

CU MARKETPLACE: WAVE 2 OVERVIEW



CU MARKETPLACE
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Agenda

- Introductions
- Project Overview
- Wave 2 - What's New
- Roles / Access / Workflow
- CU Marketplace Demonstration
- Training and Guidance
- Preparation and Transition Activities
- Questions

Introductions

Today's presenters

- Hugh Horowitz, Assistant Vice President, Procurement Services
- Ron Moraski, Vice President, Procurement Services
- Terry Park, Executive Director, Finance Information Systems
- Kate Sheeran, Assistant Vice President, Finance Administration
- Eric Zaretsky, Director, Finance Training

Audience and Q&A

Information presented in this overview is relevant for anyone who needs to buy and/or pay for goods and services for University business, including:

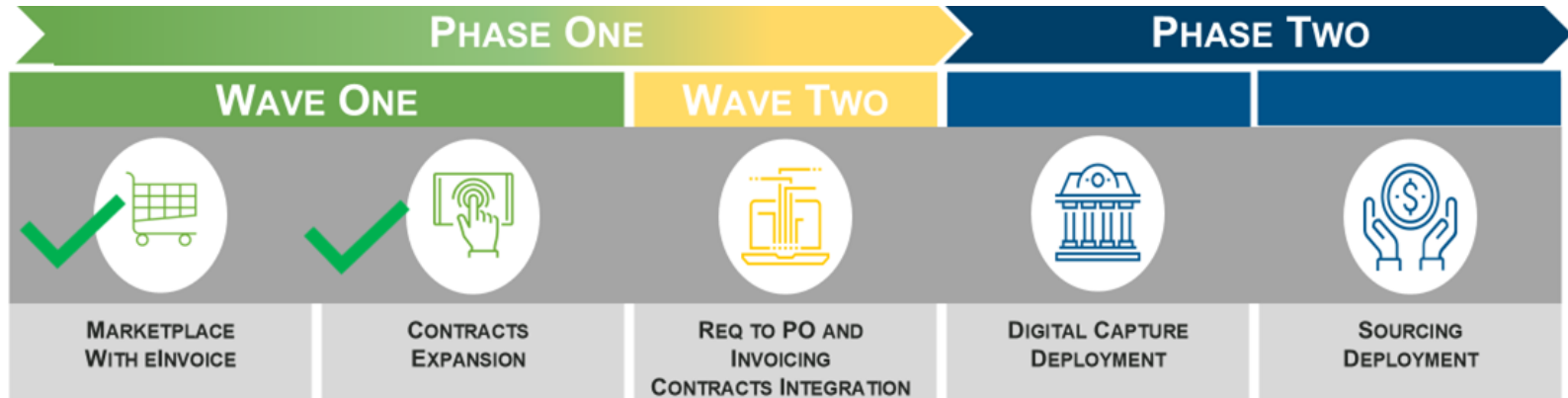
- Requisition Initiators
- Requisition Approvers
- Voucher Initiators
- Voucher Approvers

If you have questions as we go through the presentation, please use the Q&A function to submit your question(s) and we will address both during and at the end of the presentation.

Overview Objectives

- Provide a high-level refresher of the Procure-to-Pay project.
- Introduce what's new in the CU Marketplace with this wave of the project.
- Today is an overview, not training. Depending on your current role(s), web-based training has already been assigned to you (and hopefully you've already completed it!).
- Guides and job aid materials are available on the Buying and Paying Training page of the new Finance Training site:
<https://training.finance.columbia.edu/content/cu-marketplace-training>.
- Information sessions are recorded and posted on the Shopping in the CU Marketplace page of the new Procurement site:
<https://procurement.finance.columbia.edu/content/shopping-cu-marketplace>

Project Overview



The P2P project will be delivered in multiple phases.

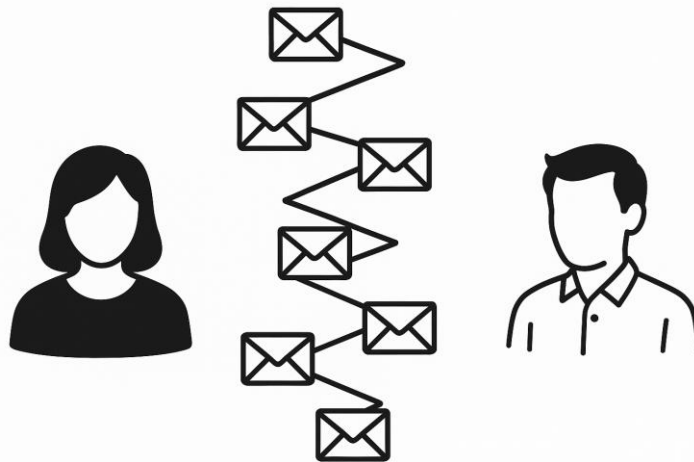
- **Wave 1 - November 2023:** launched University-wide
 - Introduction of the CU Marketplace with negotiated Catalog pricing for 20+ suppliers (now 30), which included eInvoicing
- **Wave 2 - March 2025:** Pilot launched
 - Non-Catalog (Requisition to PO) buying for both goods and services
 - Associated voucher processing
 - Contract Request to create visibility in the contracting process from campus to Central Purchasing
- **Wave 2 - July 2025:** Phase 1, Wave 2 launched University-wide
- **Future Phases:** Digital Capture for Invoices; Sourcing / RFP Tool

Wave 2: What's New

- Updated Marketplace user experience
 - Welcome page with Action Items and navigation tiles that link to task-oriented dashboards
 - Use of Adopt functionality (information icon) to provide guided assistance
- Guided buying experience for Non-Catalog purchases
 - For both goods and services
 - Form with conditional logic to capture required data
- Voucher processing
 - For both PO and non-PO invoice processing

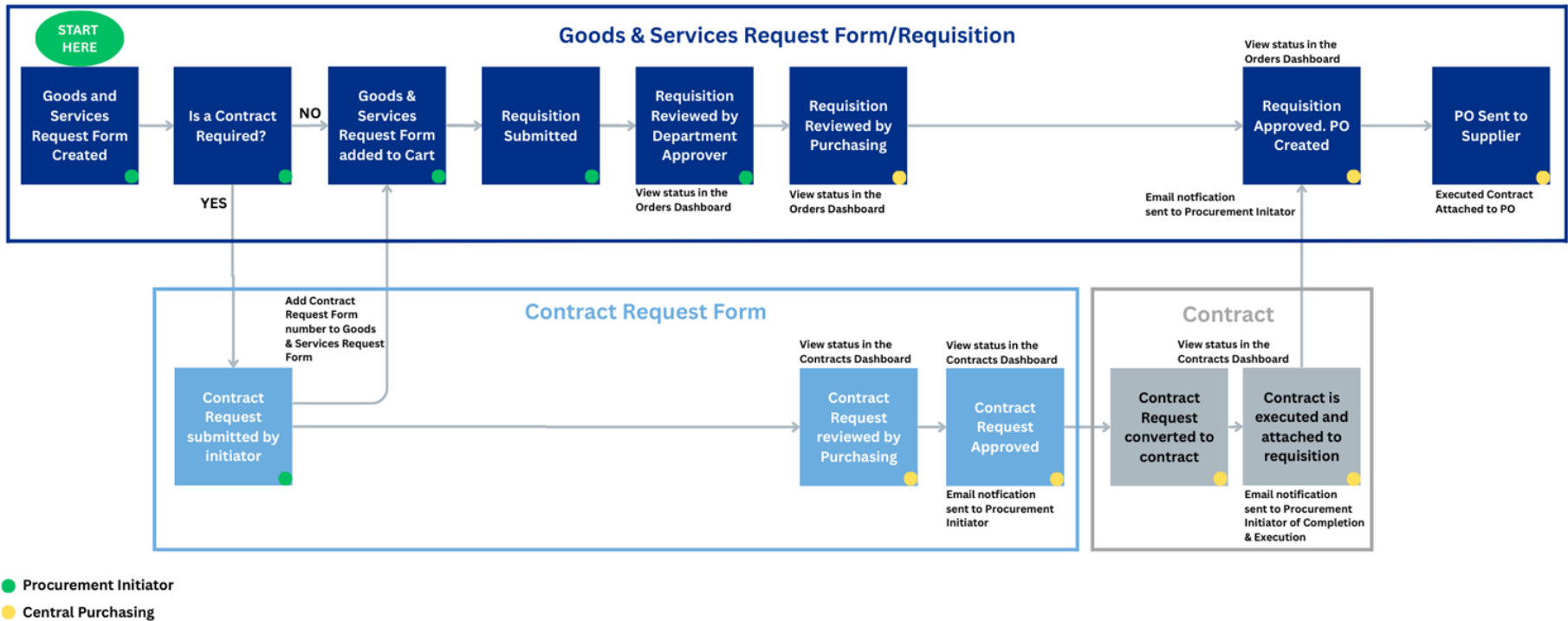
Wave 2: What's New (continued...)

- Contract Request
 - *is **NOT** a Contract, it's the vehicle to request a Contract
- Contract Request is the step prior to putting a Contract in place
 - Replaces email back and forth
 - Created when a Contract is needed as part of the purchase or engagement
 - Form that requests information to assist the Central Purchasing team in assessing requirement(s) for putting a Contract in place
 - Allows for transparency and workload balancing in Central Purchasing



Requisition to PO & Contract Request Process

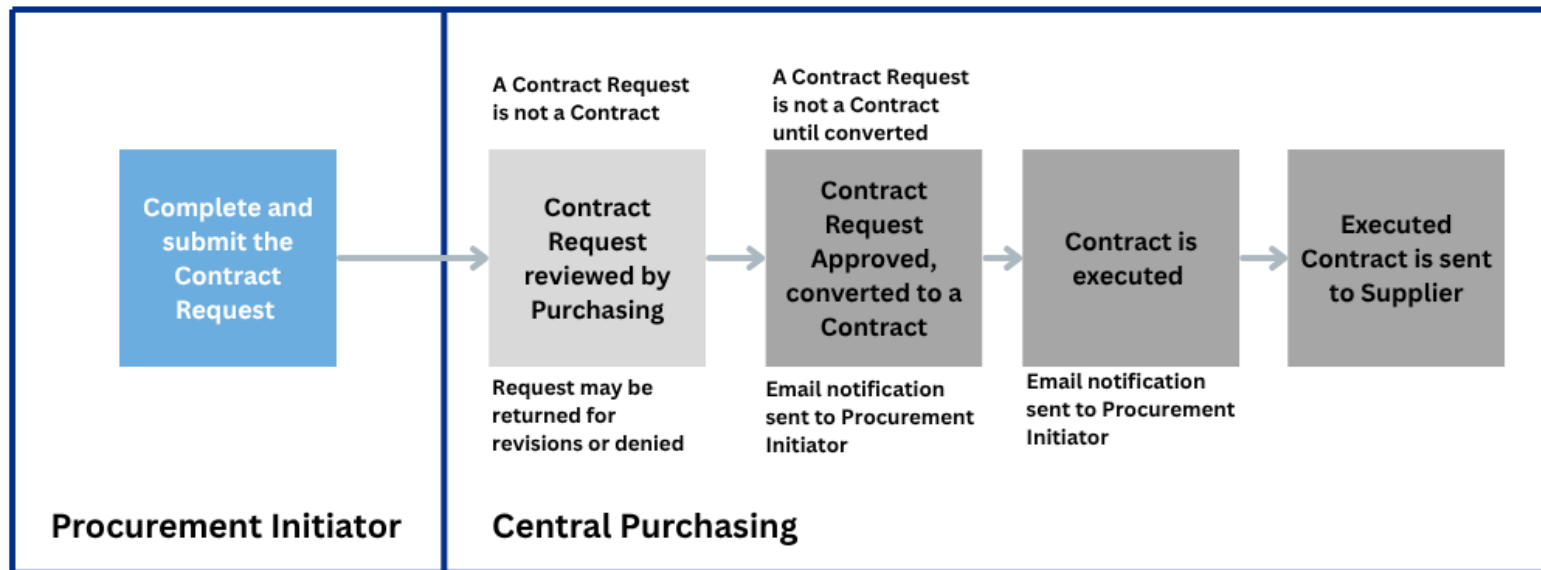
Non-Catalog PO Process



Contract Request Process

Contract Where No Purchase Order is Required

Contract where No Purchase Order is Required (including On-Site/Off-Site Events and Catering)



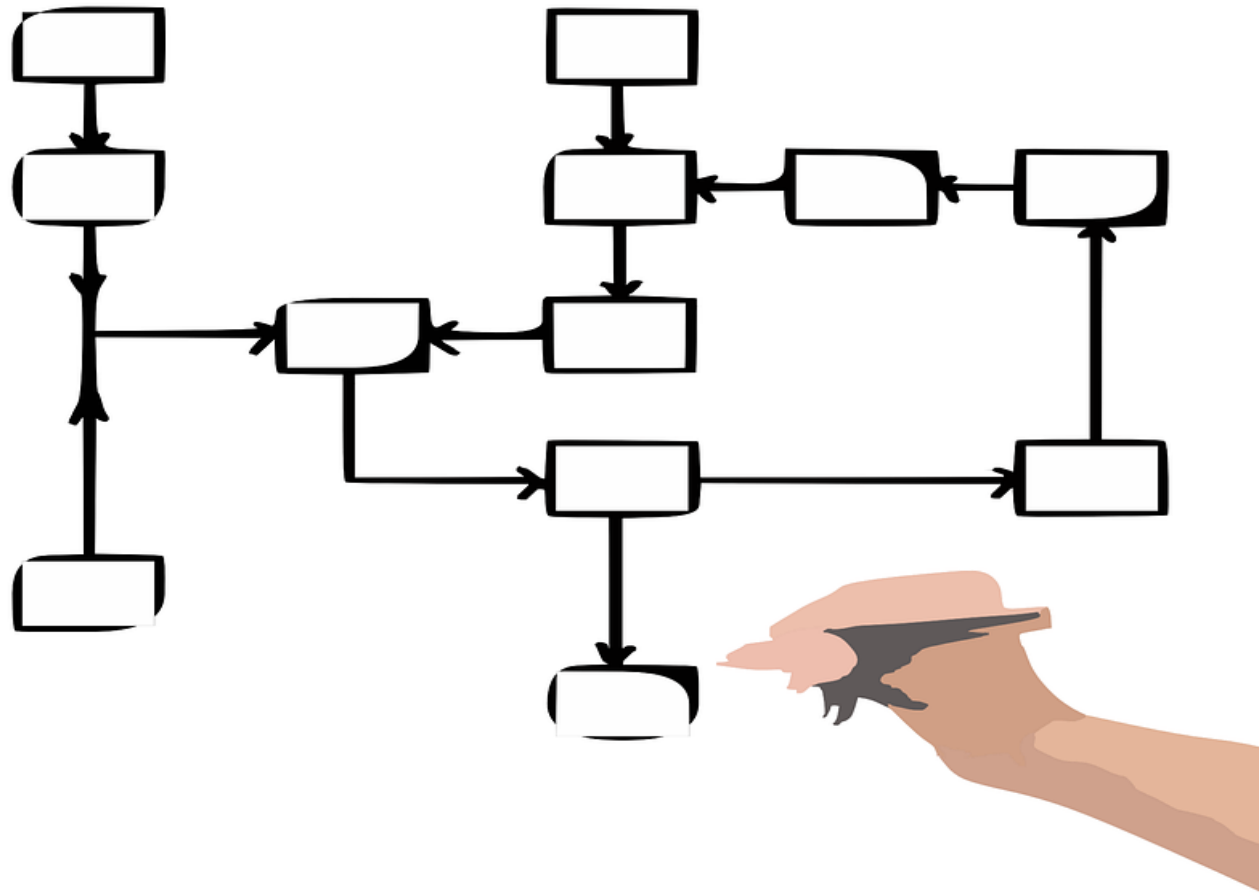
CU Marketplace Status

- **Wave 2 - Utilization Statistics (From 7/1)**
 - Unique Users
 - >2,100
 - Requisition to PO
 - >800 Requisitions created
 - ~550 Completed PO's
 - ~60 in Department Workflow Approvals (150 in Purchasing)
 - Invoices
 - >8,000 Invoices created
 - >7,000 Completed
 - ~850 in Department Workflow Approvals (140 in A/P)
 - Contract Request
 - >400 Contract Requests created
 - ~175 Completed, 150 in Purchasing Review, 70 Returned




Wave 2 Pilot

- As with any project of this scale, always good to run a pilot with a smaller group before rolling out to the wider University. This allowed us to:
 - Identify and address any technical issues
 - Refine and enhance training and guidance materials based on feedback
- Grateful to our pilot participants, who were identified to participate in the pilot due to their diverse Procurement use cases (subset of users from each of the following Schools / Departments):
 - Arts & Sciences
 - Climate School / Lamont
 - CUIMC (Central, Dental, MSPH, VP&S)
 - Engineering
 - Investment Management Company
 - Professional Studies
 - Zuckerman

CU Marketplace Roles, Access, and Workflow



CU Marketplace Roles: Who Can Do What

Role	Description
 Shopper	<ul style="list-style-type: none">✓ Shop from catalog suppliers and create carts✓ Assign carts to Initiators
 Procurement Initiator (new - Requisition Initiator & Voucher Initiator roles combined)	<ul style="list-style-type: none">✓ Shop and create carts from catalog suppliers✓ Receive carts from Shoppers✓ Shop and create requisitions from non-catalog suppliers✓ Create vouchers for non-catalog invoices
 Department Approver	<ul style="list-style-type: none">✓ Receive requisitions submitted for approval via workflow✓ Receive vouchers submitted for approval via workflow
Special Approver Ad Hoc Approver	<ul style="list-style-type: none">✓ Review all requisitions submitted for their specific approval

CU Marketplace Shopper vs Initiator

Shopper

- Add items from **Catalog Suppliers** into a cart
- Assign their cart to a Procurement Initiator to submit into workflow
- Can complete information (such as ChartString) on the requisition
- No required training
- **Cannot purchase Non-Catalog Goods and Services**

Procurement Initiator

- Combined **Requisition Initiator** and **Voucher Initiator** roles
- Can create and submit Catalog and Non-Catalog requisitions into workflow
- Can submit Vouchers into workflow
- Can submit Contract Requests
- Must complete required training to get access to the CU Marketplace

Workflow-Requisitions, Change Requests and Vouchers



Approval Workflow Stage	Approval Workflow Trigger	Approval Workflow Role (Existing ARC Roles)
Department	Financial Approval based on combination of Department and Dollar Threshold <ul style="list-style-type: none"> • Pooled Approver routing • Dollar Thresholds aligned with ARC 	<ul style="list-style-type: none"> • Department Requisition Approver • Departmental Voucher Approver
Special (if applicable)	Combination of Category Code and Dollar Threshold (e.g. Capital Equipment, Hazardous Materials, etc.)	<ul style="list-style-type: none"> • Prior Approver
Procurement (Central Purchasing or Central AP)	Requisitions and Change Requests <ul style="list-style-type: none"> • Catalog > \$50K • All Non-Catalog Orders Non PO Vouchers <ul style="list-style-type: none"> • All Non-Catalog Orders 	<ul style="list-style-type: none"> • Purchasing • Accounts Payable

 **Ad Hoc** - Inserted manually by an Initiator or Approver into workflow when additional review is necessary

Other Points to Remember: Receiving & RITA

Receiving

- For **Catalog orders**, Receiving is required when:
 - Line amount (not total order) is equal to or greater than \$5,000.
- For **Non-Catalog orders**, receiving is not required.
 - Processing of the invoice for payment is acknowledgement that the goods or services were received.
 - Leverage existing controls in place for goods that fall into a special handling category and/or capital equipment.

RITA (Requester-Initiated Transaction Approval)

- When users have both the Requisition Initiator (Procurement Initiator role as of 7/1/25), and the Requisition Approver roles with Level 1 dollar threshold approval, they can request and approve the same transaction.
- Only applies to CU Marketplace orders up to \$1,000 **from Catalog suppliers and when the purchase is shipped to a campus location. All Non-Catalog purchases, regardless of dollar amount, will require approval by someone (with the Approver role) separate from the Initiator.**

PO Conversion

- **ARC PO Conversion to the Marketplace**
 - ~4,000 POs converted (including multi-year POs)
 - Converted POs can be used for outstanding invoices
 - No Change Requests can be made to a converted PO
 - All converted POs will be closed as part of FY26 Year End Close

CU Marketplace vs. ARC

As of July 1st, 2025...

Transaction	CU Marketplace	ARC
Requisitions / POs	X	
Contract Request	X	
Payments (Vouchers)	X	
Petty Cash Replenishment	X	
Journal Vouchers		X
P-Card Reconciliation & Approval		X
SAPOs (SPA only)		X
SAPO Invoices	X	

Supercare

- **Affirmed and Rolled POs not converted into the CU Marketplace - resolved**
- **SAPO Conversion Visibility - resolved**
- **Non-Budgeted Chartstrings**
 - Only Budget-Valid Chartfield combinations are sent to the CU Marketplace
 - Non-Consolidated Business Units not available in the CU Marketplace
 - Non-Expense Natural Accounts
 - Target short term resolution - end of week
 - Target long term resolution - TBD
- **Expired Sponsored Projects**
 - Currently no ability to create vouchers when Project is expired.
 - Target resolution - early August

Demonstration

- Accessing the CU Marketplace:
 - Log into ARC using Single Sign-On, click on the **Buying and Paying** tile and then select the **CU Marketplace** tile or
 - From multiple locations across the new Procurement site:
 - From the Buying and Paying menu dropdowns, look for the **Systems Access** header and then select **Log Into the CU Marketplace**.
 - From the homepage, click on the **Log Into the CU Marketplace** icon under Log Into Procurement Systems.
 - A hyperlink titled **Go to the CU Marketplace** is permanently located in the top right of the new Procurement site's header next to links to **About Us** and **Forms & Documents**.
 - From a variety of topic-specific webpages within the new Procurement site, including the [Shopping in the CU Marketplace](#) page.
- If you are a Procurement Initiator or Approver, you will not be able to access the expanded Marketplace until you have successfully completed the required training.

Demo:

- New landing page and navigation tiles
- Shop
 - Category Tiles
 - Catalog vs. Non-Catalog Suppliers
 - Goods and Services Request Form
- Orders
- Contracts
 - Contract Request Tool
- Pay
 - Vouchers

Training



Training and Guidance

- There are two web-based trainings that, depending on your role, *you must take to be able to continue using the Marketplace and access Wave 2 functionality.*
 - **Procuring in the CU Marketplace** for anyone with the following roles:
 - Requisition Initiator
 - Voucher Initiator
 - **Approving in the CU Marketplace** for anyone with the following roles:
 - Requisition Approver
 - Voucher Approver
- Trainings were assigned in May based on your current role(s).
- These trainings must be completed—including successfully passing a short knowledge assessment—in order to transact in the new environment. You will receive reminders until the required training is complete. **If you don't complete the training, you will have no access to the Marketplace.**
- In addition, if you don't complete the required training by July 31st, you will have re-apply for the Procurement Initiator and/or Approver role(s) via the Financial Systems Security Application (FSSA)

Training and Guidance

Current Role	Required Web-Based Training	Length of Training
Shop Only	None, although guidance available: https://training.finance.columbia.edu/content/cu-marketplace-shopping-quick-guide https://training.finance.columbia.edu/content/shopping-catalog-suppliers-cu-marketplace-training-guide	N/A
Requisition Initiator and/or Voucher Initiator	Procuring in the CU Marketplace	1 hour
Requisition Approver and/or Voucher Approver	Approving in the CU Marketplace	30 minutes

For those users required to complete training, the training assignment email came from columbia@sabacloud.com and was sent to your UNI@columbia.edu email. Reminder emails are sent every few days until the required training is completed.

In addition to the web-based training that has been assigned to you, additional CU Marketplace training and guidance material is available here: <https://training.finance.columbia.edu/content/cu-marketplace-training>.

Support and Feedback

- For any questions or concerns related to Wave 2, please submit a [ServiceNow ticket](#).
 - Choose Finance as the incident type
 - In the short description state that the incident is in relation to the CU Marketplace
- For any School or Department specific questions please contact the Change Advisory Committee member for your School / Department. This information can be found on the Shopping in the CU Marketplace webpage: <https://procurement.finance.columbia.edu/content/shopping-cu-marketplace>.

Questions

