MMP QUICK REFERENCE

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GLOSSARY

MMP The McGill MarketPlace, your new tool for placing all orders for goods and services.

Hosted Vendor The catalog from a hosted vendor resides on the McGill MarketPlace. There is no interaction with the vendor's website. You will be able do product comparison between different hosted vendors.

Punchout Vendor The catalog from a punchout vendor does not reside on the McGill MarketPlace. It is in fact the vendor's complete on-line catalog. When choosing a Punchout vendor, you are redirected to the vendor's website to populate your cart. Your completed cart is brought back into MMP to review and place your order.

Non-catalog requisition This is a free-form purchase requisition for use when the goods/services you intend to buy are not available through the MMP catalogs.

Fund Financial Manager Also known as the FFM, Fund Holder or Principal Investigator (in the case of research grants). The faculty or staff member named on the McGill fund who is responsible and accountable for that fund.

Shopper Can access MMP to browse catalogs, add items to a cart and ultimately assign (i.e. forward) a cart to a Requestor for completion. All employees and active students are automatically given the Shopper role.

Requestor The McGill staff member who prepares and submits completed orders for approval. The Requestor may also receives prepared shopping carts from Shoppers, in which case, the Requestor completes the purchase requisition by adding FOAPAL information and then submitting for approval. All Fund Financial Managers (FFMs) are automatically given the Requestor role. FFMs can also sponsor others with a buying role to be Requestors.

Approver The Fund Financial Manager or their delegate who intercepts and reviews purchase requisitions originated in MMP, to assess if the order:
  - Meets the objectives of the fund(s) charged;
  - Is legitimate, reasonable and an appropriate use of funds;
  - Adheres to policies and guidelines;
  - Complies with any restrictions imposed by external funding sources

ACCESSING MMP

There are three easy ways to access the McGill MarketPlace

1. *my*McGill Protal:

2. Minerva → Finance (Fund) Administration menu (not applicable to Shopper):

3. Procurement Services Website → http://www.mcgill.ca/procurement/

PERSONALIZE YOUR SHOPPING PROFILE:

You are presented with your Shopping Profile before launching MMP. With an easy one-time set-up, all your shipping addresses and FOAPAL elements can be added to make your shopping experience more personalized.

Click on the edit icon   to see your profile.

- In the Profile Data box, verify and update your email and phone number. This information will appear as contact information on the purchase order sent to the vendor.

- In the Shipping Address box, click the ADD button to select shipping locations you typically have goods shipped to.

- In the FOAPAL Favorites box, select the Fund, Account, Activity or Location codes you frequently use, and add them as your personal favorites.

Once you are satisfied with your Shopping Profile, click the SHOP WITH THIS PROFILE button to launch MMP.

QUICK STEPS FOR CREATING SHOPPING CARTS & ADDING PRODUCTS

Creating and renaming a cart

Step 1. Go to the **Shop** page   , select **My Carts and Orders**, **View Draft Shopping Cart**.
Step 2. Press the **Create Cart** icon.
Step 3. Rename your cart by editing the information in the **Name this cart** box on the left of your screen.
Step 4. Press on **Update**.

Adding products from a Hosted Catalog Vendor

Step 1. Make sure you are using either an empty cart or one that is populated with product(s) from the same vendor.
Step 2. Select the **Home**   or **Shop**   page. Enter the product name or description in the empty rectangular box.
Step 3. Press the **Go** or **Search** button.
Step 4. To add the chosen product to your shopping cart, press on the **Add to Cart** icon.

Adding products from a Punchout Vendor

Step 1. Make sure you are using either an empty cart or one that is populated with product(s) from the same vendor.

Step 2. Select the **Home** page .

Step 3. From the **Punchout** vendor section, select the vendor by pressing on the vendor's icon. MMP will re-direct you to the vendor's website.

Step 4. If a security pop-up window appears, please choose to "**Show All Content**".

Step 5. Search and add products within Punchout Vendor's website. When you finish adding products, click on "**Check Out**" or "**Submit Order**", your completed cart will be brought back into MMP.

Creating a Non-Catalog requisition

Step 1: Make sure you are using either an empty cart or one that is populated with product(s) from the same vendor.

Step 2: Select the **Home** or **Shop** page.

Step 3. Press **Non-Catalog Item**. This will open up a pop-up window.

Step 4. Enter the beginning of a vendor's name in the **Enter Supplier** box. A list of vendors will show up. Select the vendor by clicking on the vendor name.

Step 5. You can also click on the "**Supplier Search**" link to search a vendor by part of its name. Press the **Select** button to select the vendor.

Step 6. Enter the information for the product you wish to order (Product Description, Catalog Number (not mandatory), Quantity, Unit Price and Unit of Measure).

Step 7. To add another item from the same vendor press the **Save and Add Another** button. When you finish adding product information, press the **Save and Close** button.

Step 8. Once the pop-up window closes, click the "**Current Cart**" icon on the top right corner of the page, and select "**View My Cart**" or "**Check out**".

QUICK STEPS FOR REVIEWING AND COMPLETING AN ORDER

Step 1. Access your Active Cart by pressing on the "**Current Cart**" icon on the top right corner of the page, and select "**View My Cart**".

Step 2. Press the **Proceed to Checkout** icon on the upper right corner.

Step 3. By default, you should be brought to the **FOAPAL Information** section of the flow chart (see image below) however you may back track to previous steps if necessary (see Step 4).

Step 4. Edit the **Shipping Information, Delivery Date**, add **Internal Note** and **Vendor Note** if required by selecting the appropriate section on the flow chart.

Step 5. 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**.

Step 6. Once ready to submit requisition, click on the **Final Review** section of the flow chart.

Step 7. Press the **Place Order** icon on the upper right corner.

QUICK STEPS FOR SHOPPER TO ASSIGN CARTS:

Step 1. Create and populate a cart with the required product(s). For detail instruction, please see Quick Steps for Creating Shopping Carts & Adding Products.

Step 2. Press the ***Proceed to Checkout*** icon on the upper right corner.

Step 3. By default, you should be brought to the ***FOAPAL information*** section of the flow chart (see image below) however you may back track to previous steps if necessary (see Step 4).

Step 4. Enter ***Internal Note*** *and* ***Vendor Note*** if required by selecting the appropriate section on the flow chart.

Step 5. Once ready to submit shopping cart, click on the ***Final Review*** section of the flow chart.

Step 6. Press the ***Assign Cart*** icon on the upper right corner.

Step 7. Click ***All Assignees*** to search and add the name of the assignee.

Step 8. Enter text in the ***Note to Assignee*** box if required. The note will be sent to the Assignee by e-mail.

Step 9. Press the **Assign** button.

QUICK STEPS FOR COMPLETING A CART FROM SHOPPER

Step 1. Go to the ***Shop*** page , select ***My Carts and Orders*** → ***View Draft Shopping Cart***. Or click on the ***Action Items*** in the top banner and select "***Carts assigned to me***".

Step 2. The carts assigned to you are in the ***Pending Carts Assigned to Me*** section.

Step 3. Click on the ***Shopping Cart Name*** link in order to continue with the assigned cart.

Step 4. Press the ***Proceed to Checkout*** icon on the upper right corner.

Step 5. If you want the requisition resides in your history, click on the ***General*** section of the flow chart and press the ***Edit*** button to change the ***Finalized by*** from the shopper's name to your name (the Requestor).

Step 6. From this point on, complete the order as you would do normally.

QUICK STEPS FOR RE-ORDERING FROM PAST ORDER

Step 1. Go to the **Orders & Documents** page , select ***Search Document.*** Enter the document number and click **GO**. Or click on the ***Advanced Search*** link and search orders by entering the parameters such as Participants (requestor's name), date, supplier, FOAPAL elements, etc. You

can also click on *My Requisitions* link to see a list of your personal requisitions for the past 3 months.

Step 2. Locate the order you would like to re-order from and press on the *Requisition number*.

Step 3. From the drop down menu under *Available Actions*, choose *Copy to New Cart* and press the **Go** button.

Step 4. A new *Cart/Requisition Name* will be assigned to the new cart, however all other information from the previous requisition (such as *Item details, Internal Note, Vendor Note, Shipping Address, FOAPAL*) is copied into the new cart. You can add or delete items under the *Current Cart* section.

Step 5. From this point on, complete the order as you would do normally.

QUICK STEPS FOR APPROVERS

Fund Financial Managers, as well as any approval delegates they have named, will receive an email if they have any orders to approve. This notification occurs at 10am and 2pm daily.

From the email:
- Simply click on the link provided
- Login to Minerva and you will be brought to the Approve Documents page
- Click the **Submit Query** button
- Use the **Document** hyperlink to view the order details
- Use the **History** hyperlink to view who has already approved the document, as well as who has yet to approve the document
- Use the **Approve** hyperlink to give your sign-off
- Use the **Disapprove** hyperlink to deny the order. Don't forget to explain the reason in the comments box. The Requestor will receive an email with your explanation.

OR from *my*McGill, in the Finance Admin portlet, click on **Documents to Approve**

OR from Minerva, go to the Finance (Fund) Administration menu, select **Approve Documents**

NOTE: Please note once a requisition is submitted, the system will add both GST & QST to the requisition amount regardless whether or not the vendor collects taxes. Once the PO is issued and sent back to MMP, the system will adjust the tax amount base on the vendor's tax status. Accounts Payable will only pay the amount as indicated on the vendor's invoice; once payment is issued, any remaining encumbrance will be released back to the fund

QUICK STEPS FOR ADDING COMMENT TO ACCOUNTS PAYABLE

In the case where you need to ask Accounts Payable to withhold payment for an existing MMP Purchase order, you could send comments to Accounts Payable through MMP with the following steps.

Step 1. Go to the Orders & Documents page , select *Search Document.* Enter the document number and click **GO**. Or click on the *Advanced Search* link and search orders by entering the parameters such as Participants (requestor's name), date, supplier, FOAPAL elements, etc. You can also click on *My Requisitions* link to see a list of your personal requisitions for the past 3 months.

Step 2. Locate the order you would like to add comment and press on the **Purchase Order number**.

Step 3. From the drop down menu under **Available Actions**, choose **Add Comment** and press **Go**.

Step 4. In the pop up window, click on the "***add email recipient***" link.

Step 5. Search Accounts Payable either by First Name (Account) or Last name (Payable).

Step 6. Enter you comment in the message box.

Step 7. Press the **Add Comment** icon. An e-mail will be sent to AccountsPayable@mcgill.ca

Step 8. Don't forget to send another comment to accounts payable to **release the payment** when the issue is resolved.

Add Comment ? X

This will add a comment to the requisition. If you select a user they will receive an email indicating that a comment has been added to the requisition.

Email notification(s):

☐ Ruikun Yu (Prepared for) <crystal.yu@mcgill.ca>

☑ Accounts Payable <AccountsPayable@mcgill.ca>

add email recipient...

Please hold payment until further notice. Item was defected and is in the process of being replaced.

900 characters remaining   expand | clear

Add Comment   **Cancel**

MMP TIPS

Shortcut to Current Cart

Anytime you want to return to your current shopping cart, press the cart link at the top right corner of the screen and select "View My Cart", and you will be brought to the **Current Cart** section.
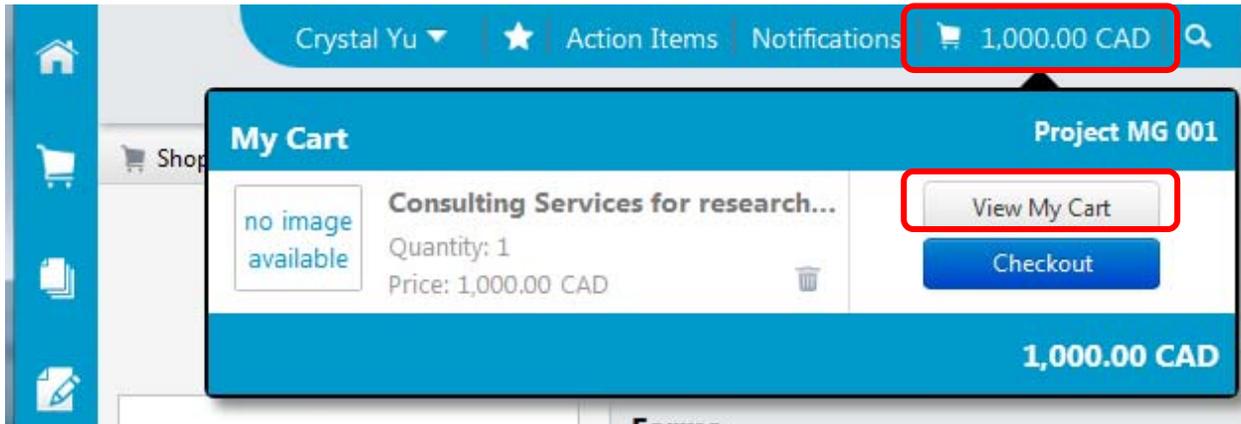
Reasons why a requisition is rejected

- Shopping cart was created or copied from an old order issued prior to your user role change (i.e. Shopper to Requestor)
- Insufficient funds (does not pass the BAVL check)
- Transaction Date is prior to when a vendor was created in the system
- Requisition is disapproved either locally or centrally

Use MMP Requisition History to trouble shoot

If your requisition is rejected, you can find the rejection reason under the requisition's History Tab.

Re-submit a Rejected order

If your requisition is rejected, you can retrieve the order under **Document Search**. Select **Copy to New Cart** under **Available Actions** and press **Go**. A new shopping cart will be created and you can correct the order information accordingly.

Order Modifications

If a PO has already been issued, and you would like to make changes or cancel the order, please first **confirm with the vendor** that the order can be changed or cancelled, then you can send a request to Procurement Services through the MMP Link, the Procurement website, or email:

- http://www.mcgill.ca/procurement/forms/**cancellation**

- http://www.mcgill.ca/procurement/forms/**changeorder**

- Feedback.purchasing@mcgill.ca

Help / Contact Information:

Financial help or questions may be directed to the Financial Help desk:

Phone: 398-3463 Option #2
Email: FISHELP.acct@mcgill.ca

Procurement/MMP software help or question may be directed to Procurement Services Help Desk:

Phone: 398-2840
Email: feedback.purchasing@mcgill.ca