

The CU Marketplace powered by JAGGAER provides powerful search functionality with results that can be filtered and refined. You can save and organize Searches so that you can easily run them again in the future to get the most up to date information regarding transactions and document status. In addition, Search results can be exported to Excel for further analysis.

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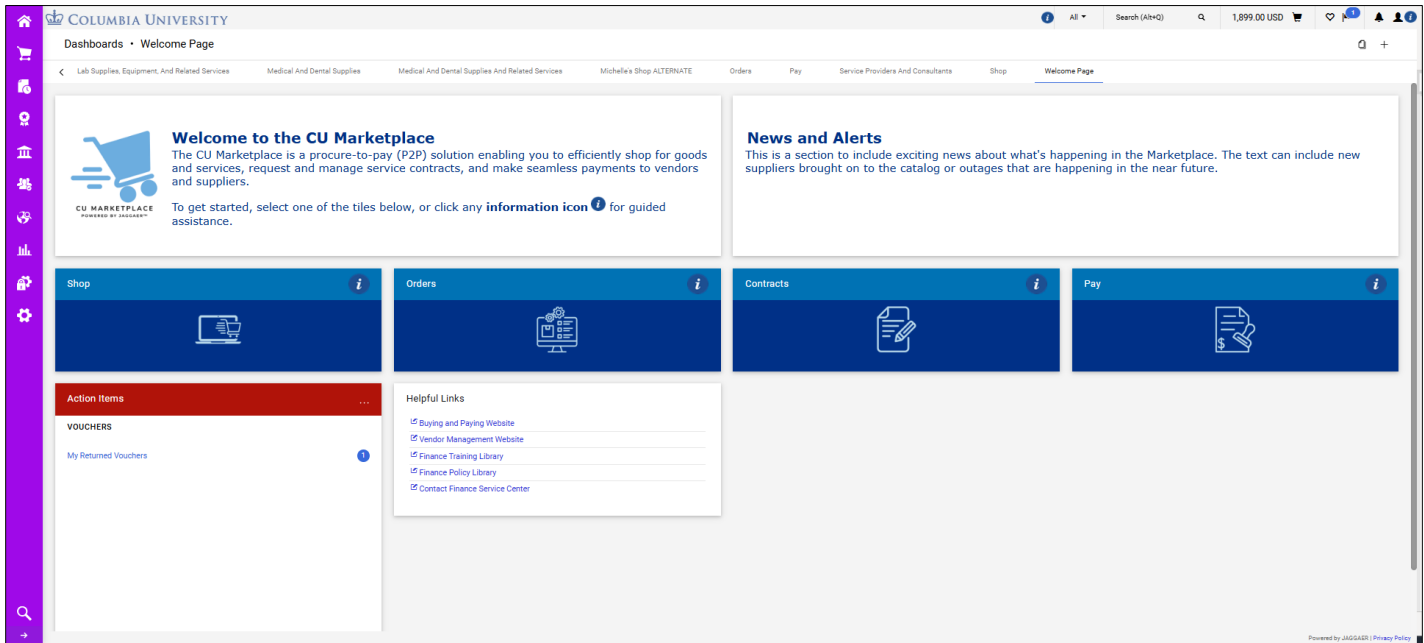
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Accessing the CU Marketplace

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



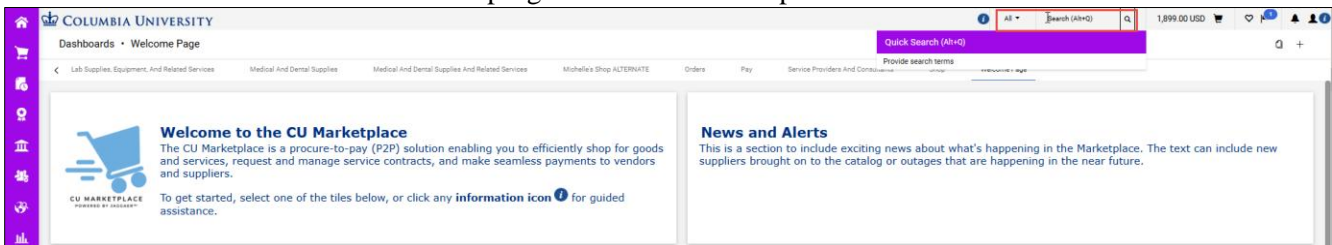
The CU Marketplace launches.



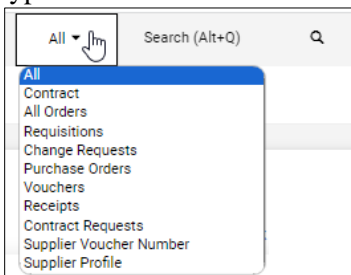
Using Quick Search

You can use the Quick Search to find documents related to your CU Marketplace transactions. The Quick Search can be set to find all related documents or you can choose to search among specific types of documents.

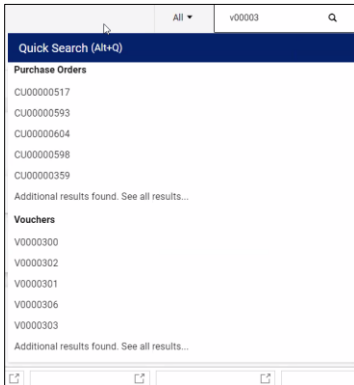
1. Click in the **Quick Search** field on the top right of the CU Marketplace window.



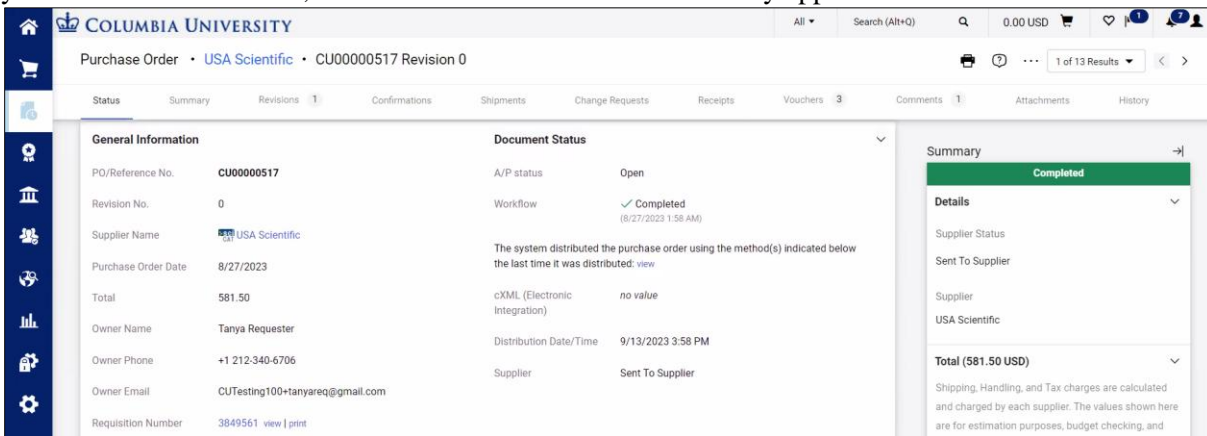
Optionally, you can click the dropdown next to the Quick Search field to narrow your search to a specific document type.



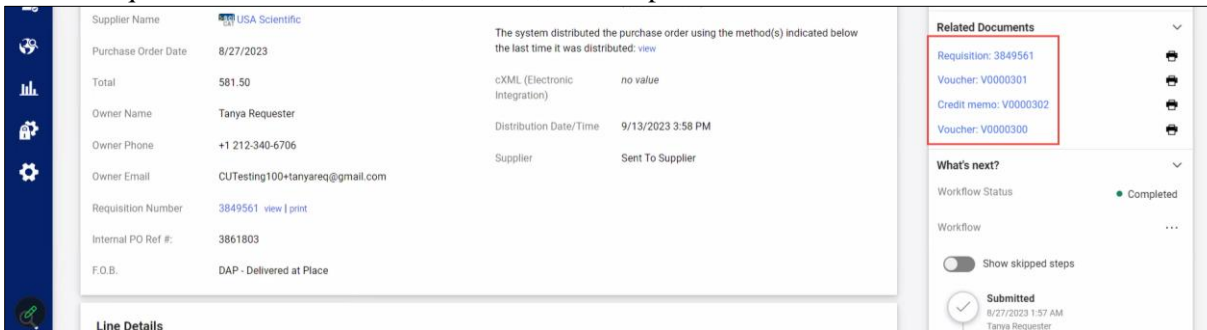
2. Type your search criteria.



3. You can click the matching document number that appears as you type or press Enter to view a list of matches. If you select an exact match, the document screen will automatically appear.

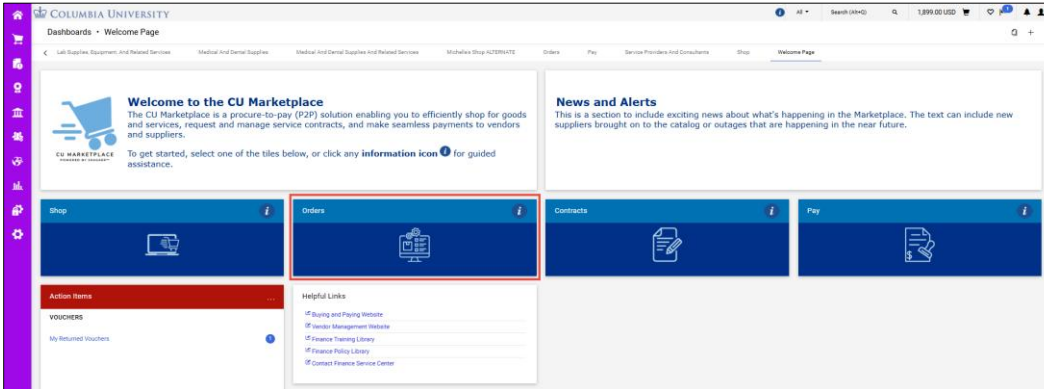


The **Summary Panel** of the document contains links to **Related Documents** so that you can easily navigate to related Requisition, Purchase Order, Voucher, or Receipt documents.

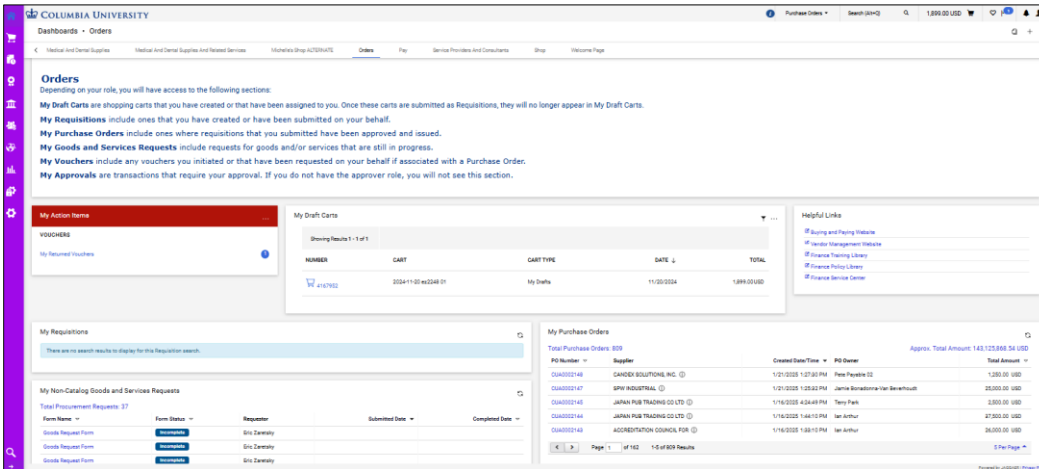


Using the Orders Dashboard

Click the **Orders** tile.



The **Orders** dashboard appears.



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.

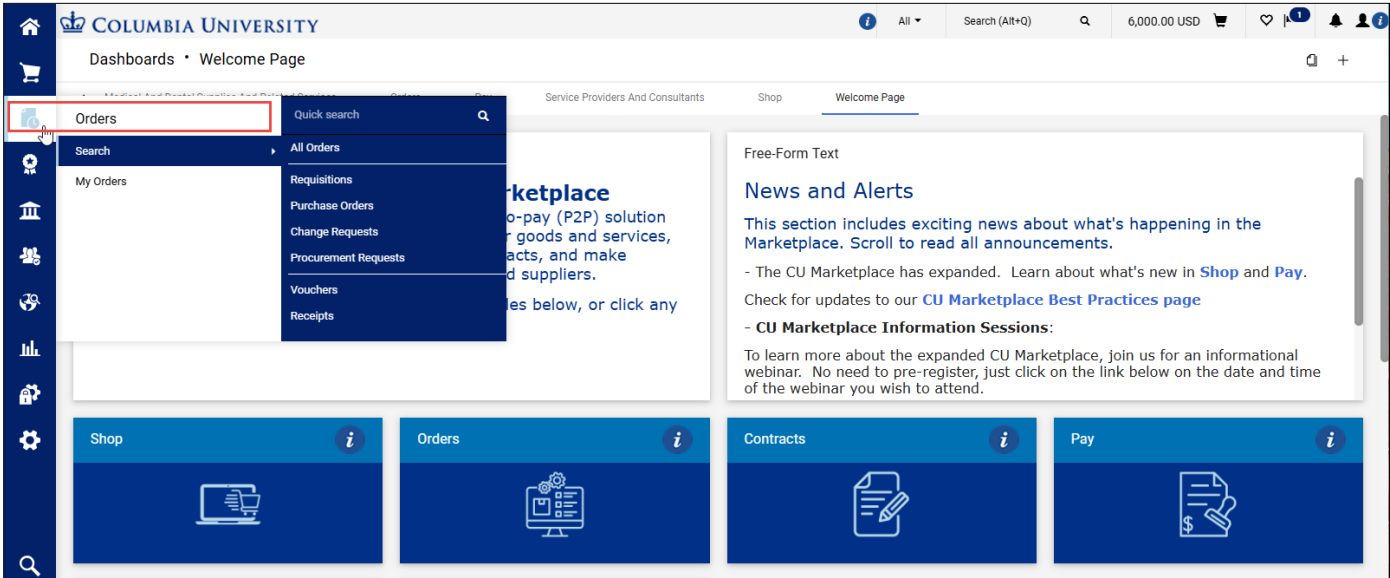
My Goods and Services Requests include requests for goods and/or services that are still in progress.

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.

Viewing Search Lists via the Orders Menu

The **Orders** menu allows you to navigate directly to lists containing all of your **Requisitions**, **Purchase Orders**, **Procurement Requests** (draft Non-Catalog Goods and Services Requests), **Vouchers**, **Receipts** (required for Catalog orders when a line is equal to or greater than \$5,000), or **All Orders**. The menu also contains a **Quick Search** field to search for documents.



Click the **Orders** icon then **Search** menu then select type of document to view. The Search screen appears for the type of document you selected.


 A screenshot of the 'Search Requisitions' screen. The page title is 'Search Requisitions' and it includes options for 'Save As', 'Pin Filters', and 'Export All'. Below the title is a search bar with 'Submitted Date: Last 90 days' and a 'Quick search' field. The main content is a table with 170 results, showing columns for Requisition Number, Supplier, Requisition Name, Requisition Status, Prepared For, Submitted Date, and Total Amount.

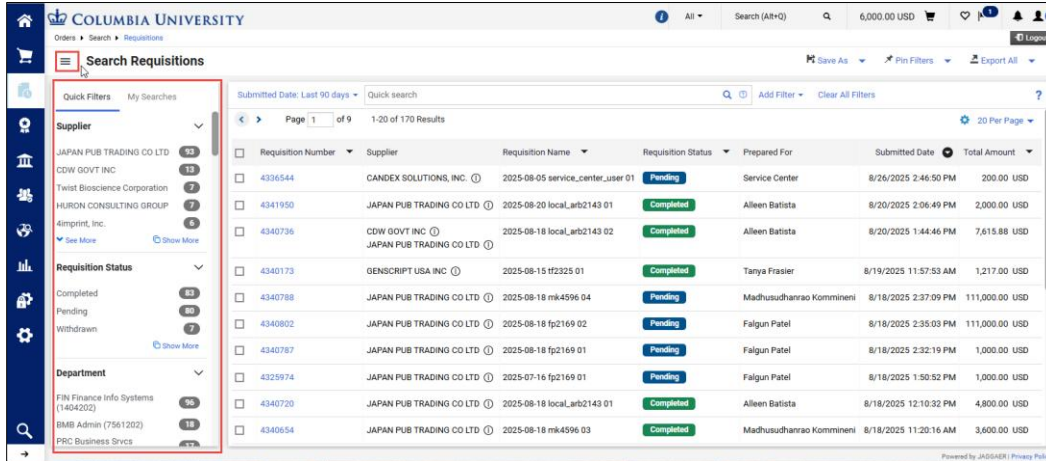
Requisition Number	Supplier	Requisition Name	Requisition Status	Prepared For	Submitted Date	Total Amount
4336544	CANDEX SOLUTIONS, INC.	2025-08-05 service_center_user 01	Pending	Service Center	8/26/2025 2:46:50 PM	200.00 USD
4341950	JAPAN PUB TRADING CO LTD	2025-08-20 local_arb2143 01	Completed	Alleen Batista	8/20/2025 2:06:49 PM	2,000.00 USD
4340736	CDW GOVT INC JAPAN PUB TRADING CO LTD	2025-08-18 local_arb2143 02	Completed	Alleen Batista	8/20/2025 1:44:46 PM	7,615.88 USD
4340173	GENSCRIPT USA INC	2025-08-15 tf2325 01	Completed	Tanya Frasier	8/19/2025 11:57:53 AM	1,217.00 USD
4340788	JAPAN PUB TRADING CO LTD	2025-08-18 mk4596 04	Pending	Madhusudhanrao Kommineni	8/18/2025 2:37:09 PM	111,000.00 USD
4340802	JAPAN PUB TRADING CO LTD	2025-08-18 fp2169 02	Pending	Falgun Patel	8/18/2025 2:35:03 PM	111,000.00 USD
4340787	JAPAN PUB TRADING CO LTD	2025-08-18 fp2169 01	Pending	Falgun Patel	8/18/2025 2:32:19 PM	1,000.00 USD
4325974	JAPAN PUB TRADING CO LTD	2025-07-16 fp2169 01	Pending	Falgun Patel	8/18/2025 1:50:52 PM	1,000.00 USD
4340720	JAPAN PUB TRADING CO LTD	2025-08-18 local_arb2143 01	Completed	Alleen Batista	8/18/2025 12:10:32 PM	4,800.00 USD
4340654	JAPAN PUB TRADING CO LTD	2025-08-18 mk4596 03	Completed	Madhusudhanrao Kommineni	8/18/2025 11:20:16 AM	3,600.00 USD

Filtering Search Lists

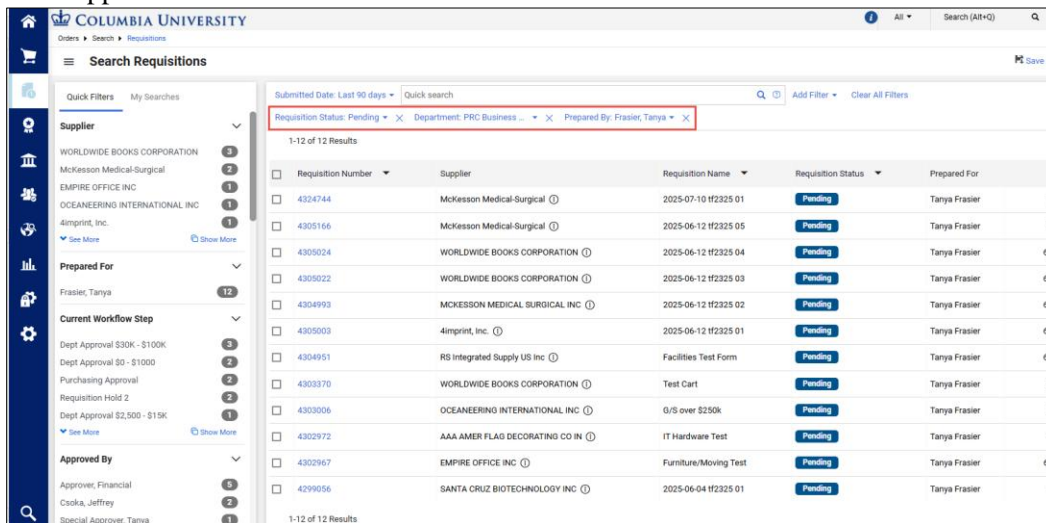
Using Quick Filters

You can use the **Quick Filters** section on the left or the filters above the list to narrow the list to those documents that contain specific attributes.

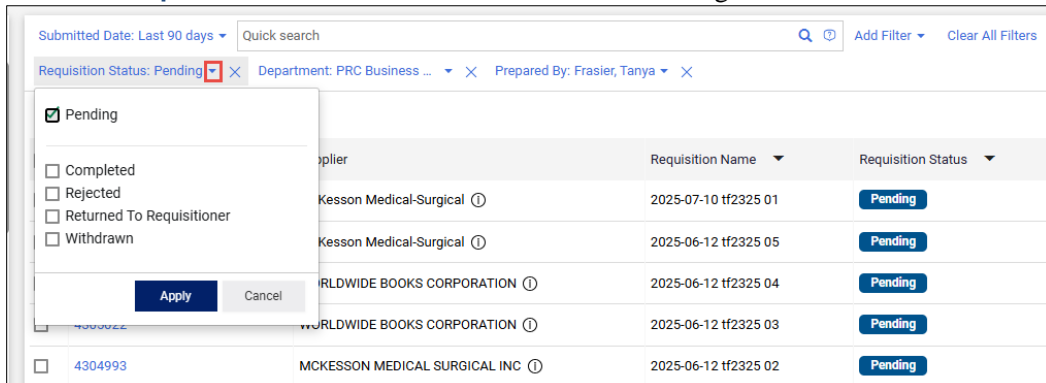
1. Click the **Show Side Panel**  icon to view the Quick Filters panel.




2. Select the **Filter** from the panel to narrow the list to those documents that contain specific attributes. Each selected Filter appears above the list.



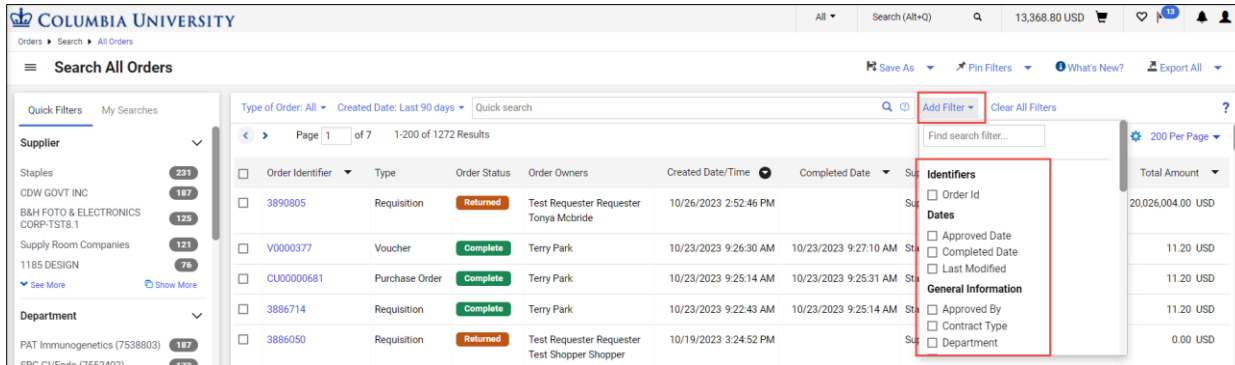
3. Click the **dropdown arrow** next each Filter to select or change the Filter values and click **Apply**.



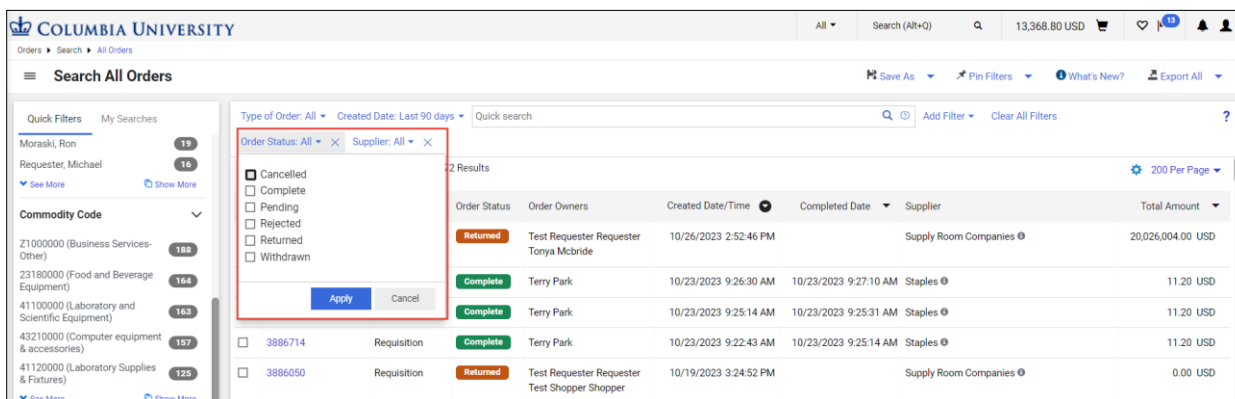
Click the **Remove**  icon for Filters that you want to remove from the list.

Adding Filters to Search Lists

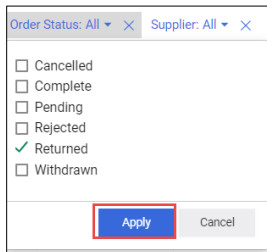
1. Click the **Add Filter** button and select **Search Filters** to add to the top of your list that you can use to find specific documents.



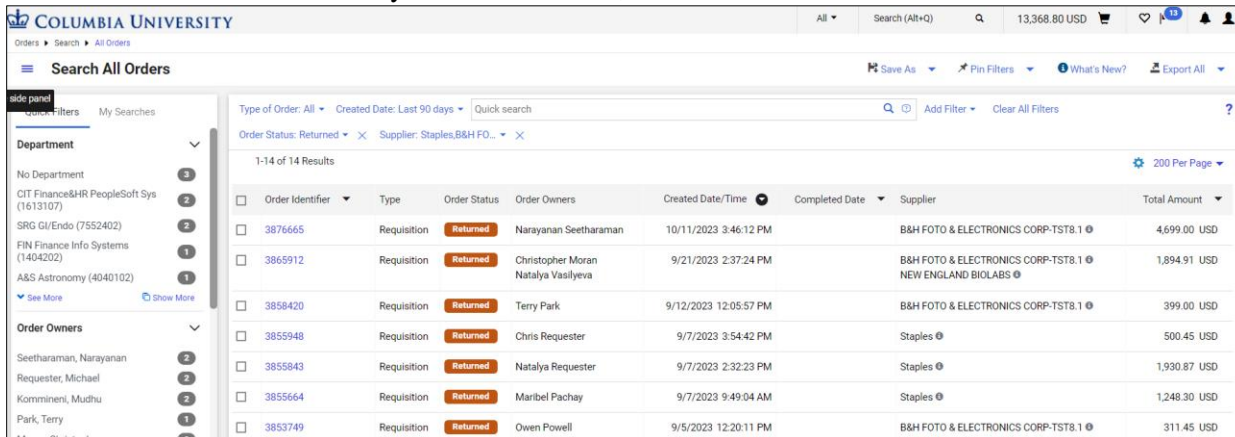
The Filter(s) you added appear above the list column headers.



2. Enter or select the desired values in the Filters you added and click **Apply** for each filter.



The list will be filtered based on your desired values,

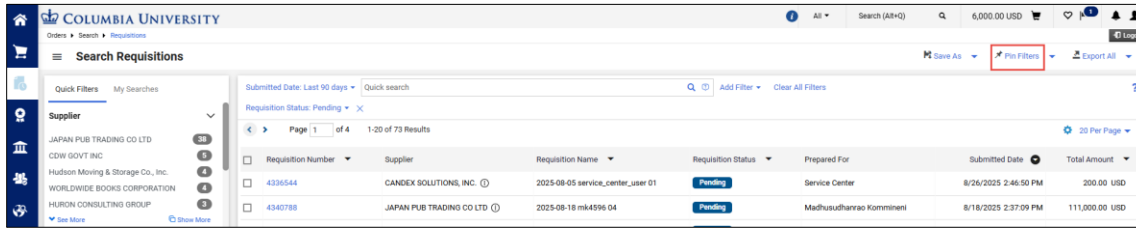


Click the **Remove** icon for Filters that you want to remove from the list.

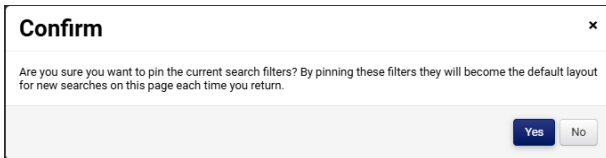
Pinning Filters

After you select Filters and Pin them, that layout becomes the default for the Search page for that Order type each time you return.

1. Click the **Pin Filters** button.

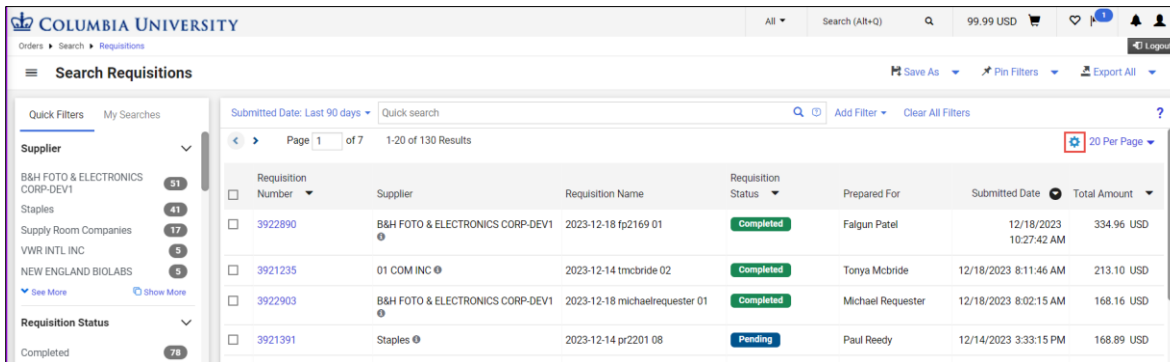


2. Click **Yes** to confirm.

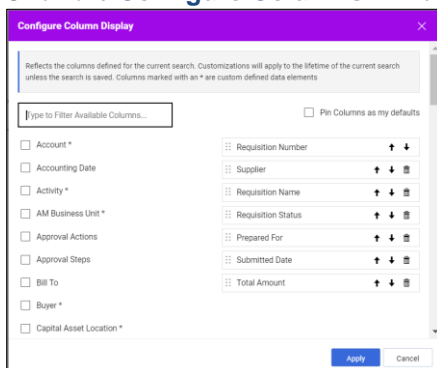


Configuring Search List Columns

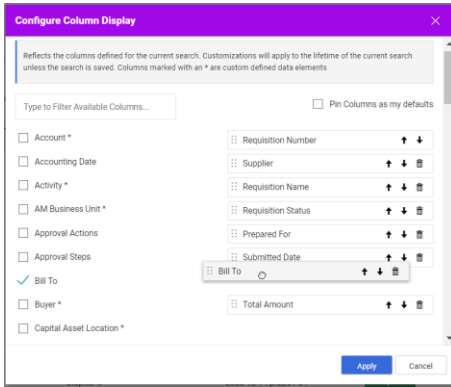
You can choose the columns that display in the search results and the order in which they display.



1. Click the **Configure Columns** icon above the document list. The Configure Column Display screen displays.



2. Select from the list of **Available Columns** on the left side of the window. The selected columns will appear on the right side of the window.

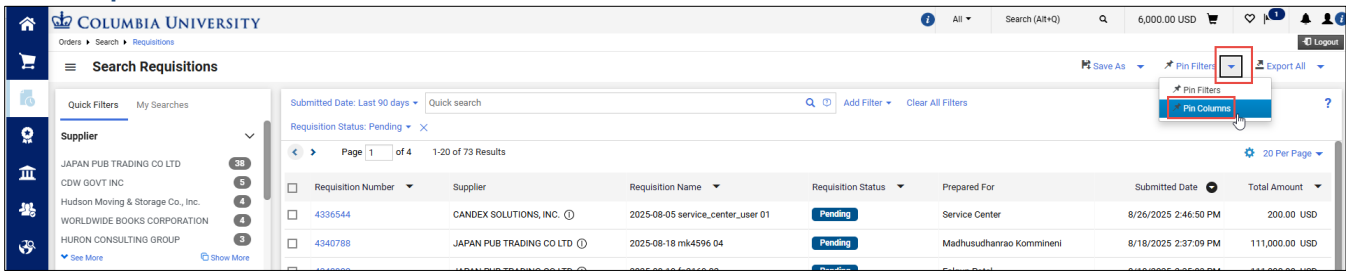


3. Drag and drop the selected columns on the right side of the window up or down depending on your desired order.
3. If desired, you can select **Pin Columns as my default** so that your selected column configuration is the default each time you search.
4. Click **Apply**.

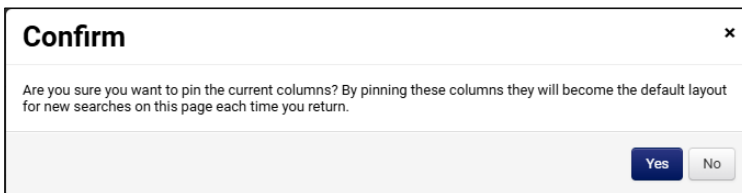
Pinning Columns

After you configure Columns and Pin them, that Column layout becomes the default for the Search page for that Order type each time you return.

Click the **dropdown** arrow next to the Pin Filters and click **Pin Columns**.



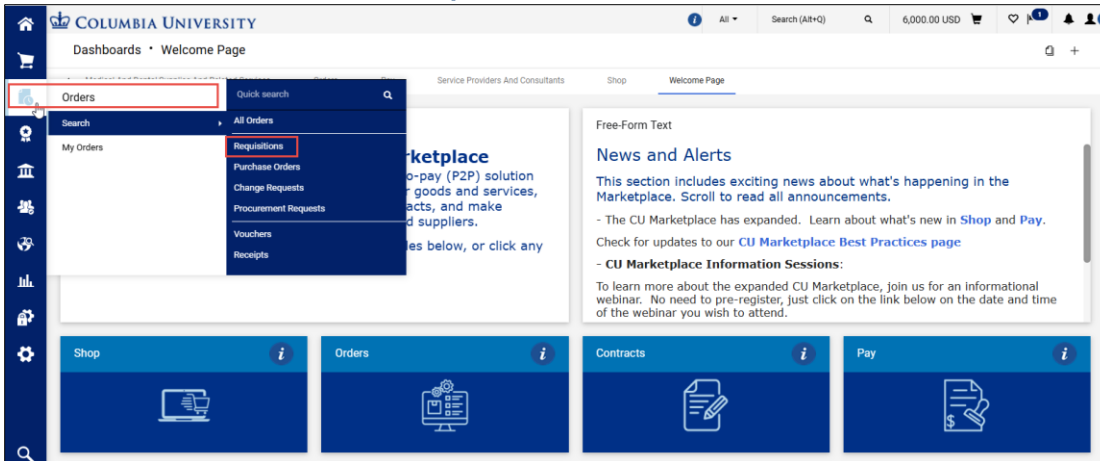
2. Click **Yes** to confirm.



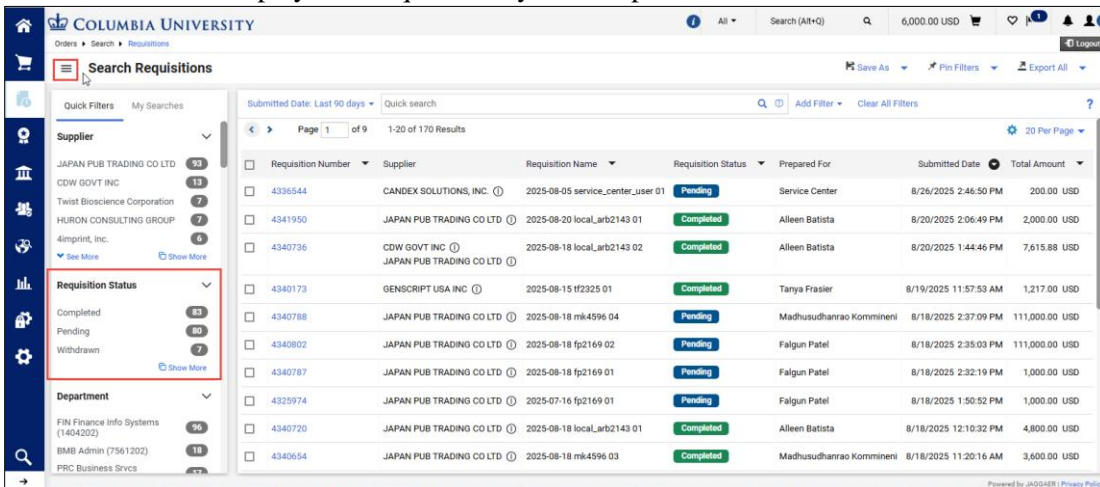
Example Searches

Viewing Requisition by Status

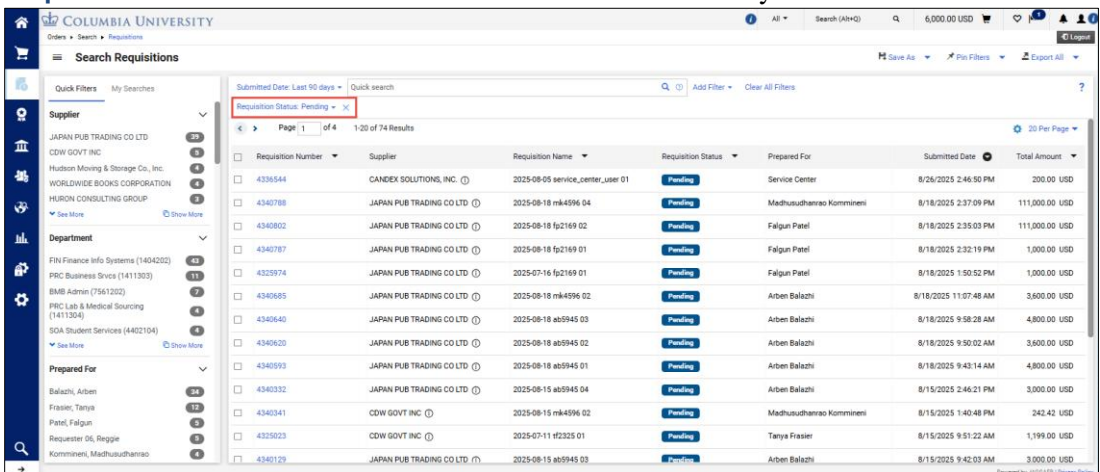
1. Click the **Orders** menu and select **Requisitions**.



The Search screen displays all Requisitions you have permission to view.



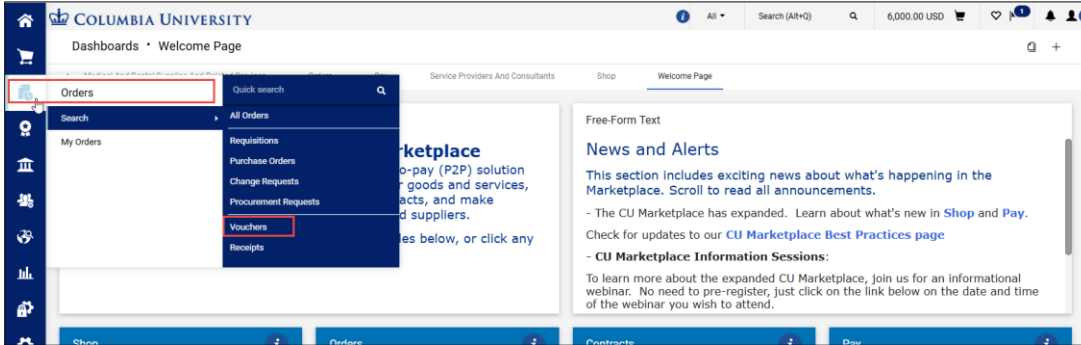
2. Click the **Show Side Panel** icon to view the Quick Filters panel and select the desired **Quick Filter** from **Requisition Status** section. The Search results will be filtered by that status.



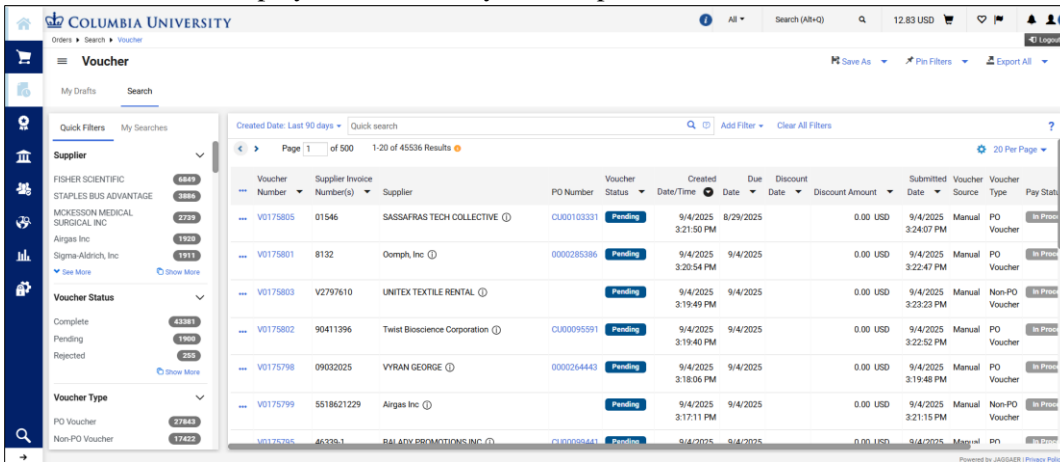
You can click the **dropdown arrow** next each Filter to select or change the Filter values and click **Apply**. You can add additional Filters or click the **Remove** icon to remove the Filter from the list.

Viewing Voucher Pay Status

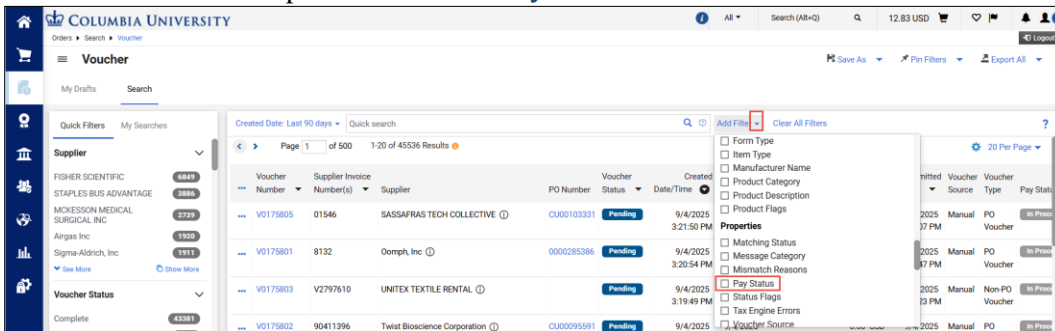
1. Click the **Orders** menu and select **Vouchers**.



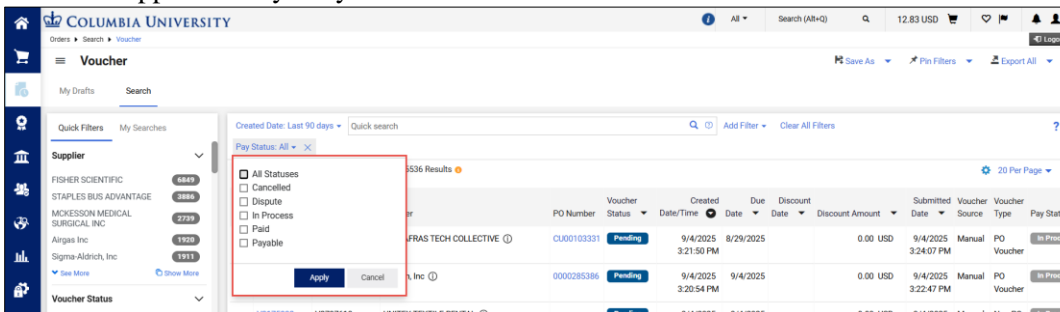
The Search screen displays all Vouchers you have permission to view.



2. Click the **Add Filter** dropdown and select **Pay Status**.



The Filter appears ready for you to set.

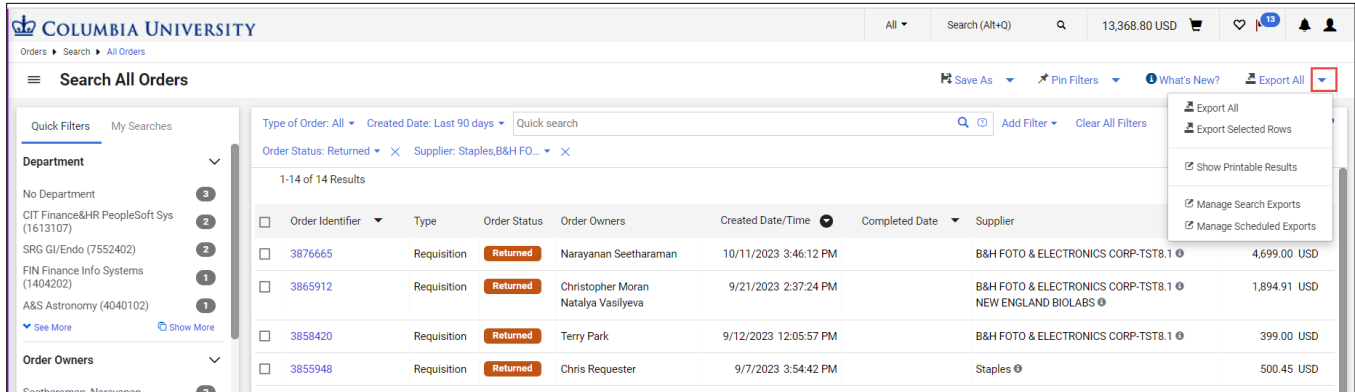


3. Select the Filter value(s). The Search list will be filtered by the Pay Status(es) you selected.

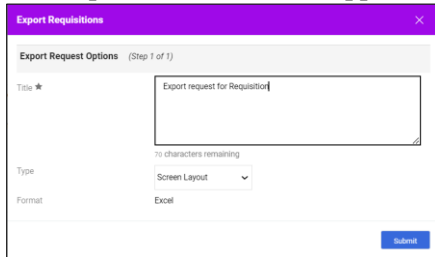
Exporting Your Search List

After your Search list contains the desired information, you can export the whole list or select individual rows to export to Excel.

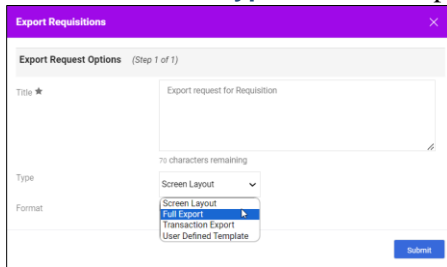
1. Click the dropdown menu next to the **Export All** button. If you selected the checkboxes for individual rows to be exported, you can select **Export Selected Rows**. If you want to export all rows, select **Export All**.



The Export Orders window appears.



2. The **Title** field can be edited to reflect the data you are exporting.
3. Select the desired **Type** from the dropdown.



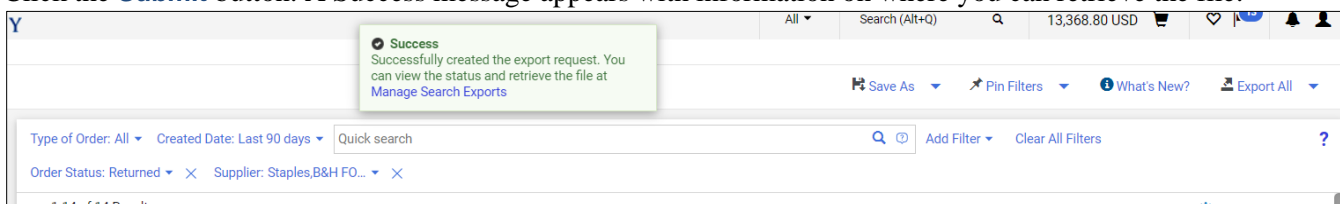
Screen Layout - Exports the search results as an Excel file exactly as they appear on the screen with no additional data.

Full Export - Exports all information available about the transaction associated with each document in CSV format. Full exports also include document history such as approvals, comments and more.

Transaction Export – Exports all information available about the transaction associated with each document in CSV format.

User Defined Templates - Access to custom templates that are configured to export specific fields and files.

4. Click the **Submit** button. A Success message appears with information on where you can retrieve the file.



- Click the dropdown next to **Export All** and select **Manage Search Exports**.

The screenshot shows the 'Search All Orders' interface. At the top right, there is a search bar and a user profile icon. Below the search bar, there are filters for 'Type of Order', 'Created Date', and 'Order Status'. A table of search results is visible, with columns for 'Order Identifier', 'Type', 'Order Status', 'Order Owners', 'Created Date/Time', 'Completed Date', and 'Supplier'. The 'Export All' dropdown menu is open, and the 'Manage Search Exports' option is highlighted with a red box.

The Manage Exports screen appears.

The screenshot shows the 'Manage Search Exports' screen. It has a navigation bar with 'Export Requests', 'Export Schedules', and 'Export Templates'. Below this is a table with the following columns: Title, Status, Search Type, Export Output, Created, Completed, Available Until, Details, and Actions. The first row in the table has the title 'Test Export request for All Orders' highlighted with a red box. The status is 'Completed', and the details show 'Total Records: 1452'.

- Click the Title of the file to export. The file will be available to download from your browser.

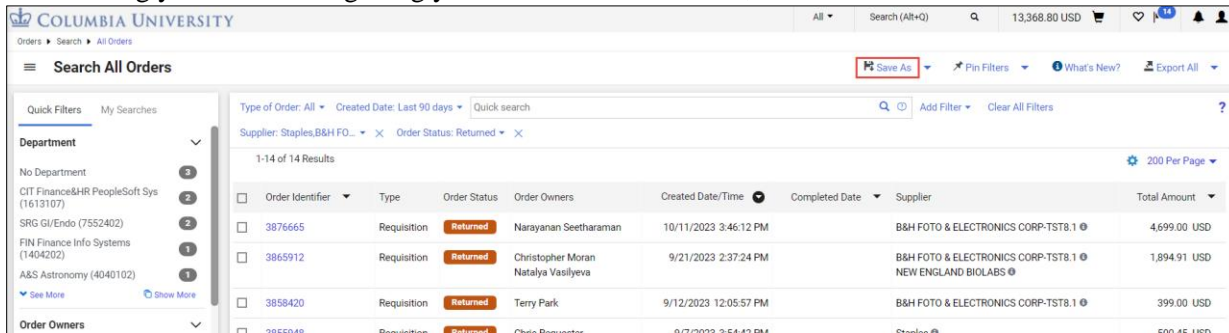
The screenshot shows an Excel spreadsheet titled 'Export request for All Orders'. The spreadsheet contains a table with the following columns: Order Identifier, Type, Order Status, Order Owners, Created Date/Time, Completed Date, and Supplier. The first row is highlighted, and the status is 'Completed'.

Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier
3876665	Requisition	Returned	Narayanan Seetharaman	10/11/2023 3:46 PM		B&H FOTO & ELECTRONICS CORP-TST8.1
3865912	Requisition	Returned	Christopher Moran, Natalya Vasilyeva	09/21/2023 2:37 PM		B&H FOTO & ELECTRONICS CORP-TST8.1, NEW ENGLAND BIOLA
3858420	Requisition	Returned	Terry Park	09/12/2023 12:05 PM		B&H FOTO & ELECTRONICS CORP-TST8.1
3855948	Requisition	Returned	Chris Requester	09/07/2023 3:54 PM		Staples
3855843	Requisition	Returned	Natalya Requester	09/07/2023 2:32 PM		Staples
3855664	Requisition	Returned	Maribel Pachay	09/07/2023 9:49 AM		Staples
3853749	Requisition	Returned	Owen Powell	09/05/2023 12:20 PM		B&H FOTO & ELECTRONICS CORP-TST8.1
3852033	Requisition	Returned	Narayanan Seetharaman	08/31/2023 2:20 PM		B&H FOTO & ELECTRONICS CORP-TST8.1
3847914	Requisition	Returned	Mudhu Kommineni	08/24/2023 2:45 PM		CDW GOVT INC, Staples
3842731	Requisition	Returned	Michael Requester	08/15/2023 3:32 PM		B&H FOTO & ELECTRONICS CORP-TST8.1
3837320	Requisition	Returned	Terry Requester Park	08/07/2023 2:38 PM		B&H FOTO & ELECTRONICS CORP-TST8.1
3833823	Requisition	Returned	Mudhu Kommineni	08/01/2023 2:22 PM		Staples
3833715	Requisition	Returned	Michael Requester	08/01/2023 12:00 PM		B&H FOTO & ELECTRONICS CORP-TST8.1
3833709	Requisition	Returned	Mark Requester	08/01/2023 11:29 AM		Staples

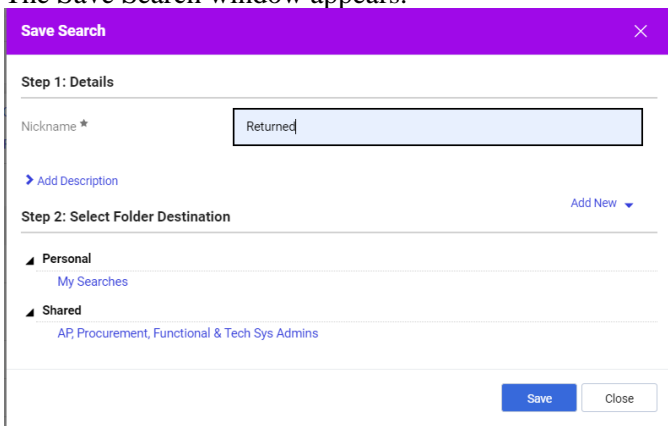
Saving Your Searches

After setting your desired Search criteria and filters, you can save the Search so that you can run it again in the future.

1. After setting your filters and getting your desired search results, click the **Save As** button.



The Save Search window appears.



2. Enter a **Nickname** for your Search.
3. Select the **Folder Destination**. If you have previously created **Personal** folders, they will be available to select here. Refer to Creating a Personal Folder within the Managing Searches section in this document on how to create a Personal folder.
4. Click the **Save** button.

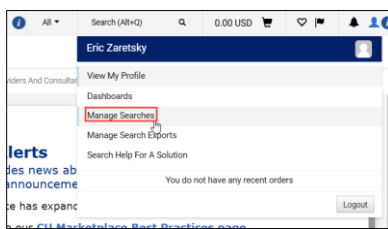
Managing Searches

Your saved Searches can be accessed via the Manage Searches screen in the CU Marketplace. From there, you can organize them, run, edit, or export them, among other tasks.

Navigating to the Manage Searches Screen and Managing Searches

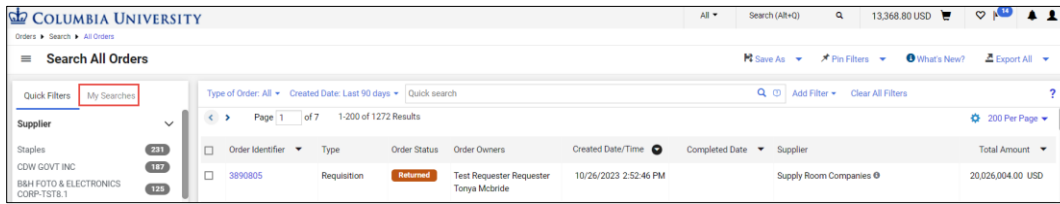
You can access Manage Searches from several places within the CU Marketplace. The two quickest methods are described below:

Click the **Profile**  icon at the top right corner of the CU Marketplace screen and select **Manage Searches**.

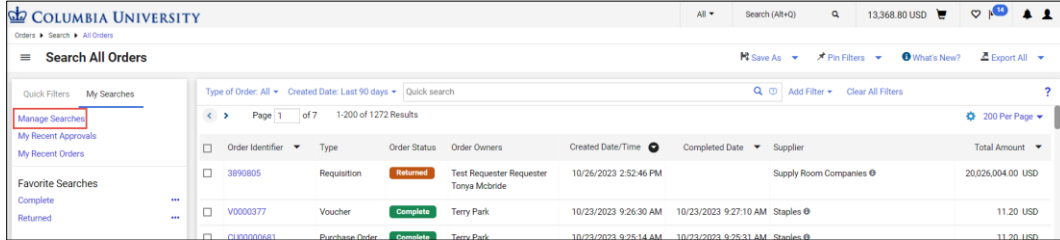


OR...

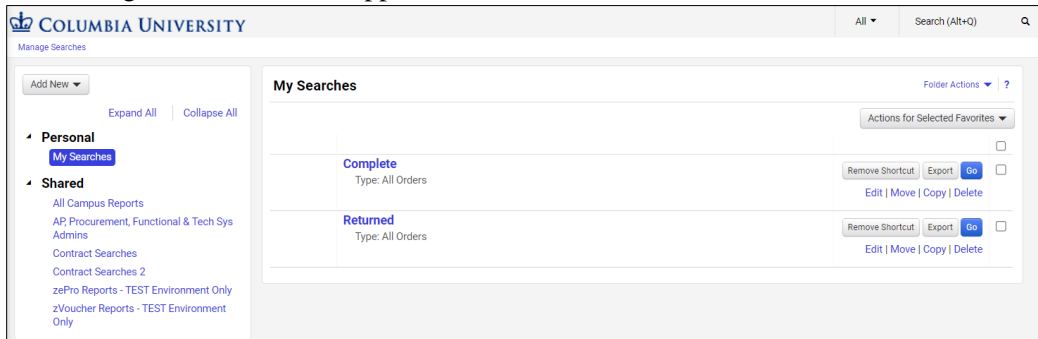
1. From the Search screen, click **My Searches** from the Quick Filters panel on the left side of the screen.



2. Click **Manage Searches**. Note that the Searches that you previously saved appear under Favorite Searches.



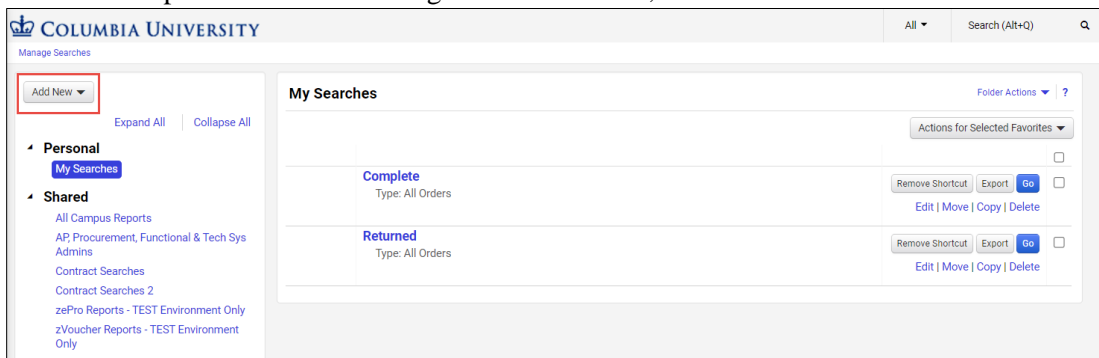
The Manage Searches screen appears.



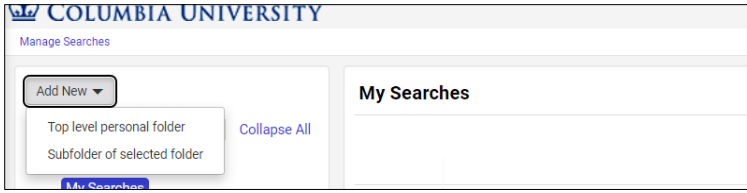
- You can select Folders from the left panel to view the saved Searches in that folder.
- For each Search listed, you can click **Remove Shortcut** to remove the Search from the Folder, click **Export** to export the latest Search results to Excel, or click **Go** to view the latest Search results on screen.
- Links are also provided to **Edit**, **Move**, **Copy** or **Delete** the Search.

Creating a Personal Folder

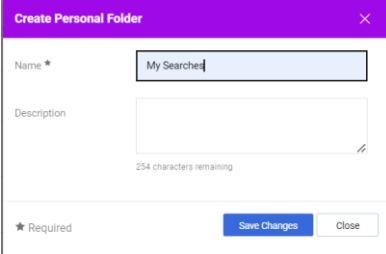
1. From the left panel within the Manage Searches screen, click the Add New button



2. Select either **Top level personal folder** or select a previously created personal folder from your list and select **Subfolder of selected folder**. The option to select Subfolder of selected folder is only available if you have previously created at least one Top level personal folder.




3. Enter a **Name** for the Personal Folder. Optionally, you can enter a Description.

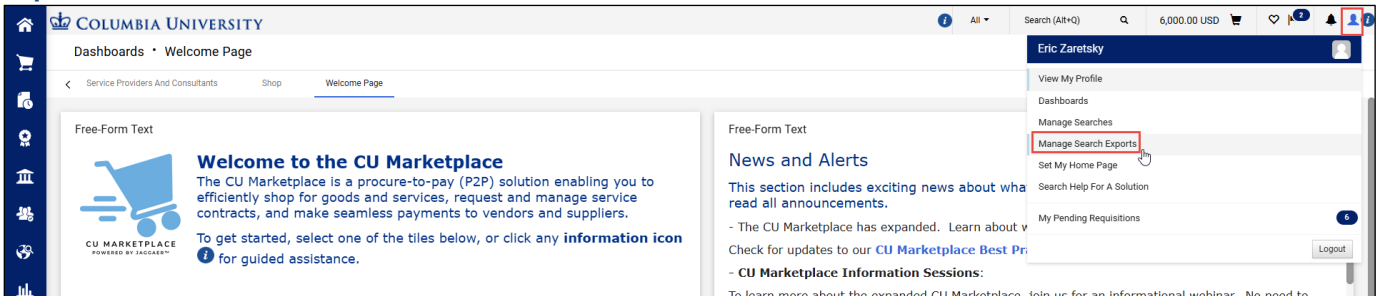


4. Click the **Save Changes** button.

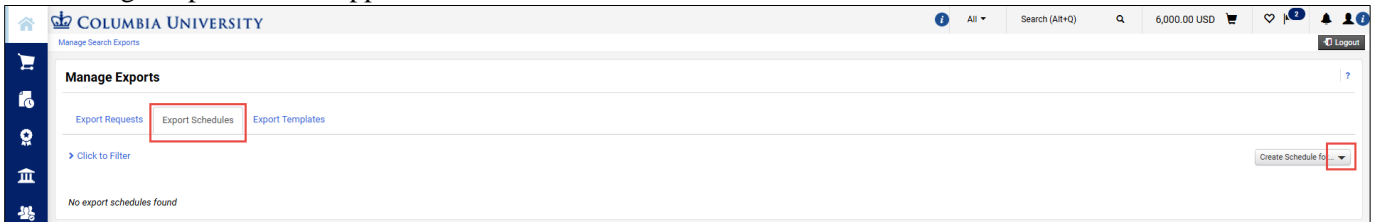
Scheduling Reports

You can schedule saved reports so they can be exported to Excel and retrieved on a set schedule.

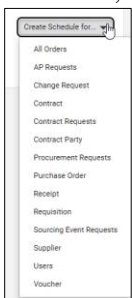
1. Click the **Profile**  icon in the upper right corner of the CU Marketplace screen and select **Manage Search Exports**.



The Manage Exports screen appears.



2. Click the **Export Schedules** tab.
3. Click the **Create Schedule for** dropdown menu and select the type of Order that your Saved Search falls under. For example, if you saved a Search that is a list of Requests, select Requisition; if your Saved Search is a list of Vouchers, select Vouchers, etc.



The Schedule Export window appears.

4. Click the **Search to Export** dropdown and select the Saved Search you want to schedule from either the Shared or Personal Folder.
5. Set your desired scheduling parameters.

6. Click the **Save** button. You **Export Schedules** tab will display the scheduled item.

Search To Export	Status	Created	Export Content	Frequency	Ending	Next Run	Actions
Pending Requisition	Enabled	9/5/2025 4:08:29 PM	Search Type: Requisition Export Content: Screen Layout-Excel	Daily More	9/12/25	9/6/2025 12:00:00 AM	Edit

After the report is run at the scheduled time, it will appear in the **Export Requests** tab ready for you to export.

Search To Export	Status	Created	Export Content	Frequency	Ending	Next Run	Actions
Pending Requisition	Enabled	9/5/2025 4:08:29 PM	Search Type: Requisition Export Content: Screen Layout-Excel	Daily More	9/12/25	9/6/2025 12:00:00 AM	Edit

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>