# **Columbia University Finance Training**

Job Aid: Making Staples Purchases

This job aid details how to make Staples purchases and how to set up Requestor Defaults for shipping, billing and ChartFields.

# **Purchasing through Staples**

1. Navigate to the **Buying and Paying** page on the Finance Website.

# **Staples**

2. Click the **Staples** icon. You will be prompted to login to ARC if you haven't already. The ARC Look Up page appears with your UNI in the Requestor field.

ARC	Navigator - Search		Advanced Sear	ch
Look Up Busin	ess Unit			
"Business Unit	COLUM Q	AM/S	Columbia Univ	ersity
AWRequester	e22248		Q Eric V. Zaretsky	/
Non-Pro-		*Non-P		
ок				

- 3. You can enter a colleague's UNI as a **Requestor**, if you are purchasing on behalf of that colleague. If you do so, their Requestor Defaults for Ship To/Bill To Address and ChartString information will be entered on the Requisition. Otherwise, your Requestor Defaults will be entered on the Requisition. Refer to the section on Setting up Requestor Defaults for details on how to setup.
- 4. Click **OK**. The Requisition Setup screen appears with the Requestor defaults and the Staples indicated in the Supplier field.

Business	Unit C	OLUM		Columbia U	niversity	Re	quisition Name		
AWS Requ	ester es	22248		Eric V. Zare	BKS			A	Sole/Single So
*Cum	incy U	SD					Priority	Medium 🗸	
Default Options (2)									
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<ul> <li>Override</li> </ul>	If yo	ou select this op	tion, the defaults	specified below v	vill override an	y predefined value	s for these fields,	only non-blank val	ues are assigned.
Line Defaults @									
Note: The information replace the data in t							C button is click	ed, the data enter	ed on this page w
AWS Suppl	ier DC	STAPLES	Q	AM	Category	()	Q	A	NS
Supplier Locati	on AC	H-01		Unit of	Measure			A	000
Bu	/er		Q						
Shipping Defaults				-0-2					
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Due (	Date		3		Attention			*Bill To Location	ID 615W131STS
Ship	Via CO	OMMON	Q	Frei	ght Terms D	ES	Q		
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Save Ship To, Bil	Io, Acc	ounting detaul	ts for the reque	Stel Elic v. Zalei					

If needed, you can change the Ship To and Bill To Locations and ChartFields to differ from the default for this purchase. If you want to update the default with the updated fields, you can click the option to **Save ShipTo**, **Bill To**, **Accounting defaults for the requestor**. If needed, you can enter the code **HOMEADDR**, which will use the home address of the Requestor from PAC.

5. Click **OK**. The Staples Advantage website will appear within ARC.



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- 6. Shop and add items to your Staples Cart.
- 7. Navigate to the **Cart** and click **Submit Order**.

	kout	
	Order Summary           nems (1)         536.95           Total         \$36.95         Submit Order	
1 item in cart Delivery	TRU RED™ 8.5° x 11° Copy Paper, 20 lbs., 92 Brightness, 500 Sheets/Ream, 5 Reams/Carton (TR56960)         Mem #900051088 + 230700758080         @ Delevery       1	

The ARC Requisition Checkout - Review and Submit page appears.

Checkout - Review and Submit			
Review the Item information and submit the reg for a	sproval.	2 DR 🗰 🖉	
Requisition Summary	AWS add	My Preferences Requisition Settings	AWS
Business Unit COLUM		moou	
Requester ez2248	SIDE	Requisition Name	
*Currency USD	Eric V. Zaretsky	Priority Medium V	- y .
-Currency 000			
art Summary: Total Amount 36.95 USD Expand lines to review shipping and accounting d	etails	Add More Items	
Requisition Lines (2)	210102		
Line Description	tem ID Supplier Steples V S	Cuantity UOM Price Total 1.0000 Carton AWS 38.9500 38.95	Details Comments Delete
Select All / Deselect All	Select lines to: 🎧 Add to Favorites 🖓 Add	d to Template(s)	*Plot
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ipping Summary			
Edit for All Lines Ship To Location HOMEA	DDR		
Address PO BOX	491308 AWS NJ 07670 Trendation	AWS AWS	
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Attention To Eric V. 2 Comments	laretsky		
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Enter approval justification for this requisition	# }-	# <u>&gt;</u> -	#Y-
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Check Budget			//
La UNIT A CONTRACTOR		review Approvals AWS	AWS
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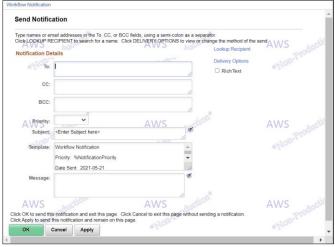
- 8. Click **Budget Check** to make sure your purchase won't fail budget check.
- 9. Click Save & Submit. The Confirmation / Approval Workflow screen appears.

	Line 1 Schedu Item:Stuff	le 1 Distribution 1:Pendir	1g Start New Path		
	Department Approval				
	Pending Multiple Approvers Department Approval	-+			
	Apply Approval Changes				
Cre	ate New Requisition	Manage Reguisitions			

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You can click the **Multiple Approvers** link to see the list of people who can approve this requisition. If you don't know who to notify, contact your Departmental Administrator. You can click the **Notify** button to alert your approver that your purchase is awaiting their approval.



Enter the email address of your Approver in the To field, compose your message, and click OK.

Making a Staples Purchases within ARC

Requisition Initiators can make Staples purchases within ARC. In ARC, navigate to **Main Menu** > **eProcurement** > **Create Requisition** > **Staples Office Supplies**. Follow the same steps as documented in the "Purchasing through Staples" section.

### **Setting up Requestor Defaults**

You can set up Requestor Defaults for yourself or on behalf of a colleague for whom you make purchases so when you initiate a Staples purchase, the Shipping, Billing and Distribution (ChartString) information will automatically be entered.

- 1. Login to <u>MyColumbia</u> and click the **ARC** link.
- 2. Scroll to the **Transaction Quick Links** tab and the **Procurement** section and click the **Update Requestor Defaults** link.

	RESC	URCES			
TRANSACTION QUICK LINKS REPORTING QUICK L	NKS LEGACY REPORTING	JOURNAL ENTRY SPREADSHEET UPLOAD	TOOLS & FORMS	TRAINING & HELP	
TRANSACTION QUICK LINKS REPORTING QUICK L Use the below links to initiate comm Budgeting • Budget Tool (FFE/FINSYS) General Ledger • Journals (Entry, Approval, Inqu • Internal Transfers (Entry, Approval, Inqu • Cash Entry (FFE/FINSYS) Procurement • Staples C • McKesson C • Requisition (Special Request) C • Requisition (Special Request) C • Requisition (Fixed Cost / Multi- • Update Requestor Defaults C • Vouchers (Entry, Approval, Inqu Payroll	on transactions or inquiries y) 급 ral, Inquiry) 급 ear) 급			Collapse all	
Labor Accounting (PAC Transa     Casual & Support Staff Time Er					

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#### The Requestor Setup Page appears.

ARC	-	Navigator 👻	Search
Requester	Setup		
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Search Cr	iteria		*NOR-2
Requester	begins with v		Q
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Search	Clear Basic Sea	rch 🖾 Save Sea	AWS arch Criteria

3. Enter the **UNI** of the Requestor you are setting up in the **Requester** field and click **Search**. The Requestor Setup page appears for the Requestor.

WS	Requester ez2248	8 Eric V. Zi Q	AWS aretsky	action	AWS	a-Production*	WA T	/S Ion-Production		AWS		
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	Percentage	"GL Business Unit	Account	*Department	"PC Business Unit	*Project	*Activity	"Initiative	*Segment	Site		

4. Enter the Ship To and Bill To Location ID's. Click the Search Q icon to search and select the Location Code associated with your shipping address.

Columbia University addresses must already be available as Location Codes. If you cannot find a Columbia Address/Location Code, go to Service Now to submit a <u>Location Setup Request</u>.

- 5. Enter a **Phone** number.
- 6. Type the **ChartField** data into the appropriate **Accounting Default** fields. You can click the + icon to add additional Distribution Lines, if any, and complete the ChartFields for the new Distribution Line and indicate the **Percentage** allocation for each. If you have only one line, indicate 100% for the Percentage.
- 7. Click Save.

#### **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