

Columbia University Finance Training

Training Guide: Creating a Facilities Requisition in the CU Marketplace

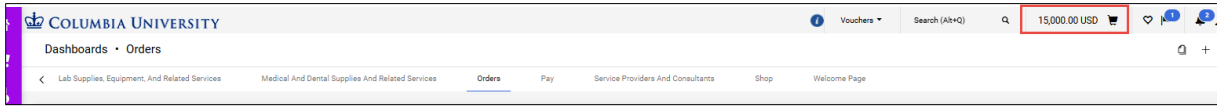
This training guide covers how to create a non-catalog Requisition for Facilities goods or services utilizing the Facilities Goods and Services Request Form. Users must have the Procurement Initiator role and specific access to this form in order to create a request.

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Initiating a Facilities Goods and/or Services Request

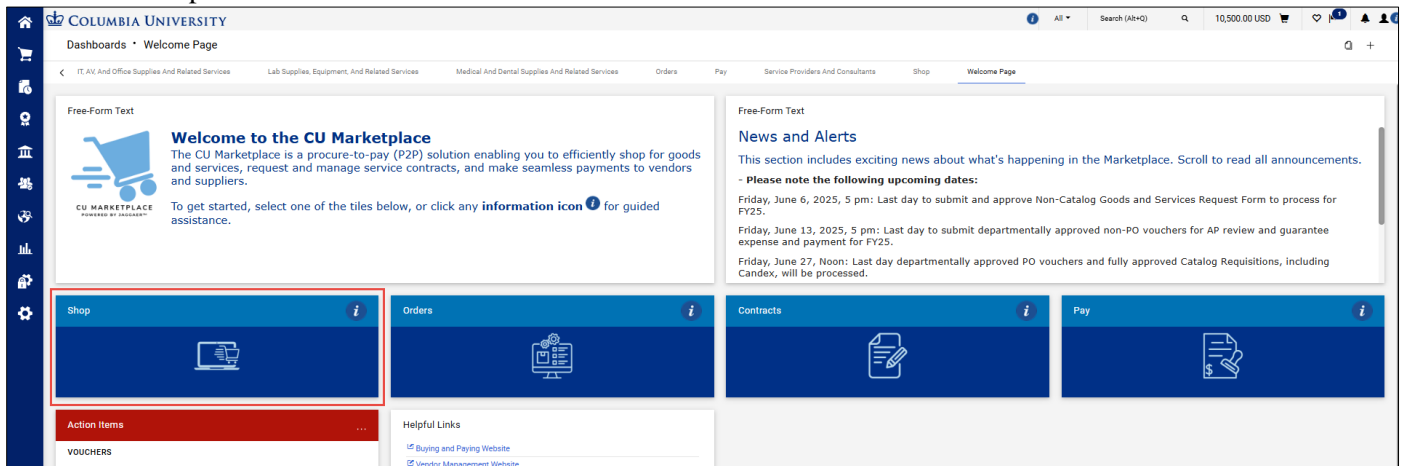
Before creating a Requisition, be sure that you do not have any **Active Draft Carts**. Process, submit, or delete any Draft Carts so that your new Requisition lines do not get added to the Active Draft Cart. Refer to the [CU Marketplace Managing Carts Quick Guide](#) for details on how to manage Carts.



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

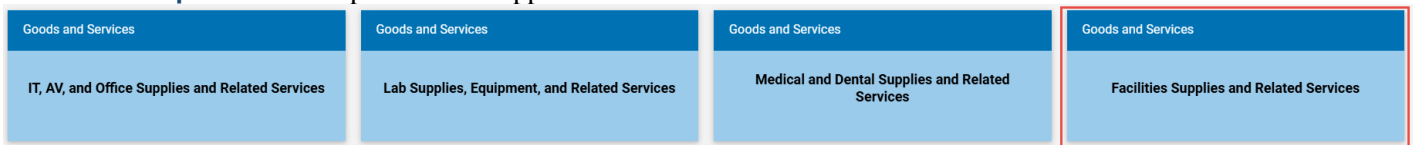


The CU Marketplace launches.

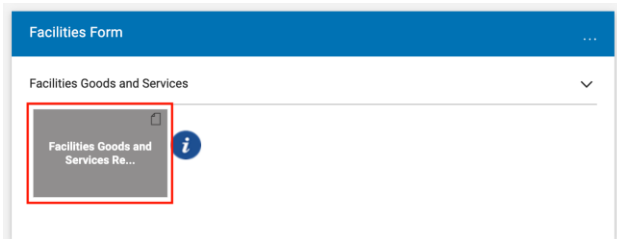


Note: The CU Marketplace will automatically time out after thirty minutes of inactivity, consistent with other University Enterprise Systems.

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



3. Select the **Facilities Supplies and Related Services** tile and then the **Facilities Goods and Services Request Form** tile.



The Facilities Goods and Services Request Instructions page appears.

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Training Guide: Creating a Facilities Requisition in the CU Marketplace

Home Shop Orders Contracts Pay Suppliers Sourcing Reporting Administer

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Procurement Request • Facilities Goods and Services Request Form

Instructions Suppliers Form Fields Review And Submit

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

Save Progress Next

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The left panel indicates the stages of the form with status indicators 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.

4. After reading the Instructions, click the **Next** button from the top right. 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

Save Progress Previous Next

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5. Read the instructions for searching for 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

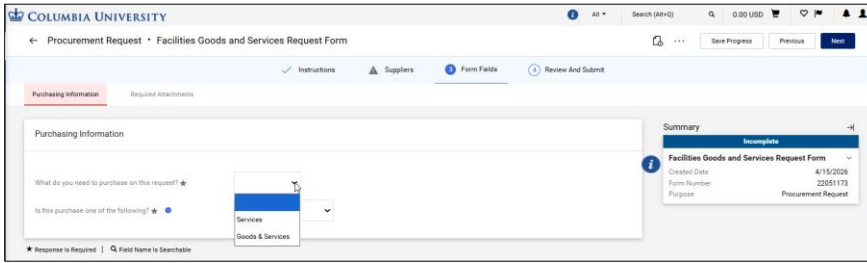
Save Progress Previous Next

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6. Click the **Next** button and on the Form Fields page click the **Next** button again.

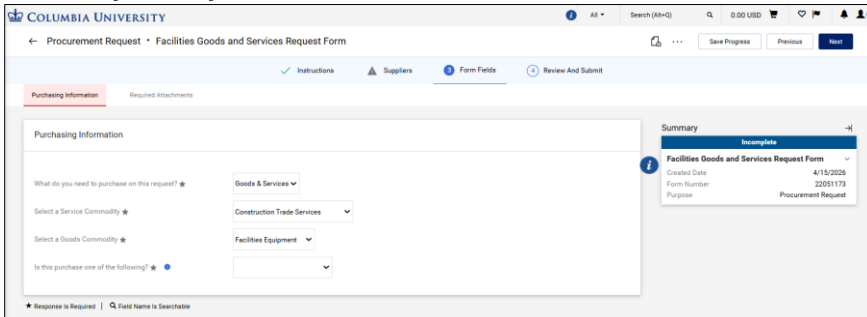
Completing the Purchasing Information Section

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

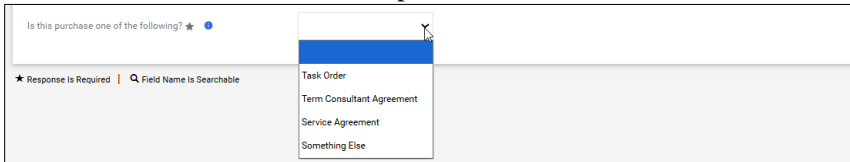


2. **Select a Commodity** from the dropdown(s) that appear based on your selection above. If you selected the Goods & Services option, two Commodity dropdown menus appear, one for Goods and the other for Services. The selection of commodities available depends on the dropdown from which you are selecting.

Note: *If the commodity you are requesting is not available from the dropdown menu, you may not be in the correct form. This form is specific for Facilities goods and services. The Non-Catalog Goods and Services Request form is available for non-facilities commodities.*



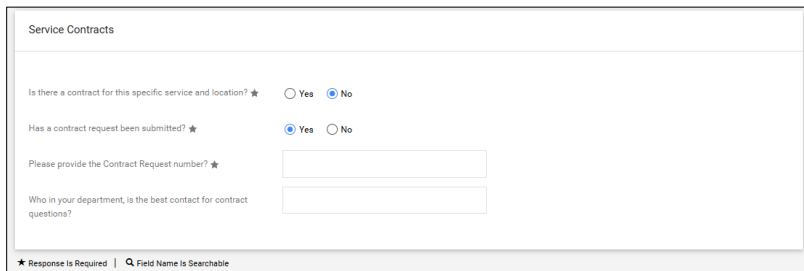
3. Select the relevant response from the **Is this purchase one of the following?** dropdown. Click the **Question Mark** icon for a definition of each option.



Based on your selections above, different questions appear.


4. If the **Service Contracts** section appears and you already have a contract, you can enter a Contract number or reference.

- If there is not a contract for the service being requested but you have submitted a Contract Request, enter the Request Number.
- If there is not a contract for the service being requested and you have not submitted a Contract Request, you will be provided instructions on how to submit a Contract Request when you reach the end of the form.

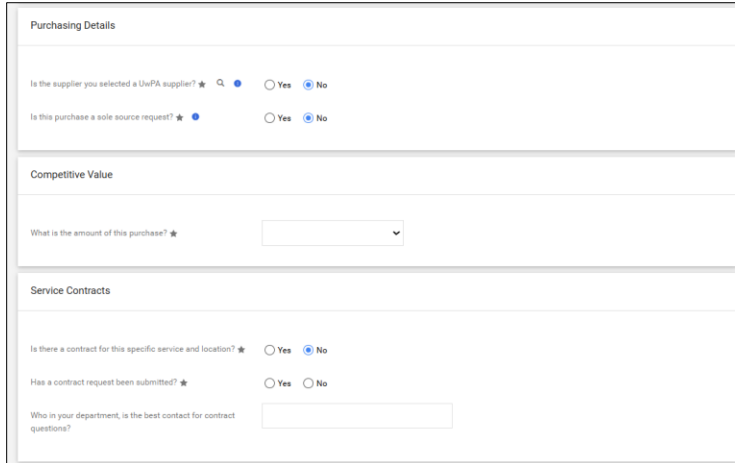


5. Select the answers in each field, as needed, and click the **Next** button.

Completing the Purchasing Details for “Something Else”

If you selected **Something Else** for the question **Is this purchase for one of the following?**, the question **Is the supplier you selected a UwPA supplier?** appears. To learn more about UwPAs or to check whether your supplier is a UwPA supplier, click the **Question Mark**  icon.

- If you select **Yes**, no additional fields appear on the page; click the **Next** button to proceed.
- If you select **No**, additional fields appear on the page, including those related to Service Contracts.



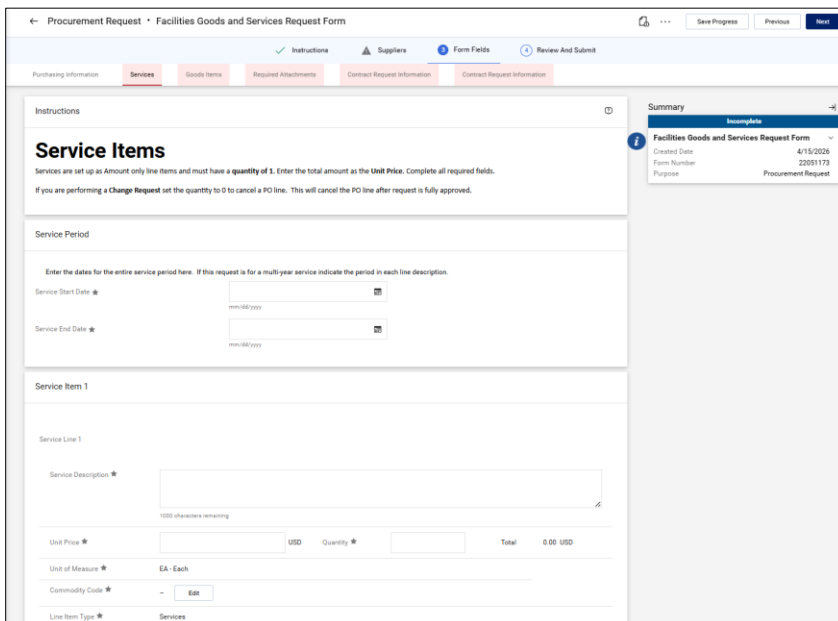
Answer the relevant questions related to the non-UwPA request.

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

Adding Lines

The pages and fields displayed depend on your initial selection on the Purchasing Information page. If you selected a Goods and Services request, the Goods page appears first for adding your Goods items. The Services page will appear next for adding your Services items. If you selected only Services, you will be directed straight to the Services page. You can add up to 20 lines. If you need more than 20 items, you can add them directly on the Requisition after you complete this form and add it to your cart.

Adding a Services Line



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Training Guide: Creating a Facilities Requisition in the CU Marketplace

1. Enter the **Service Start Date** and **Service End Date** fields in the Service Period.
2. Enter a **Service Description**, **Unit Price**, and **Quantity** (must be 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	Select
720000001	Building and Facility Construction and Maintenance Services	Select
72111111	General residential construction contractor service	Select
72141702	Construction equipment rental	Select
72151200	Heating, cooling, air conditioning HVAC construction service	Select
76101601	Construction Waste Removal, Carting Services, Containers and Dumpsters	Select
8110150810	Other Specialty Consultants & Services (Construction & Facilities)	Select
81101513	Building construction management	Select
Z4000000	Facilities & Construction-Other	Select

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 service, select **Yes** for **Would you like to add another line?** If this is a multi-year services request, add another line to represent each fiscal year.

5. Click the **Next** button to continue.

Adding a Goods Line

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

Items Page

This section of the request allows you to add up to 10 items from your selected supplier. If you need more than 10 items, you can add them after you complete this form and add it to your cart.

Multiple Invoices?

Are multiple invoices expected for this goods purchase? Yes No (Amount Only)

Item 1

Item 1

Item Description *

Unit Price * USD Quantity * Total 0.00 USD

Unit of Measure (like EA - Each unless supplier has specified otherwise) *

Catalog No.

Commodity Code * Edit

Summary Incomplete

Facilities Goods and Services Request Form

Created Date 4/15/2026

Form Number 22051173

Purpose Procurement Request

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.

- To find the **Commodity Code** for your goods item, click the **Edit** button. The Commodity Codes search window appears.

Commodity Code	Description	
720000001	Building and Facility Construction and Maintenance Services	Select
72111111	General residential construction contractor service	Select
72141702	Construction equipment rental	Select
72151200	Heating, cooling, air conditioning HVAC construction service	Select
76101601	Construction Waste Removal; Carting Services, Containers and Dumpsters	Select
8110150810	Other Specialty Consultants & Services (Construction & Facilities)	Select
81101513	Building construction management	Select
Z4000000	Facilities & Construction- Other	Select

- Type your Search criteria, click **Enter** and then 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**.

- Click the **Next** button to continue.

Uploading Required Attachments

Based on the Purchasing Information details and the Goods and / or Services lines that you added, the Required Attachments page will display the required documentation (indicated with an asterisk *) that you must upload for your purchase.

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 includes a breadcrumb trail: Procurement Request > Facilities Goods and Services Request Form. The form progress is shown as: Instructions (checked), Suppliers (checked), Form Fields (active), Review And Submit (next). The 'Required Attachments' tab is selected, showing a list of required documents. Each document has a 'No File Attached' status and an 'Upload' button. A 'Summary' panel on the right indicates the form is 'Incomplete'.

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

The 'Upload' dialog box is shown. It has a 'Title' field with 'Quote' entered and a 'File' field with a 'Choose File' button and 'No file chosen' text. A note indicates 'Maximum upload file size: 25.0 MB'. 'Save Changes' and 'Close' buttons are at the bottom.

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, select your document file, and click the **Save Changes** button.

You have the option to upload additional documentation if requested by the Purchasing Team.

Select **Yes** for **Would you like to add any additional attachments?** Additional Attachment upload fields are displayed.

The 'Additional Attachments' section shows a message: 'Based on your previous response, the following additional attachment upload fields are available for use. Providing them is optional.' Below are two attachment fields, 'Attachment #1' and 'Attachment #2', each with a 'No File Attached' status and an 'Upload' button.

3. Click the **Next** button to continue.

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.

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Vouchers Search (Alt+Q) 15,000.00 USD

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 guidance.

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All Search (Alt+Q) 0.00 USD

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 4/9/2026
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

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 or the Contract Request Information pages, click the **Next** button. The Review and Submit page appears.

Name	Address	Phone
4A Construction Corp	Ordering-1: 128 LAND LN, WESTBURY, New York 11590-6247 United States	

Section	Action
Purchasing Information	Edit
Services	Edit
Goods Items	Edit
Required Attachments	Edit
Contract Request Information	Edit
Contract Request Information	Edit

Field	Value
Facilities Goods and Services Request Form	
Created Date	4/15/2026
Form Number	22051173
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 items in this Request are not added to an Active Cart.

Section	Action
Purchasing Information	Edit
Services	Edit
Goods Items	Edit
Required Attachments	Edit
Contract Request Information	Edit
Contract Request Information	Edit

Field	Value
Facilities Goods and Services Request Form	
Created Date	4/15/2026
Form Number	22051173
Purpose	Procurement Request

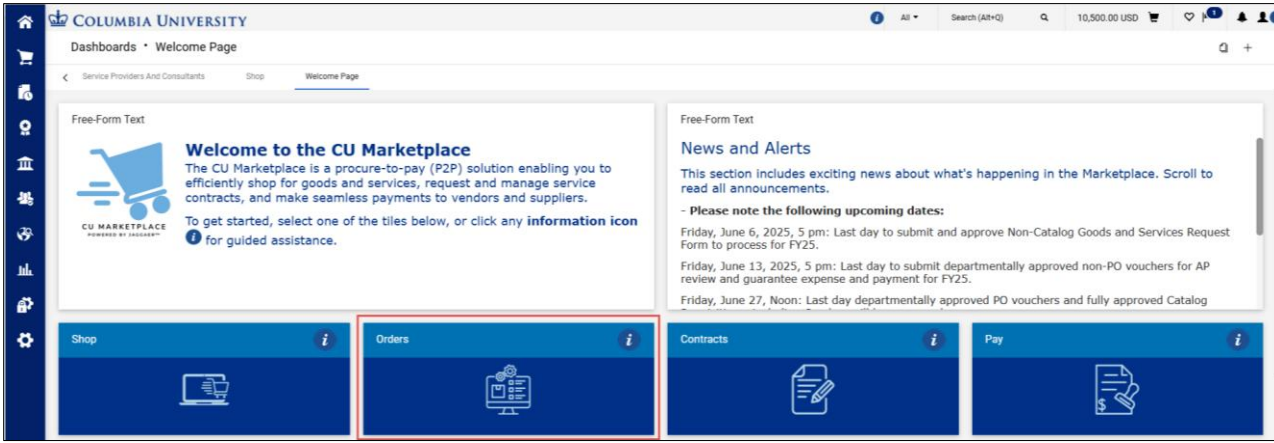
Click the dropdown menu next to Add and go to Cart and select **Add to new Cart**.

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](#).

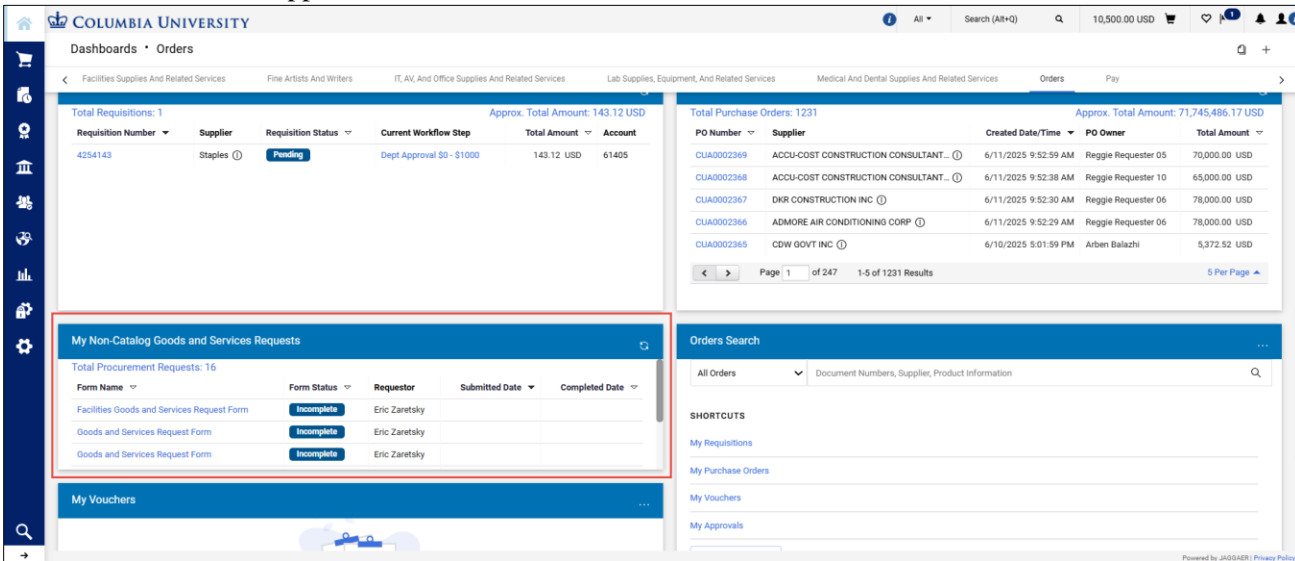
Accessing In-Progress Requests

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

Contact the Finance Service Center

<http://finance.columbia.edu/content/finance-service-center>

Log an incident or request a service via Service Now

<https://columbia.service-now.com>