HOW TO Sponsor a Requestor (MMP)

Definition of a Requestor and their responsibilities

**Requestor** = Individual who may complete and submit an order with a FOAPAL in the McGill MarketPlace (MMP).

- Fund Financial Managers (FFM) or Principal Investigators (PI) are automatically considered to be Requestors.
- FFM's or PIs may sponsor individuals as Requestors.

Sponsorship Records

To become a Requestor, a Sponsorship record must be created and a Fund Financial Manager must confirm this record.

Sponsorship records may be created in Minerva through the Finance (Fund) Administration > Procurement Administration menu:

- By the Fund Financial Manager (FFM) - once created, these records are considered to be "confirmed".
- On behalf of a Fund Financial Manager (FFM) - once created, email alerts are sent twice daily at 10am and 2pm to the FFM/PI informing them that there are pending records awaiting confirmation.

How to Sponsor a Requestor or View Sponsorship Records

1. Log in to Minerva.
2. Go to the Finance (Fund) Administration Menu
3. Select the Procurement Administration menu option
4. Click on the Sponsor a Requestor menu option
5. If you are the Fund Financial Manager (FFM) or Principal Investigator (PI), go to step 7. In the FFM ID field, enter the McGill ID of the Fund Financial Manager / Principal Investigator. Click on Search if the ID is not known.
6. Hit the TAB key to validate the ID. The FFM's name will appear next to the field. **Note:** In the bottom half of the page, a listing of individuals already sponsored by the FFM will appear.

Hover over the McGill ID of the sponsored individual to view who requested the sponsorship record. An info box will be displayed - "Requested by: First name Last name".
7. In the **ID of Intended Requestor** field, enter the McGill ID of the individual being sponsored to procure (place orders using a FOAPAL). Click on Search if the ID is not known.

8. Hit the **TAB** key to validate the ID. The individual's name will appear next to the field.

*If the following message appears you will not be able to complete the sponsorship record today:*

This individual needs a Finance profile to be created before they may be sponsored. Follow the steps below to **send a request for a Finance profile** to be created. Once processed, FIS Security will send you an email, and then you should return to this menu to create the sponsorship record:

- **Click on the hyperlinked word “here”**.
  - Follow the instructions on the screen. You will be prompted to enter information to create a profile for the individual (address, phone number, etc.).
  - Clicking on Submit will generate an email sent to FIS Security - a Finance profile will then be created for the Intended Requestor. Once processed (between 3 to 5 business days), you will receive an email with the subject line “MMP FIS Authorization Request”.

- **Once you receive the confirmation email, once again, follow the steps above to create a sponsorship record.** This time when you hit the TAB key to validate the ID of Intended Requestor, there will be no message about an incomplete system profile.
9. In the **Expiry Date** field, enter a termination date (if applicable).
   **Note:** The format of the date should be 01-MAR-2013 for a date of March 01, 2013.
   Sponsorships with termination dates will terminate at the expiry date. As a result, the entire record will be revoked automatically.

10. Click **Submit**.

Once the Sponsorship record is created, the Name and McGill ID of the Intended Requestor will appear in the bottom half of the page.

For all **sponsorship records created on behalf of a FFM / PI**, there will be a message "**Awaiting Confirmation**" displayed next to the name and McGill ID of the intended requestor. These records must be confirmed by the FFM /PI.

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**How to Confirm or Revoke Sponsorship Records**

Fund Financial Managers (FFM) or Principal Investigators (PI) may confirm or revoke records. If you prepared a record **on behalf of an FFM/PI**, you may revoke sponsorships records you created prior to the record being confirmed.

1. If you are the Fund Financial Manager (FFM) or Principal Investigator (PI), click on the **link in the email** you received (log in is required). This will bring you to the Procurement Administration menu in Minerva. Otherwise,
   - Log in to **Minerva**.
   - Go to the **Finance (Fund) Administration Menu**
   - Select the **Procurement Administration** menu option
   - Click on the **Sponsor a Requestor** menu option
   - In the **FFM ID** field, enter the McGill ID of the Fund Financial Manager / Principal Investigator on behalf of whom you created sponsorship records
   - Hit the **TAB** key to validate the ID.

2. A list of **sponsored individuals**, or those "**Awaiting Confirmation**" will be displayed.
   - Click on the **Confirm** button for each individual that is "**Awaiting Confirmation**".
   OR
   - Click on the **Revoke** button to cancel/remove a sponsorship record.
   **Note:** Once a sponsorship record is "confirmed", only the FFM / PI may revoke the record.