

# Columbia University Finance Training

## Job Aid: Fiscal Year End Document Searches in the CU Marketplace

The CU Marketplace provides powerful search functionality with results that can be filtered and refined. Four document searches are available to help you quickly identify and review your open Purchase Orders, Requisitions, Vouchers, and Change Requests.

Departments are responsible for reviewing and closing their transactions. Use the Open Transaction Searches to decide which documents should be closed before fiscal year end and which should carry forward into the next fiscal year.

For more in-depth details about searches and reports, refer to the [Reporting in the CU Marketplace Training Guide](#).

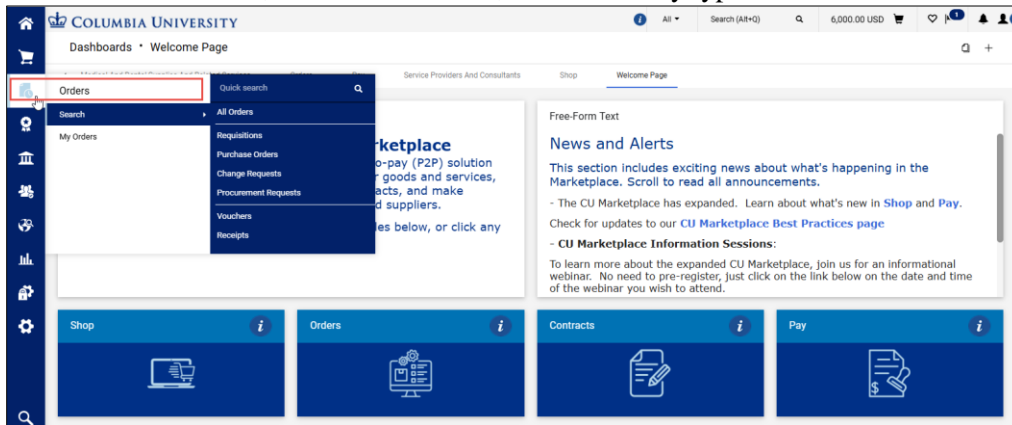
### Accessing the Open Transactions Search Lists

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

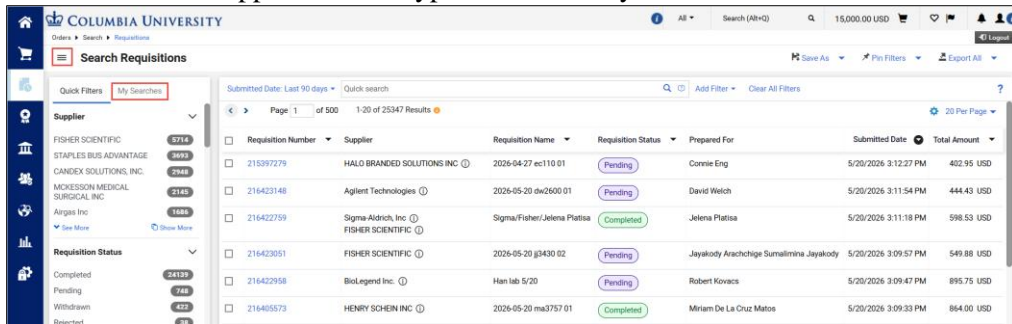


The JAGGAER application launches.

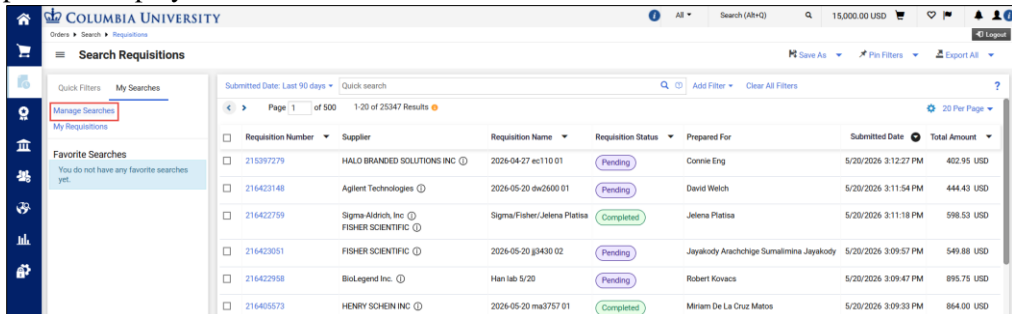
2. Click the **Orders** icon, then **Search** menu, then select any type of document.



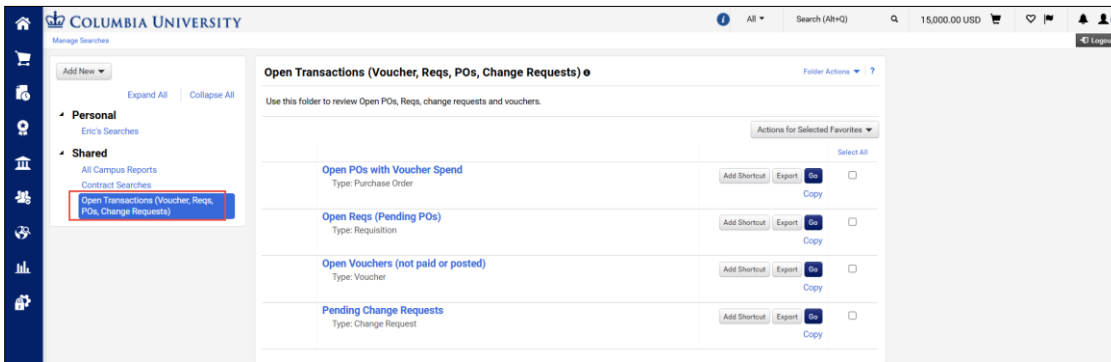
The Search screen appears for the type of document you selected.



2. Click the **Show Side Panel**  icon to view the Quick Filters panel and select **My Searches**. The My Searches panel is displayed.



3. Select **Manage Searches**. Personal and Shared Search Folders appear.



4. Select the **Open Transactions (Voucher, Reqs, POs, Change Requests)** folder. The four Open Transaction Searches are listed. Click the desired Search to view.

## Viewing Open Transaction Searches

### Open POs with Voucher Spend

PO Number	Supplier	Created Date/Time	AP Status	PO Owner	Department	Requisition Number	Matching Status	Total Amount	Voucher Total
CU00180393	MCKESSON MEDICAL SURGICAL INC	5/20/2026 3:42:56 PM	Open	Heather Van Asselt	FPO Facilities	216425712	No Matches	249.22 USD	0.00 USD
CU00180392	B&H FOTO & ELECTRONICS CORP	5/20/2026 3:42:55 PM	Open	Sonia Sorrentini	A&S Art History & Archaeology	216410212	No Matches	3,888.24 USD	0.00 USD
CU00180391	CANDEX SOLUTIONS, INC.	5/20/2026 3:42:13 PM	Open	Yecenia Lahoz	SOA Business Office	216352738	No Matches	200.00 USD	0.00 USD
CU00180390	CANDEX SOLUTIONS, INC.	5/20/2026 3:41:25 PM	Open	Yecenia Lahoz	SOA Business Office	216350538	No Matches	1,200.00 USD	0.00 USD

The **Open POs with Voucher Spend** Search displays all open **Purchase Orders** along with a **Voucher Total** column showing the cumulative payments made against each PO to date. Use the **Department** column to locate your relevant Purchase Orders, and apply a Filter to narrow the list to your specific Department. For guidance on using filters, refer to the [How do I use Filters in my Searches to view documents? CU Marketplace Tip](#).

Click the **PO Number** to view the Purchase Order. If you need to close the Purchase Order you are viewing, refer to the [CU Marketplace Closing a PO Quick Guide](#) for guidance.

### Open Reqs (Pending POs)

Requisition Number	Supplier	Requisition Name	Requisition Status	Prepared For	Submitted Date	Total Amount	Current Workflow Step	Department
216426297	Thermo Fisher Scientific (Asheville) LLC	service repair trees	Pending	Ashley Liz	5/20/2026 3:45:23 PM	1,700.00 USD	Req Validation	ENG Finance & Admin
216421119	FISHER SCIENTIFIC	2026-05-20 cp3338 01	Pending	Camryn Petersen	5/20/2026 3:44:51 PM	2,090.14 USD	Req Validation	CRR General
216318579	New York Public Radio	2026-05-18 ig2461 01	Pending	Irina Gurevich	5/20/2026 3:43:55 PM	20,550.00 USD	Dept Approval \$15K - \$30K	KNI Knight Institute
216336698	VWR Funding, INC FISHER SCIENTIFIC	2026-05-19 jk3755 01	Pending	Jordan Kesner	5/20/2026 3:43:53 PM	1,352.68 USD	Dept Approval \$1000 - \$2500	MED Cell Engineering & Therapy
216426217	Airgas Inc	2026-05-20 rs2426 01	Pending	Russell Szalaszny	5/20/2026 3:41:56 PM	60.63 USD	Dept Approval \$0 - \$1000	ICG Admin

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The **Open Reqs (Pending POs)** Search displays all **Requisitions** that have been submitted into workflow but have not yet been fully approved and issued as Purchase Orders (status of Pending). Use the **Department** column to locate your relevant Requisitions, and apply a Filter to narrow the list to your specific Department. For guidance on using filters, refer to the [How do I use Filters in my Searches to view documents? CU Marketplace Tip](#).

Click the **Requisition Number** to view the Requisition. From there, you have two options:

- **Withdraw** it from approval workflow to close it. Refer to the [How do I Edit a Requisition or Voucher Submitted for Approval? CU Marketplace Tip](#) for guidance.
- Send a **Comment** to an Approver to remind them to approve it or return it to you for edits. Refer to the [Use Comments to Notify and Communicate with Approvers CU Marketplace Tip](#) for guidance.

### Open Vouchers (not paid or posted)

Voucher Number	Supplier Invoice Number(s)	Supplier	Voucher Owner	PO Number	Total Amount	Voucher Status	Date/Time	Submitted Date	Voucher Source	Voucher Type	Current Workflow Step	Department
V0364948	76282	Talon Professional Services LLC	Estevéz Ortiz, Sandra	CU00113497	1,210.00 USD	Pending	5/20/2026 3:50:54 PM	5/20/2026 3:52:03 PM	Manual	PO Voucher	Invoice Validation	CMC IT CDIS
V0364945	5406651083	PHONAK LLC	Mong, Catherine	CU00160498	2,943.75 USD	Pending	5/20/2026 3:45:52 PM	5/20/2026 3:48:24 PM	Manual	PO Voucher	Dept Approval Level 3	SRG Dept Finance
V0364946	20068050	East View Information Services, Inc.	Barton, Vonetta	CU00118879	24.00 USD	Pending	5/20/2026 3:45:46 PM	5/20/2026 3:50:12 PM	Manual	PO Voucher	Dept Approval Level 1	LIB Office University Libraries
V0364944	INV932993	MEDIX STAFFING SOLUTIONS INC	Toribio, Kiray		3,550.76 USD	Pending	5/20/2026 3:45:32 PM	5/20/2026 3:48:14 PM	Manual	Non-PO Voucher	Dept Approval Level 3	ORT Admin

The **Open Vouchers (not paid or posted)** Search displays all **Vouchers** that have been submitted into workflow but have not yet been fully approved and paid or posted (status of Pending). Use the **Department** column to locate your relevant Vouchers, and apply a Filter to narrow the list to your specific Department. For guidance on using filters, refer to the [How do I use Filters in my Searches to view documents? CU Marketplace Tip](#).

Click the **Voucher Number** to view the Voucher. You can send a **Comment** to an Approver to remind them to approve it or return it to you for edits or deletion. Refer to the [Use Comments to Notify and Communicate with Approvers CU Marketplace Tip](#) for guidance.

### Pending Change Requests

Change Request No.	Supplier	Prepared For	Submitted Date	Change Request Status	Total Amount	Original PO Total	Amount of Change	PO Number
216390323	PIPETTE CALIBRATION & REPAIR	Katharine Rosa	5/20/2026 9:53:27 AM	Pending	1,569.00 USD	1,102.00 USD	467.00 USD	CU00177577
216278531	Creative Sources, Inc.	Deborah Creque	5/19/2026 3:57:25 PM	Pending	4,800.00 USD	4,800.00 USD	0.00 USD	CU00126841
216346649	GEOSCIENCES PROFESSIONAL SERVIC...	Angela Martin	5/19/2026 12:44:26 PM	Pending	9,105.00 USD	7,105.00 USD	2,000.00 USD	CU00129371
216322699	Airgas Inc	Robert Kovacs	5/19/2026 10:39:29 AM	Pending	28,003.00 USD	28,003.00 USD	0.00 USD	CU00145899
216310797	COSMO BIO USA INC	Michael Harrahan	5/18/2026 4:55:15 PM	Pending	814.00 USD	734.00 USD	80.00 USD	CU00110572

The **Pending Change Requests** Search displays all **Change Requests** submitted into workflow that have not yet been fully approved (status of Pending). Although no Department column is available, you can use the Supplier and Prepared For columns to help you identify relevant Change Requests. Refer to the [How do I use Filters in my Searches to view documents? CU Marketplace Tip](#) for guidance.

Click the **Change Request No.** to view the Change Request. You can send a **Comment** to an Approver to remind them to approve it or return it to you for edits or deletion. Refer to the [Use Comments to Notify and Communicate with Approvers CU Marketplace Tip](#) for guidance.

## 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>