

You can shop for items in the Marketplace from Catalog Suppliers. Shoppers can create a Shopping Cart with items from Catalog Suppliers but must assign it to a colleague who has a Procurement Initiator role, who can then submit into workflow as a Requisition. Procurement Initiators can create their own Shopping Carts and submit them into workflow as Requisitions.

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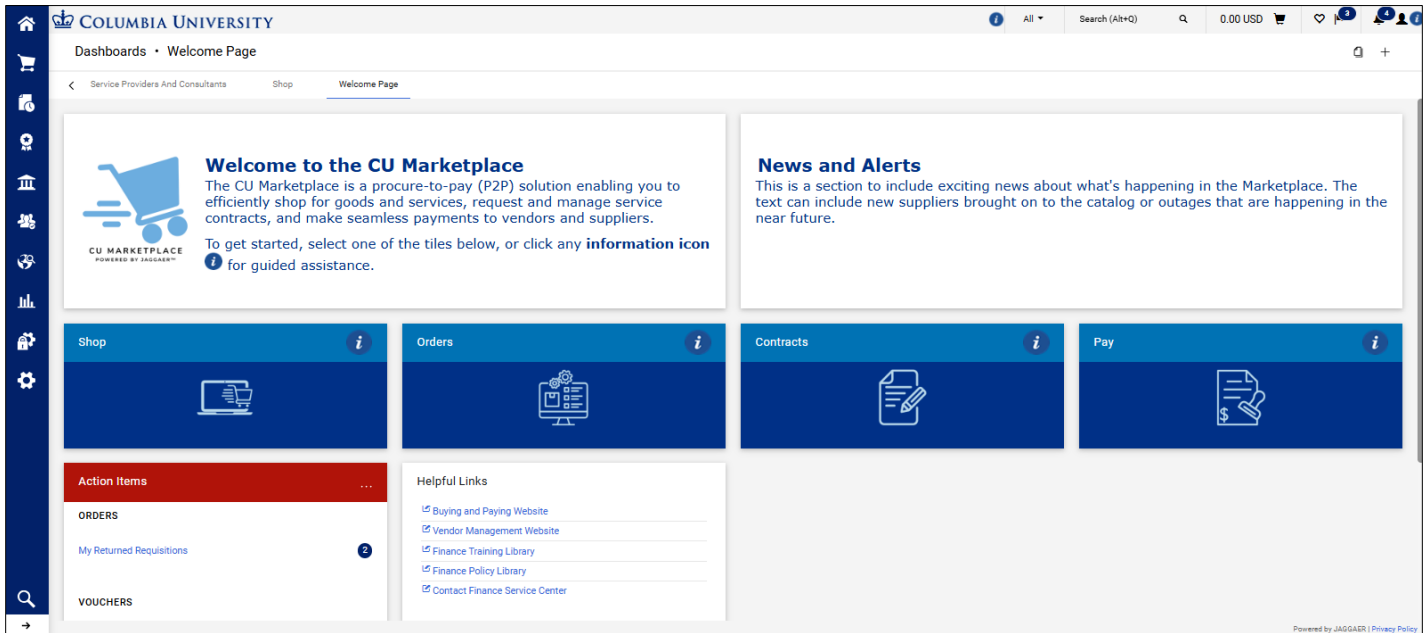
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### Accessing the CU Marketplace

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



The CU Marketplace launches.

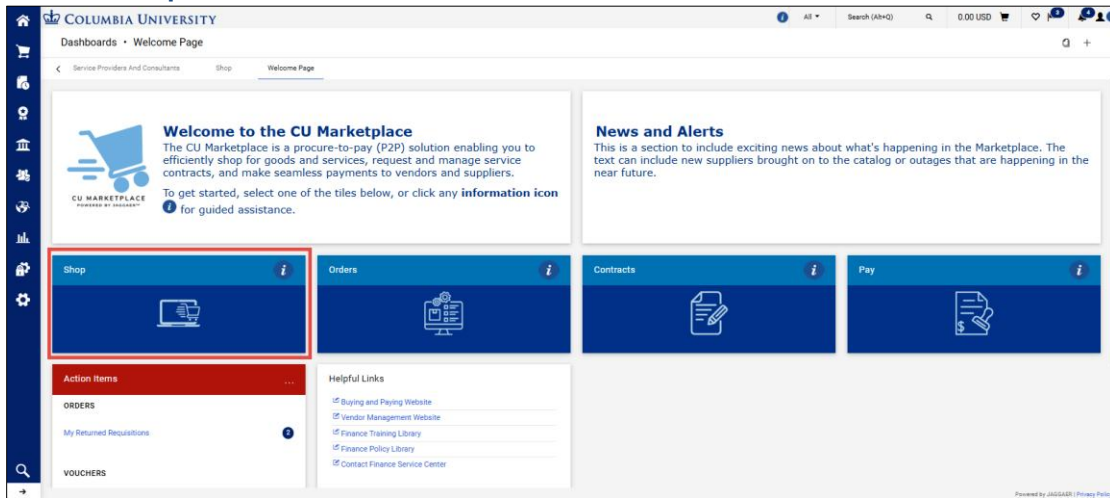


Those with a Shopper role will only have access to the Shop and Orders tiles. Procurement Initiators will have full access to all tiles displayed above.

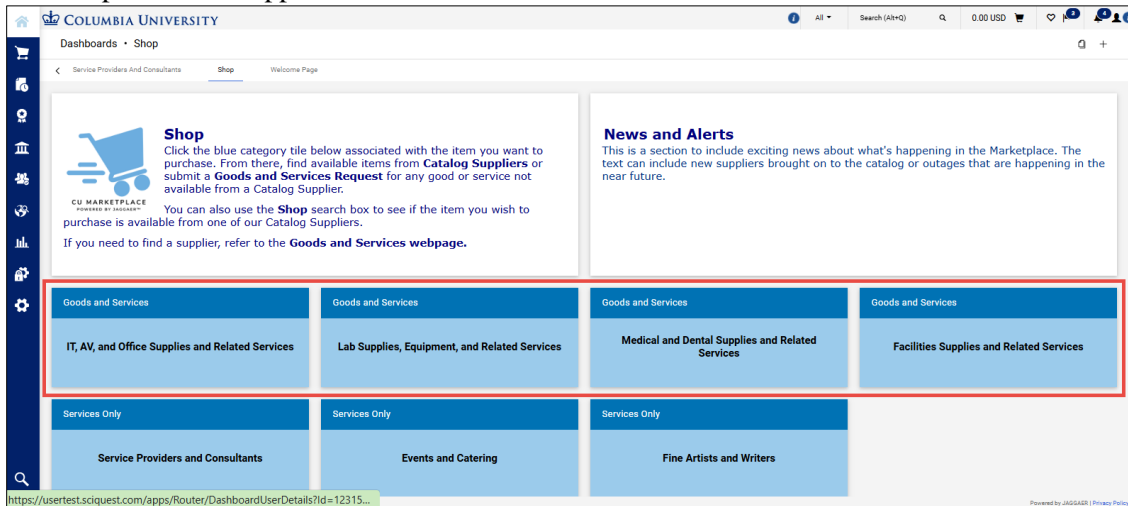
**Note:** The CU Marketplace will automatically timeout after thirty minutes of inactivity, consistent with other University Enterprise Systems.

### Shopping for Catalog Items

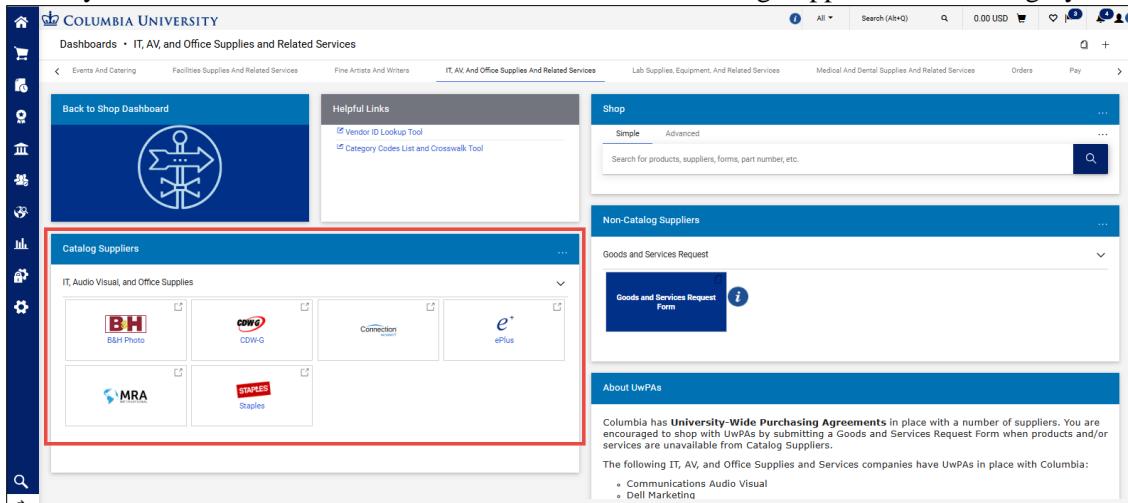
1. Click the **Shop** tile.



The Shop dashboard appears.



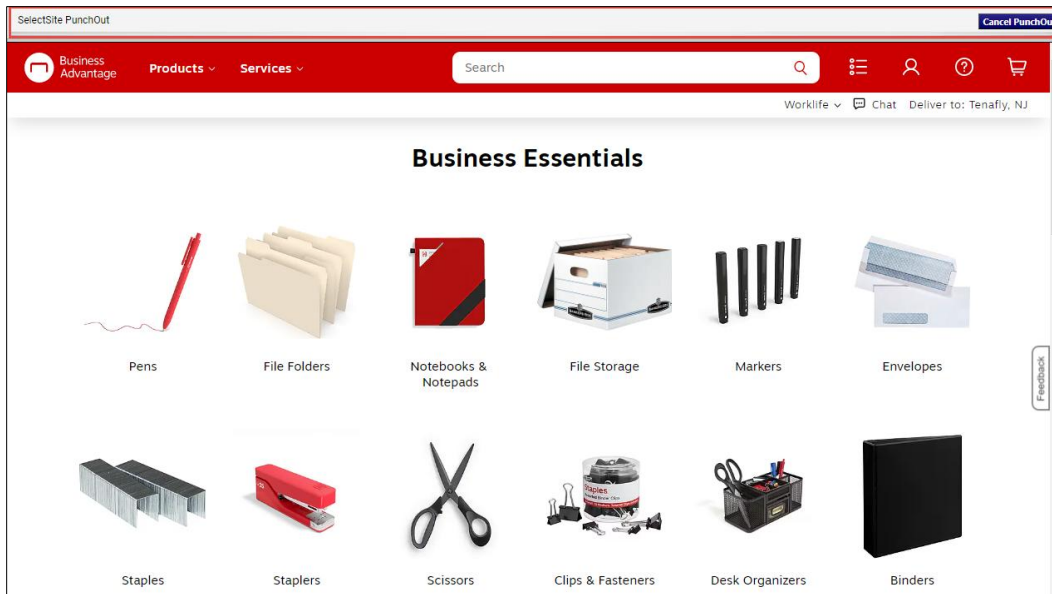
2. Click anyone of the **Goods and Services** tiles to view the Catalog Suppliers in that category.



3. Click on the desired Catalog Supplier tile to shop from that Supplier. You will then “PunchOut” to the Supplier website.

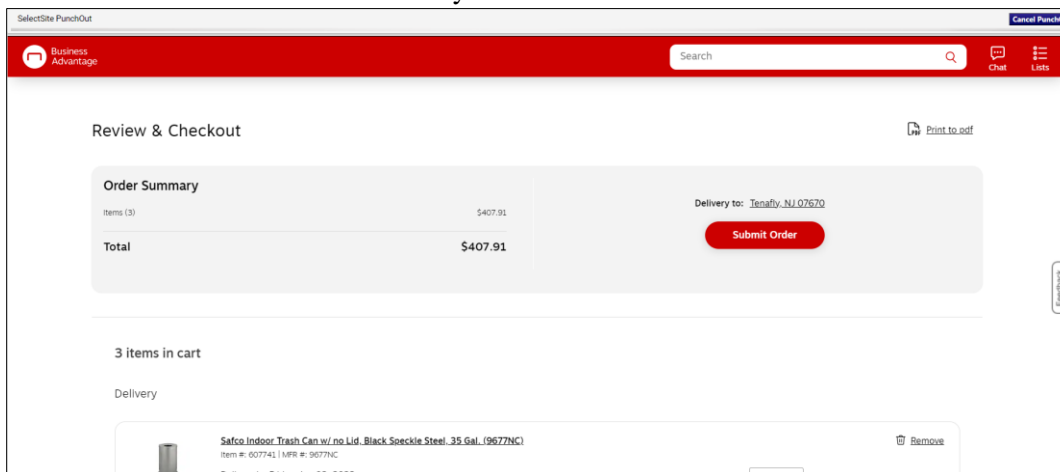
# Columbia University Finance Training

## Training Guide: Shopping from Catalog Suppliers in the CU Marketplace

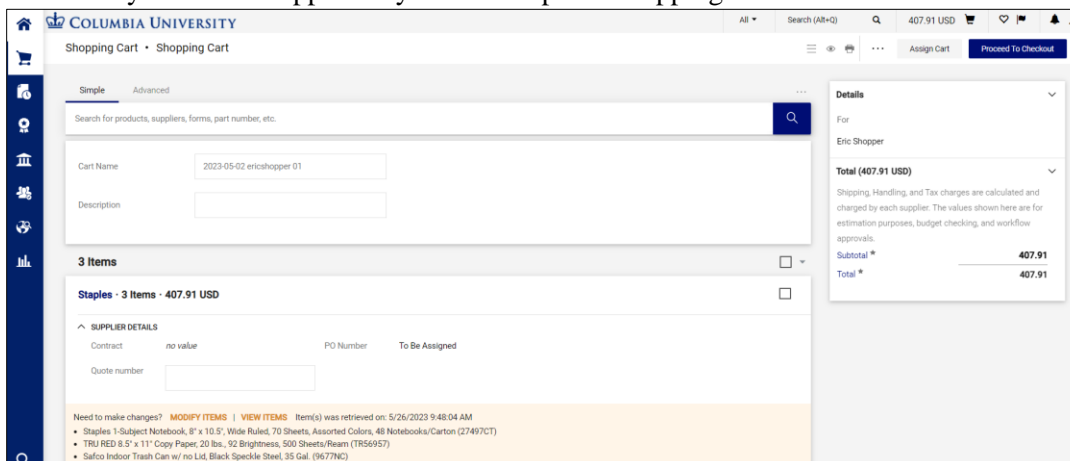


Notice the gray bar at the top of the vendor website which indicates you are punched out from the Marketplace. You can click the **Cancel PunchOut** button to return to the Marketplace, if needed.

4. Shop the vendor website for the item(s) you want to purchase and add your desired items to the vendor's cart.
5. View the vendor site cart and **Submit** your order. Each vendor will use different terms to submit your order.




The items you selected appear in your Marketplace Shopping Cart.

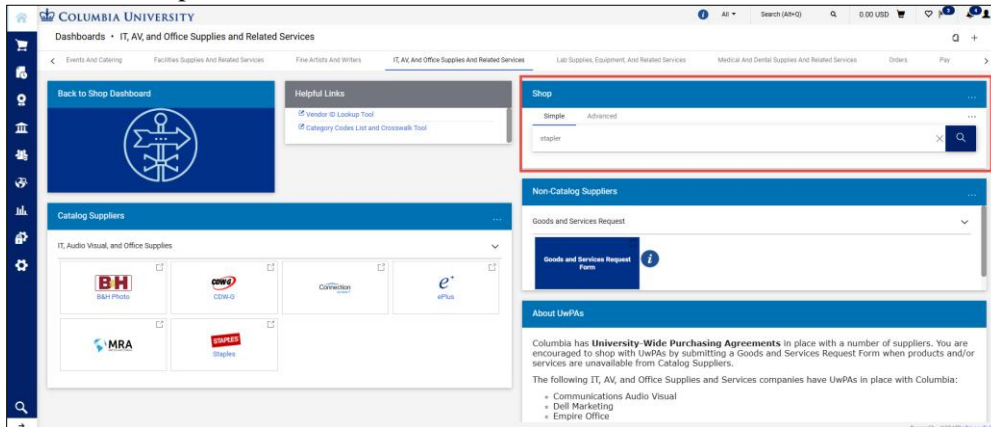


You can visit other vendor PunchOut sites and add items from multiple vendors to your Marketplace Cart.

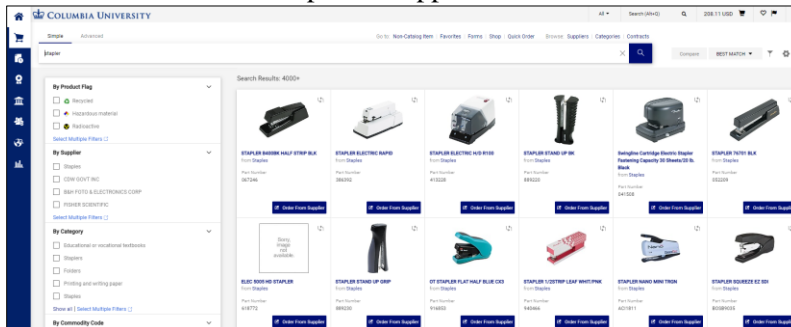
## Using Search to Shop

You can also use the Search field to find products across all Catalog Suppliers, regardless of category. Note that not all Catalog Suppliers support the Search to Shop functionality. If you do not find a result, you may need to search directly within the appropriate supplier's PunchOut.

1. Type the desired product in the **Search** field and click the **Search**  icon. You can also use the Advanced search to enter more specific search criteria.

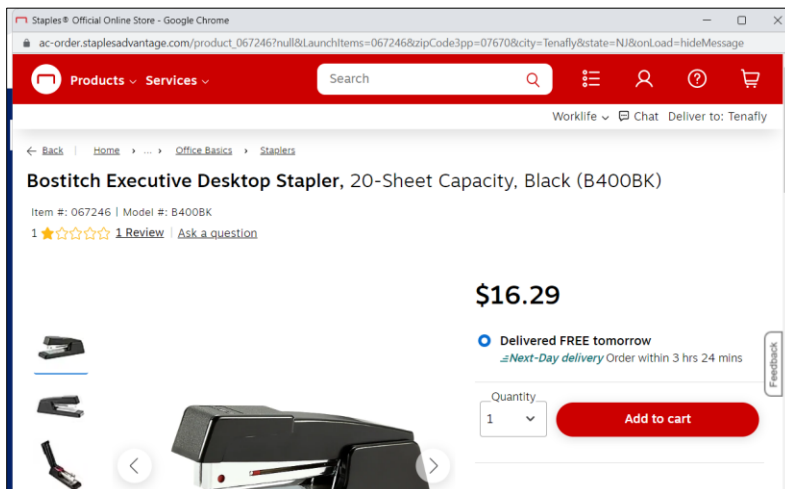


The search results for the product appear.



You can use the **Filters** from the panel on the left to narrow your results.

2. Click the **Order From Supplier** button for the desired item. You will PunchOut to the vendor's website to complete the order.



3. Add the item to the vendor cart and Checkout/Submit. The item you selected appear in your Marketplace Shopping Cart.

### Modifying Items in Your Cart

Marketplace vendors require you to modify items in your Shopping Cart by returning to PunchOut to the vendor's website to modify the items directly and bring the items back into the requisition.

**Staples - 3 Items - 407.91 USD**

^ SUPPLIER DETAILS

Contract *no value* PO Number To Be Assigned

Quote number

Need to make changes? **MODIFY ITEMS** | **VIEW ITEMS** Item(s) was retrieved on: 5/26/2023 9:48:04 AM

- Staples 1-Subject Notebook, 8" x 10.5", Wide Ruled, 70 Sheets, Assorted Colors, 48 Notebooks/Carton (27497CT)
- TRU RED 8.5" x 11" Copy Paper, 20 lbs., 92 Brightness, 500 Sheets/Ream (TR56957)
- Safco Indoor Trash Can w/ no Lid, Black Speckle Steel, 35 Gal. (9677NC)

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 Staples 1-Subject Notebook, 8" x 10.5", Wide Ruled, 70 Sheets, Assorted Colors, 48 Notebooks/Carton (27497CT)	2072481	CT	79.99	Qty: 1 CT	79.99	...

^ ITEM DETAILS

Manufacturer Name STAPLES BRANDS GROUP Contract:

Manufacturer 27497CT Category Code

Part Number 41100000 - Supplies Commodity

Supplier Part Auxiliary ID

more info...

2 TRU RED 8.5" x 11" Copy Paper, 20 lbs., 92 Brightness, 500	135855	RM	9.13	Qty: 1 RM	9.13	...
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1. Click the **Modify Items** link. Your cart on the vendor PunchOut appears.

Select Site PunchOut Cancel PunchOut

Business Advantage Search Chat Lists

Review & Checkout Print to pdf


Order Summary

Items (3) \$407.91 Delivery to: Tenafly, NJ 07670

Total \$407.91 **Submit Order**

3 items in cart

Delivery

 **Safco Indoor Trash Can w/ no Lid, Black Speckle Steel, 35 Gal. (9677NC)** Remove

Item #: 607741 | MFR #: 9677NC

Delivery by Tuesday, Jun 06, 2023

1 ▼ \$318.79 1/EA **\$318.79** Feedback

TRU RED 8.5" x 11" Copy Paper, 20 lbs., 92 Brightness, 500 Remove

2. You can increase or decrease the number of items, remove items, or add additional items. Adjust the cart as desired.
3. **Submit** the modified order. Your Marketplace Shopping Cart appears with your changes.

**Staples - 2 Items - 89.12 USD**

^ SUPPLIER DETAILS

Contract *no value* PO Number To Be Assigned

Quote number

Need to make changes? **MODIFY ITEMS** | **VIEW ITEMS** Item(s) was retrieved on: 5/31/2023 9:18:29 AM

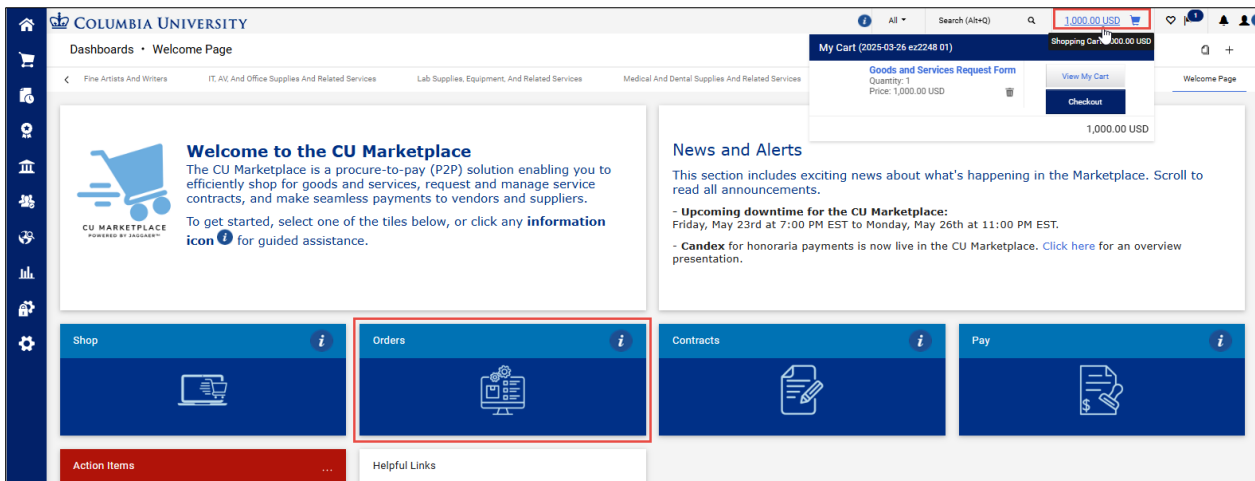
- Staples 1-Subject Notebook, 8" x 10.5", Wide Ruled, 70 Sheets, Assorted Colors, 48 Notebooks/Carton (27497CT)
- TRU RED 8.5" x 11" Copy Paper, 20 lbs., 92 Brightness, 500 Sheets/Ream (TR56957)

### Managing Carts

When you select items when shopping, you are adding items to your **Active** Shopping Cart. If you should end your CU Marketplace session and resume shopping at a later time, you will resume adding items to the same Active cart. If needed, you can create a new cart and begin adding new items (and assign it to a different Requester). You can also switch between different Carts.

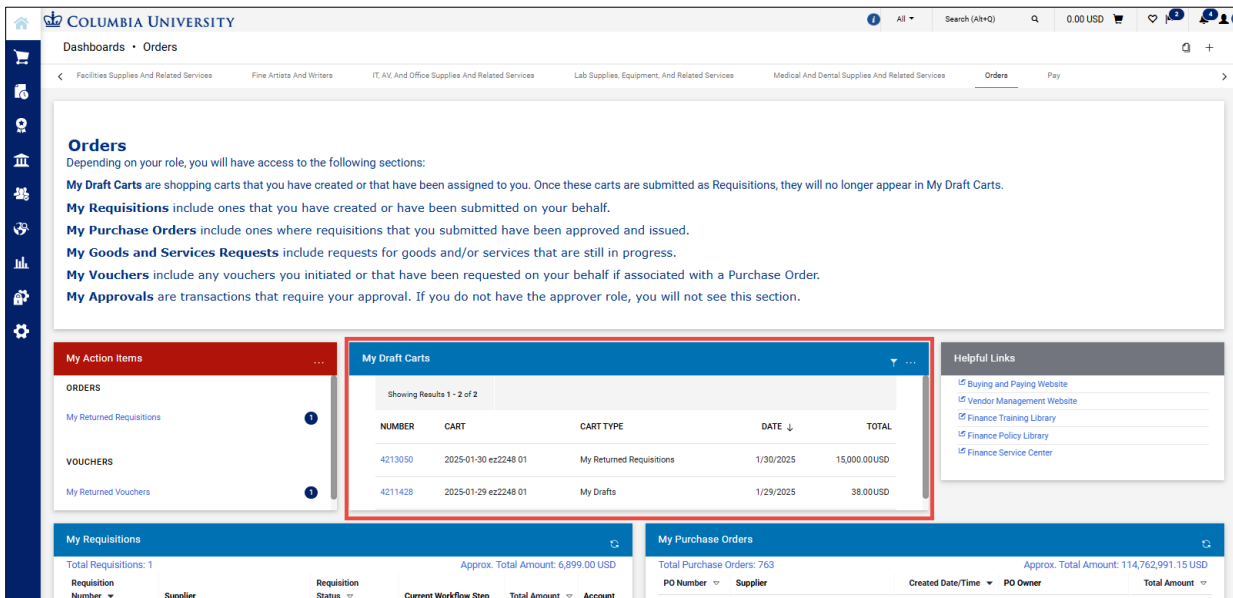
### Viewing Your Carts

If you have an Active Cart, the total amount for all items in that Cart is displayed next to the **Shopping Cart** icon in the top right of the CU Marketplace window.



Click the **Amount** link next to the Shopping Cart icon to **View My Cart** or proceed to **Checkout**.

To view all Draft Carts, click the **Orders** tile from the Welcome Page. The Orders dashboard appears.



The **My Draft Carts** section displays your Carts. The **Active** icon indicates the Cart that is currently active.

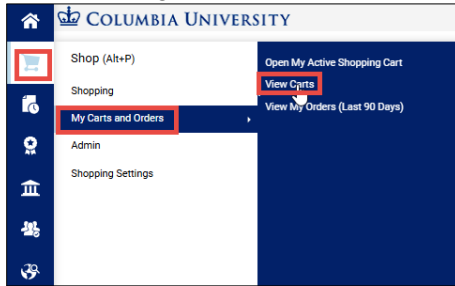
Click a **Cart Number** to view a Cart. That Cart will become your Active Cart. If you shop for Catalog Items, those items will be added to the Active Cart.

If you will be creating a Non-Catalog Requisition, process your current Active Cart (assign it or submit it into workflow), delete it, or create a new Cart.



### Creating a New Cart

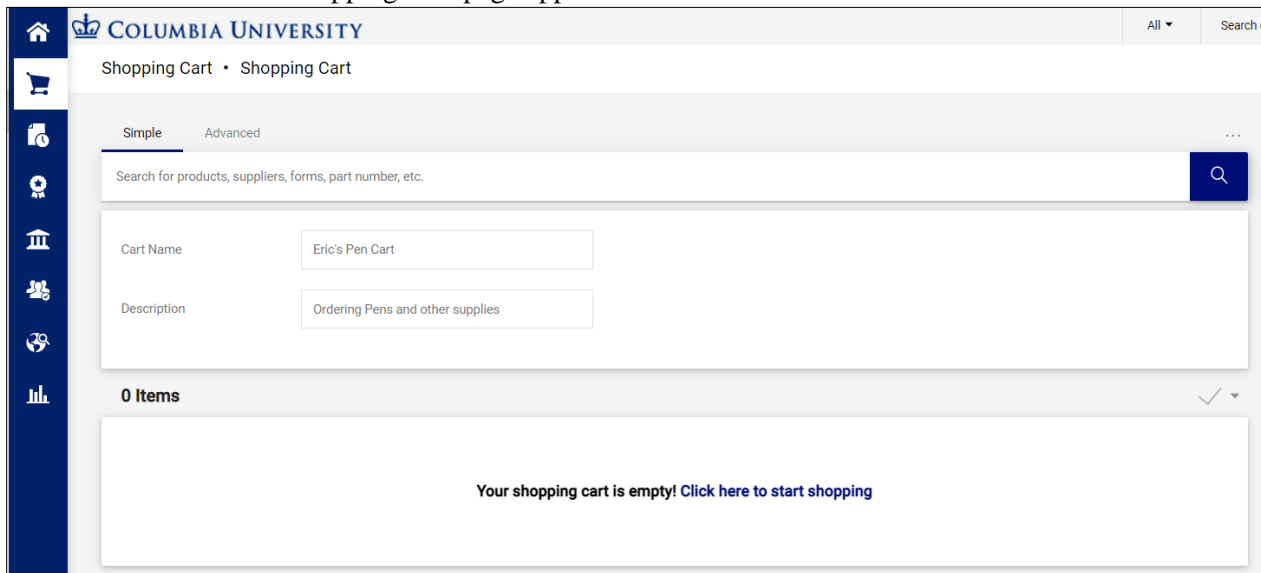
1. Use the Navigation Menu on the left to navigate to the **Shop** icon > **My Carts and Orders** > **View Cart**.



The Cart Management screen appears.



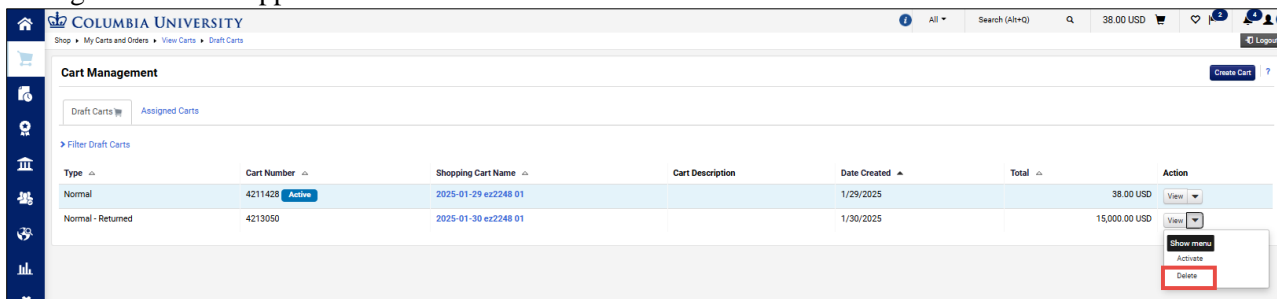
2. Click **Create Cart**. The Shopping Cart page appears for the new cart.



3. Enter a **Cart Name** and **Description**. You can begin shopping or create a Non-Catalog Requisition to add items to the new Cart.

### Deleting a Cart

1. Use the Navigation Menu on the left to navigate to the **Shop** icon > **My Carts and Orders** > **View Cart**. The Cart Management screen appears.

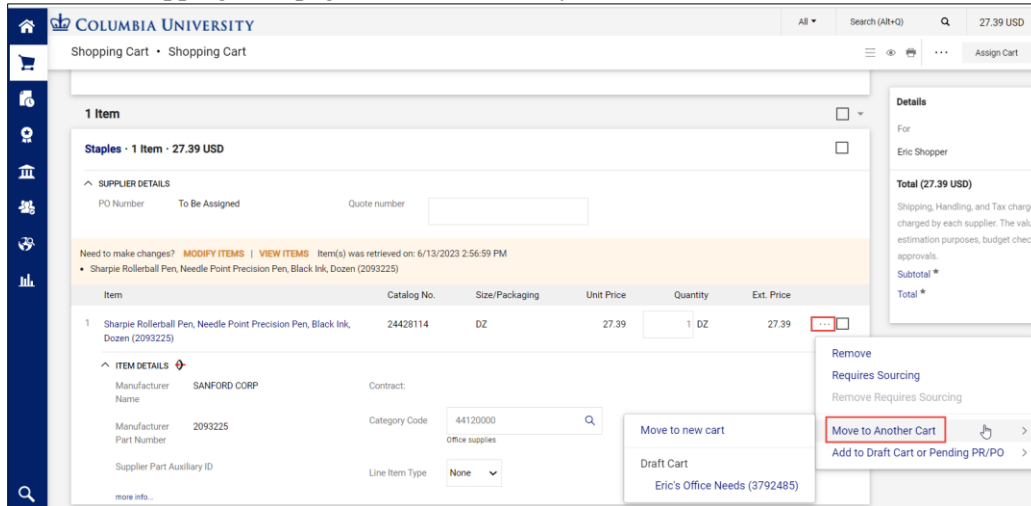



2. Click the **Action** dropdown and select **Delete**.



## Moving an Item from One Cart to Another

1. View the Shopping Cart page that has the item you want to move to another cart.

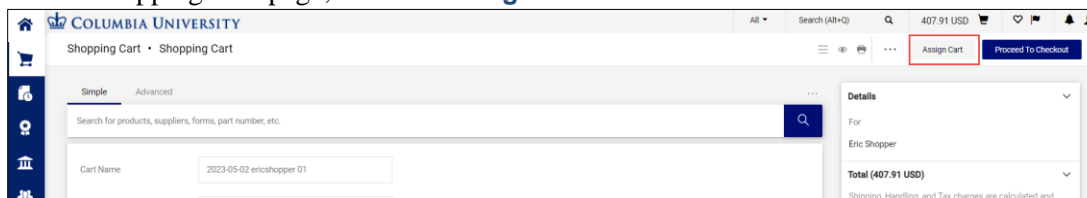


2. Click the **Line Item Actions**  icon for the item you want to move and select **Move to Another Cart**.
3. Select **Move to a new cart** to create a new cart with that item or select one of the **Draft Carts** listed to move the item to that cart.

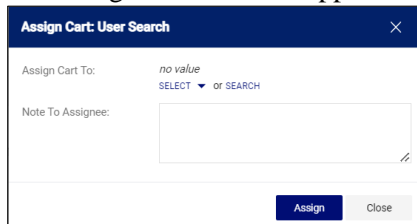
## Assigning a Procurement Initiator to a Cart (without Checking Out)

As a Shopper, you are not required to Checkout and to enter Ship To/Bill To Addresses and ChartString information before assigning the Shopping Cart to a Requester. If you do not checkout, your assigned Requester will be required to ensure that the Ship To/Bill To and ChartString information is entered before submitting into workflow.

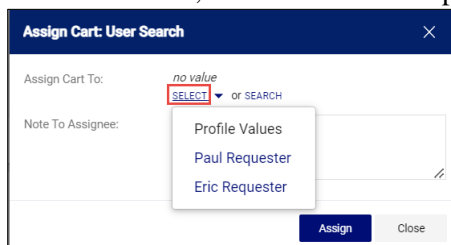
1. On the Shopping Cart page, click the **Assign Cart** button.



The Assign Cart window appears.



2. You can **Select** a Requester from Favorites you created in your Profile **or Search** for any Initiator that is setup in the Marketplace.  
Select a favorite, click the **Select** dropdown and click the desired Initiator.



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Or, to search and select a non-favorite Initiator, click the **Search** link.

User Search

Last Name

First Name

User Name

Email

Department

Role

Results Per Page

10

Search

Close

Enter the search criteria and click the Search button to view results.

User Search

New Search

Name ↑	User Name	Email	Phone	Action
Park, Terry	tp194	tp194@columbia.edu	+1 218-321-9618	+
Park, Terry	tp194@columbia.edu	tp194@columbia.edu		+

Close

Click the **Plus** sign **+** for the Initiator you are assigning.

Assign Cart: User Search

Assign Cart To:

Park, Terry

SELECT or SEARCH

Add to Profile

☐

Note To Assignee:

Assign

Close

- If the Initiator is not a favorite, you have the option to select **Add to Profile** if you want to make them a favorite. Type a **Note to Assignee**, if needed. Click the **Assign** button.  
The assigned Initiator will receive an email alerting them that your Cart has been assigned to them and includes your Note which contains a direct link to the Requisition.

### Assigning a Procurement Initiator at Checkout

When you Proceed to Checkout, you have the option to update the Ship To/Bill To Addresses and the ChartString. As a Shopper you are not required to enter this information, but you may want to complete it, if you know the information, for your assigned Initiator to simplify their task.

1. On the Shopping Cart page, click the **Proceed to Checkout** button.

The screenshot shows the 'Shopping Cart' page for Columbia University. The top navigation bar includes the university logo, a search bar, and a total amount of 407.91 USD. The main content area has a 'Simple' tab selected, showing a search bar and a 'Cart Name' field with the value '2023-05-02 ericshopper 01'. On the right, a 'Details' sidebar shows the total amount and a note about shipping, handling, and tax charges. The 'Proceed to Checkout' button is highlighted with a red box in the top right corner.

The Checkout screen appears.

The screenshot shows the 'Checkout' screen for Columbia University. The top navigation bar includes the university logo, a search bar, and a total amount of 407.91 USD. The main content area has a 'Requisition' tab selected, showing a 'Summary' view. The 'Summary' view includes sections for 'General', 'Shipping', 'Billing', and 'Accounting Codes'. The 'Shipping' section shows the 'Ship To' address: 'Contact Name Eric Shopper, Mudd, 500 W 120th St, Floor 2, Room 0203, New York, NY 10027, United States'. The 'Billing' section shows the 'Bill To' address: 'no address'. The 'Accounting Codes' section shows a table with columns for GL Business Unit, Account, Project, Activity, Department, Initiative, Segment, Site, and PC Business Unit. The 'Assign Cart' button is highlighted with a red box in the top right corner.

2. If desired, update **Ship To**, **Bill To**, and **Accounting Codes**. See the sections on Updating Ship To and Bill To at Checkout and Updating ChartString (Accounting Codes) at Checkout.
3. Click the **Assign Cart** button. The Assign Cart window appears.

The screenshot shows the 'Assign Cart: User Search' window. It has a dark blue header with the title 'Assign Cart: User Search' and a close button. The main content area has two fields: 'Assign Cart To:' with a value of 'no value' and a dropdown menu labeled 'SELECT' or 'SEARCH', and 'Note To Assignee:' with a text area. At the bottom, there are 'Assign' and 'Close' buttons.

4. Follow steps 2 and 3 from the previous section.

### Updating Shipping and Billing at Checkout

You have the option of updating the Ship To and Bill To information for your Cart. If this information is not entered, your assigned Initiator will be required to complete this information.

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

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Shipping	Billing
<b>Ship To</b>	<b>Bill To</b>
Contact Name Eric Shopper Mudd 500 W 120th St Floor 2, Room 0203 New York, NY 10027 United States	<i>no address</i>
	<b>Billing Options</b>
	Accounting <i>no value</i> 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 you 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. Enter a **Contact Name**. This is a required field.
3. Select one of your Profile favorites or type in the **Search additional** to find and select an address.

500

×

Q

Results Per Page 10

500 W 120th StreFL02RM0203 -

500 W 120th StreFL02RM0204 -

500 W 120th StreFL02RM0211 -

4. Click the **Save** button.

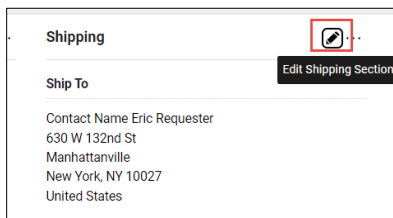
### Using an Ad Hoc Ship To Address

You are able to enter Ad Hoc Ship-To locations for off-campus addresses for orders up to \$1,000 for the following Marketplace vendors:

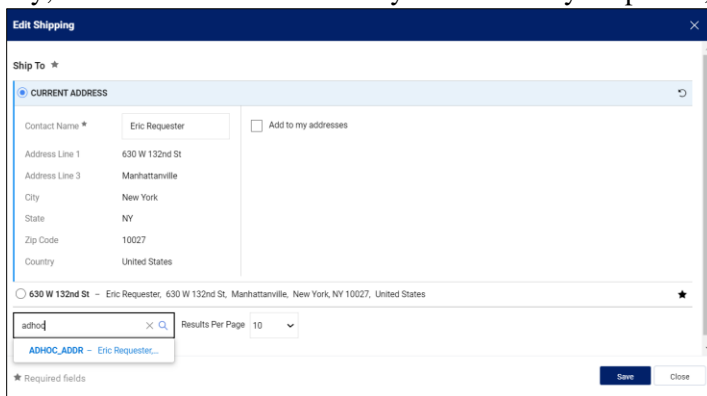
- Staples
- B&H
- CDW
- Connection (formerly Gov Connection)
- MRA International

If you are using an Ad Hoc Ship To Address, your Requisition will require departmental approval regardless of your approval role.

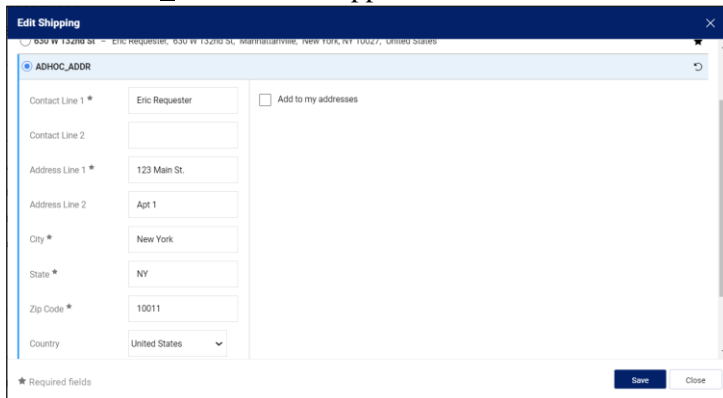
1. On the Checkout screen, click the **Edit**  icon for Shipping or Billing.



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.



2. In the **Search additional** field, type “adhoc” (no space) to search for the Ad Hoc option and select **ADHOC\_ADDR**. The ADHOC\_ADDR fields appear.

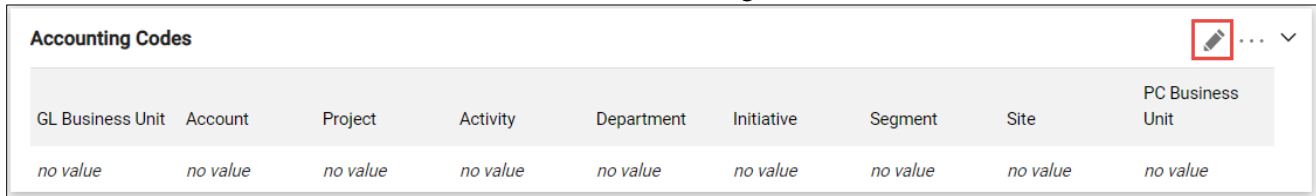


3. Complete the address information. You can optionally select **Add to my addresses** and give this address a Nickname to use this address again in the future.
4. Click the **Save** button.

### Updating the ChartString (Accounting Codes) at Checkout

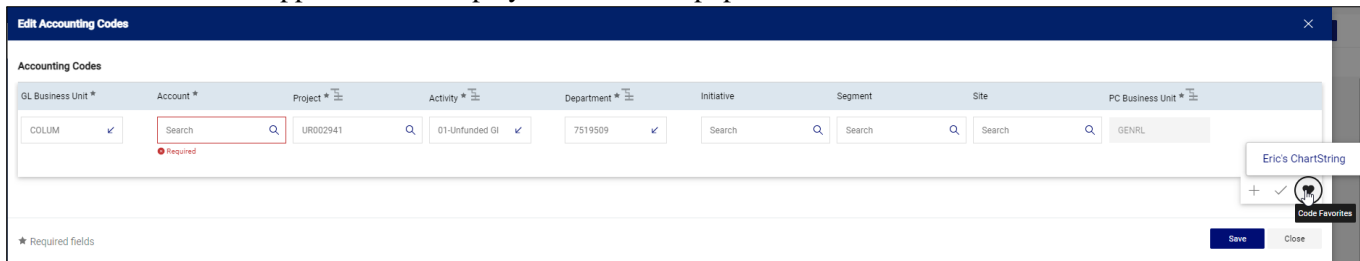
You have the option of updating the ChartString information for your Cart. If this information is not entered, your assigned Initiator will be required to complete this information.

- On the Checkout screen, click the **Edit**  icon for 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,



Accounting Codes


GL Business Unit *	Account *	Project *	Activity *	Department *	Initiative	Segment	Site	PC Business Unit *
COLUM ✓	Search 🔍	UR002941 🔍	01-Infund GI ✓	7519509 ✓	Search 🔍	Search 🔍	Search 🔍	GENRL

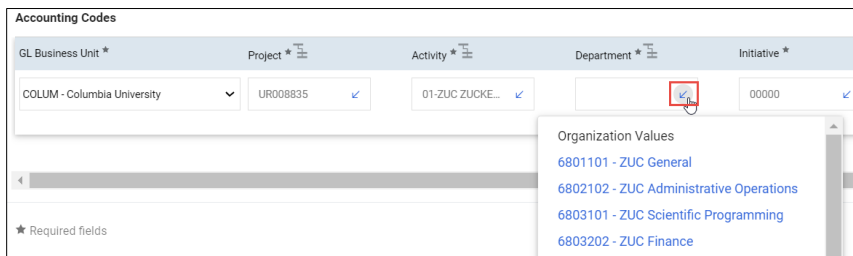
★ Required fields

Save Close

Eric's ChartString

Code Favorites

- 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... ✓	1409102	00000 ✓

★ Required fields

Organization Values

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

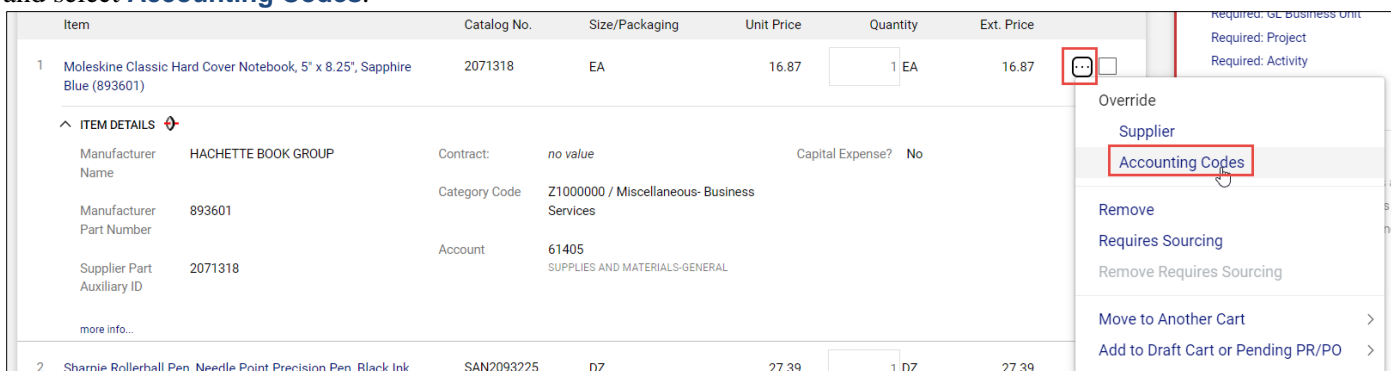
- Click the **Validate**  icon to ensure your ChartFields were entered correctly. If you corrected a ChartField and it still appears as Required , click the Validate icon again.

You can click the **Add Split**  icon to add an additional ChartString line and indicate a percent or dollar amount distribution.

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

- Click the **Save** button.

Each item in your Cart can also be updated with different ChartStrings. Click the **Line Item Actions** icon for the item and select **Accounting Codes**.



Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	Required: GL Business Unit	Required: Project	Required: Activity
1 Moleskine Classic Hard Cover Notebook, 5" x 8.25", Sapphire Blue (893601)	2071318	EA	16.87	1 EA	16.87			

ITEM DETAILS

Manufacturer Name: HACHETTE BOOK GROUP Contract: no value Capital Expense? No

Manufacturer Part Number: 893601 Category Code: Z1000000 / Miscellaneous- Business Services

Supplier Part Auxiliary ID: 2071318 Account: 61405 SUPPLIES AND MATERIALS-GENERAL

more info...

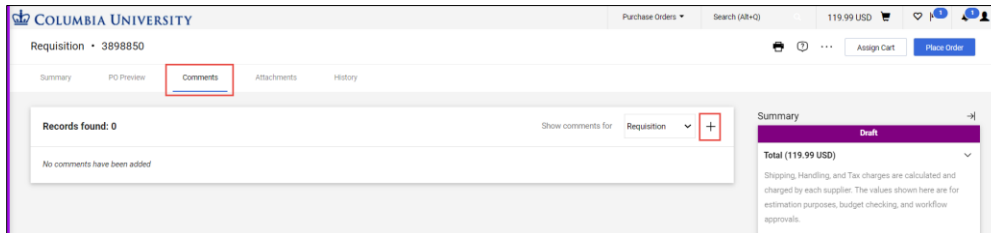
Line Item Actions

- Override
- Supplier
- Accounting Codes
- Remove
- Requires Sourcing
- Remove Requires Sourcing
- Move to Another Cart
- Add to Draft Cart or Pending PR/PO

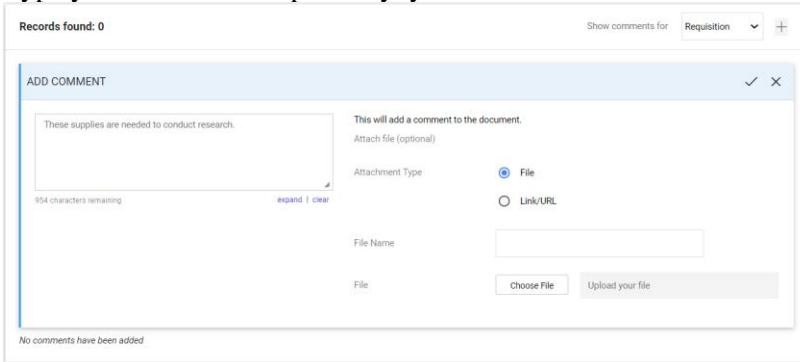
### Adding Comments and Notifying Initiators and Approvers

You can add Comments to your Requisition. If the Requisition is not yet in approval workflow, the Comment can only be viewed in the Comments tab when colleagues open and view the Requisition. After the Requester has submit the Requisition for approval, you can add Comments that can be emailed to Approvers or other colleagues to notify them that your Requisition is awaiting processing. View the section on Viewing Your Carts and Orders to open your Requisition.,

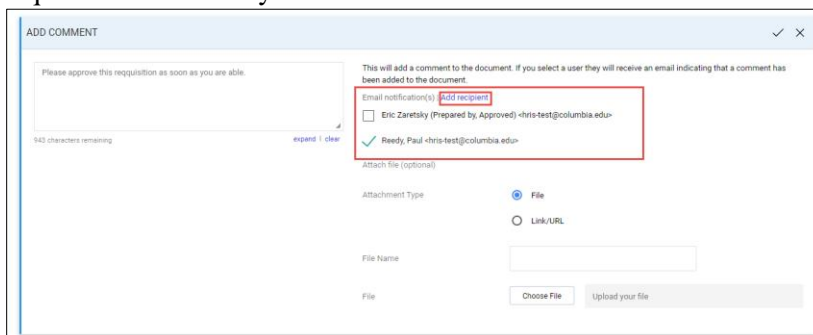
1. Click the **Comments** tab.



2. Click the **New Comments** **+** icon. The Add Comment screen appears.
3. Type your **Comment**. Optionally, you can attach a file or add a link/URL.

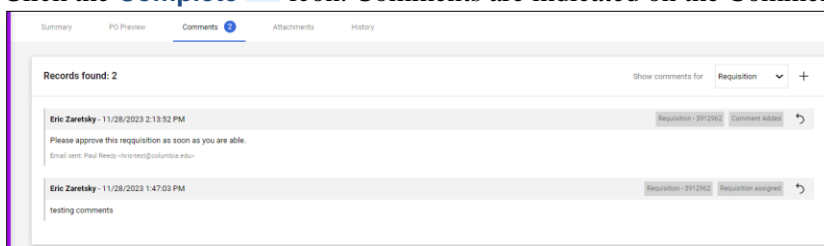


If your Requisition has already been submitted into workflow, you can open and view the Requisition to add a Comment. In the Add Comments screen, you can select the individuals listed who have worked with your requisition to receive your comment as an Email Notifications.



Or, you can click **Add recipients** to search for Approvers or individuals. This is a good way to notify an Approver that you have a Requisition in Workflow.

4. Click the **Complete** **✓** icon. Comments are indicated on the Comments tab and listed on the Comments screen.





### Adding Attachments

If required by your school or department, you can attach additional documentation to support your transaction.

1. Click the **Attachments** tab.

Requisition • 3900172

Summary PO Preview Comments **Attachments** History

Attachments found: 0

[Add Internal Attachment](#)

This document does not have any attachments associated with it.

If you need to add an attachment, return to the Summary page and find the "Add attachment" button.

Please note that attachments cannot be added to documents once they have completed workflow.

Summary Draft

Total (239.96 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 239.96

239.96

2. Click the **Add Internal Attachment** button (do not select Add External Attachment). The Add Attachments dialog box appears.

Add Attachments

Attachment Type ☒ File ☐ Link

File(s) \*

Drop File or [Browse](#)

Max. File Size: 5.0 MB

★ Required fields

[Save Changes](#) [Close](#)

3. Drag and **Drop File** or **Browse** for the file.

Add Attachments

Attachment Type ☒ File ☐ Link

File(s) \*

Drop File or [Browse](#)

Max. File Size: 5.0 MB

Transaction documentation.pdf

★ Required fields

[Save Changes](#) [Close](#)

4. Click the **Save Changes** button. Attachments are indicated on the Attachments tab and listed on the Attachments screen.

Requisition • 3842826

Summary PO Preview Comments **Attachments** History

Attachments found: 1

[Add Internal Attachment](#)

Attachment	Size	Type	Location	Visibility	Create Date ↓
<a href="#">Transaction documentation.pdf</a>	33k	File	Document	Internal	11/2/2023 3:46 PM

After all required details are updated, those with the Procurement Initiator role can submit the Requisition into workflow by clicking **Place Order**.

### 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>