

Columbia University Finance Training

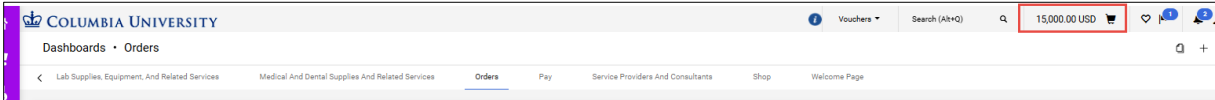
Job Aid: Creating a Non-Catalog Requisition in the CU Marketplace

This job aid covers how to create a Requisition for Non-Catalog goods or services not available from one of our Catalog Vendors by utilizing the Goods and Services Request Form.

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

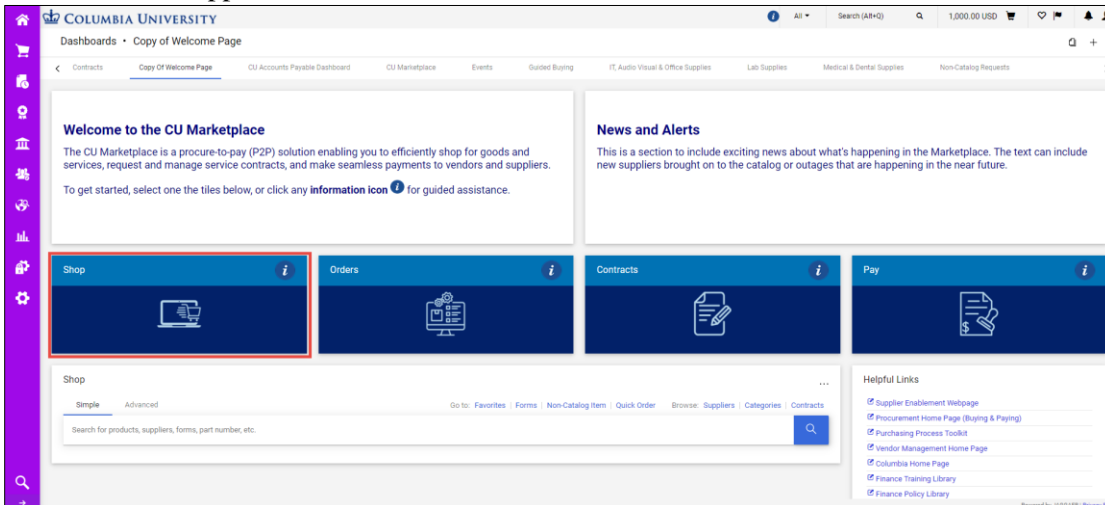
Before creating a Requisition, be sure that you do not have any **Active Draft Carts**. Process, submit, or delete any Draft Carts so that your new Requisition lines do not get added to the Active Draft Cart. *Do not combine Non-Catalog and Catalog items on the same Cart/Requestion.* Refer to the [CU Marketplace Managing Carts Quick Guide](#) 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.

Procurement Request - Goods and Services Request Form

Instructions

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

Goods and Services Request Form

Created Date 4/3/2026
Form Number 1282236
Purpose Procurement Request

The tabs at the top of the 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** at the top right of the screen. The Supplier Search screen appears.

Procurement Request - Goods and Services Request Form

Suppliers

Selected Supplier

No Supplier selected

Search Registered Suppliers

Supplier

Zip Code Within 5 Miles

Clear Search

Summary

Incomplete

Goods and Services Request Form

Created Date 4/3/2026
Form Number 21833471
Purpose Procurement Request

6. Enter your **Supplier**, click the **Search** button and select the desired Supplier match from the results.

Procurement Request - Goods and Services Request Form

Suppliers

Selected Supplier

Supplier Name	Doing Business As	Ordering Address
4imprint, Inc.	4IMPRINT, INC/4IMPRINT/4 IMPRINT, INC	Ordering: 85 Glen Road, CHICAGO, Illinois 60673-1253 United States

Search Registered Suppliers

Supplier

Zip Code Within 5 Miles

Clear Search

Supplier Name	Doing Business As	Ordering Address	Action
4imprint, Inc.	4IMPRINT, INC/4IMPRINT/4 IMPRINT, INC	Ordering-1 504 East 63rd St., CHICAGO, Illinois 60673-1253 United States	Select
		Ordering-2 29-10 Bevere road, CHICAGO, Illinois 60673-1253 United States	Select
		Ordering-3 (preferred) 85 Glen Road, CHICAGO, Illinois 60673-1253 United States	Select
		Ordering-4 85 Glen Road, 4 Martine Ave., OSHKOSH, Wisconsin 54901 United States	Select
		Ordering-5 85 Glen Road, 29 East Street, OSHKOSH, Wisconsin 54901 United States	Select

Summary

Incomplete

Goods and Services Request Form

Created Date 4/3/2026
Form Number 1282236
Purpose Procurement Request

7. Click the **Next** button.

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. The 'Purchasing Information' section is highlighted with a red box. It contains three radio buttons: 'Goods', 'Services', and 'Goods & Services'. The 'Goods & Services' option is selected. Below these are two dropdown menus: 'Select a Goods commodity' and 'Select a Service commodity'. To the right, a 'Summary' panel shows the form is 'Incomplete' and lists details like 'Created Date: 4/3/2026' and 'Form Number: 1282236'.

2. **Select a (Good or Service) Commodity** from the dropdown. The selection of commodities depends on whether you selected Goods or Services above. If you selected the Goods & Services option, two Commodity dropdown menus appear, one for Goods and the other for Service.

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.

The screenshot shows the 'Service Contracts' section. At the top, 'Select a Service commodity' is set to 'Consulting Services'. Below it is the question 'Is this request for an Independent Consultant or Sole Provider?' with 'Yes' and 'No' radio buttons. The 'Service Contracts' section contains the question 'Do you have a quote or a contract for this request?' with 'Quote' and 'Contract' radio buttons. Below that is 'Is there a previously executed Contract for this service(s)?' with 'Yes' and 'No' radio buttons. At the bottom, there is a text input field for 'Please provide the Contract number.'

Service Contracts

In the Service Contracts section, you are asked if have a **Quote** or **Contract**:

- If you selected **Contract**, you are asked if there is a **previously executed Contract**. This contract must be the current contract associated with this request (not a contract associated with a previous Purchase Order).
- If you indicate **Yes**, you can enter the **Contract ID**.
- If indicate **No**, you must submit a **Contract Request**. If you already submitted the Contract Request, you can enter the **Contract Request Number**. If have not yet submitted a Contract Request, you will be required to enter Contract Request Number information on the Attachments page.

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:

- Is the supplier you selected a UwPA supplier? Yes No
- Is this UwPA purchase over \$250,000? Yes No
- Is this UwPA purchase funded with Sponsored funds? Yes No

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:

- Is the supplier you selected a UwPA supplier? Yes No
- Are you using Sponsored funds for this purchase? Yes No
- Is this purchase a Sole Source request? Yes No

Below the questions is a section titled "Non-Sponsored Competitive Value" with a dropdown menu:

What is the amount of this Non-Sponsored service purchase?

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, 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 can add up to 20 lines. If you need more than 20 items, you can add them after you complete this form and add it to your cart.

Adding a Goods Line

1. Indicate Yes or No for **Are multiple invoices expected for this goods purchase? (Amount Only)**.
2. Type the **Item Description**, 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.

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.

If you want to add another line for an additional item, select **Yes** for **Would you like to add another item?** or select **No** and click the **Next** button to continue.

Adding a Services Line

1. In the **Service Period** section, Enter the **Service Start Date** and **Service End Date**. You must enter dates consistent with the service Scope of Work (SOW) and Contract.
2. In the **Service Item** section, enter a **Service Description**, **Unit Price**, and **Quantity** (usually 1). All Service items are automatically designated as “Amount Only.”
3. To find the **Commodity Code** for your service, click the **Edit** button. The Commodity Codes search window appears.

Commodity Code	Description	Action
43210000	Computer equipment & accessories	Select
43211502	High end computer servers	Select
81111600	Computer programmers	Select
81112300	Computer hardware maintenance & support	Select
81112400	Computer hardware leasing	Select
8111240001	Computer hardware rental	Select

3. 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.

If you want to add another Service Item line, select **Yes** for **Would you like to add another service?** including if you are adding multiple fiscal years for the same service. Another Service Item section will appear. Or, click the **Next** button to continue.

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. You should only upload documents specifically listed on this page. Do not upload additional documents.

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

The screenshot shows the 'Required Attachments' section of a procurement request form. It lists several required documents, each with an 'Upload' button and a note: 'No File Attached' and 'Uploaded attachment will be copied to the voucher.' The documents listed are: Price Justification/Summary Form, Quote or Quote Awarded, and Second Quote or Proposal. At the bottom, there is a question: 'Would you like to add any additional attachments?' with 'Yes' and 'No' radio buttons. A summary panel on the right shows the form is 'Incomplete' and lists details like 'Created Date: 4/3/2026' and 'Form Number: 1282236'.

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

The 'Upload' dialog box contains a 'Title' field with the value 'Quote' and a 'File' field with a 'Choose File' button and the text 'No file chosen'. Below the file field, it states 'Maximum upload file size: 25.0 MB'. At the bottom, there are 'Save Changes' and 'Close' buttons.

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

Only upload additional documentation if you have been instructed 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.

The 'Additional Attachments' section shows a question: 'Would you like to add any additional attachments?' with 'Yes' selected. Below this, there are two 'Attachment #' fields. Each field has a 'No File Attached' label and an 'Upload' button. A note below each field states: 'Uploaded attachment will be copied to the voucher.'

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 • Goods and Services Request Form

Instructions Suppliers **3 Form Fields** 4 Review And Submit

Purchasing Information Services Required Attachments **Contracts Request**

Attachments for Contracts

Please click "Save Progress" on this form, 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"

Contract Request Number ★ 🔍

★ Response Is Required | 🔍 Field Name Is Searchable

Summary **Incomplete**

Goods and Services Request Form

Created Date 4/3/2026
Form Number 1282236
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.

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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 Calendar

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.

High Level Process:

Summary **Incomplete**

Training Request

Created Date 4/3/2026
Form Number **21839776**
Purpose Contract Request

What's next?

Workflow

Show skipped steps

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 • Goods and Services Request Form

Instructions Suppliers **3 Form Fields** 4 Review And Submit

Purchasing Information Services Required Attachments **Contracts Request**

Attachments for Contracts

Please click "Save Progress" on this form, 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"

Contract Request Number ★ 🔍 21839776

★ Response Is Required | 🔍 Field Name Is Searchable

Summary **Incomplete**

Goods and Services Request Form

Created Date 4/3/2026
Form Number 1282236
Purpose Procurement Request

Completing Your Requisition

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

Name	Address	Phone
4imprint, Inc.	Ordering-3: 85 Glen Road, CHICAGO, Illinois 60673-1253 United States	

Created Date	4/3/2026
Form Number	1282236
Purpose	Procurement Request

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

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

- Add and go to Cart
- Save to Cart and Add Another
- Add to Cart and Return
- Add to new Cart
- Add to Draft Cart or Pending PR/PO
- Add to Draft Change Request
- Add to PO Revision

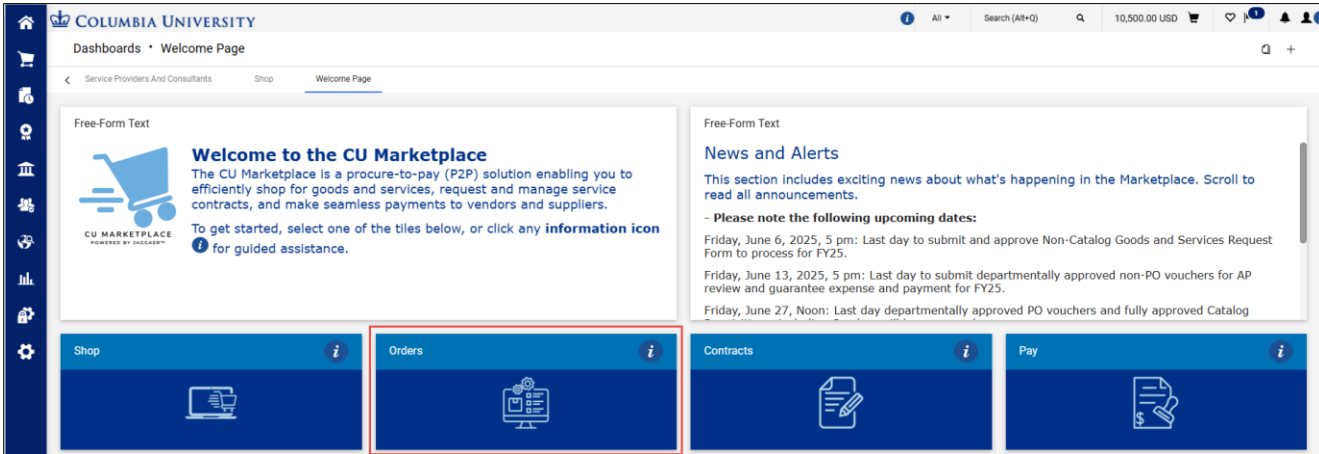
Click the dropdown menu next to Add and go to Cart and select **Add to new Cart**.

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](#).

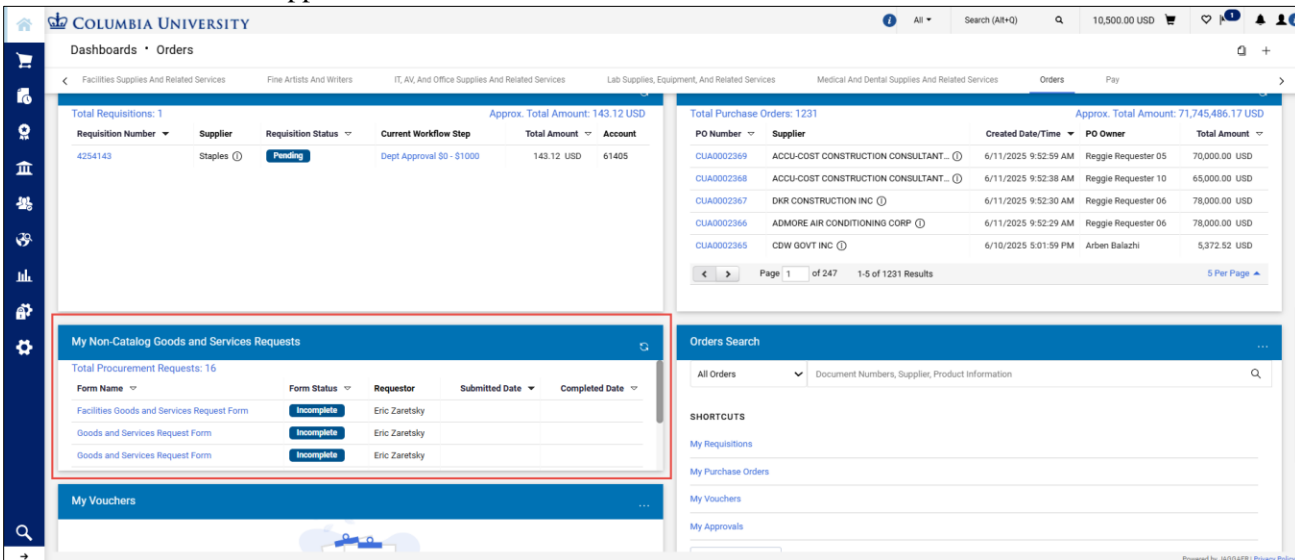
Accessing In-Progress Requests

If you clicked **Save Progress** while working on a Request and left the form, you can resume your in-progress Request to complete it.

From the **Welcome** dashboard. Select the **Orders** tile.



The Orders Dashboard appears.



From the **My Non-Catalog Goods and Services Requests** tile, click the link for the **Form Name** of the Request you wish to resume working on.

For more information on managing and editing Non-Catalog Requisitions submitted for approval, refer to the [Editing Non-Catalog Carts and Requisitions in the CU Marketplace job aid](#).

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>