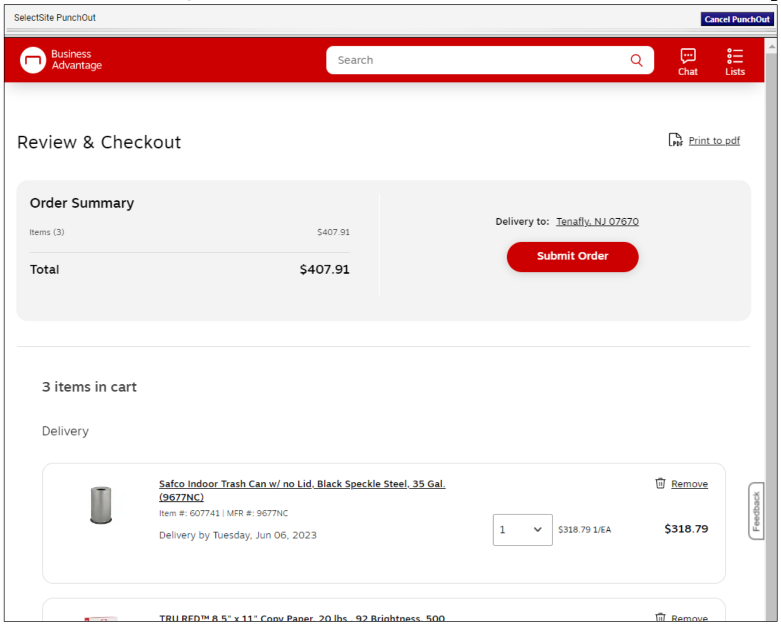
3. Add the item to the vendor cart and Checkout/Submit. The item you selected appear in your Marketplace Shopping Cart.

Modifying Items in Your Cart

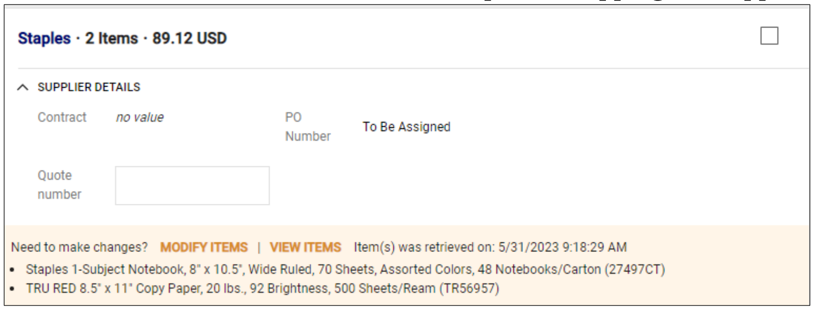
Marketplace vendors require you to modify items in your Shopping Cart by returning to PunchOut to the vendor's website to modify the items directly and bring the items back into the requisition.



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.

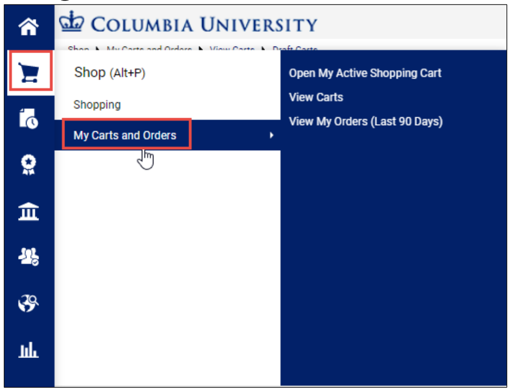


Managing Carts

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**.

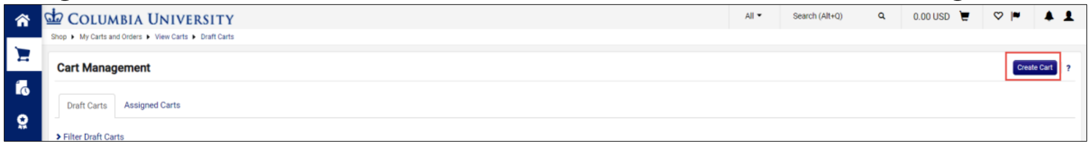


You can view:

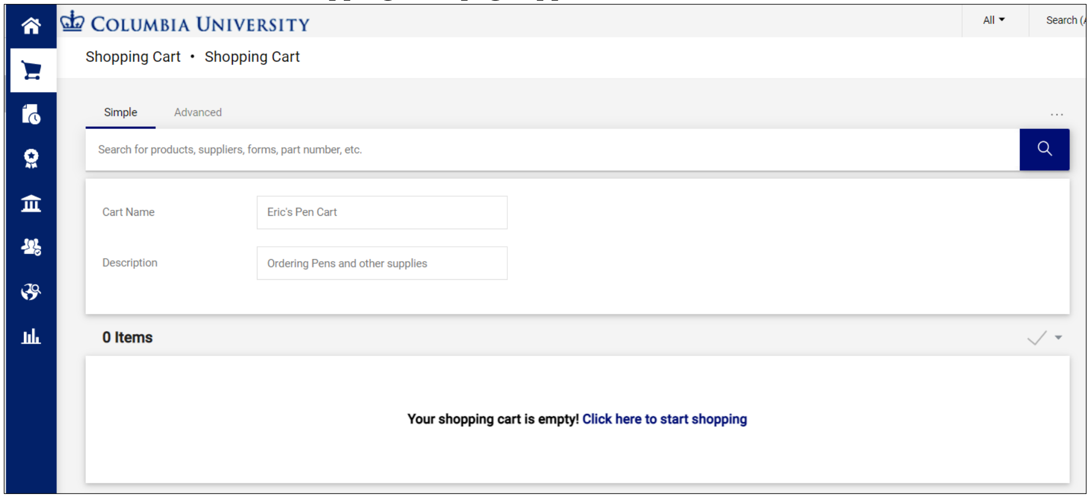
- **Open My Active Shopping Cart** – Navigate to the Shopping Cart page you are currently using for shopping,
- **View Carts** - Display a table of all of your Shopping Carts and switch between your Active Cart and others listed.
- **View My Orders (Last 90 Days)** – Display a table listing the Shopping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

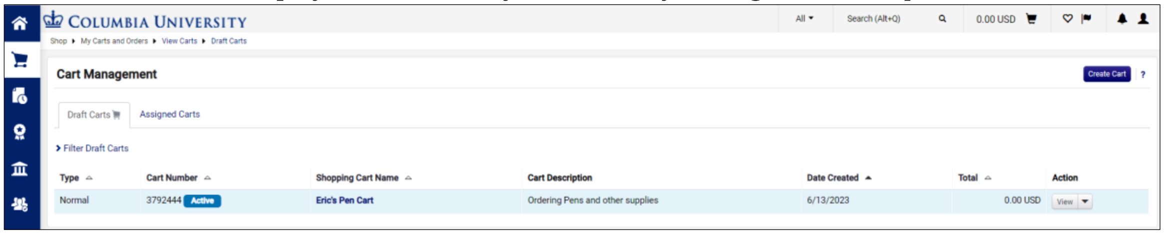


3. Enter a **Cart Name** and **Description**. You can begin shopping to add items to the cart.

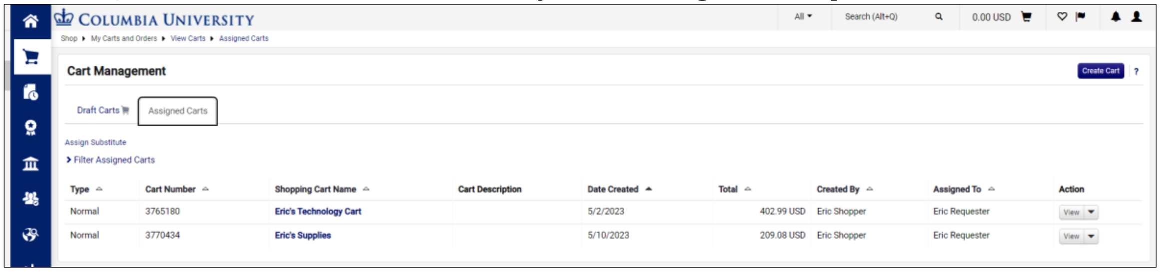
Switching Between Carts

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.

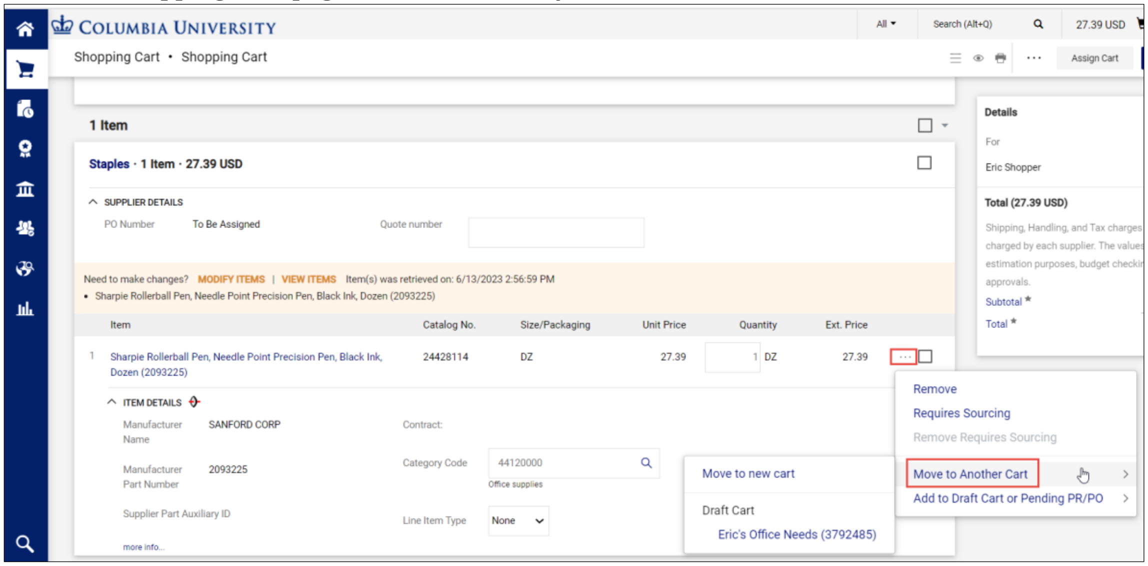


The **Active** tag indicates the cart that is currently active and any new items you select while shopping will be added to that cart.

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.

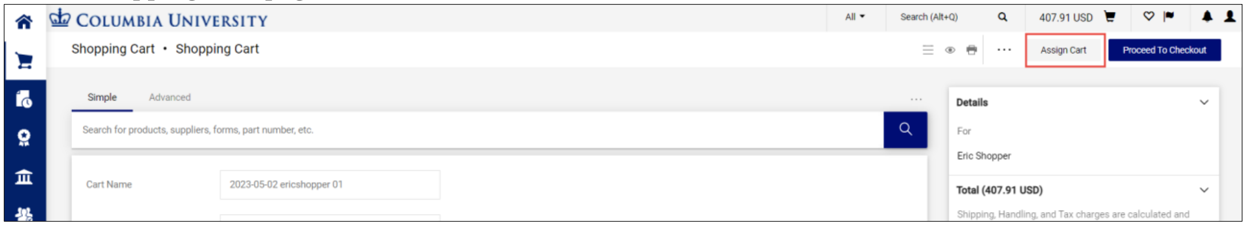


2. Click the **Line Item Actions** ⋯ icon for the item you want to move and select **Move to Another Cart**.
3. Select **Move to a new cart** to create a new cart with that item or select one of the **Draft Carts** listed to move the item to that cart.

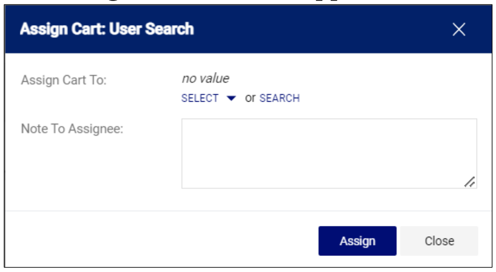
Assigning a Requester to a Cart (without Checking Out)

As a Shopper, you are not required to Checkout and to enter Ship To/Bill To Addresses and ChartString information before assigning the Shopping Cart to a Requester. If you do not checkout, your assigned Requester will be required to ensure that the Ship To/Bill To and ChartString information is entered before submitting into workflow.

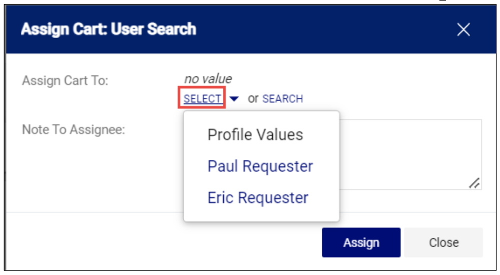
1. On the Shopping Cart page, click the **Assign Cart** button.



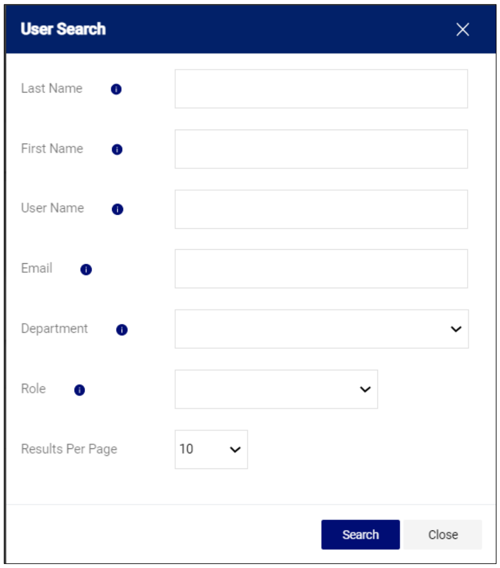
The Assign Cart window appears.



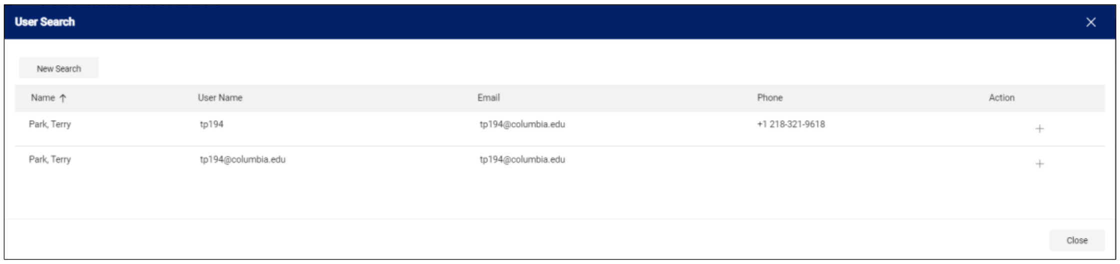
2. You can **Select** a Requester from Favorites you created in your Profile **or** **Search** for any Requester that is setup in the Marketplace.
Select a favorite, click the **Select** dropdown and click the desired Requester.



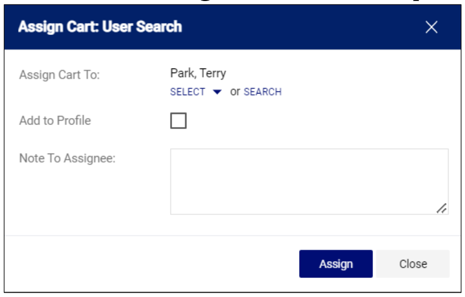
Or, to search and select a non-favorite Requester, click the **Search** link.



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



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

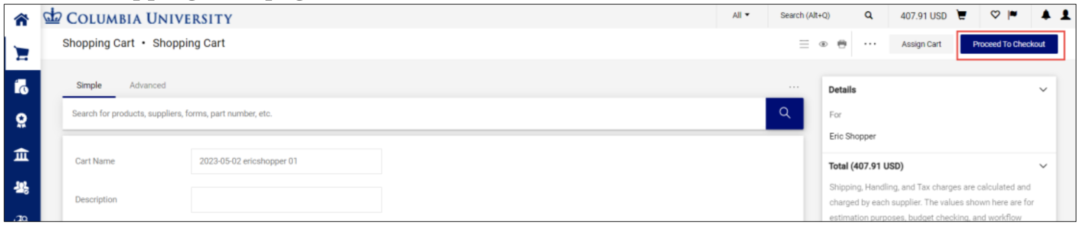


3. If the Requestor is not a favorite, you have the option to select **Add to Profile** if you want to make them a favorite. Type a **Note to Assignee**, if needed. Click the **Assign** button.
   The assigned Requester will receive an email alerting them that your Cart has been assigned to them and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

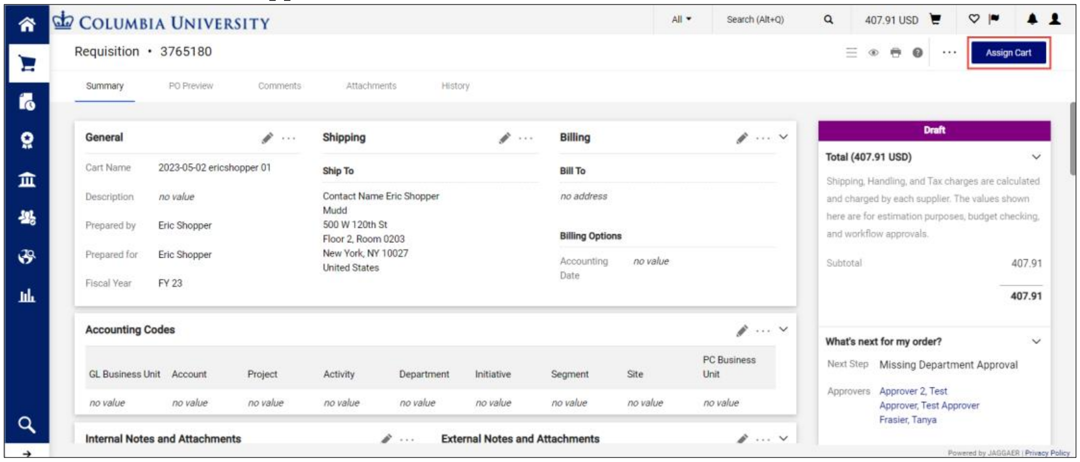
Assigning a Requestor at Checkout

When you Proceed to Checkout, you have the option to update the Ship To/Bill To Addresses and the ChartString. As a Shopper you are not required to enter this information, but you may want to complete it, if you know the information, for your assigned Requestor to simplify their task.

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

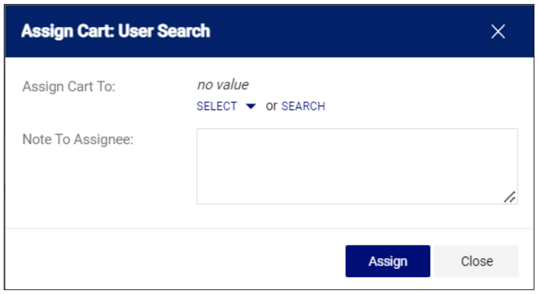


The Checkout screen appears.



2. If desired, update **Ship To**, **Bill To**, and **Accounting Codes**, See the sections on Updating Ship To and Bill To at Checkout and Updating ChartString (Accounting Codes) at Checkout.

3. Click the **Assign Cart** button. The Assign Cart window appears.

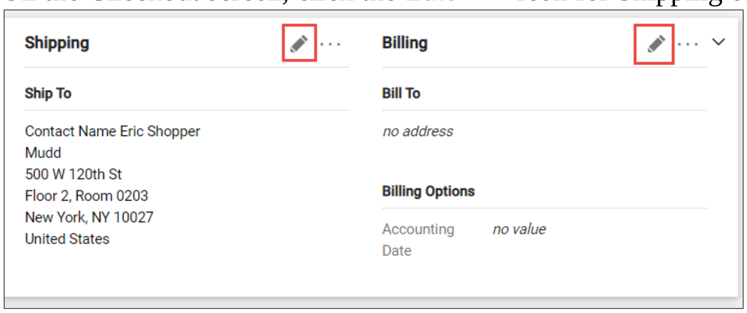


4. Follow steps 2 and 3 from the previous section.

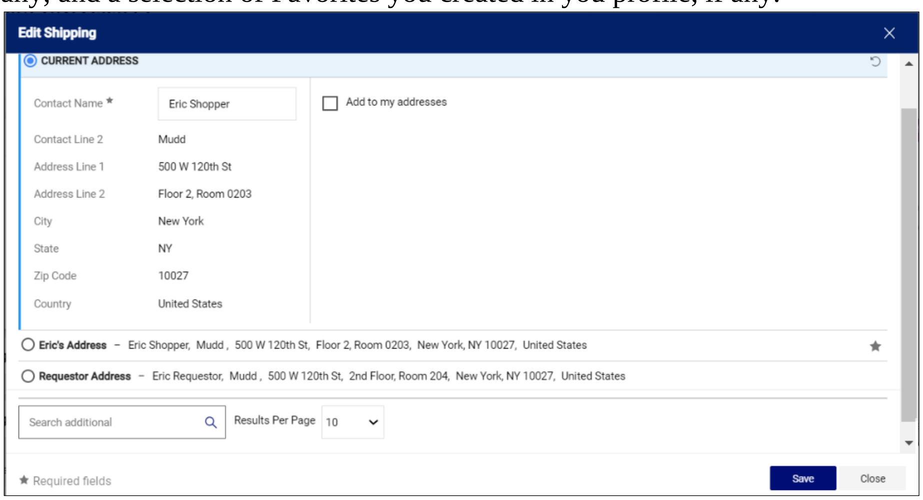
Updating Shipping and Billing at Checkout

You have the option of updating the Ship To and Bill To information for your Cart. If this information is not entered, your assigned Requestor will be required to complete this information.

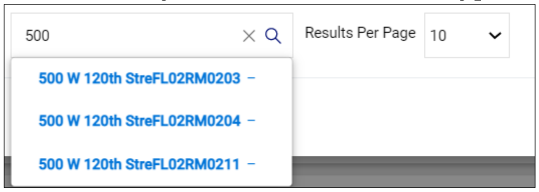
1. On the Checkout screen, click the **Edit** icon for Shipping or Billing.



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** to find and select an address.



4. Click the **Save** button.

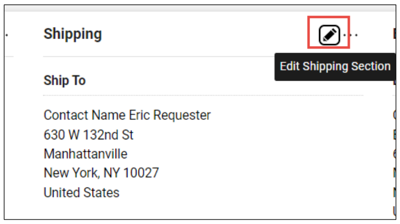
Using an Ad Hoc Ship To Address

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:

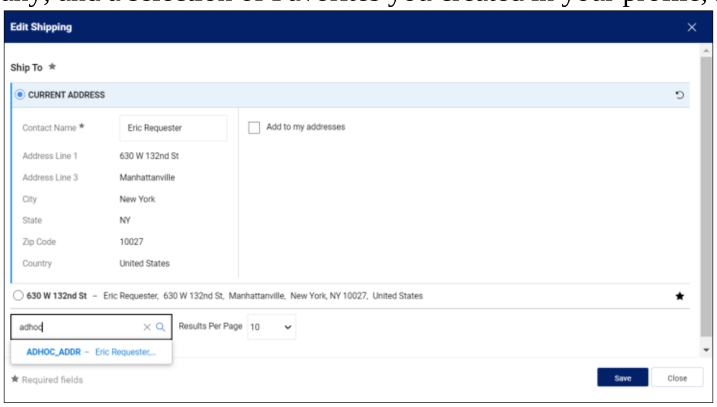
- Staples
- B&H
- CDW
- Connection (formerly Gov Connection)
- MRA International

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

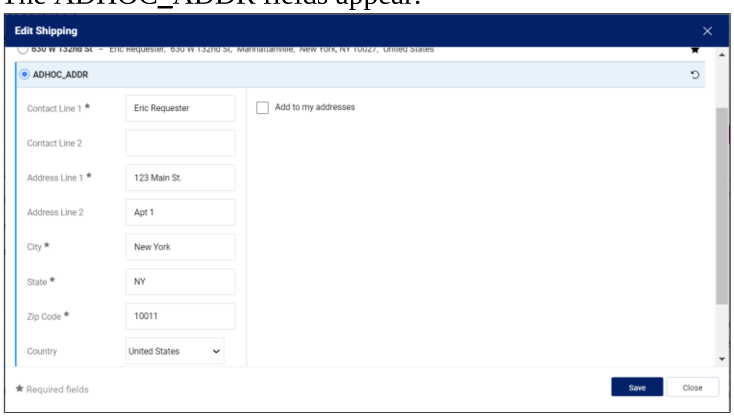
1. On the Checkout screen, click the **Edit** icon for Shipping or Billing.



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 **ADHOC_ADDR**. The ADHOC_ADDR fields appear.

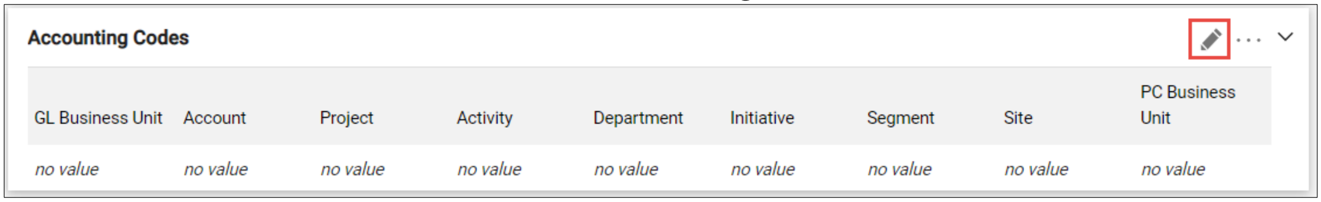


3. Complete the address information. You can optionally select **Add to my addresses** and give this address a Nickname to use this address again in the future.
4. Click the **Save** button.

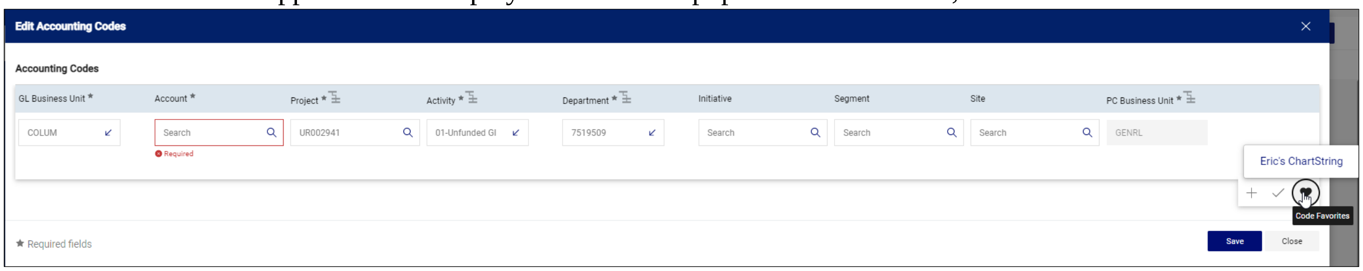
Updating the ChartString (Accounting Codes) at Checkout

You have the option of updating the ChartString information for your Cart. If this information is not entered, your assigned Requestor will be required to complete this information.

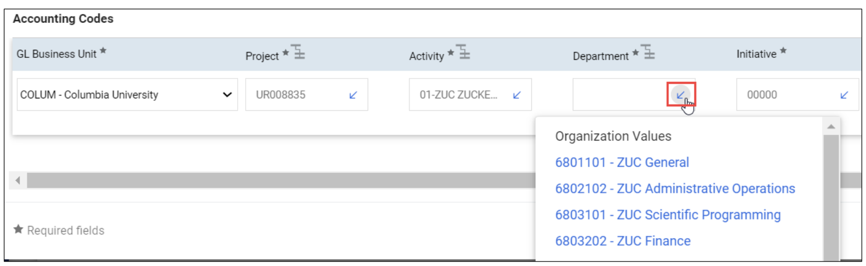
1. On the Checkout screen, click the **Edit** icon for Accounting Codes.



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.



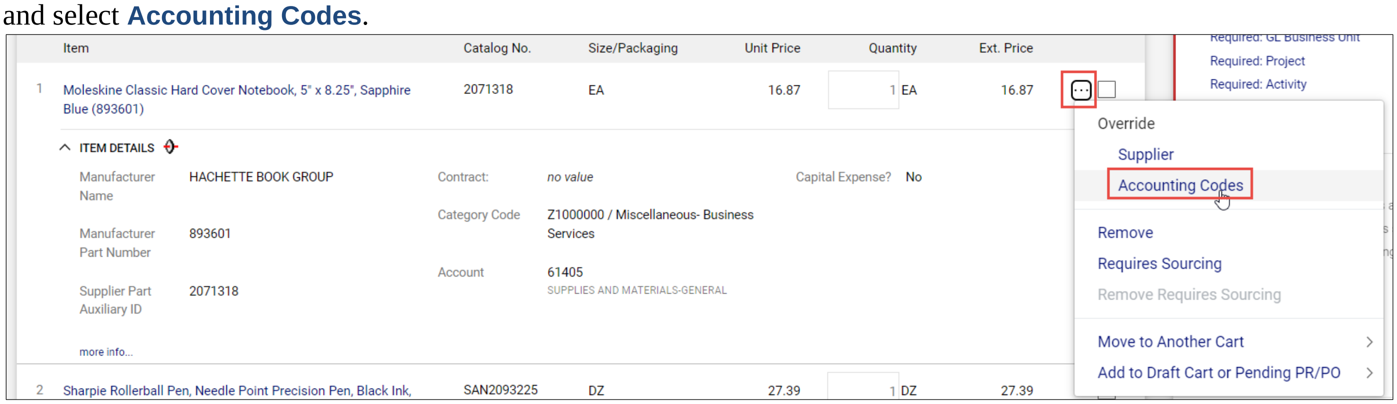
3. Click the **Validate** icon to ensure your ChartFields were entered correctly. If you corrected a ChartField and it still appears as Required, click the Validate icon again.

   You can click the **Add Split** icon to add an additional ChartString line and indicate a percent or dollar amount distribution.

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

4. Click the **Save** button.

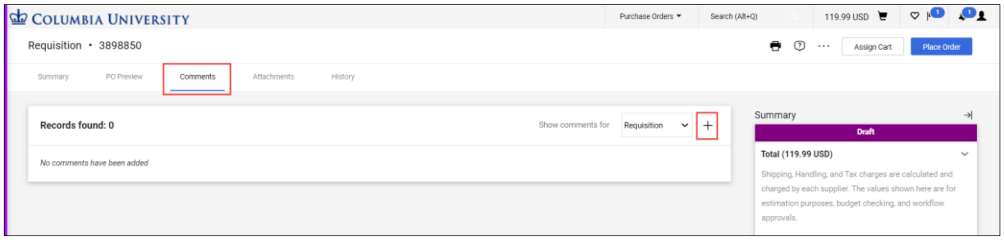
Each item in your Cart can also be updated with different ChartStrings. Click the **Line Item Actions** icon for the item and select **Accounting Codes**.



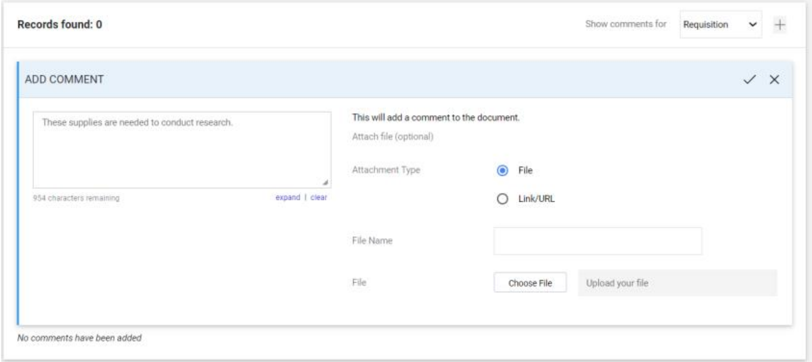
Adding Comments and Notifying Requesters and Approvers

You can add Comments to your Requisition. If the Requisition is not yet in approval workflow, the Comment can only be viewed in the Comments tab when colleagues open and view the Requisition. After the Requester has submit the Requisition for approval, you can add Comments that can be emailed to Approvers or other colleagues to notify them that your Requisition is awaiting processing. View the section on Viewing Your Carts and Orders to open your Requistion,.

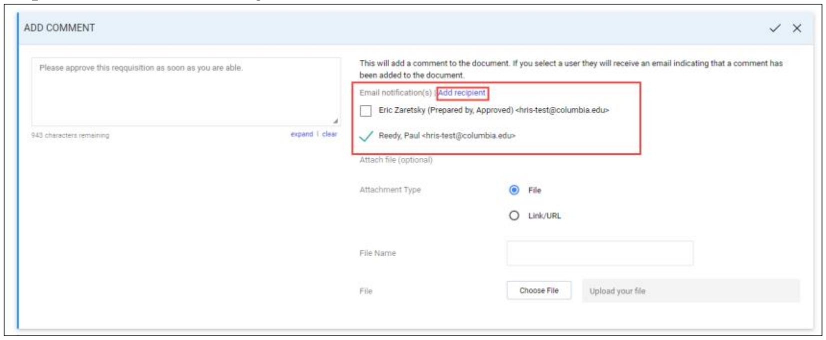
1. Click the **Comments** tab.



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.

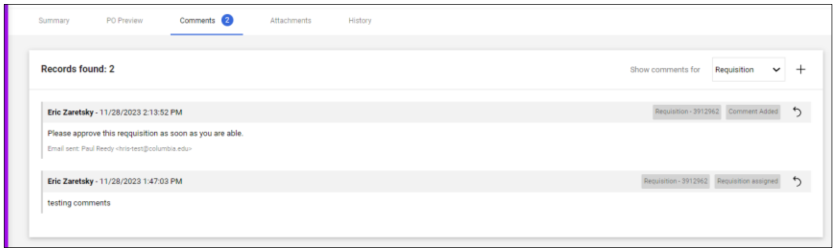


If your Requisition has already been submitted into workflow, you can open and view the Requisition to add a Comment. In the Add Comments screen, you can select the individuals listed who have worked with your requisition to receive your comment as an Email Notifications.



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.

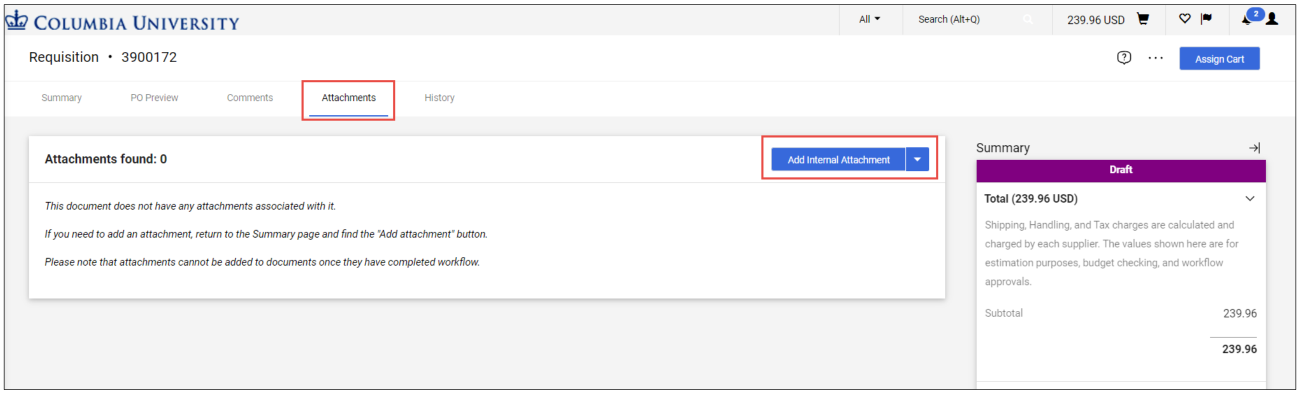
4. Click the **Complete** ✓ icon. Comments are indicated on the Comments tab and listed on the Comments screen.



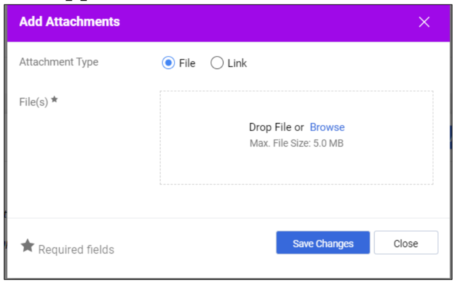
Adding Attachments

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

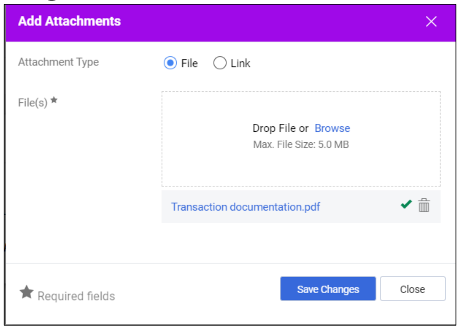
1. Click the **Attachments** tab.



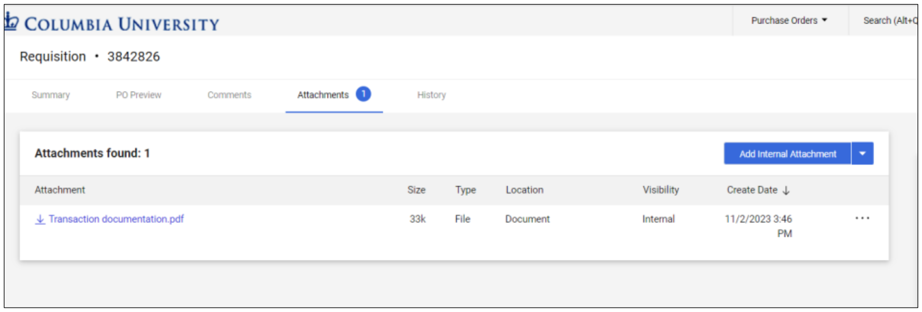
2. Click the **Add Internal Attachment** button (do not select Add External Attachment). The Add Attachments dialog box appears.



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.



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