

Columbia University Finance Training

Job Aid: Modifying CU Marketplace Profile Settings

This job aid covers how to modifying your Profile settings in the CU Marketplace. You are not required to enter Profile settings in order to begin using the CU Marketplace. However, you have the option to set Favorites and Defaults for ChartStrings, Ship To and Bill To Addresses, and Assignees (Requestors) in order to accelerate your purchases.

In order for Requesters to submit Requisitions, ensure that your Admin Department is indicated in the ARC Requester Defaults screen. In most cases, this information is automatically imported from PAC. If so, no action is required. Refer to the [Entering Your Admin Department in ARC Requester Defaults](#) job aid for details and instructions.

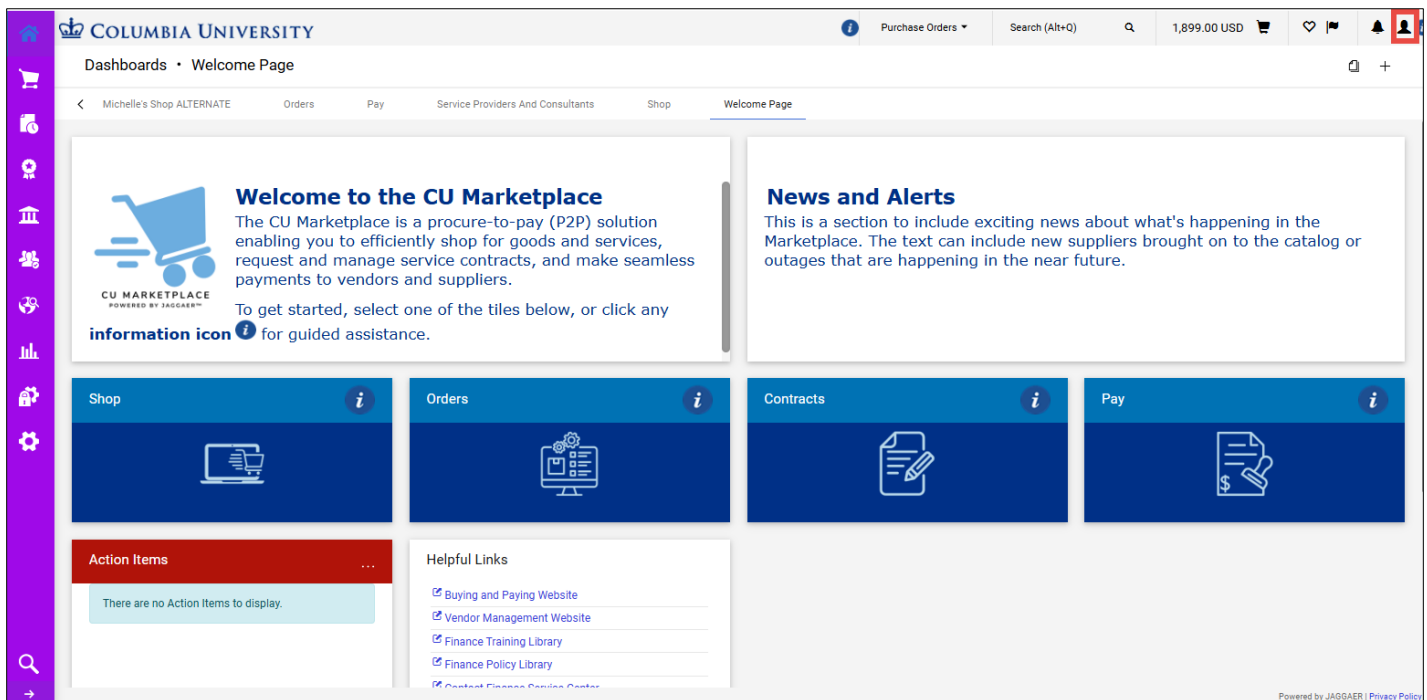
In addition, your email address is fed from PAC, while your phone number is fed from the ARC Requester Defaults screen.

Accessing the CU Marketplace

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




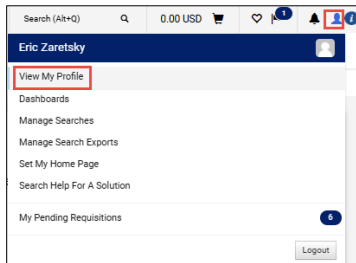
The CU Marketplace launches.



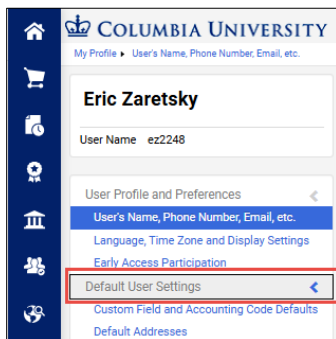
Note: The CU Marketplace will automatically timeout after thirty minutes of inactivity, consistent with other University Enterprise Systems.

Setting Profile Favorites and Defaults

1. Click the **Profile**  icon in the upper right corner of the CU Marketplace screen.

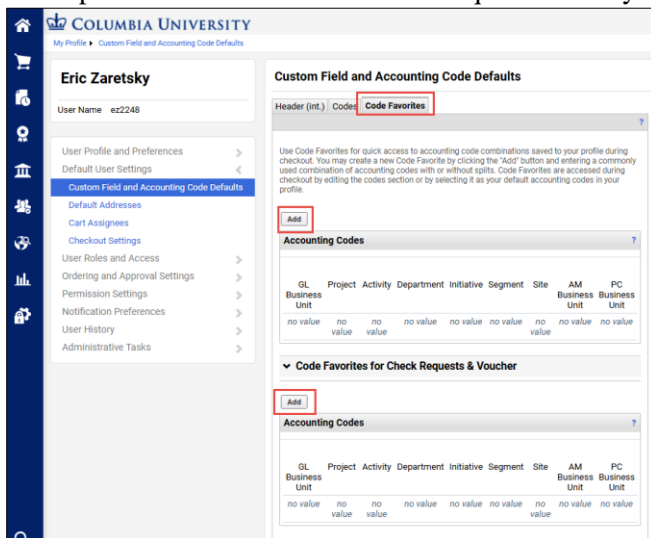


2. Click **View My Profile**.
3. Click **Default User Settings**.

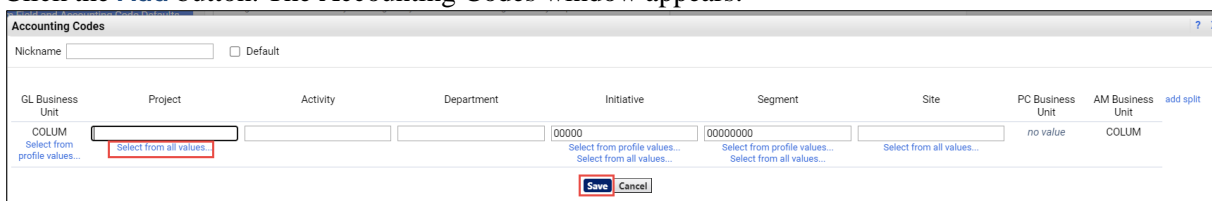


Setting ChartString Favorites and Default

1. Under **Default User Settings**, click **Custom Field and Code Defaults**. There are two sections for adding favorites. The top section will be available for Requestions only. The second section will be available for Vouchers only.



2. Click the **Code Favorites** tab,
3. Click the **Add** button. The Accounting Codes window appears.

A screenshot of the 'Accounting Codes' window. The window has a 'Nickname' field and a 'Default' checkbox. Below these is a table with columns for GL Business Unit, Project, Activity, Department, Initiative, Segment, Site, PC Business Unit, and AM Business Unit. The 'Initiative' column has a value of '00000' and the 'Segment' column has a value of '00000000'. Below the table are two 'Select from profile values...' buttons and one 'Select from all values...' button. At the bottom are 'Save' and 'Cancel' buttons.

4. Enter a **Nickname** for the ChartString so that you can easily access it. Click the **Default** checkbox to indicate that this will be your default ChartString.
5. Enter the ChartField values. They must be entered in order left to right as the available values are dependent on the value in the previous field. You can leave fields blank.
You can click the **Select from all values** link to use the Custom Field Search for field you are populating.

A screenshot of a web browser window showing a 'Custom Field Search' dialog box. The dialog has a search bar with the text '630' entered. Below the search bar are labels for 'Value' and 'Description'. A 'Search' button is at the bottom right. The browser's address bar shows a URL from 'usertest.sciquest.com'.

6. Click the **Save** button.
You can click Add again for additional ChartString favorites.

Setting Default Ship To and Bill To Addresses

1. Under Default User Settings, click **Default Addresses**.

A screenshot of the 'Default Addresses' page in a user profile settings interface. The page title is 'Eric Zaretsky'. On the left is a sidebar menu with options like 'User Profile and Preferences', 'Default User Settings', 'Custom Field and Accounting Code Defaults', 'Default Addresses' (highlighted), 'Cart Assignments', 'Checkout Settings', 'User Roles and Access', 'Ordering and Approval Settings', 'Permission Settings', 'Notification Preferences', 'User History', and 'Administrative Tasks'. The main content area shows 'Default Addresses' with a message 'No addresses defined in profile.' and tabs for 'Ship To' and 'Bill To'. A 'Select Address for Profile' button is visible.

2. Select either the **Ship To** or **Bill To** tab to set the default for the desired address type.
3. Click the **Select Addresses for Profile** button. The Select Address Template dropdown appears.
4. Enter an address **Nickname / Address** to search for a matching address and click **Search**. A list of matches appears.

A screenshot of the 'Address Search' results within the 'Default Addresses' page. It shows a search bar with '630 w 132' entered. Below the search bar, it says 'Addresses Found: 1' and 'Page 1 of 1'. A table lists the found address with columns for 'Name' and 'Address'. The address listed is '630 West 168th Street FL 01 RM 1132' with contact name 'Eric Zaretsky'.

5. Select the desired matching address.

A screenshot of the 'Edit Selected Address' form. It shows fields for 'Nickname' (Eric's Address), 'Default' (checked), 'Current Default', and 'Address'. Below these are fields for 'Contact Name *', 'Contact Line 2', 'Address Line 1', 'Address Line 2', 'Address Line 3', 'City', 'State', 'Zip Code', and 'Country'. The address details are populated with 'Eric Zaretsky', '630 West 168th Street', 'RM/STE 1-132 FL 01', 'CUIMC', 'New York', 'NY', '10032', and 'United States'. A 'Save' button is at the bottom right.

You can enter a **Nickname**, select if this address will be your **Default**, or change the **Contact Name**.

- Click **Save**. The Address you saved will appear in the Addresses list.

You can click the Select Addresses for Profile button again within the Ship To or Bill To tabs to add additional addresses.

You can click an address from the Addresses list to edit the settings or delete it.

Creating Requester Favorites (Adding Assignees)

As Shopper, you must assign a Requester who has been approved to submit your Cart into approval workflow in order to create a requisition. You can create favorite Requesters that are available when you assign your Cart.

- Under Default User Settings, click **Cart Assignees**.
- Click the **Add Assignee** button. The User Search window appears.


- Use any of the available fields to search for a colleague and click the **Search** button. Your colleague must have the Requester role for you to add them as an assignee. The search results appear.

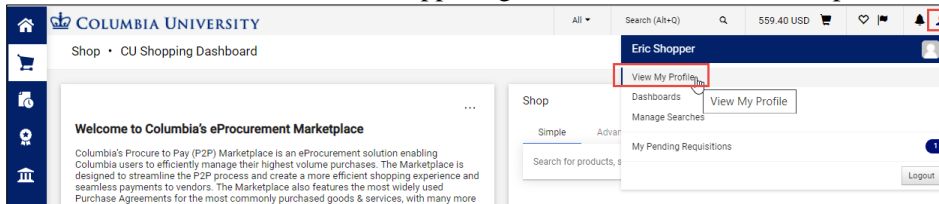
Name	User Name	Email	Phone	Action
Requester, Paul	paulrequester	nobody@jaggaer.com		[select]

- Click the **Select** link in the Action column to select the colleague. You can click Add Assignee again for additional Requesters.

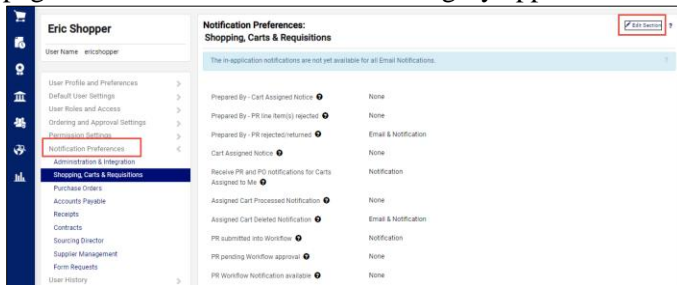
Setting Notification Preferences

The Notifications defaults are set so that you receive system notifications, email alerts, or both when key events occur or milestones are reached. You have the ability to edit these settings to remove notifications, change the notification type for some triggers, or add notifications settings for additional trigger events.

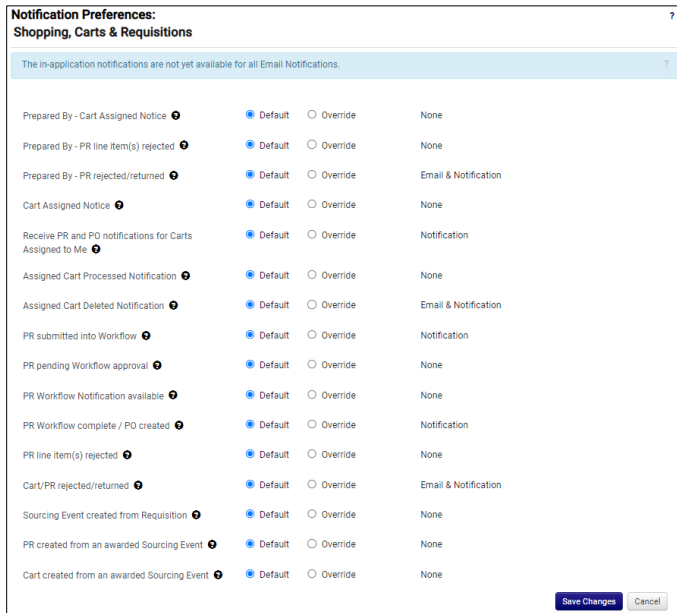
1. Click the **Profile**  icon in the upper right corner of the CU Marketplace screen.



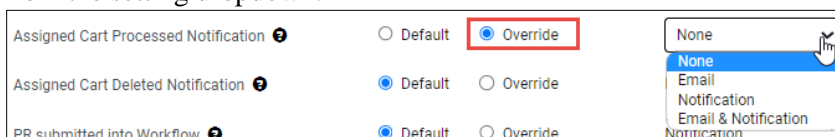
2. Click **View My Profile**.
3. Click **Notification Preferences** and select the menu item for the category of notifications you want to edit. The page for the selected notification category appears.



4. Click the **Edit Section** link. The Notification Preferences appear ready to be edited.



5. To change a Notification Preference, select the **Override** option for the desired setting, and select the desired choice from the setting dropdown.



6. Click the **Save Changes** button after you have made all the desired changes within the section.

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>