

# CU Marketplace Shopping for Initiators

## Quick Guide



This Quick Guide covers how to open a Shopping Cart assigned to you by a Shopper (or another Initiator) and to submit the Cart as a Requisition in approval.

For detailed instruction on using the CU Marketplace, including how to shop and create your own Carts, refer to the [Shopping from Catalog Suppliers in the CU Marketplace Training Guide](#).

# 1.

## Viewing a Shopping Cart Assigned to You

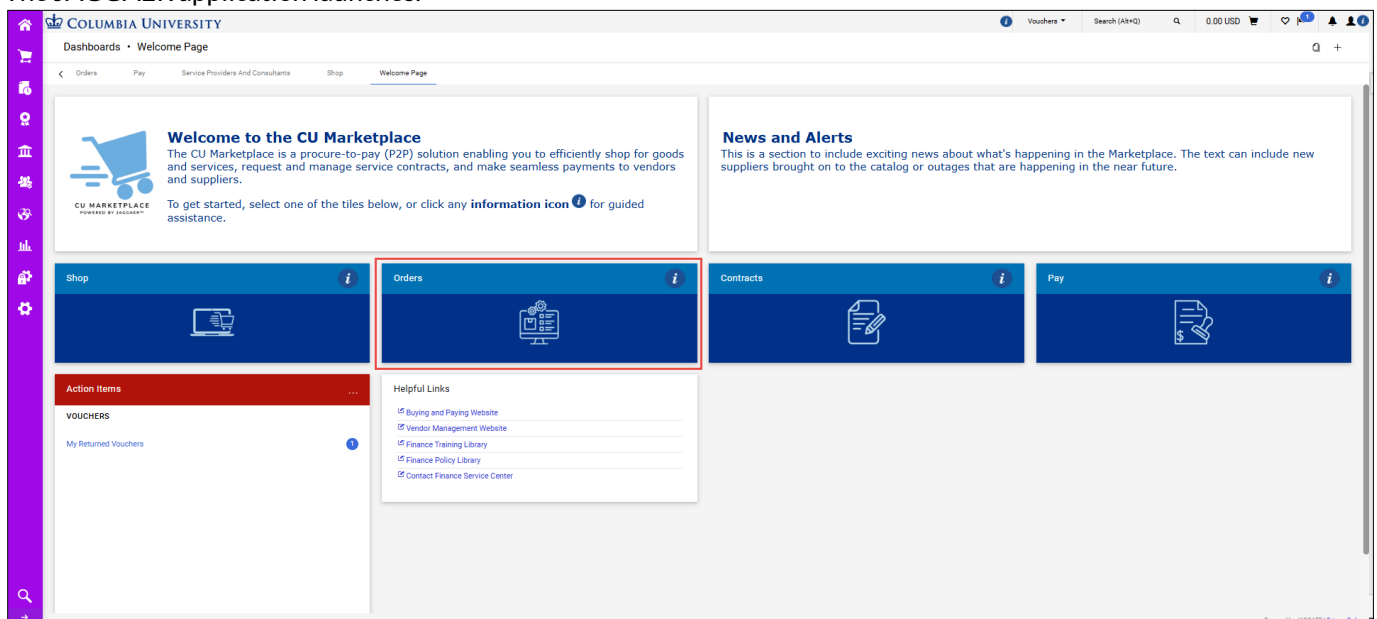


Shoppers who do not have a Procurement Initiator role cannot submit the Cart as a requisition into the approval workflow but they can assign their Cart to a Procurement Initiator. In addition, Procurement Initiators can assign Carts to other Initiators. As the assigned Initiator, you can submit the Cart 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 Initiator) to modify items in the Cart or do so yourself.

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



The JAGGAER application launches.



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

2. Click the **Orders** tile.

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## Viewing a Shopping Cart Assigned to You

**Orders**  
Depending on your role, you will have access to the following sections:

- My Draft Carts** are shopping carts that you have created or that have been assigned to you. Once these carts are submitted as Requisitions, they will no longer appear in My Draft Carts.
- My Requisitions** include ones that you have created or have been submitted on your behalf.
- My Purchase Orders** include ones where requisitions that you submitted have been approved and issued.
- My Goods and Services Requests** include requests for goods and/or services that are still in progress.
- My Vouchers** include any vouchers you initiated or that have been requested on your behalf if associated with a Purchase Order.
- My Approvals** are transactions that require your approval. If you do not have the approver role, you will not see this section.

NUMBER	CART	CART TYPE	DATE ↓	TOTAL
4211462	2025-01-29 local_eq1 03	Drafts Assigned To Me	1/29/2025	38.00USD
4211428	2025-01-29 ez2248 01	My Drafts	1/29/2025	38.00USD

5. In the **My Draft Carts** section, click the **Number** for the Shopping Cart you want to view. Carts assigned to you will be indicated by the **Cart Type**. The Shopping Cart screen appears.

**Shopping Cart** · Shopping Cart

Return Cart Assign Cart Proceed To Checkout

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Cart Name: 2025-01-29 local\_eq1 03

Description:

Ad-Hoc Approver: Select

10 Items

Staples - 10 Items - 38.00 USD

SUPPLIER DETAILS To Be Assigned

Need to make changes? MODIFY ITEMS | VIEW ITEMS Item(s) was retrieved on: 1/29/2025 1:13:32 PM

- Staples ProGel Retractable Gel Pen, Bold Point, 1.0mm, Blue Ink, Dozen (ST62590)

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Staples ProGel Retractable Gel Pen, Bold Point, 1.0mm, Blue Ink, Dozen (ST62590)	24598470	02	3.80	10 02	38.00

Summary

Details

For Edward Johnson

Total (38.00 USD)

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

# CU Marketplace Shopping for Initiators

## Quick Guide

### 2. 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 the CU Marketplace 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.

# CU Marketplace Shopping for Initiators

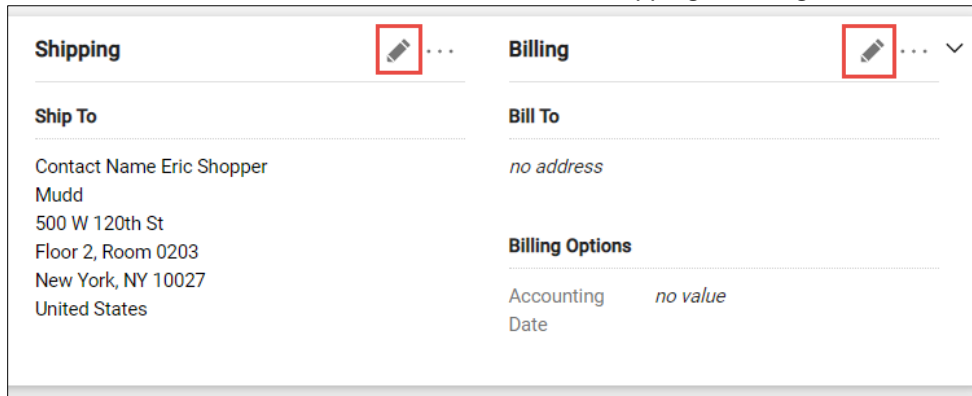
## Quick Guide


### 2.

### Checking Out

#### Updating Shipping and Billing

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




**Shipping**  ...

**Shipping**

**Ship To**

Contact Name Eric Shopper  
Mudd  
500 W 120th St  
Floor 2, Room 0203  
New York, NY 10027  
United States

**Billing**  ...

**Billing**

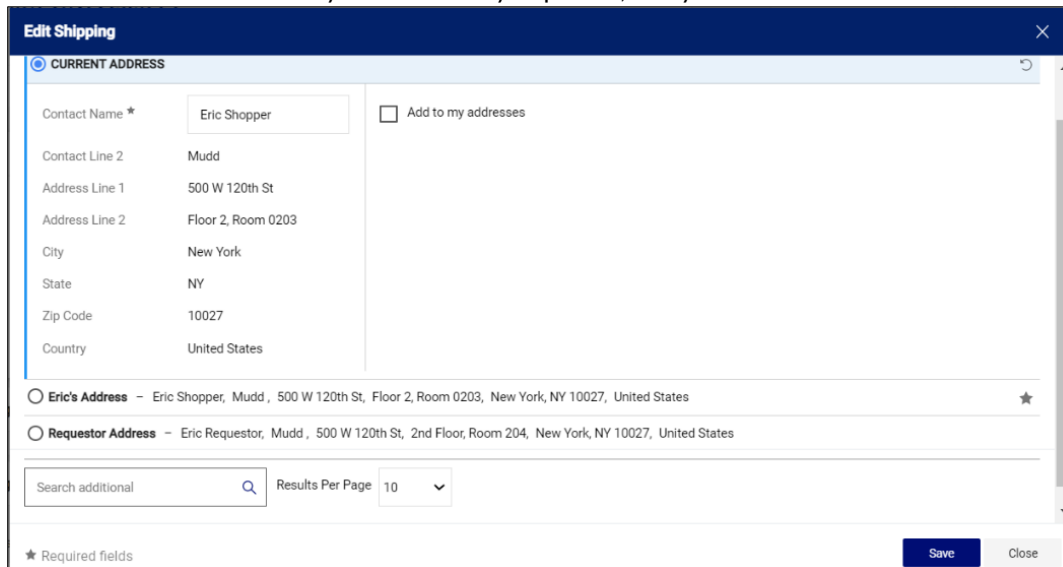
**Bill To**

no address

**Billing Options**

Accounting no value  
Date

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.



**Edit Shipping**

**CURRENT ADDRESS**

Contact Name \* Eric Shopper  Add to my addresses

Contact Line 2 Mudd

Address Line 1 500 W 120th St

Address Line 2 Floor 2, Room 0203

City New York

State NY

Zip Code 10027

Country United States

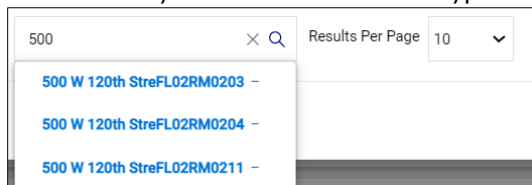
**Eric's Address** - Eric Shopper, Mudd, 500 W 120th St, Floor 2, Room 0203, New York, NY 10027, United States

**Requestor Address** - Eric Requestor, Mudd, 500 W 120th St, 2nd Floor, Room 204, New York, NY 10027, United States

Search additional  Results Per Page 10

★ Required fields Save Close

2. Select one of your Profile favorites or type in **Search additional** to find and select an address.



500  Results Per Page 10

- 500 W 120th StreFL02RM0203 -
- 500 W 120th StreFL02RM0204 -
- 500 W 120th StreFL02RM0211 -


3. Click the **Save** button.

# CU Marketplace Shopping for Initiators

## Quick Guide

### 2. Checking Out

Updating the ChartString (Accounting Codes)

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


Accounting Codes								
GL Business Unit	Account	Project	Activity	Department	Initiative	Segment	Site	PC Business Unit
no value	no value	no value	no value	no value	no value	no value	no value	no value

The Edit window will appear. It will display the default or populated ChartFields,

**Edit Accounting Codes**


Accounting Codes

GL Business Unit *	Project *	Activity *	Department *	Initiative *	Segment *	Site	PC Business Unit
COLUM - Columbia University	UR008835	01-ZUC.ZUCKE...	6801101	00000	00000000	Search	GENRL


+ 

\* Required fields

Sum Close

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.



Accounting Codes

GL Business Unit *	Project *	Activity *	Department *	Initiative *
COLUM - Columbia University	UR008835	01-ZUC.ZUCKE...		00000

Organization Values

- 6801101 - ZUC General
- 6802102 - ZUC Administrative Operations
- 6803101 - ZUC Scientific Programming
- 6803202 - ZUC Finance


\* Required fields

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 distribution.

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

4. Click the **Save** button.

**Note:** Each Line Item in your Requisition can also be updated with different ChartStrings. Click the **Line Item Actions**  icon for the Line to **Override Accounting Codes**.

Some product Categories map to multiple Accounts. If that is the case, you will be required to select the appropriate Account number from a dropdown in the Account field.

### Placing Your Order

After ensuring that all required fields are populated, the Status pane will not list any further requirements. Click the **Place Order** button.

COLUMBIA UNIVERSITY

Requisition - 3770434

Summary PD Preview Comments Attachments History

General	Shipping	Billing	Cart
<p>Cart Name: Eric's Supplies</p> <p>Description: no value</p> <p>Prepared by: Eric Shopper</p> <p>Prepared by: Eric Shopper</p>	<p>Ship To:</p> <p>Contact Name Eric Shopper</p> <p>Mudd</p> <p>500 W 120th St</p> <p>Floor 2, Room 0203</p> <p>New York, NY 10027</p>	<p>Bill To:</p> <p>Contact Name Eric Z</p> <p>Living Cancer Res Ctr</p> <p>1130 St. Nicholas Ave</p> <p>ELIZ, NY 10020</p> <p>CUBAC</p>	<p>Total (209.08 USD)</p> <p>Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.</p>

Place Order

The Cart is now entered as a Requisition into approval workflow