

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 [Procurement Buying](#) 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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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

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.

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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.

Shopping Cart • Shopping Cart

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

Cart Name: Eric's Supplies

Description:

2 Items

Staples - 2 Items - 209.08 USD

SUPPLIER DETAILS

PO Number: To Be Assigned

Quote number:

Details

For: Eric Shopper

Total (209.08 USD)

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.

Subtotal * 209.08

Total * 209.08

The Checkout screen appears.

Requisition • 3770434

Summary PO Preview Comments Attachments History

General Shipping Billing

Cart Name: Eric's Supplies

Description: no value

Prepared by: Eric Requester

Prepared for: Eric Shopper

Fiscal Year: FY 23

Hazardous Materials: X

Ad-Hoc Approver: Select

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

Bill To: no address (Required)

Billing Options: Accounting (no value), Date (no value)

Accounting Codes

GL Business Unit	Account	Project	Activity	Department	Initiative	Segment	Site	PC Business Unit	AM Business Unit	Asset Profile ID	Asset Location
no value	no value	no value	no value	no value	no value	no value	no value	no value	no value	no value	no value
Required	Required	Required	Required	Required	Required	Required	Required	Required	Required	Required	Required

Internal Notes and Attachments

Internal Note: no value

Internal Attachments: Add

External Notes and Attachments

Note to all Suppliers: no value

Notes for the following suppliers are unsupported and will not be sent: Staples

Draft

Correct these issues. You are unable to proceed until addressed.

Required: Billing address

Required: GL Business Unit

Required: Account

Required: Project

Required: Activity

Required: Department

Required: PC Business Unit

Total (209.08 USD)

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.

Subtotal 209.08

Total 209.08

What's next for my order?

Next Step: Exception Approval

Approver (DO NOT DELETE), Workflow Approver

Workflow

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.

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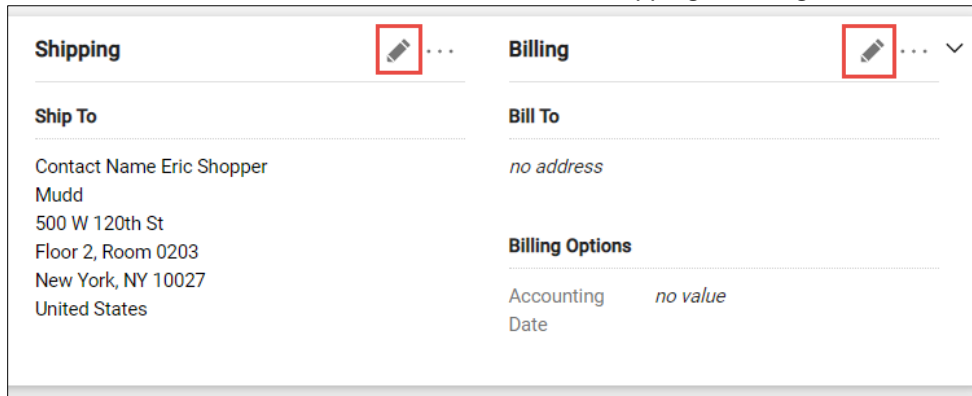
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Checking Out

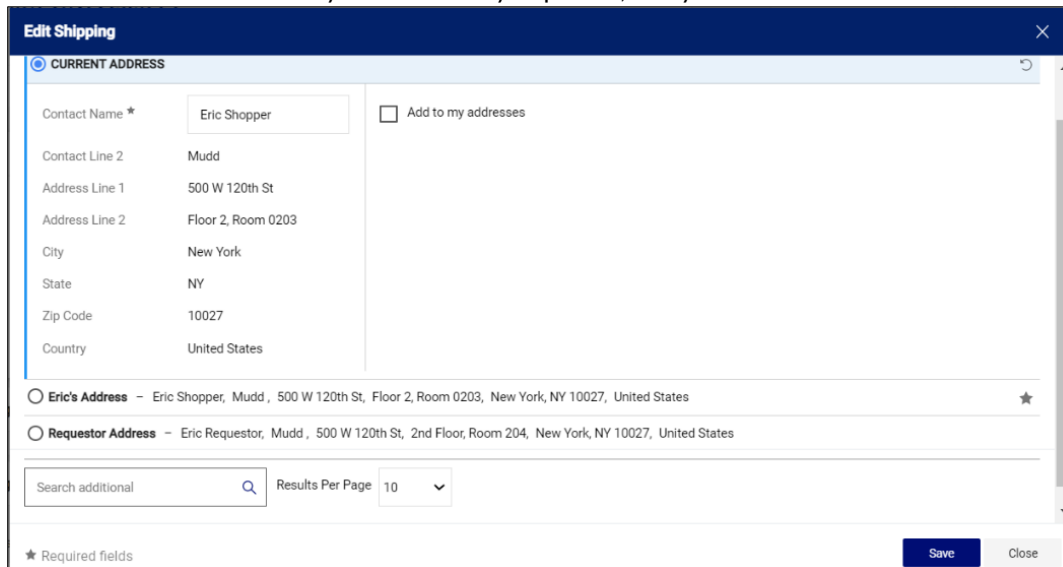
Updating Shipping and Billing

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



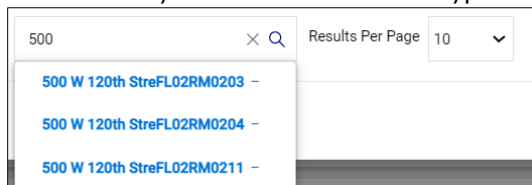
The screenshot shows the checkout interface with two main sections: **Shipping** and **Billing**. Each section has an **Edit** icon (a pencil) next to it, which is highlighted with a red box. The **Shipping** section displays the following information: **Ship To**, Contact Name Eric Shopper, Mudd, 500 W 120th St, Floor 2, Room 0203, New York, NY 10027, United States. The **Billing** section displays: **Bill To**, no address, and **Billing Options** with Accounting set to no value and Date as a field.

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.



The **Edit Shipping** window is shown. It features a **CURRENT ADDRESS** section with the following fields: Contact Name (Eric Shopper), 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), and Country (United States). There is an **Add to my addresses** checkbox. Below the current address are two radio button options: **Eric's Address** (selected) and **Requestor Address**. A search bar labeled **Search additional** and a **Results Per Page** dropdown (set to 10) are also present. **Save** and **Close** buttons are at the bottom right.

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



The search results show a list of three address suggestions: **500 W 120th StreFL02RM0203**, **500 W 120th StreFL02RM0204**, and **500 W 120th StreFL02RM0211**. Each suggestion is preceded by a blue checkmark icon.

3. Click the **Save** button.


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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,


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 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.

The Cart is now entered as a Requisition into approval workflow