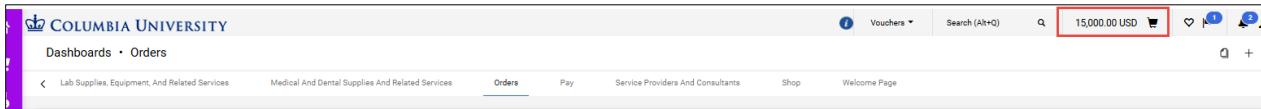


This job aid covers how to create a Multi-Year Requisition for Non-Catalog ..

Those with the Procurement Initiator role can create and submit Requisitions into approval workflow for goods or services (or both) not available from one our Catalog Vendors.

Initiating a Goods and/or Services Request

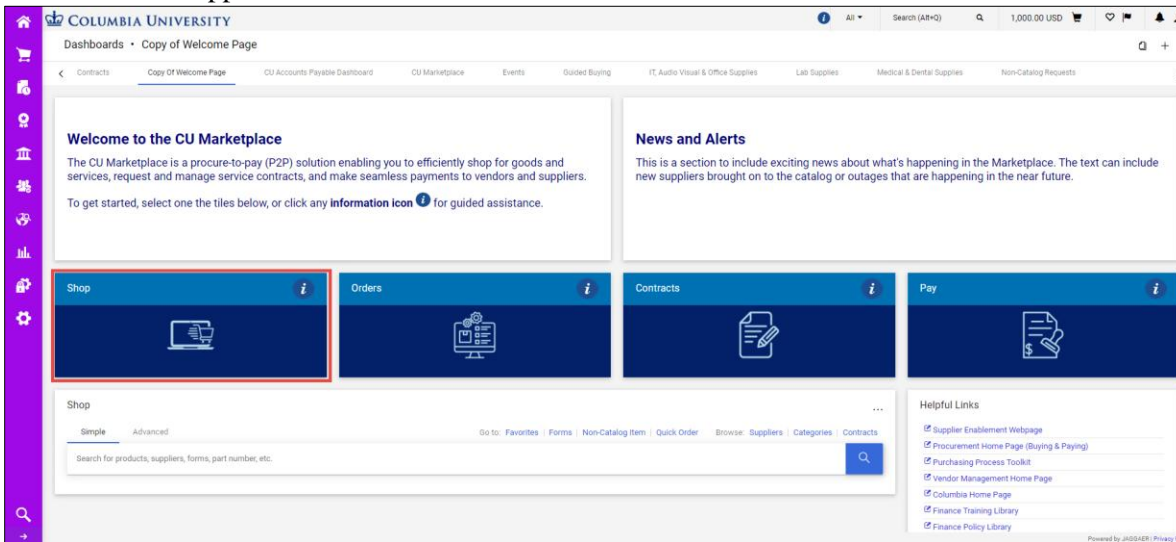
Before creating a Requisition, be sure that you do not have any **Active Draft Carts**. Process, submit, or delete any Draft Carts so that your new Requisition lines do not get added to the Active Draft Cart. Refer to the [Managing Carts in the CU Marketplace Quick](#) for details on how to manage Carts.



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



The JAGGAER application launches.



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

2. Select the **Shop** tile. The Shop dashboard appears.



3. Select any of the product category tiles.
4. Select the **Goods and Services Request Form** tile.



The Goods and Services Request Instructions page appears.

Columbia University Finance Training

Job Aid: Creating Multi-Year Requisitions in the CU Marketplace

Instructions

Purpose: This form is used to request **facilities non-catalog services and goods**.

For non-facilities purchases use the **Goods and Services Request Form**. For **catalog purchases**, go to the Shop Dashboard and select the category of purchase and the desired supplier's catalog to create a cart and requisition.

To complete this form, you must select the supplier to purchase your goods or services from. You can verify that your supplier is registered and active using the Vendor Lookup Tool. If your supplier is not registered and active, please submit a request for resource (RFR) to the Facilities Supplier Management Steering Committee (SMSC) via Qualtrics. If you do not have access to Qualtrics, please contact Christine Salto at cs2932@facil.columbia.edu.

If you do not know which supplier to purchase from, contact the Purchasing Department using a Service Now Incident.

Supporting Documentation: Based on the answers provided, the form will display any supporting documentation (e.g., quote, statement of work, certificate of insurance) that is required to be attached. Once you start this form, you may use the **Save Progress** button to save your work and return to it at a later time.

High Level Process:

Complete the form → Attach supporting documents → Add items and checkout → Complete requisition → Enter Ship and Bill To, Acct codes → Submit for approval

Summary

Incomplete

Facilities Goods and Services Request Form

Created Date: 4/15/2026
Form Number: 22051173
Purpose: Procurement Request

The left panel indicates the stages of the form with status indications as you complete the form. While completing the form, some fields have a **Question Mark** icon that you can click to get more information about that field.

5. After reading the Instructions, click the **Next** button in the upper right corner. The Supplier Search screen appears.

Suppliers

Selected Supplier

No Supplier selected

Search Registered Suppliers

Supplier

Zip Code

Within 5 Miles

Clear Search

Summary

Incomplete

Facilities Goods and Services Request Form

Created Date: 4/15/2026
Form Number: 22051173
Purpose: Procurement Request

6. Read the instructions for searching and selecting your Supplier, enter your **Supplier**, click the **Search** button and select the desired Supplier match from the results.

Suppliers

Selected Supplier

No Supplier selected

Search Registered Suppliers

Supplier: Construction

Zip Code

Within 5 Miles

Clear Search

Page 1 of 4 1-20 of 70 Results 20 Per Page

Supplier Name	Doing Business As	Fulfillment Centers	Action
4A Construction Corp	4A CONSTRUCTION CORP	Ordering-1 128 LAND LN, WESTBURY, New York 11590-6247 United States	Select
		Ordering-2 (preferred) 128 LAND LN, WESTBURY, New York 11590-6247 United States	Select
ACC CONSTRUCTION CORP	ACC CONSTRUCTION CORPORATION/ACC CONSTRUCTION/ACC CONSTRUCTION CORPORATION	Ordering-1 (preferred) 519 EIGHTH AVENUE, 7TH FLOOR, NEW YORK, New York 10018 United States	Select
		Ordering-2 6 EAST 32ND STREET, 7TH FLOOR, NEW YORK, New York 10018 United States	Select

Summary

Incomplete

Facilities Goods and Services Request Form

Created Date: 4/15/2026
Form Number: 22051173
Purpose: Procurement Request

7. Click the **Next** button and on the next page click the **Next** button again.

Completing the Purchasing Information Section

1. Select **Goods**, **Services**, or **Goods & Services**.

The screenshot shows the 'Goods and Services Request Form' in the 'Form Fields' step. Under 'Purchasing Information', there are three radio buttons: 'Goods', 'Services' (selected), and 'Goods & Services'. Below these is a dropdown menu for 'Select a Service commodity' with 'Consulting Services' selected. A summary panel on the right shows the form is 'Incomplete' and lists details like 'Created Date: 4/20/2026' and 'Form Number: 1231890'.

2. **Select a (Good or Service) Commodity** from the dropdown. The selection of commodities depends on whether you selected Goods or Services above.

Additional questions may appear based on the specific commodity you selected.

If your purchase includes a Service, an additional question: **Is this request for an Independent Consultant or Sole Provider** appears and the **Service Contracts** section appears.

This section contains the following questions and options:

- 'Select a Service commodity' dropdown: Consulting Services
- 'Is this request for an Independent Consultant or Sole Provider?' radio buttons: Yes, No (selected)
- 'Do you have a quote or a contract for this request?' radio buttons: Quote, Contract (selected)
- 'Is there a previously executed Contract for this service(s)?' radio buttons: Yes, No (selected)
- 'Has a Contract Request been submitted?' radio buttons: Yes (selected), No
- 'Please provide the Contract Request number.' text input field

If you already have a contract, you can enter a Contract ID. If you are requesting a Contract, you can enter the Request Number. You can also enter Contract Request information on the Attachments page.

3. Select the answers in each field, as needed.

Completing the Purchasing Details Section

Select Yes or No for **Is the supplier you selected a UwPA supplier?** Your selection determines additional questions that appear on the form. To learn more about UwPAs or to lookup your supplier is a UwPA supplier, click the **Question Mark** icon.

- If you select **Yes**:

The following questions appear: **Is this UwPA purchase over \$250,000?** and **Is this UwPA purchase funded with Sponsored Funds?**

The screenshot shows a form titled "Purchasing Details" with three questions. The first question, "Is the supplier you selected a UwPA supplier?", has a search icon and a blue dot next to it, and the "Yes" radio button is selected. The second question, "Is this UwPA purchase over \$250,000?", has the "No" radio button selected. The third question, "Is this UwPA purchase funded with Sponsored funds?", has the "No" radio button selected.

Select the appropriate answers and click the **Next** button.

- If you select **No**:

Questions regarding **using sponsored funds**, if this is a **sole source request**, and, if it's not a sole source request, a dropdown to select a range for **the amount of the purchase** appear.

The screenshot shows a form titled "Purchasing Details" with three questions. The first question, "Is the supplier you selected a UwPA supplier?", has a search icon and a blue dot next to it, and the "No" radio button is selected. The second question, "Are you using Sponsored funds for this purchase?", has a blue dot next to it, and the "No" radio button is selected. The third question, "Is this purchase a Sole Source request?", has a blue dot next to it, and the "No" radio button is selected. Below these questions is a section titled "Non-Sponsored Competitive Value" with a question "What is the amount of this Non-Sponsored service purchase?" followed by a dropdown menu.

Answer the relevant questions related to the non-UwPA request.

You can select the **Save Progress** button and return to the form later or can progress by clicking **Next**.

Adding Lines

The page and fields that appear are based on whether you initially selected a Goods or Services, or Goods and Services request. If you selected a Goods and Services request, the Goods page appears for adding your Goods items. The Services page will appear next for adding your Services.

You will add a Line for each year of your Multi-Year Requisition.

Adding Goods Lines

1. Indicate **Yes** for **Are multiple invoices expected for this goods purchase? (Amount Only)**.
2. Type the **Item Description** with the number of total fiscal years and this current fiscal year. For example, “3 years of equipment leasing – FY25.”
3. Enter the **Unit Price**, **Quantity** and select the **Unit of Measure**. If you know the Catalog No. of the item you are purchasing, you can enter it.
3. To find the **Commodity Code** for your item, click the **Edit** button. The Commodity Codes search window appears.

Commodity Code	Description
43210000	Computer equipment & accessories
43211502	High end computer servers
81116000	Computer programmers
81112300	Computer hardware maintenance & support
81112400	Computer hardware leasing
811240001	Computer hardware rental

4. Type your Search criteria, press **Enter** and click the **Select** button for the matching Commodity Code. The Commodity window will suggest Commodity Codes based on what you typed in the Item Description Box.
5. Click **Yes** for **Would you like to add another item?**
6. Repeat the steps above for each fiscal. For each **Item Description** enter the fiscal year for the corresponding Line. For example, “FY26 - year 2 of equipment leasing”, “FY 27 - year 3 of equipment leasing”, etc.
7. After entering your final fiscal year, Click **No** for **Would you like to add another item?** and click the **Next** button.

Adding a Services Line

1. In the **Service Period** section, Enter the **Service Start Date** and **Service End Date** for entire service period.
2. In the **Service Item** section, type the **Item Description** with the number of total fiscal years and this current fiscal. For example, “3 years of consulting services – FY25.”
3. Enter a **Unit Price**, and **Quantity** (usually 1).
4. To find the **Commodity Code** for your service, click the **Edit** button. The Commodity Codes search window appears.

5. Type your **Search** criteria, press **Enter** and click the **Select** button for the matching Commodity Code. The Commodity window will suggest Commodity Codes based on what you typed in the Item Description Box.
5. Click **Yes** for **Would you like to add another item?**
6. Repeat the steps above for each fiscal. For each **Item Description** enter the fiscal year for the corresponding Line. For example, “FY26 - year 2 of consulting service”, “FY 27 - year 3 of consulting service”, etc.
7. After enter your final fiscal year, Click **No** for **Would you like to add another item?** and click the **Next** button.

Uploading Required Attachments

Based on your Purchasing Information details and the Goods and or Services lines that you added, the Required Attachments page will display the required attachments (indicated with an asterisk *) that you must upload for your purchase. Only upload the documents that have been indicated on this page as required.

If necessary, you can click the **Save Progress** button in order to obtain any required documentation and [return to the form later](#).

Procurement Request - Facilities Goods and Services Request Form

Instructions Suppliers Form Fields Review And Submit

Purchasing Information Services Goods Items Required Attachments Contract Request Information Contract Request Information

Required Attachments

Please submit all required documents listed below. Refer to the [Purchase Requisitions and Purchase Orders Policy](#) for additional information.

Quote/Proposal awarded * No File Attached
Uploaded attachment will be copied to the voucher.

Certificate of Insurance * No File Attached

Would you like to add any additional attachments? Yes No

Summary Incomplete

Facilities Goods and Services Request Form

Created Date 4/15/2026
Form Number 22051173
Purpose Procurement Request

* Response is Required | Field Name is Searchable

1. Click the **Upload** button for each required document indicated to upload the file that satisfies the requirement. The Upload window appears.

Upload

Title *

File * No file chosen
Maximum upload file size: 25.0 MB

2. In the **Title** field, enter the type of the document you are uploading (i.e., SOW, COI, Quote), click the **Choose File** button to search and select your document file, and click the **Save Changes** button.

Additional Attachments

You have the option to upload additional documentation that you may need to explain the transaction. Only upload Additional Attachments if you have been requested by the Purchasing Team to do so.

Select **Yes** for **Would you like to add any additional attachments**. Additional Attachment fields for you to upload up to five documents.

Would you like to add any additional attachments? Yes No

Additional Attachments

Attachment #1 No File Attached
Uploaded attachment will be copied to the voucher.

Attachment #2 No File Attached
Uploaded attachment will be copied to the voucher.

Be sure to scroll down to view if you are required to provide a Contract Request Number in the Attachments for Contracts section.

Completing Contract Request Information

If you selected a Service that requires a Contract and indicated in the Purchasing Information page that you did not have a Contract, the Contract Request Information page appears. You must submit a Contract Request and copy/paste the Contract Request Number.

Procurement Request · Facilities Goods and Services Request Form

Instructions Suppliers **Form Fields** Review And Submit

Purchasing Information Services Goods Items Required Attachments **Contract Request Information**

Contract Request Information

The purchase order (PO) for this request also requires a contract. Since a contract was not indicated in the Purchasing Information page, visit the [Contracts Home](#) and create a Contract Request. Once submitted and you have the Contract Request Number, return to this form to enter the Contract Request Number.

Note: For the Contract Request Template select 'Contract for Use with a PO' as the template.

Contract Request Number

Field Name Is Searchable | * Response Is Required

Summary Incomplete

Facilities Goods and Services Request Form

Created Date 4/15/2026

Form Number 22051173

Purpose Procurement Request

1. Click the **Contracts Home** link to initiate a Contract Request. A new tab will open in your browser to the Contracts dashboard.

COLUMBIA UNIVERSITY

Dashboards · Contracts

Contract Approver Contract Manager Contract Not Associated With Payment (PROPOSED) Contract Requester Contract With PO (PROPOSED) Contract Without PO (PROPOSED) Contracts Events And Catering

Contracts

Where Columbia policy does not permit procurement of goods or services solely through the use of a Purchase Order, a more detailed contract must be requested. This could be a contract required to issue a purchase order, a contract to hire an individual or entity for consulting services, or for on-site and off-site events.

If you have the Requester role, you can submit a Contract Request.

Contract Request Tool

[Request Contract](#)

My Contract Requests

View Saved Searches

2. Click the **Request Contract** link to initiate a Contract Request. Refer to the [Requesting a New Contract job aid](#) for instruction.

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Contract Request · Training Request

Instructions Details Attachments Questions Review And Complete

Instructions

Purpose: This is request for a contract for use with a Purchase Order.

To complete this form, you must select the supplier that will be included in the contract. You can verify that your supplier is registered and active using the [Vendor Lookup Tool](#). If you cannot find your supplier to select, follow the vendor registration process to invite a new supplier on the [Vendor Management](#) website.

If you do not know which supplier to purchase from, contact the Purchasing Department using a [Service Now Incident](#).

Supporting Documentation: Based on the contract requested, supporting documentation will need to be attached.

You can use the [Purchasing Process Toolkit](#) to select the right template or simply select a University standard contract template from our [Forms & Documents Library](#).

You can also access a Job Aid related to requesting contracts [here](#).

Once you start this request, you may use the **Save Progress** button to save your work and return to it at a later time.

Summary Incomplete

Training Request

Created Date 4/3/2026

Form Number **21839776**

Purpose Contract Request

What's next?

Workflow ...

Show skipped steps

Draft Active

3. Copy the **Form Number** from your Contract Request.
4. Return to the tab with your Goods and Services Request to paste your **Contract Request Number** in the field. Do not forget to complete the Contract Request and submit it into workflow.

Procurement Request · Facilities Goods and Services Request Form

Instructions Suppliers **Form Fields** Review And Submit

Purchasing Information Services Goods Items Required Attachments **Contract Request Information** Contract Request Information

Contract Request Information

The purchase order (PO) for this request also requires a contract. Since a contract was not indicated in the Purchasing Information page, visit the [Contracts Home](#) and create a Contract Request. Once submitted and you have the Contract Request Number, return to this form to enter the Contract Request Number.

Note: For the Contract Request Template select 'Contract for Use with a PO' as the template.

Contract Request Number

Field Name Is Searchable | * Response Is Required

Summary Incomplete

Facilities Goods and Services Request Form

Created Date 4/15/2026

Form Number 22051173

Purpose Procurement Request

Completing Your Requisition

1. From the Attachments page, click the **Next** button. The Review and Submit page appears.

Green checks appear to indicate that all required fields are complete.

2. Click the **Add and go to Cart** button. The Shopping Cart screen appears. You can select the option to **Add to new Cart** so items in this Request are not added to an Active Cart.

Click the dropdown menu next to Add and go to Cart and select **Add to new Cart**.

You can now **Proceed to Checkout** to submit your Request as a Requisition for approval. For details refer to the [CU Marketplace Requisition Checkout Quick Guide](#).

Checking Out Multi-Year Requisitions

In addition to ensuring that you have you populated your Billing/Shipping Addresses and your Accounting Codes (ChartString) information (refer to the [Requisition Checkout Quick Guide](#)), you must select the **Multi-Year PO flag** for the Requisition and set the **Budget Year** for each Line Item.

Selecting the Multi-Year PO Flag

1. Click the **Edit General Section** icon. The Edit General window appears.

2. Click the **Multi-year PO** dropdown and select **Yes**.
3. Click **Save**.

Setting the Budget Year for Each Line

Goods and Services Request Form						
Contract:		no value				
1	3 year leasing agreement - FY 25	EA	5,000.00	1	5,000.00	...
ITEM DETAILS						
Internal Attachments		Capital Asset Type	N/A			
Requested Delivery Date		Asset Location	no value			
Category Code		Capital Profile ID	no value			
Account		Capital Related Tag / Asset ID (if known)	no value			
Budget Year		no value				
2	2nd year of of leasing agreement - FY25	EA	5,000.00	1	5,000.00	...
ITEM DETAILS						
Internal Attachments		Capital Asset Type	N/A			

1. Navigate to Line 1 of your Requisition and click the **Edit Line Item Details** icon. The Edit Line Item Details window appears so that you can scroll to all other Lines on the Requisition.

2. Click the **Budget Year** dropdown for the first Line and select the date range that corresponds with the fiscal year of that Line (for example, “07/01/24 – 2025” is fiscal year 25).

Columbia University Finance Training

Job Aid: Creating Multi-Year Requisitions in the CU Marketplace

3. In the same Edit Line Item Details window, scroll to the Budget Year fields for the subsequent Lines and select the date ranges that correspond with the fiscal year of those Lines.
4. After updating the Budget Year for all Lines, click **Save**. Double check to make sure the Budget Year is correctly populated for each line.

Ensure that all other required fields are complete for the Requisition and click **Place Order**.

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>