



McGill Marketplace

Author

Nadia Orsini, Supervisor, Systems, Training & Client Support



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McGill Marketplace Handbook

How to Guide

Glossary

MMP	The McGill MarketPlace, the University's official purchasing tool for placing all orders for goods and services in accordance with the University Procurement Policy.
Hosted Supplier	The catalog from a hosted supplier resides on the McGill MarketPlace. There is no interaction with the supplier's website. You will be able to do a product comparison between different hosted suppliers.
Self-Managed Catalog Supplier	The catalog from a Self-Managed supplier resides on the McGill MarketPlace. There is no interaction with the supplier's website. You will be able to do a product comparison between different hosted suppliers. The catalog is managed internally by Procurement administrators.
Punchout Supplier	The catalog from a punchout supplier does not reside on the McGill MarketPlace. Their on-line catalog is housed on a website dedicated to only McGill users. When choosing a Punchout supplier, you are redirected to the supplier's website to populate your cart. Your completed cart is brought back in to 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 Foapal Requestor for completion. All employees and active students are automatically given the Shopper role.
Foapal Requestor	The McGill staff member who prepares and submits completed orders for approval. The Foapal Requestor may also receive prepared shopping carts from Shoppers, in which case, the Foapal 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 Foapal Requestors.
Approver	The Fund Financial Manager or their delegate who intercepts and reviews purchase requisitions originated in MMP, to assess if the order: <ul style="list-style-type: none">- 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 source

Before Getting Started

Just like many online ordering systems, shopping on the McGill MarketPlace is done with the popular shopping cart model.

What role will I have when shopping on MMP?

- A **Shopper** can search and place items in a basket but must **assign** their cart to a Foapal Requestor who will complete the order on their behalf.
- **Shoppers do not** have access to a shipping profile or access to charge FOAPALs.
- A **Foapal Requestor** can place orders on their own.

Have you been sponsored to place orders in MMP?

- Only those users who are [sponsored](#) as Foapal Requestors have "**My First Profile**" created in the McGill MarketPlace (MMP) Entrance screen and can place orders in MMP.
- For more information, please refer to ["My First Profile" / Shopping Profiles in the McGill MarketPlace \(MMP\)](#)

No need to be sponsored, I'm a shopper.

- Feel free to login to MMP and begin your shopping experience

How do I add or update my shipping information?

- I'm a Foapal Requestor:
 - Refer to ["My First Profile" / Shopping Profiles in the McGill MarketPlace \(MMP\)](#)
- I'm a Shopper:
 - You cannot add or update shipping information because you do not have a shopping profile.

What information should I have on hand before I begin?

- Review Procurement Services' [Procurement Decision Chart](#) and ensure you have obtained the required number of quotes.
- Ensure the supplier is active in MMP.
 - Supplier not active? Go to MMP homepage and fill in the [New Supplier Request Form](#)



- Ensure the supplier fulfillment address(es) is active in MMP.
 - Can't find the address? Go to the MMP homepage and fill in the [Supplier Reactivation/Change Form](#).



- Ensure the currency on the supplier quote is the same as in MMP
 - Look for the currency flag to appear next to the supplier's name
 - Can't find the correct currency? Go to the MMP homepage and fill in the [Supplier Reactivation/Change Form](#).

Punchout, Hosted & University Managed Catalog Requisitions

General Information

- a) Requisitions are to be issued against contracts using Punch-out, Hosted and University-Managed Catalogues
- b) Users must determine at the beginning of the ordering process whether a requisition will be quantity based or cost based. To inquire further before placing your order, please refer to [Processing Receipts in MMP](#)
- c) One PO can be created for the contract term or individually as goods/services are required
- d) Delivery date should be set for the contract end date ¹
- e) Supporting documentation is not required
- f) One or more invoices can be paid against a contract
- g) PO will be allowed to roll over fiscal years to align with contract term ²
- h) PO amount is to be setup for initial budget available (long term PO) in any given fiscal year however (whenever financially possible) the same PO should be used through the term of the contract by leveraging the change order procedure for the new fiscal years (**see long term PO section**)

¹ This does not apply to Punchout Orders

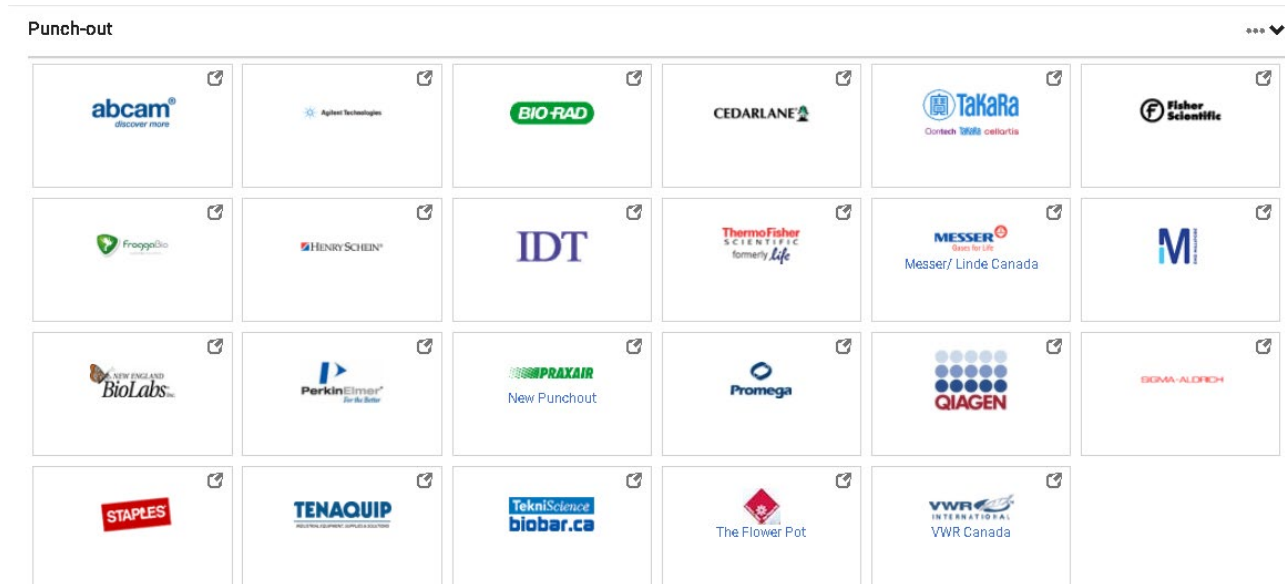
² This applies to long term purchase orders


Placing a Requisition Order using a Punchout Catalog Supplier

Option A

Step 1. Go to the MMP Homepage 

Step 2. Scroll down to the Punch-out Section



Step 3. Click on the supplier icon 

Step 4. The system will redirect you to the supplier website.

Step 5. Search your item by product description or product code

Step 6. Select quantity and add item to your cart

Step 7. To continue shopping, repeat steps 5 and 6.

Step 8. Once all items have been added to your cart, submit order, and check out

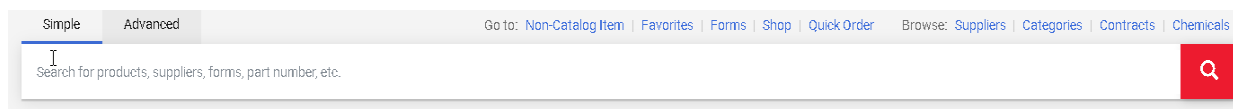
Step 9. You will be reverted to MMP to complete your order

Step 10. **Proceed to Checkout**

Option B

Step 1. Go to the MMP Homepage 

Step 2. Search for product item(s) using the search engine bar with one of the following methods





❖ Product Description

- ❖ Product Code
- ❖ Supplier Name

Product Description	Product Code	Supplier Name
Highlighters	AVE24060	Staples Advantage Canada

- Step 3. Select **Order from Supplier**
- Step 4. The system will redirect you to the supplier punchout.
- Step 5. Select the quantity then add to cart
- Step 6. To continue shopping, search next item by product description or product code using the supplier search engine bar located on the website
- Step 7. Select the quantity then add to cart, repeat step 6 and 7 as needed
- Step 8. Once all items have been added to your cart, submit order, and check out
- Step 9. You will be reverted to MMP to complete your order
- Step 10. **Proceed to Checkout**

Shoppers

- Step 1. Go to **Internal Notes** and add additional details about the order as required by clicking on the edit icon  (for internal use only)
- Step 2. Go to **Supplier Notes** to add additional details as required by clicking on the edit icon  (for supplier use)
- Step 3. Select **Assign Cart**
- Step 4. Search user by name
- Step 5. Select name by clicking on the **+** sign. (ensure you select their short name)
i.e. JSMT2
- Step 6. Add an explanation note to Assignee
- Step 7. Select **Assign**
- Step 8. Notification message will pop up
- Step 9. Email will be sent to the Foapal Requestor informing them that a cart has been assigned to them.

Requisition Summary






Reference number	134296420
Cart name	2020-07-30 NORSIN1 03
Requisition total	5,000.00 CAD
Number of line items	2

Options

- [Create new draft cart](#)
- [Recent orders](#)
- [Return to your home page](#)

Foapal Requestors

Determine whether the order will be a Cost Base Line Item. Go to [Processing Receipts in MMP](#) to inquire before completing and placing your order with the supplier.


- Step 1. Go to **General** and click on the edit icon  and select **Yes** or **No** based on the above statement.
- Step 2. Edit **Shipping Information** as required by clicking on the edit icon. 
- Step 3. Edit **Delivery Date** as required.
- Step 4. **Save Changes**
- Step 5. Go to **Internal Notes** to add additional details about the order as required by clicking on the edit icon  (for internal use only).
- Step 6. Go to **Supplier Notes** to add additional details about the order as required by clicking on the edit icon  (for supplier use).
- Step 7. Go to **FOAPAL Information**, select the edit icon  then enter the FOAPAL.

Splitting FOAPALS

FOAPALS can be split by

- a) % of Price
- b) % of Quantity
- c) Amount of Price

To split a foapal multiple times, place your cursor over the foapal section then select the **+** sign.

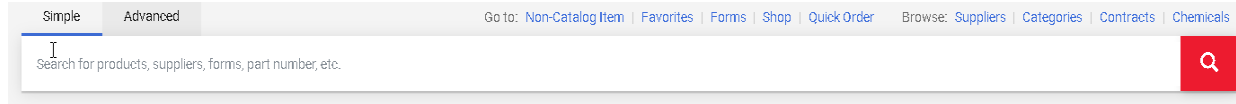
Once completed select the  to validate the distribution, then **Save Changes**.

- Step 8. **Save Changes**
- Step 9. Review Order
- Step 10. **Place Order**

Adding Products from a Hosted Catalog Supplier

Step 1. Go to the MMP Homepage 

Step 2. Search for product item(s) using the search engine bar with one of the following methods




- ❖ Product Description
- ❖ Product Code
- ❖ Supplier Name

Step 3. Search product item


Product Description	Product Code	Supplier Name
<p>Simple Advanced</p> <p>LEWIS-RAT-MALE-151-175-GRAMS</p>	<p>Simple Advanced</p> <p>24982975</p>	<p>Simple Advanced</p> <p>Charles River Laboratories Saint-Constant S.A.</p>


Step 4. Indicate quantity then select **Add To Cart**.

Step 5. To add more products, repeat steps 3 and 4.

Step 6. Once all items have been added to the cart scroll back up to the shopping cart icon and click on the basket total **135.35 CAD**  then **Proceed to Checkout**.

Shoppers

Step 1. Go to **Internal Notes** and add additional details about the order as required by clicking on the edit icon  (for internal use only)

Step 2. Go to **Supplier Notes** to add additional details as required by clicking on the edit icon  (for supplier use)

Step 3. Select **Assign Cart**

Step 4. Search user by name

Step 5. Select name by clicking on the **+** sign. (ensure you select their short name)
i.e. JSMIT2

Step 6. Add an explanation note to Assignee

Step 7. Select **Assign**






Step 8. Notification message will pop up

Step 9. Email will be sent to the Foapal Requestor informing them that a cart has been assigned to them.

✔ Cart Assigned		
Requisition Summary	Options	
Reference number	134296420	Create new draft cart
Cart name	2020-07-30 NORSIN1 03	Recent orders
Requisition total	5,000.00 CAD	Return to your home page
Number of line items	2	

Foapal Requestors

Determine whether the order will be a Cost Base Line Item. Go to [Processing Receipts in MMP](#) to inquire before completing and placing your order with the supplier.

- Step 1. Go to **General** and click on the edit icon  and select **Yes** or **No** based on the above statement.
- Step 2. Edit **Shipping Information** as required by clicking on the edit icon .
- Step 3. Edit **Delivery Date** to reflect contract end date
- Step 4. **Save Changes**
- Step 5. Go to **Internal Notes** to add additional details about the order as required by clicking on the edit icon  (for internal use only)
- Step 6. Go to **Supplier Notes** to add additional details about the order as required by clicking on the edit icon  (for supplier use)
- Step 7. Go to **FOAPAL Information**, select the edit icon  then enter the FOAPAL.

Splitting FOAPALS

FOAPALS can be split by

- a) % of Price
- b) % of Quantity
- c) Amount of Price

To split a foapal multiple times, place your cursor over the foapal section then select the **+** sign.

Once completed select the **✓** to validate the distribution, then **Save Changes**.

Step 8. **Save Changes**

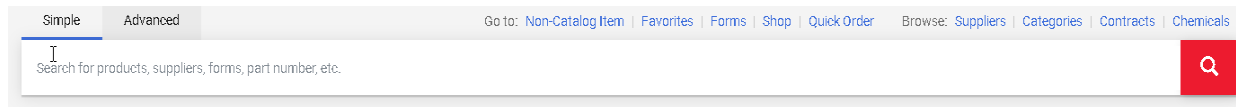
Step 9. Review Order

Step 10. **Place Order**

Adding Products from a University Managed Catalog Supplier

Step 1. Go to the MMP Homepage 

Step 2. Search for product item(s) using the search engine bar with one of the following methods



- ❖ Contract Number – eg. (C0000945)
- ❖ Product Description
- ❖ Product Code
- ❖ Supplier Name


In order to obtain a complete list of products or services offered by the University-Managed catalog, search by contract number (C0000945) ³

Step 3. Search product item

Product Description	Product Code	Supplier Name	Contract Number
<p>Simple Advanced</p> <p>Frais Mensuels Dechets - Horticulture Services - Farm</p>	<p>Simple Advanced</p> <p>437-DEC</p>	<p>Simple Advanced</p> <p>TTI Environnement Inc</p>	C0000945

Step 4. Indicate quantity then select **Add To Cart**.

Step 5. To add more products, repeat steps 3 and 4.

Step 6. Once all items have been added to the cart scroll back up to the shopping cart icon and click on the basket total **135.35 CAD**  then on **View my Cart**

Step 7. Go to **Item Details**, click on the contract number, then **View Summary**



Step 8. Manually record the **Contract End Date** (this will be transcribed to the Delivery Date)

Step 9. Close

Step 10. **Proceed to Checkout.**

³ Searching by supplier name may result in having multiple contracts




Shoppers



- Step 1. Go to **Internal Notes** and add additional details about the order as required by clicking on the edit icon  (for internal use only)
- Step 2. Go to **Supplier Notes** to add additional details as required by clicking on the edit icon  (for supplier use)
- Step 3. Select **Assign Cart**
- Step 4. Search user by name
- Step 5. Select name by clicking on the **+** sign. (ensure you select their short name)
i.e. JSMT2
- Step 6. Add an explanation note to Assignee
- Step 7. Select **Assign**
- Step 8. Notification message will pop up
- Step 9. Email will be sent to the Foapal Requestor informing them that a cart has been assigned to them.

✔ Cart Assigned		
Requisition Summary	Options	
Reference number	134296420	Create new draft cart
Cart name	2020-07-30 NORSIN1 03	Recent orders
Requisition total	5,000.00 CAD	Return to your home page
Number of line items	2	

Foapal Requestors

Determine whether the order will be a Cost Base Line Item. Go to [Processing Receipts in MMP](#) to inquire before completing and placing your order with the supplier.


- Step 1. Go to **General** and click on the edit icon  and select **Yes** or **No** based on the above statement.
- Step 2. Edit **Shipping Information** as required by clicking on the edit icon 
- Step 3. Edit **Delivery Date** as required
- Step 4. **Save Changes**
- Step 5. Go to **Internal Notes** to add additional details about the order as required by clicking on the edit icon  (for internal use only)

- Step 6. Go to **Supplier Notes** to add additional details about the order as required by clicking on the edit icon  (for supplier use)
- Step 7. Go to **FOAPAL Information**, select the edit icon  then enter the FOAPAL.
- Step 8. **Save Changes**

Splitting FOAPALS

FOAPALS can be split by

- a) % of Price
- b) % of Quantity
- c) Amount of Price

To split a foapal multiple times, place your cursor over the foapal section then select the  sign.

Once completed select the  to validate the distribution, then **Save Changes**.

Step 9. Review Order

Step 10. **Place Order**

Placing a Non-Catalog Requisition Order

General Information

- a) Requisitions must be created for the contract term (allow for yearly roll over to the new fiscal year).
- b) Users must determine at the beginning of the ordering process whether a requisition will be quantity based or cost based. To inquire further before placing your order, please refer to [Processing Receipts in MMP](#).
- c) After-the-fact POs are deemed unacceptable and contravene the Procurement Policy and Guidelines.⁴
- d) The purchase requisition “Description” field must provide a meaningful description of the good or service purchased. Please review the [Procurement Directive](#) issued by Procurement Service’s Senior Director.
- e) The delivery date should be set for the contract end date as it applies to the supporting documentation.
- f) Requisitions must be supported by one or more quotes or price lists, as per Policy and Guidelines.
 - *Exceptions are made to Research related purchases and Crown Corporations such as Canada Post or Quebec public bodies such as Hydro Quebec*
- g) PO will be allowed to roll over fiscal years to align with contract term.
- h) PO amount is to be setup for initial budget available in any given fiscal year however the same PO will be used through the term of the contract by leveraging the change order procedure for the new fiscal years.
- i) There could be one or more invoices against one PO.
- j) Use of this type of PO will be reviewed and pre-approved by Procurement (annually)
- k) This practice is to be slowly phased out to the point of becoming an exception, as additional contracts are put in place by Procurement Services to meet the University’s needs.

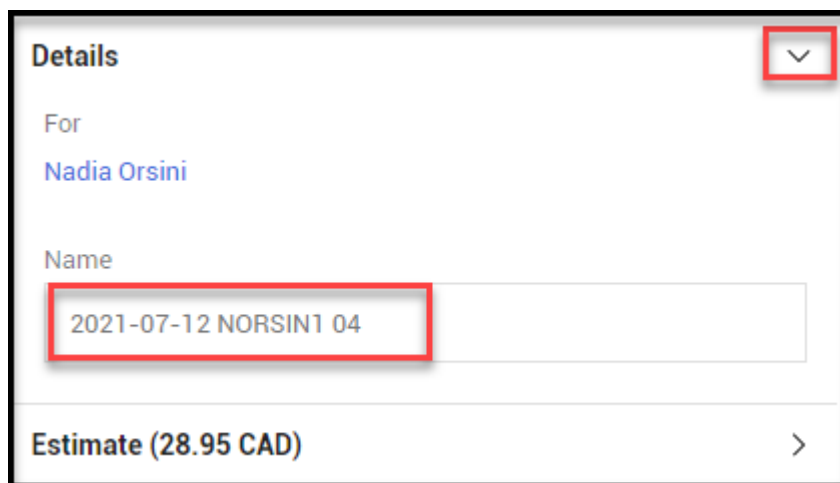
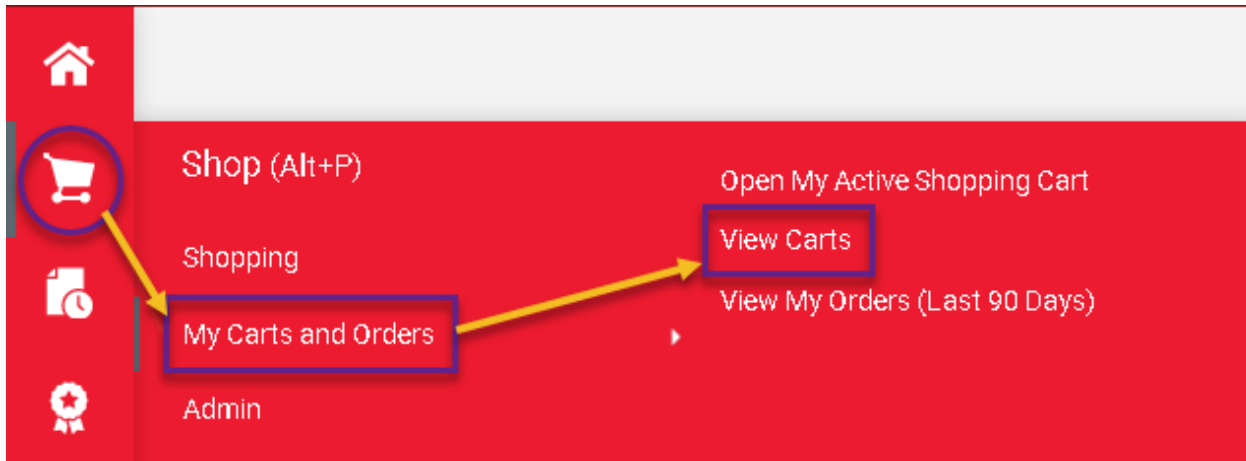
⁴ After-the-fact PO’s are requisitions processed after the services/goods have been rendered. Often processed at the invoice stage.

Adding Products to a Non-Catalog Requisition Order

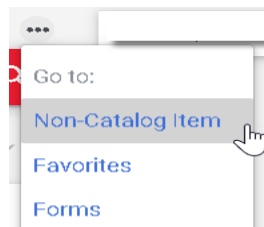
Step 1. Go to **Shop --> My Carts and Orders --> View Carts**

Step 2. Select the **Create Cart** icon.

Step 3. Rename your cart by going to Details box and select the arrow to the right of your screen



Step 5 To the right of the Simple/Advanced search engine bar, click on the 3 dots, then select **Non-Catalog Item** from the drop-down menu.



Step 6. Search for supplier name ★

Step 7. Go to **Item** and enter information for the following:

- ❖ Description★
- ❖ Catalog or SKU number (if applicable)
- ❖ Quantity ★
- ❖ Price
- ❖ Quantity and Unit of Measure
- ❖ Currency (**do not override what is already indicated**)

Step 8. Save and Close (**1-line-item order**)

Step 9. Save and Add Another (**multiple line-item order**)

Required Fields ★

Step 10. Select **Proceed to Checkout**

Shoppers

Step 2. Go to **Internal Notes** and add supporting documentation(s) by attaching the MCS sales quote

Step 3. Add additional details about the order by clicking on the edit icon  (as applicable)

Step 4. Go to **Supplier Notes** to add additional details by clicking on the edit icon 

(Add the MO number, the recipient's full ship to name, address, and phone number)

Step 5. Select **Assign Cart**

Step 6. Search user by name

Step 7. Select name by clicking on the + sign. (ensure you select their short name)

i.e. JSMIT2

Step 8. Add an explanation note to Assignee

Step 9. Select **Assign**

Step 10. Notification message will pop up

Step 11. Email will be sent to the Foapal Requestor informing them that a cart has been assigned to them.

Cart Assigned

Requisition Summary






Reference number	134296420
Cart name	2020-07-30 NORSIN1 03
Requisition total	5,000.00 CAD
Number of line items	2

Options

- [Create new draft cart](#)
- [Recent orders](#)
- [Return to your home page](#)

Foapal Requestors

Determine whether the order will be a Cost Base Line Item. Go to [Processing Receipts in MMP](#) to inquire before completing and placing your order with the supplier.

- Step 1. Go to **General** and click on the edit icon  and select **Yes** or **No** based on the above statement.
- Step 2. Edit **Shipping Information** as required by clicking on the edit icon .
- Step 3. Edit **Delivery Date** as required
- Step 4. **Save Changes**
- Step 5. Go to **Internal Notes** and add supporting documentation(s) by attaching the necessary quote(s)
- Step 6. Add additional details about the order by clicking on the edit icon  (as applicable)
- Step 7. Go to **Supplier Notes** to add additional details as needed by clicking on the edit icon .
- Step 8. Go to **FOAPAL Information**, select the edit icon  then enter the FOAPAL

Splitting FOAPALS

FOAPALS can be split by

- d) % of Price
- e) % of Quantity
- f) Amount of Price

To split a foapal multiple times, place your cursor over the foapal section then select the **+** sign.

Once completed select the **✓** to validate the distribution, then **Save Changes**.

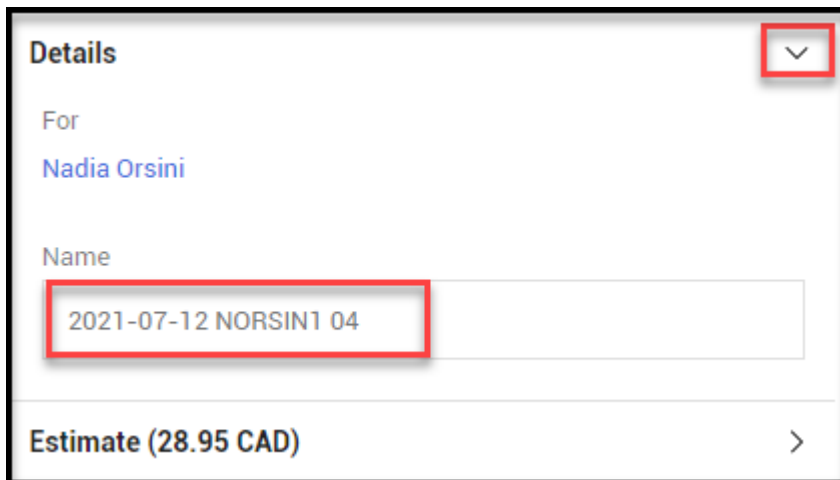
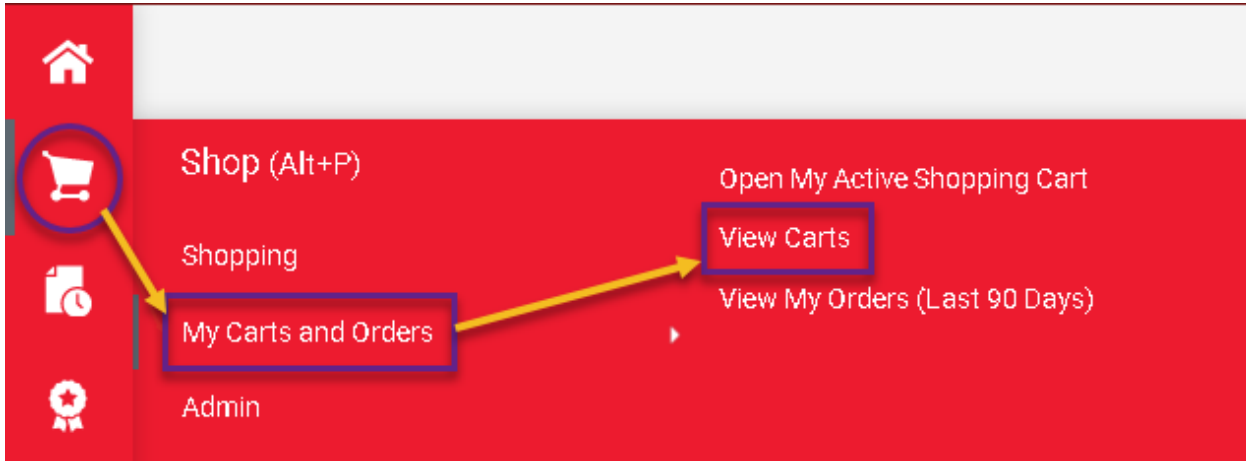
- Step 9. **Save Changes**
- Step 10. Review Order
- Step 11. **Place Order**

Long Term Purchase Requisition Orders

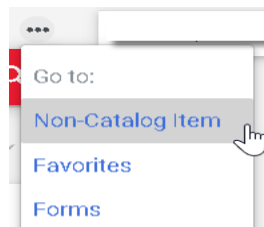
Step 1. Go to **Shop --> My Carts and Orders --> View Carts**

Step 2. Select the **Create Cart** icon.

Step 3. Rename your cart by going to Details box and select the arrow to the right of your screen



Step 5. To the right of the Simple/Advanced search engine bar, click on the 3 dots, then select **Non-Catalog Item** from the drop-down menu.



Step 6. Search for supplier name ★

Step 7. Go to **Item** and enter information for the following:

- ❖ Description (e.g. Long Term PO for “description”, fiscal year “xx”, between mmm-dd-yyyy and mmm-dd-yyyy)★
- ❖ Catalog or SKU number (not applicable)
- ❖ Quantity (1)★
- ❖ Price (estimated amount) ★
- ❖ Quantity and Unit of Measure (EA) ★
- ❖ Currency (**do not override what is already indicated**)

Step 8. Save and Close (**1-line-item order**)

Step 9. Select **Proceed to Checkout**

Shoppers

Step 1. Go to **Internal Notes** and add supporting documentation(s)

Step 2. Add additional details about the order by clicking on the edit icon  (as applicable)

Step 3. Go to **Supplier Notes** to add additional details by clicking on the edit icon 

Step 4. Select **Assign Cart**

Step 5. Search user by name

Step 6. Select name by clicking on the **+** sign. (ensure you select their short name)
i.e. JS MIT2

Step 7. Add an explanation note to Assignee

Step 8. Select **Assign**







Step 9. Notification message will pop up

Step 10. Email will be sent to the Foapal Requestor informing them that a cart has been assigned to them.

✔ Cart Assigned		
Requisition Summary	Options	
Reference number	134296420	Create new draft cart
Cart name	2020-07-30 NORSIN1 03	Recent orders
Requisition total	5,000.00 CAD	Return to your home page
Number of line items	2	

Foapal Requestors

Long Term Purchase orders must be identified as Cost Base Line Items. To learn more about this, go to [Processing Receipts in MMP](#) before completing and placing your order with the supplier.

- Step 1. Go to **General** and click on the edit icon  and select **Yes**.
- Step 2. Edit **Shipping Information** as required by clicking on the edit icon 
- Step 3. Edit **Delivery Date** and enter the Contract End Date. (E.g. April 30, 2022) 
- Step 4. **Save Changes**
- Step 5. Go to **Internal Notes** and **Add** supporting documentation(s) as it applies to the [Procurement Decision Chart](#)
- Step 6. Add additional details about the order as required by clicking on the edit icon  (for internal use only)
- Step 7. Go to **Supplier Notes** to add additional details about the order as required by clicking on the edit icon  (for supplier use)
- Step 8. Go to **FOAPAL Information**, select the edit icon  then enter the FOAPAL

Splitting FOAPALS

FOAPALS can be split by

- a) % of Price
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To split a foapal multiple times, place your cursor over the foapal section then select the **+** sign.

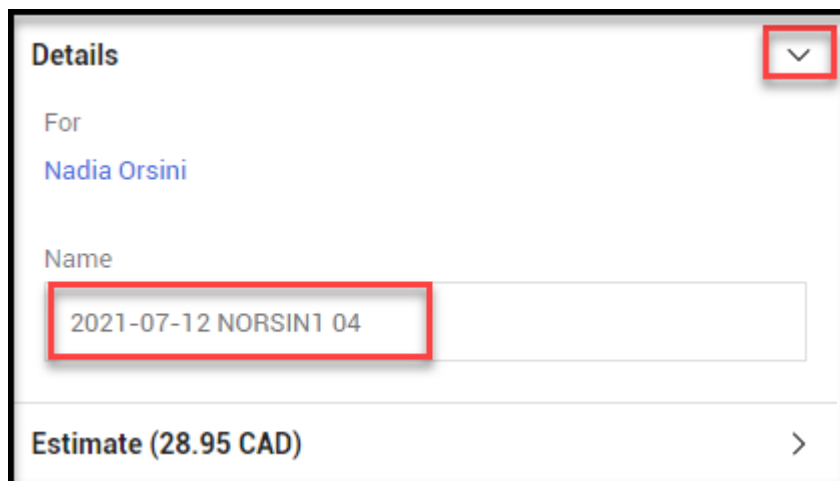
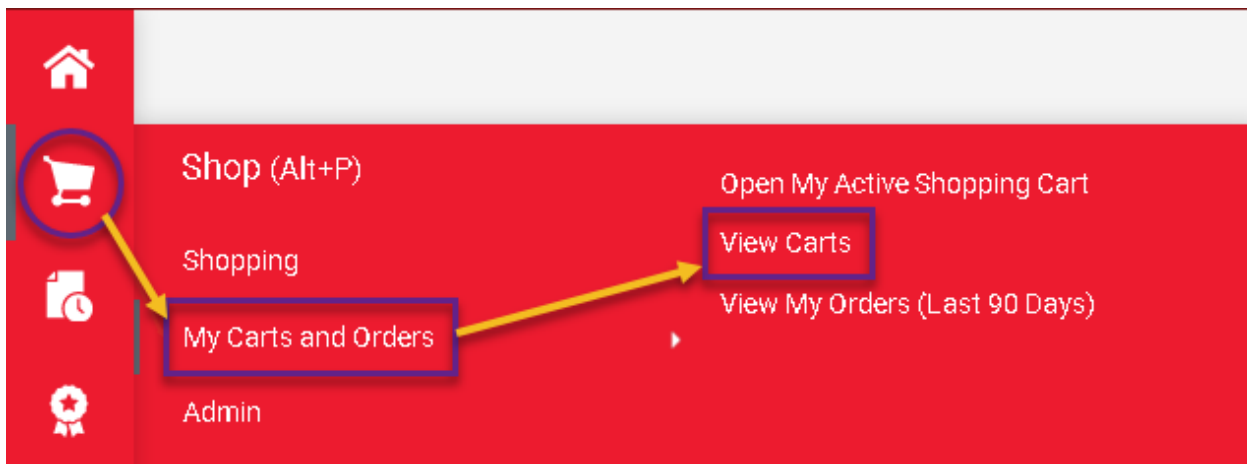
Once completed select the **✓** to validate the distribution, then **Save Changes**.

- Step 9. **Save Changes**
- Step 10. Review Order
- Step 10. **Place Order**

Miscellaneous



Creating and Renaming a Shopping Cart

- Step 1. Go to **Shop --> My Carts and Orders --> View Carts.**
- Step 2. Select the Create Cart icon.
- Step 3. Rename your cart by clicking on the arrow in the Details box located to the right of your screen.



How to Assign a cart

Shoppers must assign carts to Foopal Requestors in order to complete and place orders. To do so, once all items have been added to the cart:

- Step 1. Select **Proceed to Checkout**
- Step 2. Go to **Internal Notes** and add supporting documentation(s) ⁵
- Step 3. Add additional details about the order as required by clicking on the edit icon 
(for internal use only)
- Step 4. Go to **Supplier Notes** to add additional details as required by clicking on the edit icon 
(for supplier use)
- Step 5. Select **Assign Cart**
- Step 6. Search user by name
- Step 7. Select name by clicking on the **+** sign. (ensure you select their short name)
i.e. JS MIT2
- Step 8. Add an explanation note to Assignee
- Step 9. Select **Assign**
- Step 10. Notification message will pop up
- Step 11. Email will be sent to the Foopal Requestor informing them that a cart has been assigned to them.

✔ Cart Assigned		
Requisition Summary	Options	
Reference number	134296420	Create new draft cart
Cart name	2020-07-30 NORSIN1 03	Recent orders
Requisition total	5,000.00 CAD	Return to your home page
Number of line items	2	

⁵ Supporting documentations added to the MMP order will not be passed back to the supplier.

How to View your Draft Carts & Pending Carts Assigned to Me

To easily view a list of your pending draft carts, go to the homepage of MMP, and search for the widget **My Draft Carts** located to the left of the page.

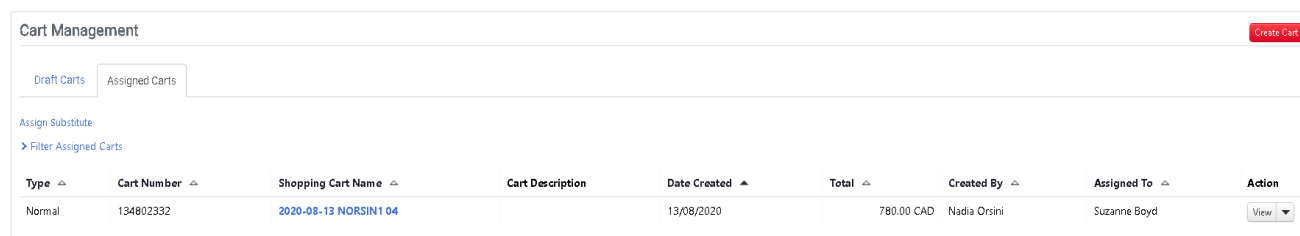
To change the Draft Cart Type, select from the drop-down menu.

To view a list of [Pending Carts Assigned to Me](#), go to Draft Cart Type, and select it from the drop-down menu.

How to Unassign a cart

Step 1. Go to **Shop --> My Carts and Orders --> View Carts.**

Step 2. Go to Assign Cart Tab



The screenshot shows the 'Cart Management' interface. At the top right is a 'Create Cart' button. Below it are tabs for 'Draft Carts' and 'Assigned Carts'. There are links for 'Assign Substitute' and 'Filter Assigned Carts'. A table lists cart details:

Type	Cart Number	Shopping Cart Name	Cart Description	Date Created	Total	Created By	Assigned To	Action
Normal	134802332	2020-08-13 NORSIN1 04		13/08/2020	780.00 CAD	Nadia Orsini	Suzanne Boyd	View

Step 3. Go to the Action column and click on the drop-down menu next to View and select Unassign

Step 4. The order will reopen in draft mode so it can be reassigned to the correct person.

Step 5. To reassign the order, go to [How to Assign a cart](#)

Rejected Cart

Step 1. Go to the MMP homepage and locate the Requisition by entering in the number in the search (Alt + Q) engine bar at the top right-hand side of the page. Ensure type parameters remains at ALL



Step 2. Go to the **History** tab to identify the reason for the rejection

Step 3. Go to the **Requisition 149714228** then to the far right, click on the 3 dots () then select **Copy to New Cart**

Step 4. This will replicate the previous order to create an active draft cart.

Step 5. Modify the order per the history note and resubmit the order again.

Copying Orders to a New Cart

- Step 1. Go to the MMP homepage and locate the Requisition by entering in the number in the search (Alt + Q) engine bar at the top right-hand side of the page. Ensure type parameters remains at ALL



- Step 2. Go to the **Requisition 149714228** then to the far right, click on the 3 dots () then select **Copy to New Cart**
- Step 3. This will replicate the previous order and create an active draft cart.
- Step 4. Modify the order as needed then **Proceed to Checkout**.
- Step 5. Review and revise the information in the **Summary** tab as needed then **Place Order** or **Assign Cart**, depending on your existing permissions.

Adding Comments and Attachments

- Step 1. Go to the MMP homepage and locate the Requisition by entering in the number in the search (Alt + Q) engine bar at the top right-hand side of the page



- Step 2. Go to the **Comments** tab and select the plus + icon
- Step 3. In the pop-up box, enter the comment in the text box
- Step 4. **Optional:** Add an email recipient (this will alert the user that a comment has been added to the order)
- Step 5. If an attachment needs to be attached, click on Attach file (optional)
- Step 6. Add a File Name
- Step 7. To save the comment select check mark ✓ icon

Suppliers

Adding a New Supplier

If a supplier is not active within McGill Marketplace (MMP), please go to the Forms section on the MMP homepage and fill in the [New Supplier Request Form](#). Procurement Services will respond to the request within 5 business days.



Deactivating a Supplier

Suppliers that have no order activity following a 24-month period are deactivated in MMP.

Suppliers that no longer accept purchase orders will be deactivated in MMP. To initiate this process please contact vendor.purchasing@mcgill.ca

Reactivating a Supplier

To reactivate a supplier previously in MMP, please go to MMP and fill in the [Supplier Reactivation/Change Request Form](#) located in the Forms section.



Fulfillment Addresses

Some suppliers have multiple fulfillment addresses that will require selecting an alternate address or adding a new one altogether.

Adding a Fulfillment Address

If the fulfillment address is not available in MMP, please go to MMP and fill in the [Supplier Reactivation/Change Request Form](#) located in the Forms section.

Selecting an Alternate Fulfillment Address

To select another fulfillment address when placing a non-catalog order:

Step 1. Go to [Adding Products to a Non-Catalog Requisition Order](#) and follow the instructions from Step 1 to Step 6.

Step 2. Then go to **Fulfillment Address** and select the address from the drop-down menu

Step 3. Select Business/Organization address

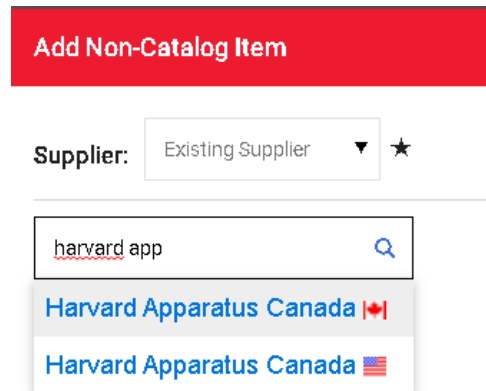
Step 4. **Save**

Remit to Addresses

Supplier Remit to Addresses are now visible to users in MMP. To inquire on whether the address information matches that of the quote information, please search for the supplier's name by entering the information in the search engine box at the top of the MMP page, then select the name to view the supplier summary details.

Currencies

Currency flags are displayed next to the supplier names to allow users to identify which currency will be applied to the order. In some cases, suppliers may provide goods/services in multiple currencies depending on their physical location. In these circumstances, separate supplier records must be created to accommodate the ordering process.



The screenshot shows a red button labeled "Add Non-Catalog Item". Below it is a "Supplier:" dropdown menu with "Existing Supplier" selected and a star icon. A search box below the dropdown contains the text "harvard app" and a magnifying glass icon. Below the search box, two search results are displayed: "Harvard Apparatus Canada" with a Canadian flag icon and "Harvard Apparatus Canada" with a US flag icon.

Adding Multiple Currencies to a Supplier Record

If a quote is submitted in a currency other than what is indicated next to the supplier record in MMP, please go to the MMP home page and fill in [Supplier Reactivation/Change Request Form](#) located in the Forms section.

Incorrect Currency

If a purchase requisition order has been placed using the **incorrect** currency, it must be cancelled and a new one created in its place. To inquire on how to cancel a pending purchase requisition order, go to [How to Disapprove a Pending Requisition](#)

Forms

Specialty Ordering

Hotels


McGill Official Hotel Program (MOHP) Downtown & West Island

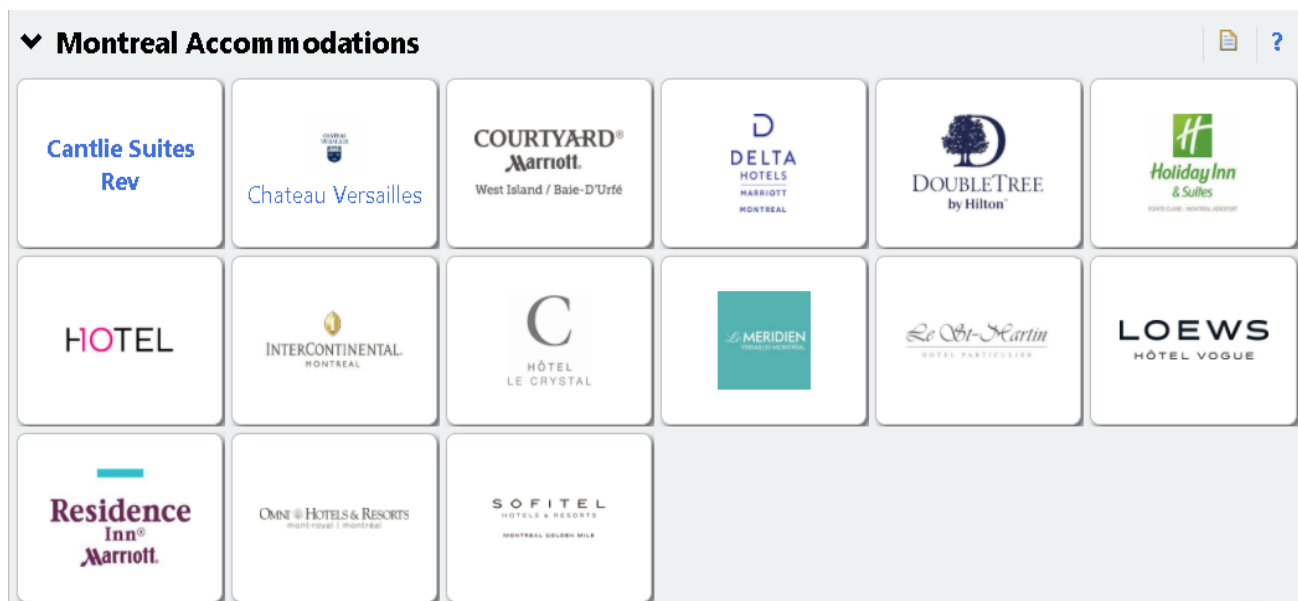
The McGill Official Hotel Program (MOHP) offers negotiated rates at a variety of hotels ranging from 3* to 5* within walking distance of McGill's Downtown Campus and in close proximity to the Macdonald Campus.

If you are booking 10 or more rooms, please contact the hotel directly for pricing. Do not use the form as listed on the MMP homepage section entitled – Montreal Accommodations. Rather, process a non-catalog order per the instructions provided in [Placing a Non-Catalog Requisition Order](#).

For a list of MOHP hotels, visit the Travel Services website

❖ [Accommodations in Downtown Montreal & West Island](#)



- Step 1. Make a reservation with the MOHP hotel in the name of the visitor(s) with required dates
- Step 2. Obtain the reservation/confirmation number
- Step 3. Log in to MMP
- Step 4. On the Homepage,  scroll down to **Montreal Accommodations** Section
- Step 5. Select the appropriate Hotel Icon to open the form



- Step 6. Read Ordering Instructions
- Step 7. Enter Guest and Stay Details

- Step 8. Select the appropriate Nightly Room Rate according to the seasonal period
- ❖ High Season (**May 1st to October 31st**)
 - ❖ Low Season (**November 1st to April 30th**)
- Step 9. Indicate the **Quantity (# of nights)** according to the selected **Accommodation rate per night**.
- Step 10. Indicate the **Quantity (# of nights)** according to the selected **required Lodging Tax - 3.5%**
- Step 11. Click on [Recalculate List Total](#)
- Step 12. Once the form is completed, scroll back to the top of the page and select **Add and Go to Cart**
- ❖ For multiple guests staying at the same hotel,
 - Step 12.1 Select **Add to Cart**, then select **Go** rather than **Add and Go to Cart**
 - Step 12.2 Override the existing information on the form to reflect new guest information
 - Step 12.3 Repeat step 12.1 and 12.2 until the last guest has been added, then select **Add and Go to Cart**
- Step 13. Select **Proceed to Checkout**

Shoppers

- Step 2. Add additional details about the order as required by clicking on the edit icon 
(for internal use only)
- Step 3. Go to **Supplier Notes** to add additional details as required by clicking on the edit icon 
(for supplier use)
- Step 4. Select **Assign Cart**
- Step 5. Search user by name
- Step 6. Select name by clicking on the **+** sign. (ensure you select their short name) i.e. JSMIT2
- Step 7. Add an explanation note to Assignee
- Step 8. Select **Assign**
- Step 9. Notification message will pop up
- Step 10. Email will be sent to the Foapal Requestor informing them that a cart has been assigned to them.

Requisition Summary





Reference number	134296420
Cart name	2020-07-30 NORSIN1 03
Requisition total	5,000.00 CAD
Number of line items	2

Options

- [Create new draft cart](#)
- [Recent orders](#)
- [Return to your home page](#)

Foapal Requestors

Determine whether the order will be a Cost Base Line Item. Go to [Processing Receipts in MMP](#) to inquire before completing and placing your order with the supplier.

- Step 1. Go to **General** and click on the edit icon  and select **Yes** or **No** based on the above statement.
- Step 2. Edit **Shipping Information** as required by clicking on the edit icon .
- Step 3. Edit **Delivery Date** as required
- Step 4. **Save Changes**
- Step 5. Go to **Internal Notes** and **Add** supporting documentation(s) as it applies to the [Purchasing Decision Chart](#)⁶
- Step 6. Add additional details about the order as required by clicking on the edit icon  (for internal use only)
- Step 7. Go to **Supplier Notes** to add additional details about the order as required by clicking on the edit icon  (for supplier use)


⁶ Supporting documentations added to the MMP order will not be passed back to the supplier.

Step 8. Go to **FOAPAL Information**, select the edit icon  then enter the FOAPAL

Splitting FOAPALS

FOAPALS can be split by

- a) % of Price
- b) % of Quantity
- c) Amount of Price

To split a foapal multiple times, place your cursor over the foapal section then select the  sign.

Once completed select the  to validate the distribution, then **Save Changes**.

Step 9. **Save Changes**

Step 10. Review Order

Step 11. **Place Order**

Security Agents Request

Downtown and Macdonald Campus Security

Booking Agent Services for either Downtown or Macdonald Campus must be processed by filling in the form request in MMP.

Ordering Instructions

Note: Student Organizations or Groups must follow the Public Campus Safety

[ordering guidelines](#)

1. The Security Agent will be given all the necessary keys and will escort the requestor for the access required.

2. **ALL BOOKINGS AND CANCELLATIONS** must be received at least 12 full business hours prior to the start of your event (excludes Saturdays, Sundays, Summer Fridays and Statutory Holidays). Bookings and cancellations received within 12 business hours of the event are subject to a \$100 administration fee. McGill Campus Public Safety reserves the right to cancel any request that does not meet the 12-business hour requirement.
3. A minimum 4-hour charge is applicable to **ALL** agent bookings, even if your event is shorter.
4. We **CANNOT** provide the final costs, as the charges are labour-related. To evaluate your potential costs, simply multiply the number of hours/agents you booked by the applicable rates below.
5. Labour costs will only be charged to your **FOAPAL** a minimum of 30 days after the end of your event/project. This ensures that all hours worked have been properly verified.
6. Rates are **DOUBLE** on all statutory holidays

For a more detailed overview of these and other policies, please read the [Agent Booking Policy](#)

Any questions regarding billing for agent labour for both Downtown and Macdonald Campus can be forwarded to billing.security@mcgill.ca

Placing an order for Security Agent Request

Step 1. Go to the MMP Homepage 

Step 2. Scroll down to the **Forms** Section

Forms



Step 3. Select the appropriate form

Step 4. Read Ordering Instructions

Step 5. Fill all the required fields listed in the form

1. Requestor Information
2. Work site Information
3. On-Site Contact
4. Type of Agent
 - a. Indicate Quantity next to the Unit Price per the formula
 - b. Click on Recalculate List Total

5. Installation Plans for Cranes
6. Required Safety Equipment
7. Other Information


Step 6. Once the form is completed, scroll back to the top of the form and select **Add and Go to Cart**

Step 7. To submit another Security Agent Request on the same requisition, **repeat steps 1 to 6**

Step 8. Select **Proceed to Checkout** 

Shoppers

Step 1. Add additional details about the order as required by clicking on the edit icon 
(for internal use only)

Step 2. Go to **Supplier Notes** to add additional details as required by clicking on the edit icon 
(for supplier use)

Step 3. Select **Assign Cart**

Step 4. Search user by name

Step 5. Select name by clicking on the **+** sign. (ensure you select their short name) i.e. JSMIT2

Step 6. Add an explanation note to Assignee

Step 7. Select **Assign**

Step 8. Notification message will pop up

Step 9. Email will be sent to the Foapal Requestor informing them that a cart has been assigned to them.

Cart Assigned	
Requisition Summary	Options
Reference number	134296420
Cart name	2020-07-30 NORSIN1 03
Requisition total	5,000.00 CAD
Number of line items	2
	Create new draft cart Recent orders Return to your home page

Foapal Requestors


Determine whether the order will be a Cost Base Line Item. Go to [Processing Receipts in MMP](#) to inquire before completing and placing your order with the supplier.


Step 1. Go to **General** and click on the edit icon  and select **Yes** or **No** based on the above statement.

Step 2. Edit **Shipping Information** as required by clicking on the edit icon 

Step 3. Edit **Delivery Date** as required

Step 4. **Save Changes**

Step 5. Add additional details about the order as required by clicking on the edit icon 
(for internal use only)

Step 6. Go to **Supplier Notes** to add additional details about the order as required
by clicking on the edit icon  (for supplier use)


Step 7. Go to **FOAPAL Information**, select the edit icon  then enter the FOAPAL


Step 8. **Save Changes**

Splitting FOAPALS

FOAPALS can be split by

- a) % of Price
- b) % of Quantity
- c) Amount of Price

To split a foapal multiple times, place your cursor over the foapal section then select the  sign.

Once completed select the  to validate the distribution, then **Save Changes**.

Step 9. Review Order

Step 10. **Place Order**

MCS Order (Le James)

Ordering Instructions

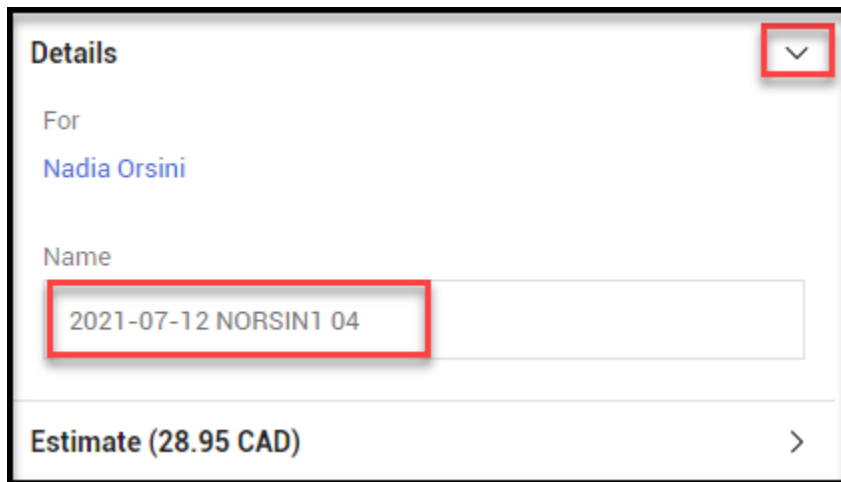
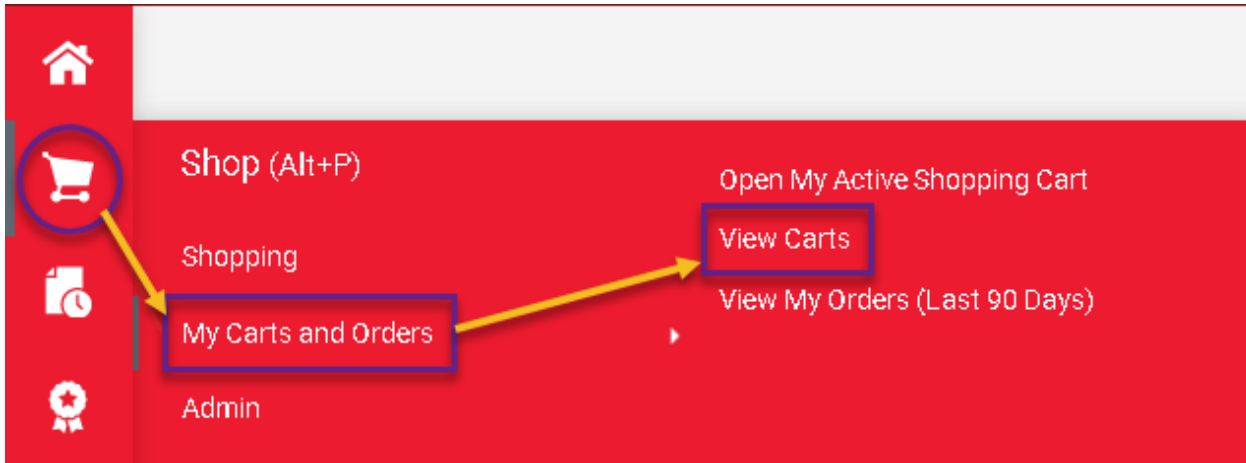
To proceed with a purchase order, you must first contact the sales team at is.bookstore@mcgill.ca with your enquiry or list of products. They will then contact you to discuss the details of your order and create a quote for you to review.

Placing an Order

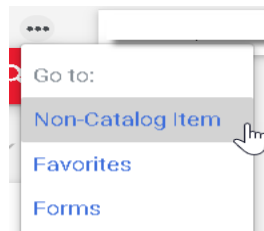
Step 1. Go to **Shop --> My Carts and Orders --> View Carts**

Step 2. Select the Create Cart icon.

Step 3. Rename your cart by clicking on the arrow in the Details box located to the right of your screen



Step 5 To the right of the Simple/Advanced search engine bar, click on the 3 dots, then select **Non-Catalog Item** from the drop-down menu.



Step 6. Search for supplier name **Le James McGill Bookstore & Computer Store** ★

Step 7. Go to **Item** and enter information for the following:

- ❖ Description (include a product description for the overall purchase regardless of how many line items are listed on the MCS sales quote) ★
- ❖ Catalog number (MO-number provided by MCS)
- ❖ Quantity (1) ★
- ❖ Price (**PRE-TAX AMOUNTS**) – this can be found in a box on the bottom of the original quote.
- ❖ Quantity and Unit of Measure (EA)
- ❖ Currency (**do not override what is already indicated**)

Step 8. Save and Close (**1 line-item order**)

Step 9. Select **Proceed to Checkout**

Shoppers

Step 1. Go to **Internal Notes** and add supporting documentation(s) by attaching the MCS sales quote⁷

Step 2. Add additional details about the order by clicking on the edit icon  (as applicable)

Step 3. Go to **Supplier Notes** to add additional details by clicking on the edit icon 

(Add the MO number, the recipient's full ship to name, address, and phone number)

Step 4. Select **Assign Cart**

Step 5. Search user by name

Step 6. Select name by clicking on the **+** sign. (ensure you select their short name) i.e. JSMIT2

Step 7. Add an explanation note to Assignee

Step 8. Select **Assign**

Step 9. Notification message will pop up

Step 10. Email will be sent to the Foapal Requestor informing them that a cart has been assigned to them.

⁷ Supporting documentations added to the MMP order will not be passed back to the supplier.

Cart Assigned

Requisition Summary







Reference number	134296420
Cart name	2020-07-30 NORSIN1 03
Requisition total	5,000.00 CAD
Number of line items	2

Options

- [Create new draft cart](#)
- [Recent orders](#)
- [Return to your home page](#)

Foapal Requestors

Determine whether the order will be a Cost Base Line Item. Go to [Processing Receipts in MMP](#) to inquire before completing and placing your order with the supplier.

- Step 1. Go to **General** and click on the edit icon  and select **Yes** or **No** based on the above statement.
- Step 2. Edit **Shipping Information** as required by clicking on the edit icon .
- Step 3. Edit **Delivery Date** as required .
- Step 4. **Save Changes**
- Step 5. Go to **Internal Notes** and add supporting documentation(s) by attaching the MCS sales quote⁸
- Step 6. Add additional details about the order by clicking on the edit icon  (as applicable)
- Step 7. Go to **Supplier Notes** to add additional details by clicking on the edit icon 
(Add the MO number, the recipient's full ship to name, address, and phone number)
- Step 8. Go to **FOAPAL Information**, select the edit icon  then enter the FOAPAL
- Step 9. **Save Changes**
- Step 10. Review Order
- Step 11. **Place Order**

⁸ Supporting documentations added to the MMP order will not be passed back to the supplier.

uPrint

Ordering Instructions

The McGill uPrint cost-per-impression program allows departments to benefit from multifunctional devices available throughout campus. This comprehensive print management solution aims at ensuring cost-efficiency and sustainability.

To be eligible to order paper for your uPrint device, you need to meet the following 2 conditions:

1. You must be sponsored to use the McGill MarketPlace (for further information, please call the Procurement Help Desk at 398-2840)
2. You must be assigned to your respective MFD (Multi-Function Device) – Please contact the ICS help desk at 398-3398

Key operators must use this form to purchase their paper products which are subsidized through the cost-per-impression uPrint program. Only the products shown below on the form are available for purchase.

Please follow these steps to submit your purchase requisition:

1. Enter your required quantity below (one or both can be purchased simultaneously)
2. Go to the top of the form and "Add to cart"
3. During the checkout process, add the MFD device group at the line level
4. Use FOAPAL **159892-00526-700001-3300-000204-000000**

* If you are purchasing for multiple MFD groups, please use a separate form for each MFD group you are buying for. They can however all be put on the same shopping cart.

** Do not update quantity in the shopping cart (pre-checkout) on the right of your screen. To update quantity, click on the product description.

Note: (8.5 x 11 & 8.5 x 14) * 500 sheets/package is = 10 packages/box**

(11 x 17) * 500 sheets/package is = 5 packages/box**

Placing a uPrint order in MMP

- Step 1. Go to the MMP Homepage
- Step 2. Scroll down to the **Forms** Section
- Step 3. Select the **uPrint Form**
- Step 4. Read **Ordering Instructions**

Step 5. Go to Items List

Step 6. Select paper quantity.

❖ (8.5 x 11) *** 500 sheets/package is = 10 packages/box

❖ (8.5 x 14) *** 500 sheets/package is = 10 packages/box

❖ (11 x 17) *** 500 sheets/package is = 5 packages/box


Step 7. **Recalculate list total**


Step 8. Scroll to the top of form to Available Actions and select Add and go to Cart

Step 9. **Go**

Step 10. **Proceed to Checkout**

Shoppers

Step 1. Go to **Internal Notes** and add additional details about the order as required by clicking on the edit icon  (for internal use only)

Step 2. Go to **Supplier Notes** to add additional details as required by clicking on  the edit icon (for supplier use)

Step 3. Select **Assign Cart**

Step 4. Search user by name

Step 5. Select name by clicking on the **+** sign. (ensure you select their short name) i.e. JSMT2

Step 6. Add an explanation note to Assignee

Step 7. Select **Assign**








Step 8. Notification message will pop up

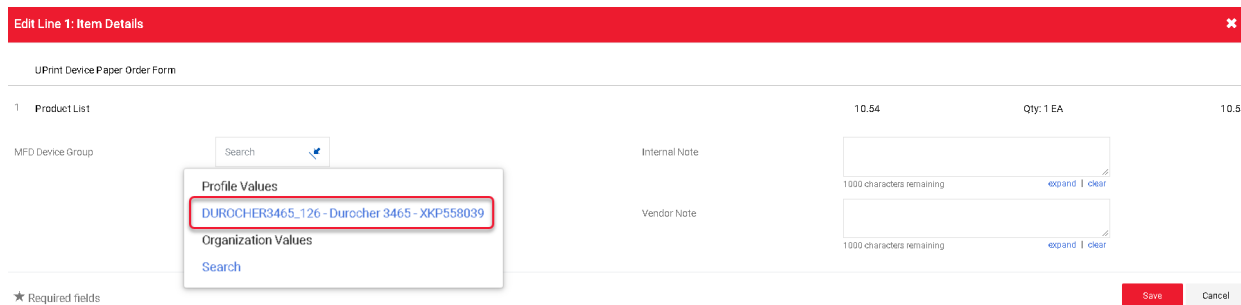
Step 9. Email will be sent to the Foapal Requestor informing them that a cart has been assigned to them.

✔ Cart Assigned		
Requisition Summary	Options	
Reference number	134296420	Create new draft cart
Cart name	2020-07-30 NORSIN1 03	Recent orders
Requisition total	5,000.00 CAD	Return to your home page
Number of line items	2	

Foapal Requestors

Determine whether the order will be a Cost Base Line Item. Go to [Processing Receipts in MMP](#) to inquire before completing and placing your order with the supplier.

- Step 1. Go to **General** and click on the edit icon  and select **Yes** or **No** based on the above statement.
- Step 2. Edit **Shipping Information** as required by clicking on the edit icon .
- Step 3. Edit **Delivery Date** .
- Step 4. **Save Changes**
- Step 5. Go to **Internal Notes** to add additional details about the order as required by clicking on the edit icon  (for internal use only)
- Step 6. Go to **Supplier Notes** to add additional details about the order as required by clicking on the edit icon  (for supplier use)
- Step 7. Go to **FOAPAL Information**, select the edit icon  then enter the FOAPAL **159892-00526-700001-3300-000204-000000**.
- Step 8. Go to **Item**, then **Item Details** and click on the edit icon .
- Step 9. Go to MFD Device Group and select the appropriate group from the drop-down menu



Step 10. **Save and Place Order**

Note: You must be associated to an MFD Device group in order to place the order. For further inquiry please contact IT support at itsupport@mcgill.ca

Tracking your Order

How to Track my Requisition Status

1. To see a list of pending requisition(s) issued by **you**, please do the following:
 - Log in to **Minerva**
 - Go to **Finance** menu
 - Select **Approve Document**
 - Select **Submit Query**
 - Select the **History** link to view the approval/disapproval details of the document. Approvals required as well as Approvals recorded will be displayed.

2. To view the approval history of a particular requisition (**either issued by you or someone else in your unit**), please do the following:

- Log in to **Minerva**
- Go to **Finance** menu
- Select **View Document**
- Select **Requisition** in **Choose Type** drop-down menu, enter the MMP requisition # in **Reference Number** box
- Select the **Approval History** button to view the approval/disapproval details of the document. Approvals required as well as Approvals recorded will be displayed.

View Document

To display the details of a document enter parameters then select View document. To display approval history for a document enter parameters then select Approval history. If you do not know the document number, select Document Number to access the Code Lookup feature. This enables you to perform a query and obtain a list of document numbers to choose from. You can now view invoice document images. Click on the **HELP** link at the top right for more information.

Choose type:	Requisition	Document Number	
Submission#:	Requisition	Change Seq#	
Display Account	Yes	Reference Number	12345678

Display Document/Line Item Text: All Printable None

Display Commodity Text: All Printable None

How to Disapprove a Pending Requisition

During the requisition approval process, you can disapprove a requisition submitted by you. Please do the following:

- Log in to **Minerva**
- Go to **Finance** menu
- Select **Approve Document**
- Select the option **All Documents which you may approve**
- Select **Submit Query**
- click the **Disapproved** link on the right-hand side and follow the instructions. You will receive two e-mails notifying you about the disapproval of your requisition.

For more details, please visit Financial Services' Guide to Financial Management website: [How to use the Minerva Approve Documents Menu](#)

Note

If your requisition has already been approved, however a purchase order has not yet been issued and you want to cancel the requisition, contact [Procurement Services' Helpdesk](#)

If your requisition has already been approved as well as a purchase order has been issued and you want to cancel the order, please submit a [PO Cancellation Request Form](#).

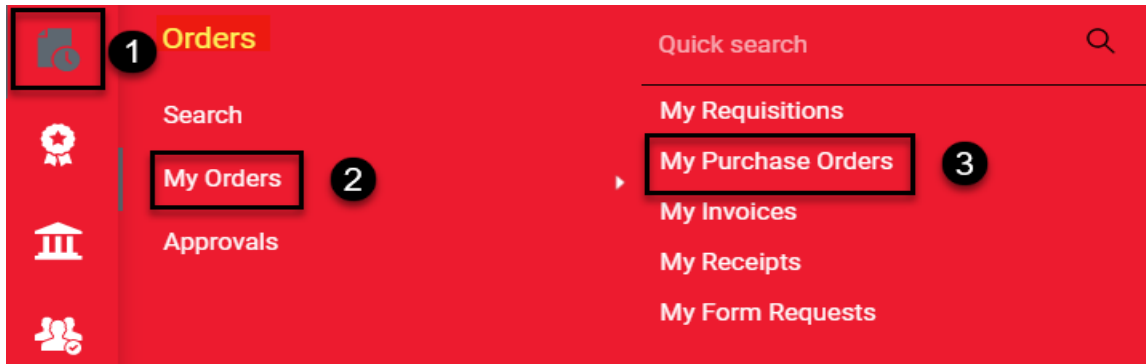
How to View the Status of a Purchase Order

Once a PO is issued, you can view the following information in MMP.

My PO Summary

To access all your completed purchase orders

- Go to the side menu, select **Orders**, then **My Orders**, then **My Purchase Orders**.
- Select the Purchase Order Number



PO Document Status

To view the purchase order distribution method, date, or time the order was delivered to the supplier.

- Go to the **Status** tab of the PO and scroll down to the **Document Status**
- There are 3 possible distribution methods whereby a PO can be sent to a supplier.
 - E-mail
 - Fax
 - cXML (direct data injection to the supplier's system, normally used with punchout suppliers)

Purchase Order : P0925286 Revision 0

Status Summary Revisions Confirmations Shipments Receipts Invoices Comments Attachments History

Cart/Requisition Number 141174035 [view](#) | [print](#)

Document Status

The system distributed the purchase order using the method(s) indicated below the last time it was distributed: [view](#)

Email (HTML Body) stockroom.fmd@mcgill.ca

Distribution Date/Time 25/02/2021 12:27 PM

Supplier Sent To Vendor

Retrieving an Electronic copy of the PO

To retrieve an electronic copy of the PO, select one of the following options. If the intent is to re-distribute the purchase order to the supplier, please ensure to attach the University Standard Terms and Conditions to the document.

- Go to the **Revisions** tab of the PO, and click on the link displayed by one of the following:
 - HTML Body Email PO
 - HTML Attachment Email PO
 - Fax PO
 - Not Applicable for (cXML PO distribution)

Purchase Order : P0925286 Revision 0

Status Summary **Revisions** Confirmations Shipments Receipts Invoices Comments Attachments History

Records found: 1

Revision No.	Revision Date	Revision Name	Revised By	
original	25/02/2021 12:27 PM	original	System	PO Documents HTML Body Email PO PO Export Document Documents will expire on 26/02/2022 See fax configuration for this revision Attachments Standard Terms and Conditions of Purchase_April 18 2018 (1 page versions).pdf (System)

How to Search for a Requisition / PO / Invoice Number (starting with IV) in MMP

If you have an MMP requisition, PO number, or Invoice Number starting with IV, you can quickly access the document by using the search engine bar on the top right corner.

By document number

Select the document type (Purchase Order, Requisition, Invoice Number), enter the document number, and press the **Search** button.

All Search (Alt+Q) 🔍

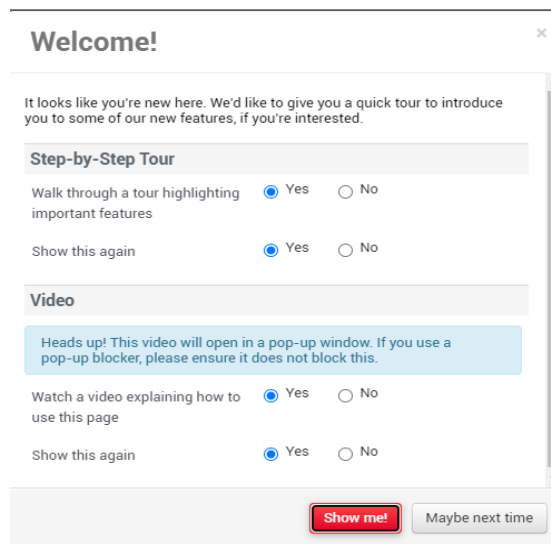
By different parameter

You can also search for a particular order by setting different parameters.

- Go to **Orders**, then **Search**, then select the order type.



- To assist users in applying search filters effectively, the system offers a Step-by Step Tour and Video. This option can be turned off by the user once they are comfortable navigating the system.



How to view a purchase related document

You can view a list of documents related to your purchase order (such as the requisition, invoices, checks) in Minerva or Banner. For instructions, please visit the [Financial Services Guide to Financial Management](#) website.

Training and Materials

Training

To register for training sessions offered by Procurement Service, please visit our [website](#).

Course Material

All course related material is also available on our website by selecting the appropriate [training session](#).

Other MMP Related Documents & Forms

- [Processing Change Orders](#)
- [Processing Receipts](#)

MMP Forms

- [PO Cancellation Form](#)
- [New Supplier Request Form](#)
- [Supplier Reactivation/Change Request Form](#)

Contact Us

- [Procurement Services Support Portal](#)