Get Your Hands on MMP

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Procurement Cycle

Procurement Cycle

Define need for goods /services — Sourcing /Bidding — Select supplier(s) — Execute contract/ Place order — Goods/ Services received — Process invoice — Issue payment — Disposal

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

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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

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McGill MarketPlace (MMP)

■ 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.

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MMP Steps

Verify, Edit and/or Create Profile → Shop with this profile

- Profile Data
- Shipping Addresses
- FOAPAL Favorites

Create Cart

↓

Select Vendor
- Hosted Catalog
- Punch-Out
- Non-Catalog

↓

Add Products

↓

Checkout (Shopper)
- Rename Cart
- Add Internal Note
- Add External Note
- Edit Item Details

A Shopper will assign cart to a Requestor

Assigned Cart → Checkout (Requestor)
- Permit Number
- Shipping Address
- FOAPAL Information

Requestor will continue to complete the requisition

↓

Place Order

↓

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

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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

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)- 3982840   extn

Save

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 ☆ to make it your default (★) selection.

Actions   Ship To Alias   Location
☆   Front Desk   Rm 111 Durocher 3465
☆   my office   Rm 108b Durocher 3465

Add

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 ☆ to make it the default (★) selection. Click on the to delete a favorite from the list.

FOAPAL Element Fund   Individual Code   Group   Add Favorite

MMP – How to

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

+ Creating and Renaming a Shopping Cart
+ Adding Products from a Hosted Catalog Supplier
+ Adding Products from a Punchout Supplier
+ Creating a Non-Catalog Requisition
+ Reviewing and Completing an Order
+ Spliting FOAPALS
+ Adding an Attachment
+ Assigning Carts as a Shopper
+ Completing a Cart from a Shopper
+ Searching for an order
+ Copying past orders or rejected requisitions to a new cart
+ Ordering uPrint Paper

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Creating and renaming a cart

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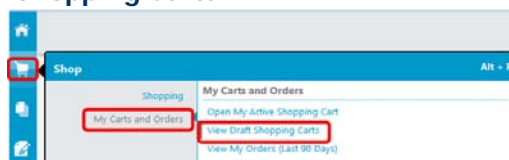
2) Press the *Create Cart* icon
3) Rename your cart by editing the information in the *Name this cart* box on the left of your screen.
4) Press on *Update*.

NOTE: Only 1 cart per Vendor
              You can have multiple pending carts

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Select Vendor: Catalog VS Non-Catalog

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

  Enter Supplier   santa c

  Santa Cruz Biotechnology Inc   B2B/cXML

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

  Punch-out

  Foodie Traiteur | abcam discover more | Agilent Technologies | CEDARLANE | Fisher Scientific | HENRY SCHEIN

  IDT | AB Invitrogen | Lyreco | M | NEW ENGLAND BioLabs Inc. | PerkinElmer For the Better

  Promega | QIAGEN | SIGMA-ALDRICH | The Flower Pot | VWR INTERNATIONAL | TENAQUIP

- **Non-catalog**: quote on hand, free-form requisition

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Catalog: Filter Search Results

Shop   Shopping   Dashboard   Shopping Home | Product Search - All   Logout

Shop   Everything   tips 2.5ml   Go

Go to: advanced search | favorites | forms | non-catalog item | quick order   Browse: suppliers | categories | contracts | chemicals

Results for: Everything : tips 2.5ml

Showing **1 - 33** of **33 Results**   Compare Selected: 0

Add Keywords   ?   Go

Results Per Page 200   Sort by: Best Match   Page 1 of 1   ?

Filter Results ?

By Supplier

Agilent Technologies Canada Inc. (4)

Diamed Lab Supplies Inc (4)

PerkinElmer Health Sciences Canada, Inc. (2)

Sigma-Aldrich Canada Co. (2)

Ultident (4)   less...

VWR International Co. (17)

By Supplier Class

McGill Contract Vendor (23)

CAD Science Catalog (6)

Canadian Dollars (33)   more...

By Category

TIP ROXYM 2.5ML NS PK100 Roxy M Repeat Pipettor Tips 2.5ml Scienceware disposable non-sterilefit most manual repeating pipettors reliable German made performance polypropylene with polyethylene inner plunger that prevents liquid from contacting pipettor from VWR International Co.
   Part Number   89233-672 (CS)
   Manufacturer Info   373000003 - (BEL-ART PRODUCTS)
Order from Supplier   1UNIT, CS   add favorite | compare

TIP ROXYM 2.5ML NS PK100 Roxy M Repeat Pipettor Tips 2.5ml Scienceware disposable non-sterilefit most manual repeating pipettors reliable German made performance polypropylene with polyethylene inner plunger that prevents liquid from contacting pipettor from VWR International Co.
   Part Number   89233-672 (PK)
   Manufacturer Info   373000003 - (BEL-ART PRODUCTS)
Order from Supplier   1UNIT, PK   add favorite | compare

TIP ROXYM 2.5ML ST PK100 Roxy M Repeat Pipettor Tips 2.5ml Scienceware disposable sterilefit most manual repeating pipettors reliable German made performance polyethylene with polyethylene inner plunger that prevents liquid from contacting pipettor grad from VWR International Co.
   Part Number   89233-686 (CS)
   Manufacturer Info   373000012 - (BEL-ART PRODUCTS)
Order from Supplier   1UNIT, CS   add favorite | compare

Adding products from a Punchout Vendor

1. Select the *Home* page.
2. 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.
3. If a security pop-up window appears, please choose to "Show All Content"
4. 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.

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Adding products from a Hosted Catalog Vendor

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.
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.

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Creating a <u>Non-Catalog</u> Item order

1. Select the *Home* or *Shop* page and click *Non-Catalog Item*.
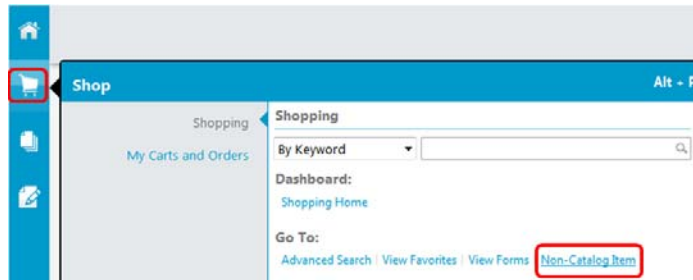
2. In the pop-up window, enter the beginning of a vendor's name in the *Enter Supplier* box. A list of vendors will show up. Select the vendor by clicking on the name.

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Creating a <u>Non-Catalog</u> Item order

Note: 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.

3. Enter the information for the product to order (Product Description, Quantity, Unit Price and Unit of Measure).

4. 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.

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Creating a <u>Non-Catalog</u> Item order

Non Catalog Item

Enter Supplier   abc supplier

Try searching again

Product Description (50 characters maximum)	Catalog No.	Quantity	Unit Price (before taxes)		U/M	
goods and services summary	not mandator	1	100	CAD ▾	EA - Each	▾

228 characters remaining   expand | clear

Save and Close   Save and Add Another   Close

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<u>Non-Catalog</u> 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**
  - <u>Requisition</u>: Requestor will not see any taxes in MMP, but the approver(s) will see taxes added in Minerva
  - <u>Purchase Order</u>: will include taxes as per supplier's tax status
  - <u>Invoice</u>:
    - 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

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Non-Catalog Requisition – currency & addresses

■ Select the correct currency

Enter Supplier

harvard a

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

Mozilla Firefox

🔒 https://solutions.sciquest.com/apps/Router/NonCatalogItemSupplierSearchPopup?Tmstmp=1411138217835354&Param_SupplierId=13288442&

Results Per Page 200 ▼	Suppliers found: 1	◄ Page 1 of 1 ► ?
	Supplier Name/Address	**Select**

IBM Canada Ltee 🍁

Business/Organization 1: Daniel Dumoulin 1250 Rene Levesque Ouest Montreal, QC H3B 4W2 CA   Select

Business/Organization 3: 3600 Steeles Avenue East Markham, ON L3R 9Z7 CA   Select

Business/Organization 4: 1360 boul. Rene-Levesque Blvd. Ouest Montreal, QC H3G 2W6 CA   Select

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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.

Product Description (50 characters max): Brokerage fees will be charged to your fund for international purchases	Catalog No.	Quantity	Unit Price (before taxes)	Quantity and Unit of Measure
Standing Order for Services between May 1 20XX to April 30 20XX; Customer # 0000001		1	500.00 CAD	YR - Year
169 characters remaining expand | clear				

Save and Close   Save and Add Another   Close

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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.
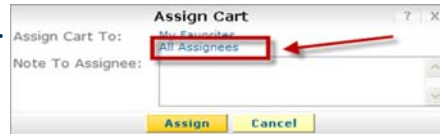
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Shoppers - Assign Cart
(Method 2)

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
3. Enter *Internal Note* and *Vendor Note* if required by selecting the appropriate section on the flow chart.
4. Once ready to submit shopping cart, click on the *Final Review* section of the flow chart.
5. Press the *Assign Cart* icon on the upper right corner & follow steps in method 1.

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Requestors - Reviewing and completing an order

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


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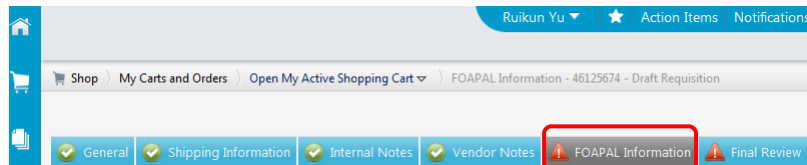
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Requestors - Reviewing and completing an order

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**.
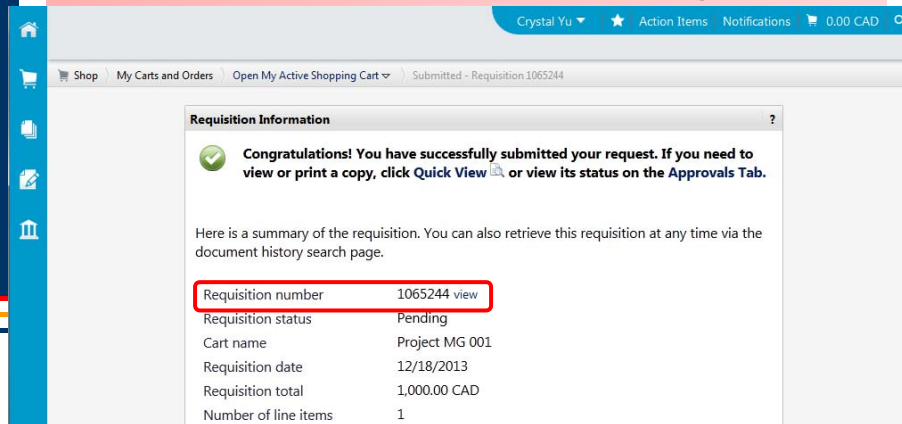
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Requestors - Reviewing and completing an order

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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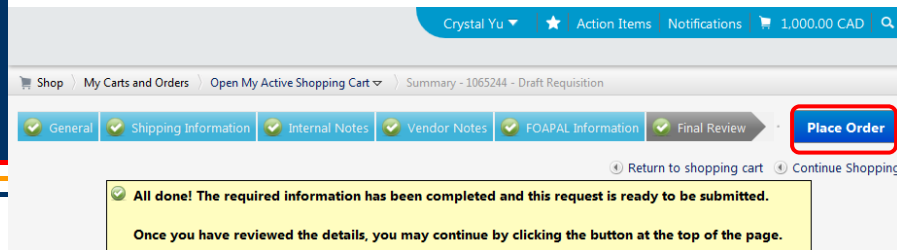
MMP STEPS:
Place Order
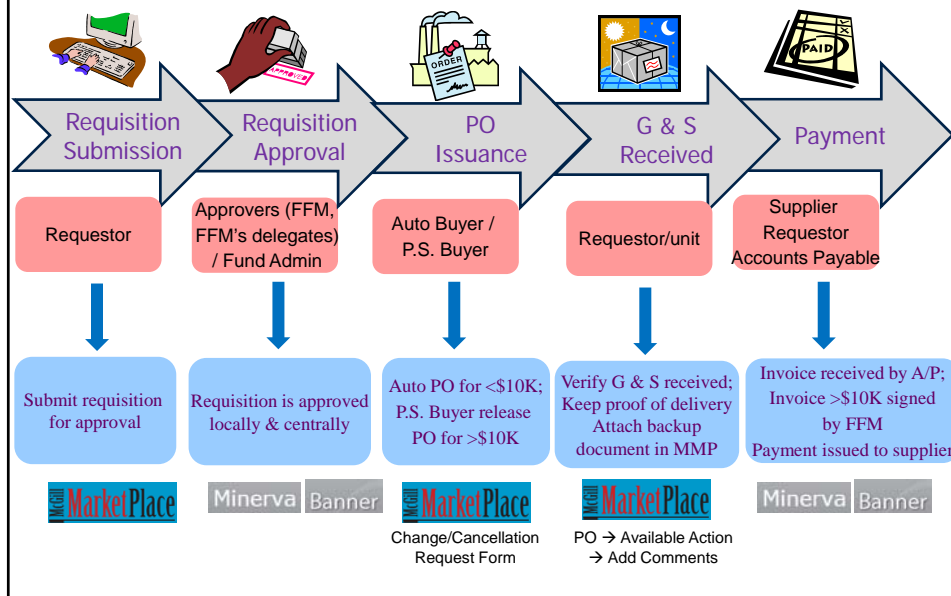
Requisition number is assigned

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What happens next?

- MMP Requisition # is assigned (ie. 12345678).
- Passes Banner BAVL check, "R" Requisition # is assigned (R0123456)
- Approvals recorded, purchase order (PO) number is assigned (P0123456), e-mail notifications are sent to requestor and to supplier.

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Ordering - Roles & Responsibilities

Requisition Submission	Requisition Approval	PO Issuance	G & S Received	Payment
Requestor	Approvers (FFM, FFM's delegates) / Fund Admin	Auto Buyer / P.S. Buyer	Requestor/unit	Supplier Requestor Accounts Payable
Submit requisition for approval	Requisition is approved locally & centrally	Auto PO for <$10K; P.S. Buyer release PO for >$10K	Verify G & S received; Keep proof of delivery Attach backup document in MMP	Invoice received by A/P; Invoice >$10K signed by FFM Payment issued to supplier
McGill MarketPlace	Minerva Banner	McGill MarketPlace — Change/Cancellation Request Form	McGill MarketPlace — PO → Available Action → Add Comments	Minerva Banner

Tracking & Troubleshooting

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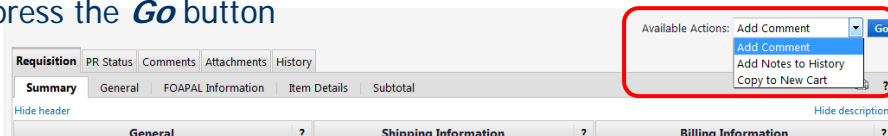
http://www.mcgill.ca/procurement/mmp/**troubleshooting**
- Requisition is rejected - How to trouble shoot
- I never receive a PO#
- I never received my order
- My supplier never received payment

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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*

Order Modifications

- If Req is pending for approval → disapprove req:
  http://www.mcgill.ca/procurement/mmp/tracking - Disapprove a pending requisition

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

- Send request to Procurement Services:

  New punchout:
  - Cedarlane
  - Promega

  New punchout coming soon:
  - Tenaquip

  PO Change Request Form
  PO Cancellation form

  Training available: "Get your Hands on MMP"

  - http://www.mcgill.ca/procurement/forms/**cancellation**
  - http://www.mcgill.ca/procurement/forms/**changeorder**
  - Feedback.purchasing@mcgill.ca

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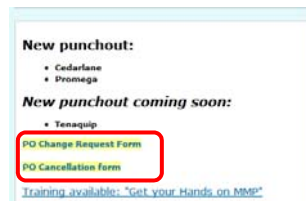
Exercise 1

You have been asked to order the following items from Staple:

- Paper Mate Flexgrip Ultra Floating Ball Pen, Fine Point, 0.8mm, Blue
  ITEM # PAP96601   QUANTITY – 24

- Post-it Notes, Canary Yellow, 3" x 3", Blank, 100 Sheets/Pad
  ITEM# MMM654YW   QUANTITY – 12

- Avery Highlighter, Fluorescent Yellow
  ITEM # AVE83507   QUANTITY – 12

[HINT – Punchout Order]

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Exercise 2

You have been asked to search MMP and order 2 toner cartridges for an HP printer 5SI.

The Professor requires that the order be placed with a contracted vendor, and a vendor deemed as being environmentally friendly

[HINT – Hosted Catalog Order
(add Internal Note if all requirements are met)]

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Exercise 3

You have been asked to make a hotel reservation for Dr. John Smith, for a 2 night stay (check in on May 28 and check out on May 30).

You called one of the Official Hotels, Delta, and confirmed there were rooms available for the date. It will cost $146/night x 2 nights = $292.00 + taxes. The Booking Confirmation #is MG2016.

You told them McGill will issue a purchase order with all the pertinent information (Booking #, date, and quoted price).
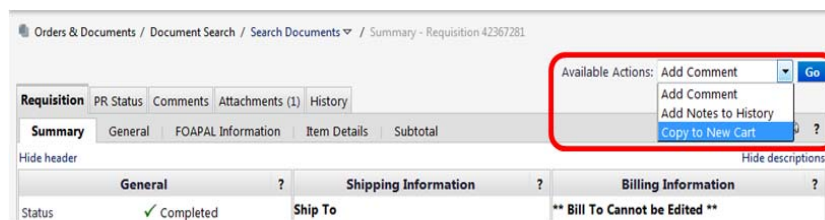
[HINT – Non Catalog Item Order with Vendor Note]

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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.

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Copying a cart

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**, **Transaction Date**, **Shipping Address**, **Delivery Date**, **FOAPAL**) is copied into the new cart.
5. Press the ***Proceed to Checkout*** icon on the upper right corner and make the required changes.
6. Press **Place Order** to complete the order.

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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?
Supplier.Procurement@mcgill.ca

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Additional Information

- Financial Services Knowledge Base
  http://kb.mcgill.ca/fskb/
  - Who to contact and when – Article #3953
  - Overview of Payment Methods - Article # 4111

- Procurement Services
  http://www.mcgill.ca/procurement/mmp
  feedback.purchasing@mcgill.ca
  514.398.2840

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☑CHECKLIST for Placing an Order

Proceed to Checkout

Changes can be made to each section below by clicking on the edit **button**

| ✓ General | ✓ Shipping Information | ✓ Internal Notes | ✓ Vendor Notes | ✓ FOAPAL Information | ✓ Final Review |

GENERAL Section
☐ Did I rename my cart? *[✓Shoppers]*
☐ Is the transaction date field blank or is today's date displayed? *[✓Shoppers]*
☐ If ordering hazardous materials, does my permit number appear? (FSKB article #3953)

SHIPPING INFORMATION Section
☐ Am I shipping this order to the correct address?
☐ Do I need to change the contact information in the shipping address*?
☐ Is the delivery date today or a day in the future?
*If there are special delivery instructions, you may modify the "Attention:" field to "see Vendor note for special instructions"

INTERNAL NOTES Section *(visible only to MMP Users) [✓Shoppers]*
☐ Is there something about my order I need to clarify for the Approvers?
☐ Do I have a quote or Invoice to attach as supporting documentation for Approvers/Procurement Services?

VENDOR NOTES Section *(appears on the Purchase Order sent to the Vendor) [✓Shoppers]*
☐ Do I have a quote? If yes, did I add a note with the quote number/person I spoke with?
☐ Is there something about my order I need to clarify for the Vendor?
   Such as special delivery instructions

FOAPAL INFORMATION Section
☐ Did I click on "Update Org/Prog" (bottom right hand corner) for the Fund defaults to appear?
☐ Do I need to split my FOAPAL?

ITEM DETAILS Section (at the bottom of every section) *[✓Shoppers]*
☐ For non catalog items, did I enter the unit price before taxes?
☐ Am I making a standing order? If yes, did I select YR as the Units of Measure (U/M)?