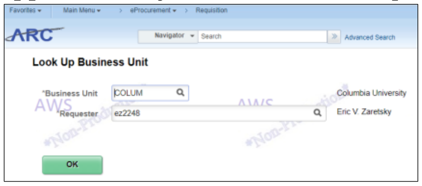
This job aid details how to make Staples purchases and how to set up Requestor Defaults for shipping, billing and ChartFields.

Purchasing through Staples

1. Navigate to the [Buying and Paying]() page on the Finance Website.

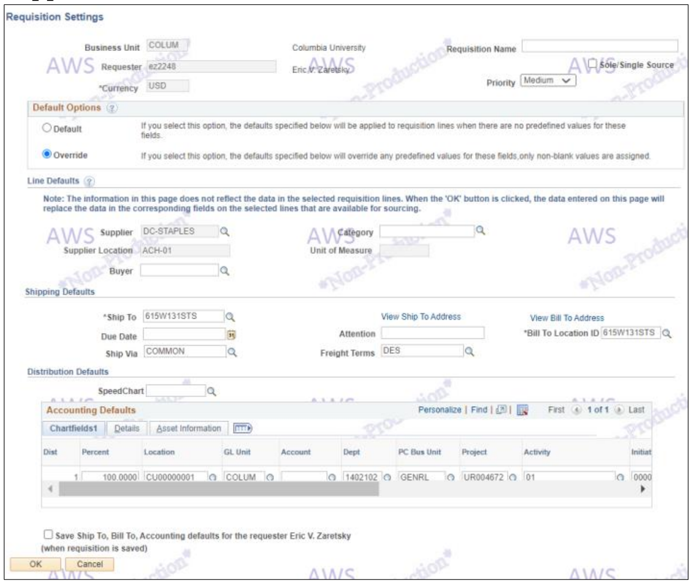
   Staples

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.

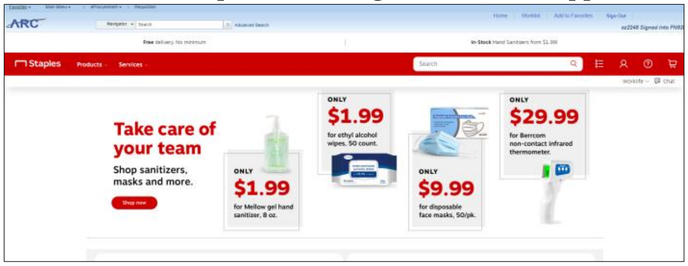
3. You can enter a colleague's UNI as a **Requestor**, if you are purchasing on behalf of that colleague. If you do so, their Requestor Defaults for Ship To/Bill To Address and ChartString information will be entered on the Requisition. Otherwise, your Requestor Defaults will be entered on the Requisition. 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.

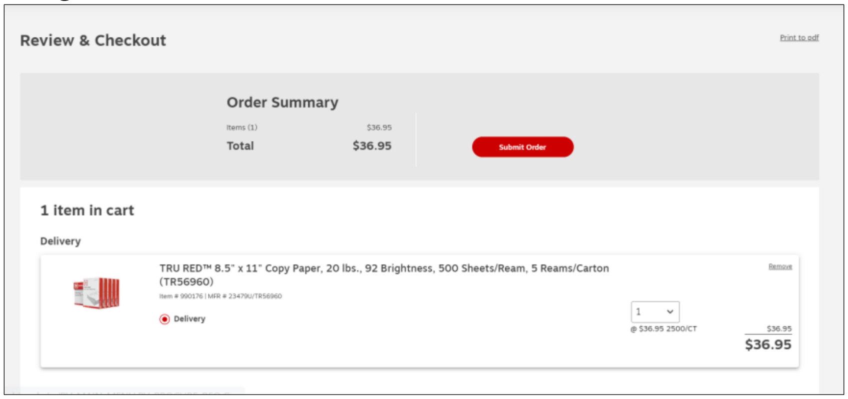
   

   If needed, you can change the Ship To and Bill To Locations and ChartFields to differ from the default for this purchase. If you want to update the default with the updated fields, you can click the option to **Save ShipTo, Bill To, Accounting defaults for the requestor**. If needed, you can enter the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

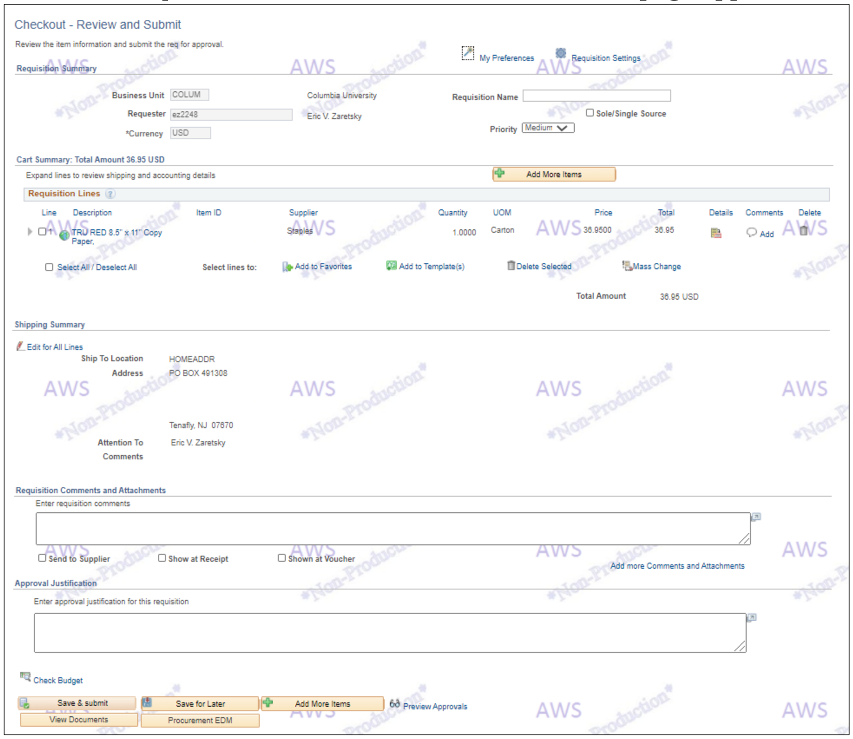
5. Click **OK**. The Staples Advantage website will appear within ARC.

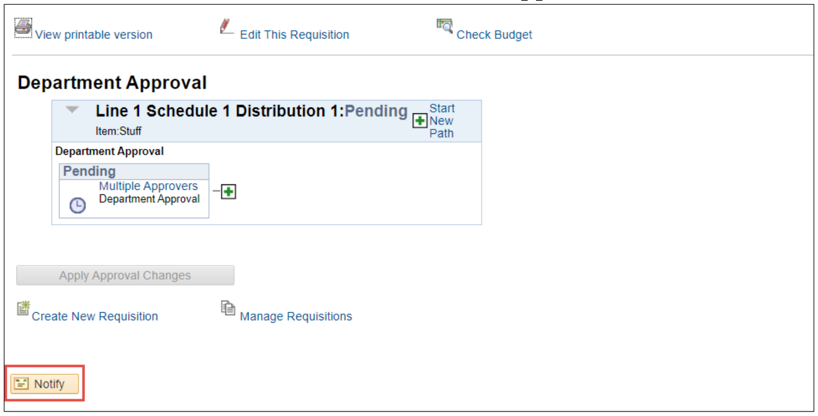
6. Shop and add items to your Staples Cart.
7. Navigate to the **Cart** and click **Submit Order**.



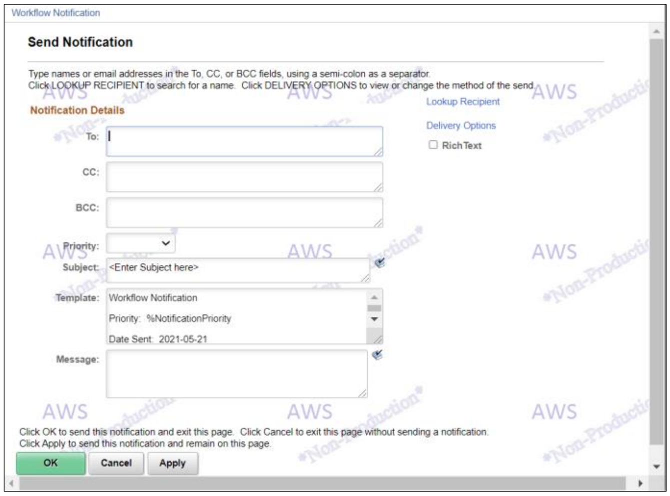
The ARC Requisition Checkout - Review and Submit page appears.



8. Click **Budget Check** to make sure your purchase won't fail budget check.
9. Click **Save & Submit**. The Confirmation /Approval Workflow screen appears.



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**.

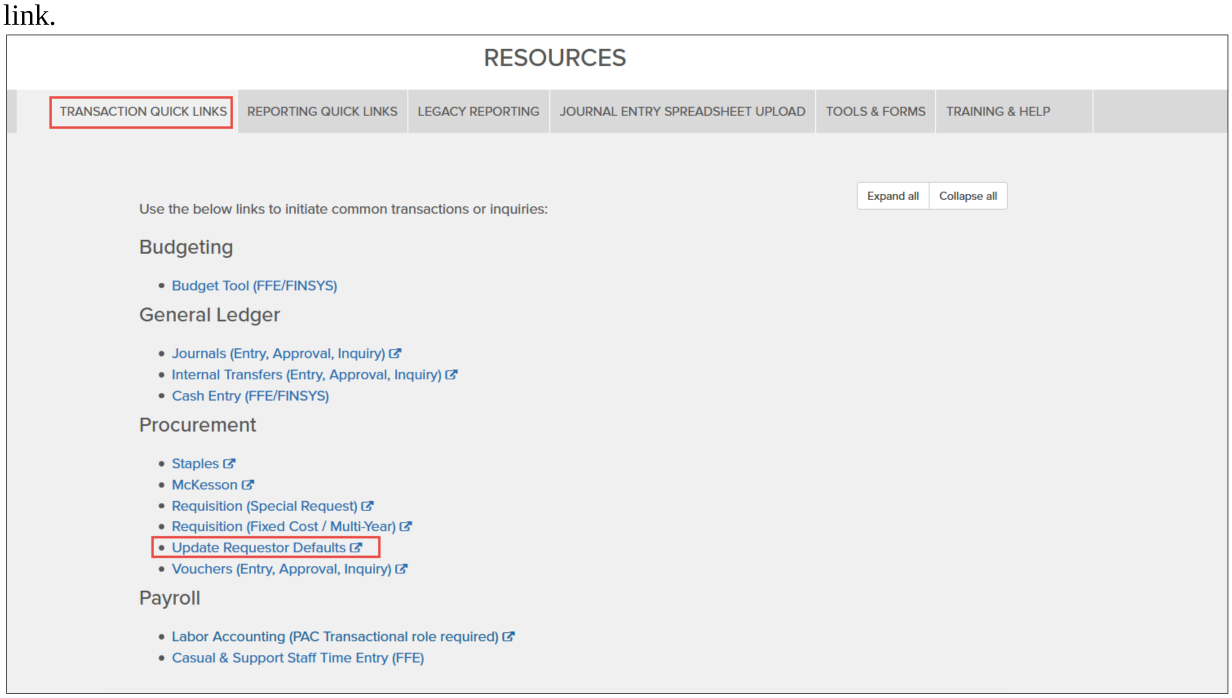
Making a Staples Purchases within ARC

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.

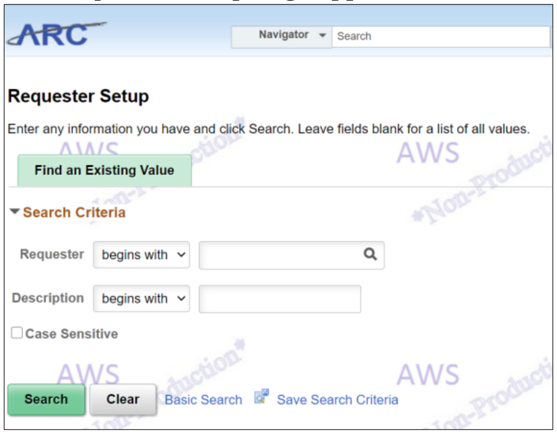
Setting up Requestor Defaults

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.

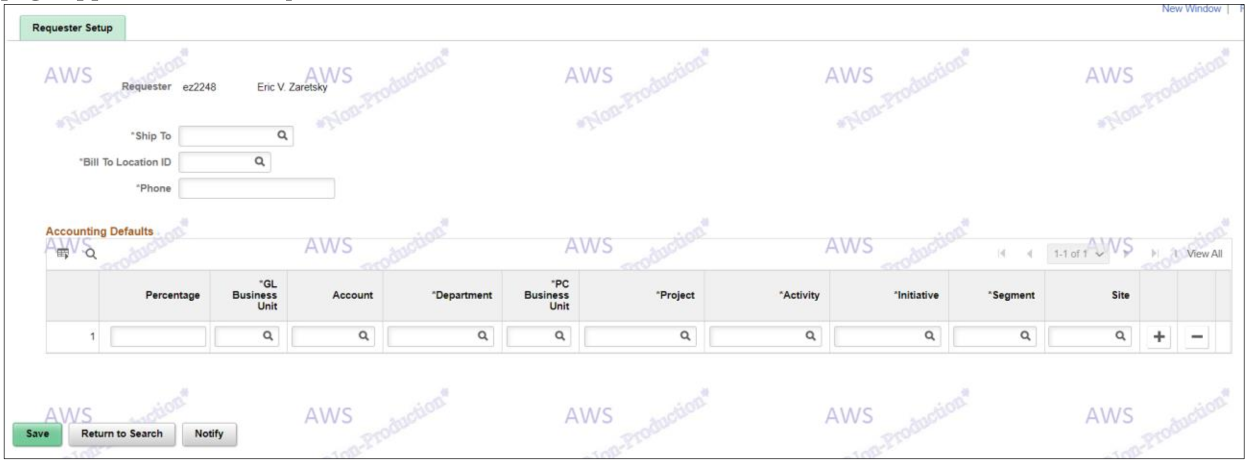
1. Login to [MyColumbia]() and click the **ARC** link.
2. Scroll to the **Transaction Quick Links** tab and the **Procurement** section and click the **Update Requestor Defaults** link.



The Requestor Setup Page appears.



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.



4. Enter the **Ship To** and **Bill To Location ID's**. Click the **Search** 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 [Location Setup Request].
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