Get Your Hands on MMP
Introduction

- First/last name
- Department
- Use MMP before? (Yes/No)
- Your role in MMP (Shopper vs. Requestor)
Agenda

- Course expectations
- Procurement Cycle & Requirement
- MMP Steps
- Procurement to Pay Directive
- User Support
- Q&A
Course expectations

When I walk out of this course, I want to know …

What are your QUESTIONS?
a) **Pre-contract award:**
1. delineating procurement requirements
2. determining selection strategies and criteria
3. obtaining pricing and availability quotations from suppliers
4. evaluating quotations and select supplier(s)

b) **Post-contract award:**
1. ordering through sanctioned channels/executing contracts
2. Receiving, accepting and distributing goods
3. issuing payments to suppliers
4. managing warranty and supplier performance
5. reporting during custody of purchased assets
6. disposing of purchased assets
7. maintaining auditable records
Purchase Orders: Clarifying Requirements

If there is no existing contract in place:

- < $2,500, it is recommended as a best practice to obtain written confirmation from a supplier, such as a quotation, an email, or website printout.
- $2,500 - $24,999 → negotiated contract (1 quote)
- $25,000 - $99,999 → competitive bid (3 quotes)
- $100,000 and over → Public competitive bid or Legal Exceptions/Executive authorization

*Procurement Services are developing a complete Purchase Order delegation agreement for MMP users*
McGill MarketPlace (MMP) Overview

The McGill MarketPlace (MMP) is an e-procurement system, a virtual shopping mall where users can view, compare and order products from various catalog vendors, as well as place non-catalog requisitions.

FOAPALs are used as method of payment.
Ways to Log into MMP

1) Through the McGill Hompage (My McGill)
Ways to Log into MMP

2) Through our Procurement Homepage
Ways to Log into MMP

3) Through Minerva:

User Login

Please select one of the following login methods:

<table>
<thead>
<tr>
<th>McGill ID Number</th>
<th>Minerva PIN</th>
</tr>
</thead>
<tbody>
<tr>
<td>9 digit ID number</td>
<td>6 character PIN</td>
</tr>
<tr>
<td>Forgot ID?</td>
<td>Forgot PIN?</td>
</tr>
</tbody>
</table>

OR

<table>
<thead>
<tr>
<th>McGill Username</th>
<th>McGill Password</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:first.last@mcgill.ca">first.last@mcgill.ca</a></td>
<td>8-10 character password</td>
</tr>
<tr>
<td>Forgot Password?</td>
<td></td>
</tr>
</tbody>
</table>
Shop with this profile

- Only Requestors have a profile to edit.
- Profile data – email address in the profile is used for system generated emails.
- Each room in a building must have its own shipping address created in your profile – If your shipping address is missing fill in this form: [http://www.mcgill.ca/financialservices/forms/location-code](http://www.mcgill.ca/financialservices/forms/location-code)

**Profile data**

To change your email and/or phone fill in the Override field or select from the dropdown list; press Save.

- Email Address:
- Or Override: feedback.purchasing@mcgill.ca
- Phone Number:
- Or Override: (514) 3982340 extn

**Shipping Addresses**

Press the Add button to add a new shipping address for the MarketPlace, or click on Edit or Delete for existing addresses. If you have more than 1 address listed below, click on the star to make it your default (star) selection.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Ship To Alias Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>🌟 🌟 Front Desk</td>
<td>Rm 111 Durocher 3465</td>
</tr>
<tr>
<td>🌟 my office</td>
<td>Rm 103b Durocher 3465</td>
</tr>
</tbody>
</table>

**FOAPAL Favorites**

Use the fields below to add favorite FOAPAL codes to your MarketPlace dropdown lists.

To add favorites, choose a FOAPAL element, then add a code or select a group; click on Add Favorite. If you have more than 1 favorite in your list, click on the star to make it the default (star) selection. Click on the trash to delete a favorite from the list.
MMP Steps

1. Verify, Edit and/or Create Profile
   - Profile Data
   - Shipping Addresses
   - FOAPAL Favorites

2. Shop with this profile

3. Create Cart

4. Select Vendor

5. Add Products

6. Checkout (Shopper)

7. Assigned Cart
   - A Shopper will assign cart to a Requestor
   - Requestor will continue to complete the requisition

8. Checkout (Requestor)

9. Place Order

10. View Requisition History

   - View Requisition Status (MMP)
   - View Approval History (Minerva)
Select Vendor

- **Hosted Catalog**: catalog resides on MMP

- **Punch-out**: supplier’s complete on-line catalog specific to McGill

- **Non-catalog**: quote on hand, free-form requisition
Creating and renaming a cart

1) Go to **Shop → My Carts and Orders → View Draft Shopping Carts**.

2) Press the **Create Cart** icon.

3) Rename your cart by editing the information in the **Name this cart** box on the left of your screen.

4) Press on **Update**.

NOTE: **Only 1 cart per Supplier**

**You can have multiple pending carts**
Catalog: Filter Search Results

Shop Everything tips 2.5ml

Results for: Everything : tips 2.5ml

Showing 1 - 33 of 33 Results
Adding products from a Hosted Catalog Supplier

1. Select the **Home** tab. Enter the product name or description in the empty rectangular box. 
   *Note:* You can expand your search by clicking the **Advanced Search** option. *Eg. Toners (HP 1100, HP 2100)*

2. Press the **Go** button.

3. You can use the **Filters** to further refine your results.

4. To add the chosen product to your shopping cart, press on the **Add to Cart** icon.
Adding products from a Punchout Supplier

1. Select the **Home** page.
2. From the **Punchout** supplier section, select the supplier by pressing on the supplier’s icon. MMP will re-direct you to the supplier’s website. *Eg. Staples- bic pens*
3. If a security pop-up window appears, please choose to "Show All Content“
4. Search and add products within Punchout supplier’s website. When you finish adding products, click on "**Check Out**" or "**Submit Order**", your completed cart will be brought back into MMP.
Non-Catalog Requisition
- currency & addresses

- Select the correct currency
  
  | Enter Supplier | Harvard Apparatus Canada | Harvard Apparatus Canada |

- Select the correct Business Address
  
  | IBM Canada Ltee | select different supplier |
  |**Fulfillment Address** | Business/Organization 1: (preferred)
Daniel Dumoulin
1250 Rene Levesque Ouest
Montreal, QC H3B 4W2 CA |

select different fulfillment center
Non-Catalog Requisition – description & taxes

- **Meaningful Description**
  - Provide appropriate description along with the applicable quotation#/contract#/promo code (i.e. laboratory equipment as per quote #123)
  - Note that attachments are viewed only internally and are NOT sent to supplier

- **GST & QST are added automatically**
  - **Requisition**: Requestor will not see any taxes in MMP, but the approver(s) will see taxes added in Minerva
  - **Purchase Order**: will include taxes as per supplier’s tax status
  - **Invoice**:
    - A/P will pay taxes that appear on the invoice;
    - Taxes not paid directly to supplier maybe self-assessed by A/P and paid to government
    - Any unused tax encumbrance will be released back into the fund
Creating a **Non-Catalog Item** order

**Method 1:** If Current Cart is empty, click **non-catalog item** link on the MMP homepage.

**NOTE:** If you select this method, once you finished entering the items (see the next 2 slides), click the current cart link to either “**View My Cart**” or “**Checkout**”.
Creating a **Non-Catalog Item** order

**Method 2:** Go to **Shop → My Carts and Orders → View Draft Shopping Carts**. Press the **Create Cart** icon → **Add Non-Catalog Item**
Non-Catalog Requisition
– Standing Order

- Enter an **estimated amount** to cover services for the full fiscal year (from May to April).
- Supplier can quote the same PO number on invoices associated with your account within the period.
- Select "**YR-Year**" as unit of measure (U/M);
- Include your **customer #** on the Vendor Note section.
Shoppers - Assign Cart (Method 1)

1. Press the **Assign Cart** icon on the upper right corner.

2. Click **All Assignees** to search and add the name of the assignee.

3. Enter text in the **Note to Assignee** box if required. The note will be sent to the Assignee by e-mail.

4. Press the **Assign** button.
Shoppers - Assign Cart
(Method 2)

1. Press the *Proceed to Checkout* icon on the upper right corner.

2. By default, you should be brought to the *FOAPAL information* section of the flow chart. Ignore the error message for the Shipping & FOAPAL Information as you don’t have access to these two sections.

3. Click on the *Final Review* section of the flow chart. Enter *Internal Note, Vendor Note,* and *Add Attachment* if required.

4. Press the *Assign Cart* icon on the upper right corner & follow steps in method 1.
Requestors - Reviewing and completing an order

1. Press the **Proceed to Checkout** icon on the upper right corner.

2. By default, you should be brought to the **FOAPAL Information** section of the flow chart, however you may back track to previous steps if necessary (see next step).
Requestors - Reviewing and completing an order

3. Edit the **Shipping Information, Delivery Date**, add **Internal Note** and **Vendor Note** if required by selecting the appropriate section on the flow chart.

4. Press the **Edit** button in the **FOAPAL Information** section of the flow chart. If you enter a fund code manually, press the **Update Org/ Prog** link to match the **Organization** and the **Program** to the **Fund**. You can select a code from the **My Favorites** drop down list under the associated FOAPAL Element. Or you can click on **All Codes** to search a code by value or by description. Press **Save**.
5. Once ready to submit requisition, click on the **Final Review** section of the flow chart.

6. Press the **Place Order** icon on the upper right corner.

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**All done! The required information has been completed and this request is ready to be submitted.**

*Once you have reviewed the details, you may continue by clicking the button at the top of the page.*
MMP STEPS: Place Order

Requisition number is assigned

Next Steps
- View Approval Status
- Search for another item
- View order history
- Check the status of an order
- Return to your home page
- Create new draft cart

Requisition Summary
- Reference number: 69598654
- Requisition status: Pending
View Requisition Status (in MMP)

**Pending** → waiting for FFM/FFM’s delegate, Fund Admin’s approval

<table>
<thead>
<tr>
<th>Requisition No.</th>
<th>Supplier(s)</th>
<th>Requisition Name</th>
<th>Requisitioner</th>
<th>Requisition Date/Time</th>
<th>Requisition Total (CAD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1499236</td>
<td>McGill Computer Store</td>
<td>2016-01-26 RY5 01</td>
<td>Ruiken Yu</td>
<td>1/26/2016 10:38 AM</td>
<td>10,000.00</td>
</tr>
</tbody>
</table>

**Approved** → <$10K: PO issued automatically; >$10K pending for Procurement review

<table>
<thead>
<tr>
<th>Requisition No.</th>
<th>Supplier(s)</th>
<th>Requisition Name</th>
<th>Requisitioner</th>
<th>Requisition Date/Time</th>
<th>Requisition Total (CAD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>69598654</td>
<td>Megalexis Communications Inc.</td>
<td>2015-12-18 RY5 01</td>
<td>Ruiken Yu</td>
<td>12/18/2015 9:29 AM</td>
<td>141.75</td>
</tr>
</tbody>
</table>

**Rejected** → click the **History** Tab to view Note for more information

<table>
<thead>
<tr>
<th>Requisition No.</th>
<th>Supplier(s)</th>
<th>Requisition Name</th>
<th>Requisitioner</th>
<th>Requisition Date/Time</th>
<th>Requisition Total (CAD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>62916395</td>
<td>Copibec</td>
<td>2015-06-09 RY5 01</td>
<td>Ruiken Yu</td>
<td>6/9/2015 9:34 AM</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Records found:** 7

<table>
<thead>
<tr>
<th>Line No</th>
<th>Date/Time</th>
<th>User</th>
<th>Step(s)</th>
<th>Action</th>
<th>Field Name</th>
<th>From</th>
<th>To</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line 1</td>
<td>6/9/2015 9:34 AM</td>
<td>System</td>
<td>Budget Availability Checking</td>
<td>Requisition rejected</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Line 1</td>
<td>6/9/2015 9:34 AM</td>
<td>System</td>
<td>Budget Availability Checking</td>
<td>Requisition Line item rejected</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Item 1, Sequence 1: Insufficient budget for item 1, sequence 1, suspending transaction.
What happens next?

- MMP Requisition # is assigned (i.e., 12345678).
- Passes Banner BAVL check, “R” Requisition # is assigned (R0123456).
- Approvals recorded, purchase order (P0) number is assigned (P0123456), e-mail notifications are sent to requestor and to supplier.
Requisition Approval Path
(in Minerva)

Minerva → go to “Finance” menu → click “Approve Document” → Select “All documents which you may approve” → click “Submit Query” → click “History”.

Approve Documents

Select the Document Number link to display the details of a document. Select the History link to display the approval history of the document. Select the Approve link, if enabled, to approve the document. Select the Disapprove link, if enabled, to disapprove the document.

Grant holder/delegate authorization of purchase requisitions/orders for international acquisitions includes authorization of the cost incurred for customs and brokerage charges for the acquisitions.

<table>
<thead>
<tr>
<th>Queried Parameters</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID: RYU5</td>
</tr>
<tr>
<td>Document Number:</td>
</tr>
<tr>
<td>Documents Shown: Next Approver</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Approve Documents List</th>
</tr>
</thead>
<tbody>
<tr>
<td>Next Approver</td>
</tr>
<tr>
<td>-----------------</td>
</tr>
<tr>
<td>REQ</td>
</tr>
<tr>
<td>REQ</td>
</tr>
<tr>
<td>REQ</td>
</tr>
<tr>
<td>REQ</td>
</tr>
<tr>
<td>REQ</td>
</tr>
<tr>
<td>REQ</td>
</tr>
</tbody>
</table>
Requisition Approval Path (in Minerva)

• FFM/FFM's delegates + FAs will receive email notifications to approve orders
• This notification occurs at 10am and 2pm daily.
• Email notifications are sent in the order of the approval queue - once the 1st approver approves the requisition, the "next" approver receives the notification email.

NOTE: Approvers can perform approval at anytime instead of waiting for the notification:

• Go to Minerva → “Finance” menu → click “Approve Document” → Select “All documents which you may approve” → click “Submit Query”
**View PO Status**

Electronic copy of the PO: under the **Revision** tab of the PO, click on the "**HTML Attachment Email PO**" or "**Fax PO**" link (not applicable if PO is sent by cXML).

<table>
<thead>
<tr>
<th>Summary</th>
<th>Details</th>
<th>PO Status</th>
<th>Shipments</th>
<th>Comments</th>
<th>Attachments</th>
<th>History</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revision</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revision No.</td>
<td>Revision Date</td>
<td></td>
<td>Revision Name</td>
<td></td>
<td></td>
<td>Revised By</td>
</tr>
<tr>
<td>original</td>
<td></td>
<td></td>
<td>original</td>
<td></td>
<td></td>
<td>System</td>
</tr>
<tr>
<td>10/11/2012 11:07 AM</td>
<td></td>
<td></td>
<td>HTML Attachment Email PO</td>
<td></td>
<td></td>
<td>Attachments McGillITG.pdf (System)</td>
</tr>
</tbody>
</table>

**Shows whether or not the PO was sent by e-mail, by fax or by cXML (direct data injection to the supplier's system) and the exact time and date of the transmission.**
Adding Comments/Backups

- Locate the document (Req or PO) → Open the **Summary** page → **Available Actions**, choose **Add Comment** and press the **Go** button.

- Enter a brief description of the attachment → enter a **File Name** → click “**Browse**” to select document from your computer → click **Add Comment**
Copying a cart

1. Retrieve the order under **Orders & Documents → Search Document**.
2. Call up **Requisition** summary page.
3. From the drop down menu under **Available Actions**, choose **Copy to New Cart** and press the **Go** button.
Order Modifications

- If Req is pending for approval → disapprove Req:
  Minerva → go to “Finance” menu → click “Approve Document” → click “Submit Query” → click “Disapprove”

- PO already issued → confirm with vendor that order can be changed or cancelled

- Send request to Procurement Services:

  MMP homepage
  - Staple Core List
  - Lyreco list of Non Taxable products
  - PO Change Request Form
  - PO Cancellation form
  - How to use MMP + Training course

  Procurement Website – Forms:
  - http://www.mcgill.ca/procurement/forms/cancellation
  - http://www.mcgill.ca/procurement/forms/changeorder

  Feedback.purchasing@mcgill.ca
Ordering - Roles & Responsibilities

Requisition Submission
- Requestor
  - Submit requisition for approval

Requisition Approval
- Approvers (FFM, FFM’s delegates) / Fund Admin
  - Requisition is approved locally & centrally

PO Issuance
- Auto Buyer / P.S. Buyer
  - Auto PO for <$10K; P.S. Buyer release PO for >$10K

G & S Received
- Requestor/unit
  - Verify G & S received; Keep proof of delivery
    - Attach backup document in MMP

Payment
- Supplier
  - Requestor Accounts Payable
    - Invoice received by A/P; Invoice >$10K signed by FFM
      - Payment issued to supplier

Additional notes:
- Change/Cancellation Request Form
- PO → Available Action → Add Comments
REVIEW - MMP Steps

Create Cart → Select Vendor → Add Products → Checkout (Shopper) → Checkout (Requestor) → Place Order

Assigned Cart

- Hosted Catalog
- Punch-Out
- Non-Catalog
- Rename Cart
- Add Internal /Vendor Note
- Add Attachment
- Permit Number
- Shipping Address
- FOAPAL Information
Procure to Pay Process Directive

- Payment of invoices is triggered by Accounts Payable receiving a copy of the invoice.
- Accounts Payable will only pay invoices that meet the following criteria:
  - clearly reference a valid Purchase Order number
  - only reflect charges authorized by the Purchase Order
  - bear a unique invoice number
  - indicate an invoice date

Questions?
feedback.purchasing@mcgill.ca
MMP - How to

http://www.mcgill.ca/procurement/mmp/howto

https://www.mcgill.ca/procurement/mmp/tracking
  Track requisition status – Approval History
  View PO status
  Search for a Requisition / PO
  View a purchase related document

http://www.mcgill.ca/procurement/mmp/troubleshooting
  Requisition is rejected - How to trouble shoot
  I never receive a PO#
  I never received my order
  My supplier never received payment
Additional Information

Financial Services Knowledge Base

http://kb.mcgill.ca/fskb/
- Who to contact and when – Article #3953
- Overview of Payment Methods - Article # 4111
- Approve or Disapprove document - Article #3894
- Sales Tax and Expenditures - Article #4050

Procurement Services

http://www.mcgill.ca/procurement
feedback.purchasing@mcgill.ca (General Procurement Inquiries)
vendor.purchasing@mcgill.ca (Adding/Updating Supplier Info)
514.398.2840
Is the following statement TRUE or FALSE

- I am purchasing products from a hosted catalog vendor. I added the items to my cart, but, the item total does not equal the price I negotiated with the Sales Representative. I can change the price of the items myself once I Proceed to Checkout.

FALSE
Is the following statement TRUE or FALSE

- I always enter the unit price after taxes.

FALSE
Is the following statement TRUE or FALSE

- The transaction date of my cart does not matter. I only need to make sure that the delivery date is for a date in the future.

FALSE
Is the following statement TRUE or FALSE

- When I go to the Final Review section, I will see the total amount to be charged to my FOAPAL, including the calculated taxes.

FALSE
Course expectations

When I walk out of this course, I want to know …

Did I get my answers?

Any more QUESTIONS?