

PROCESSING A SECURITY AGENT REQUEST FORM

Nadia Orsini
Procurement Training Consultant

Logging into MMP

- www.mcgill.ca/minerva

Minerva Main Menu

McGill Minerva Minerva

MAIN MENU | ICS | Security Admin | HR Admin | **Finance** | Reports | Personal | Student | Employee | Applicant | Financial Aid/Awards

Search FRANÇAIS | SITE MAP | HELP | EXIT

Main Menu

Welcome, Nadia Orsini, to Minerva - McGill's Administrative Systems! Last web access on May 25, 2018 at 02:05 PM

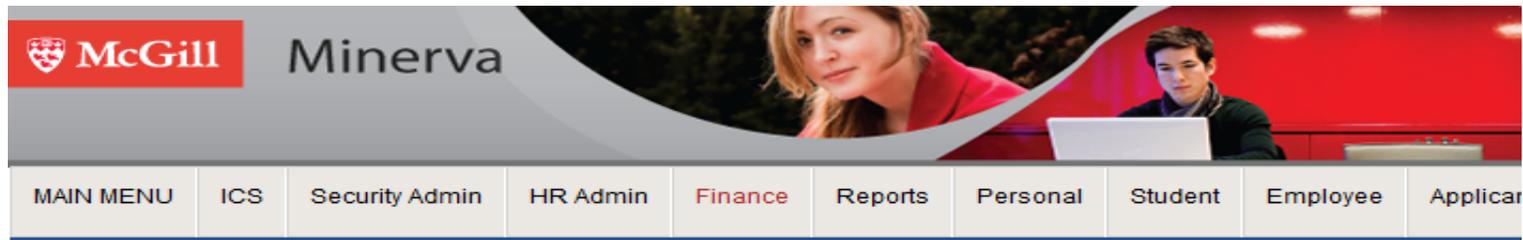
ICS Training Administration Menu
ICS Staff and Security Officers only - view employee training records and administer ICS courses/sections and registration.

Security Administration Menu
Display Userid, Class and Object information.

Human Resources Administration Menu
Appointment processing; Position processing; Citizenship and Immigration Form; Salary policy merit forms.

Finance (Fund) Administration Menu
Query Budget Status or Encumbrances; View Financial Statements; View Budget & Control Reports; Access the McGill MarketPlace (MMP) to place orders for goods and services (request a purchase order); Sponsor Requestors and set-up Delegates to approve MMP orders; Reconcile PCards; View Documents and invoice images; Request Advances and other Personal Reimbursements.

Finance (Fund) Administration Menu



Finance (Fund) Administration Menu

Beware of fraud targeting employees with access to financial information

Recent scams have targeted personnel at McGill who have access to financial accounts and data. Please use caution w
Fraudulent requests may be submitted by email, text, phone or other communication channels.

Budget Query for Fund Holders

A fund code is all you need - An ideal format for **researchers**.

Budget Query

Create your own query format.

Financial Statements

View Financial Statement Reports.

Public FOAPAL Hierarchy Reports

View a complete listing of fund, organization, account, program, activity, and location codes (reports are in PDF format).

McGill MarketPlace Entrance

Go shopping at the McGill MarketPlace; manage your personal shopping profile(s); place orders for goods and services (browsers to access the page; Google Chrome is not supported.

McGill Marketplace Entrance

Before you Shop.....update My First Profile

Select the Edit icon  to update your Profile Information, Shipping Address and Foopal Favorites

McGill MarketPlace Entrance

Click on the **Shop with this profile** link to access the McGill MarketPlace. If the link does not appear, edit  an existing profile or create a new profile. A valid profile includes a phone number, email, and at least one shipping address. A profile may have multiple shipping addresses as well as FOAPAL favourites associated to it. Click on the HELP link above for more details.

My Shopping Profiles

Profile Name	Actions	Warnings
My First Profile	  Shop with this profile	
Uprint	  Shop with this profile	

Create New Profile

My First Profile

To request a New Shipping Address go to: <https://www.mcgill.ca/financialservices/forms/location-code>

Editing Profile *My First Profile* belonging to *Nadia Orsini*.

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:

Phone Number

Or Override: () - 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
  	Dr. Smith reception	Rm 1002 Leacock Buildin
  	Nadia Orsini	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 Individual Code Group

Add Favorite

Favorite Funds

 	159391	Financial Services
 	159395	Procurement Services

Favorite Accounts

	700001	Materials & Supplies
	700011	Postage
	700017	Publications - Books
	700067	Contract Services Catering
	700505	Stationery
	700563	Cell Phones

Shop with this profile

Back to profile list

McGill Marketplace Home Page

- Go to Forms and Select the Security Agent Request Form

The screenshot displays the McGill Marketplace Home Page. At the top left is the 'McGill MarketPlace' logo. The top right navigation bar includes the user name 'Nadia Orsini', a star icon, notification counts '33' and '42', a shopping cart icon with '510.00 CAD', and a search bar with the text 'Search (Alt+Q)'. Below the navigation bar is a breadcrumb trail: 'Shop > Shopping > Shopping Home > Home/Shop' and a 'Logout' button. A search bar is centered, showing 'Shop Everything' in a dropdown menu and a 'Go' button. Below the search bar are links for 'Go to: advanced search | favorites | forms | non-catalog item | quick order' and 'Browse: suppliers | categories | contracts | chemicals'. On the right side, there is a link for '[Manage Showcases]'. The main content area is divided into two sections. The left section contains 'Directives for Santa Cruz order' and a link for 'PO Change Request Form'. The right section is titled 'Forms' and contains three cards: 'uPrint Paper Order Form', 'Academic Laptop Program', and 'Security Agent Request Form'. A red arrow points to the 'Security Agent Request Form' card.



Ordering Instructions ?

Book a Security Agent by completing this MMP form and going to the top of the form and clicking "Add to cart".

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

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.

A minimum 4-hour charge is applicable to **ALL** agent bookings, even if your event is shorter.

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.

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.

The current rates for agent labour are:

* \$30.60 (non-taxable) per hour/agent for internal McGill departments

* \$38.60 per hour/agent for non McGill Events.

These rates are **DOUBLE** on all statutory holidays.

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

Any questions regarding billing for agent labour can be forwarded to billing.security@mcgill.ca

Requestor Information ?

Full Name	<input type="text"/>
Email	<input type="text"/>
Office phone	<input type="text"/>
Cell phone/Other	<input type="text"/>
Department	<input type="text"/>
Building	<input type="text"/>
Project # / Event name	<input type="text"/>

Shopping Cart for Nadia Orsini

[Continue Shopping](#)

Name this cart:

1 Item(s) for a total of **306.00** CAD

subtotal: 306.00 CAD

estimated tax, shipping & handling: 0.00 CAD

[Proceed to Checkout](#)

or

[Assign Cart](#)

Have you made changes? [Update](#)



[Help](#)

[Add Non-Catalog Item](#)

[Empty Cart](#)

[Create New Cart](#)

Perform an action on (0 items selected)...

Select All

McGill Campus Public Safety-Downtown Campus



[more info...](#)

[Add Non-Catalog Item](#)

Product Description



[McGill Security Agent Request Form](#) open form...



Campus Downtown

Unit Price	Quantity	Total
306.00	<input type="text" value="1"/>	306.00
Update	GST	0.00
More Actions	QST	0.00
	Shipping	0.00
	Handling	0.00
Supplier subtotal		306.00

Before placing your order ensure all the headers are checked



➤ Ensure the Foapal information is duly filled

Requisition [PR Status](#) [Comments](#) [Attachments](#) [History](#)

Summary | [General](#) | **FOAPAL Information** | [Item Details](#) | [Subtotal](#)  

[Hide descriptions](#)

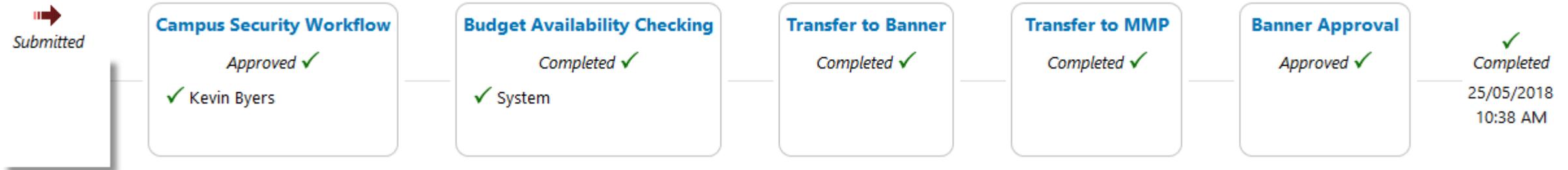
The FOAPAL and/or PERMIT number below will apply to all items. To specify different FOAPAL and/or PERMIT numbers for an item, click on the edit button for that item.

FOAPAL Information

Fund	Organization	Account	Program	Activity	Location	edit
159395 Procurement Services	00356 Procurement Services	700425 Security Services	4106 Support Serv. Procurement	000000 Unassigned Activity	000000 Unassigned Location	

What Happens Next.....

- MMP Requisition # is assigned (ie. 12345678).
- Passes through the Campus Security Workflow
- Passes through 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



Processing Change Orders
For
Security Agent Request Forms

Why is a Change Order Necessary...

- Security Service Requests are processed using an estimated amount according to need
- Change orders are usually required to increase the final amount of the purchase order so they reflect actual hours worked by the agents. (including travel time)

Increasing a Purchase Order Amount

- Go to the McGill Marketplace and enter the purchase order number in the search engine

Nadia Orsini ▾ All ▾ P0860415 🔍

Logout

Available Actions Add Comment ▾ Go

PO No. **P0860415** Revision 0 Available Actions Add Comment ▾ Go

Supplier **McGill Campus Public Safety-Downtown Campus**

Summary Details Revisions PO Status Shipments Receipts Invoices Comments Attachments History

General Information

PO No. **P0860415**
Revision No. 0
Supplier Name McGill Campus Public Safety-Downtown Campus [more info...](#)
PO Date 16/01/2020
Total 376.75
Name [REDACTED]
Phone +1 514-398 [REDACTED]
Email [REDACTED]
Cart/Requisition Number 127970532 [view](#) [print](#)

Document Status

Distribution The system distributed the purchase order using the method(s) indicated below the last time it was distributed. [view](#)
Email (Plain Text) orders.security@mcgill.ca
Distribution Date/Time 16/01/2020 11:29 AM
Supplier Sent To Vendor [view](#)

Item Status

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching
1 McGill Security Agent Request Form-Downtown Campus more info...		1/EA	376.75	1 EA	376.75 CAD	Sent To Vendor	none	none	No Matches

In addition to GST and QST, you may be charged additional fees relating to shipping and brokerage (international purchases). Your authorization of this order confirms your acceptance of these additional fees.

Subtotal	376.75
GST	0.00
QST	0.00
Shipping	0.00
Handling	0.00
Total	376.75 CAD

Increasing a Purchase Order Amount

➤ Go to **Details** tab

PO No. **P0860415 Revision 0**
Supplier **McGill Campus Public Safety-Downtown Campus**
[Add Non-Catalog Item](#)

Summary **Details** Revisions PO Status Shipments Receipts Invoices Comments Attachments

Summary General Information FOAPAL Information PO Total

[Hide header](#)

General Information

PO No.	P0860415	edit
Revision No.	0	
Priority	Normal	
Supplier Name	McGill Campus Public Safety-Downtown Campus	
Address	805 Sherbrooke St West Room #115 Montreal, QC H3A 0B9 CA	
Phone	+1 514-398-5186	
PO Date	16/01/2020	
Total	376.75	
Cart/Requisition Number	127970532 view print	
Buyer	Automated Buyer	
Permit Number	<i>no value</i>	
Do Not Send to Banner	x	

➤ Scroll down to **Vendor Information** section and enter a reason for the change order, then SAVE.

Vendor Information

Note to Vendor

880 characters remaining [expand](#) | [clear](#)

Internal Note

1000 characters remaining [expand](#) | [clear](#)

Currency

[All Codes](#)

[Save](#) [Cancel](#)

Increasing a Purchase Order Amount

- Select **Add non-catalog item**

- Enter the **Description**,
- Enter the **Quantity**,
- Enter **Amount before taxes**
- **SAVE** and **CLOSE**

Item Details

[Hide item details](#)

[Add non-catalog item...](#)

Product Description	
1	McGill Security Agent Request Form-Downtown Campus more info...
General Information values have been overridden for this line view/edit	
FOAPAL Information values have been overridden for this line view/edit	
Service End Date	1/18/2020
Service Start Date	1/17/2020
more info...	

Add Non-Catalog Item

McGill Campus Public Safety-Downtown Campus 

805 Sherbrooke St West, Room #115, Montreal, QC H3A 0B9 CA

Product Description (50 characters max):	Catalog No.	Quantity	Unit Price (before taxes)	Quantity and Unit of Measure
Increase Purchase Order per actual hours worked by agents.		1	34.25 CAD	EA - Each

196 characters remaining [expand](#) | [clear](#)

[Save and Close](#) [Save and Add Another](#) [Close](#)

Increasing a Purchase Order Amount

- Go to **FOAPAL Information Tab**
- Enter in the FOAPAL in the **Item Details** section
- click **Edit**

- Enter in the **FOAPAL**
- Ensure to update **Org/Prog**
- **SAVE**

PO No. **PO860415 Revision 0** Available Actions: Add Comment Go

Supplier: **McGill Campus Public Safety-Downtown Campus**

Summary **Details** Revisions PO Status Shipments Receipts Invoices Comments Attachments History

Summary General Information **FOAPAL Information** PO Total

The FOAPAL and/or PERMIT number below will apply to all items. To specify different FOAPAL and/or PERMIT numbers for an item, click on the edit button for that item.

FOAPAL Information values vary by item

Fund	Organization	Account	Program	Activity	Location
no value	no value	no value	no value	no value	no value

FOAPAL Information values vary by item

Item Details

For selected items: Cancel Selected PO Lines Go

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 McGill Security Agent Request Form-Downtown Campus		1/EA	376.75	1 EA	376.75 CAD
FOAPAL Information values have been overridden for this line					
Fund	Organization	Account	Program	Activity	Location
		700425			
2 Increase Purchase Order per actual hours worked by agents					
FOAPAL Information (same as header)					

edit

Edit section "FOAPAL Information"

FOAPAL Information

Fund	Organization	Account	Program	Activity	Location
		700425			

My Favorites All Codes

My Favorites All Codes

My Favorites All Codes

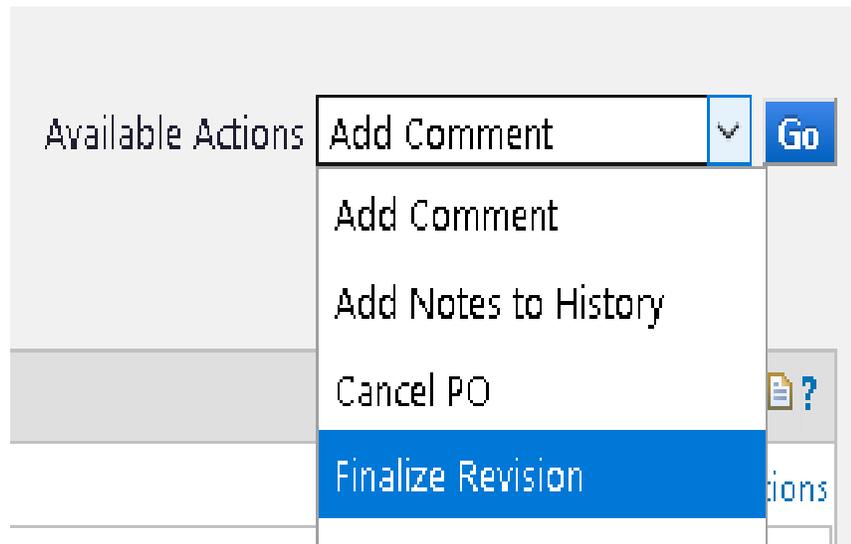
My Favorites All Codes

Update Org/Program

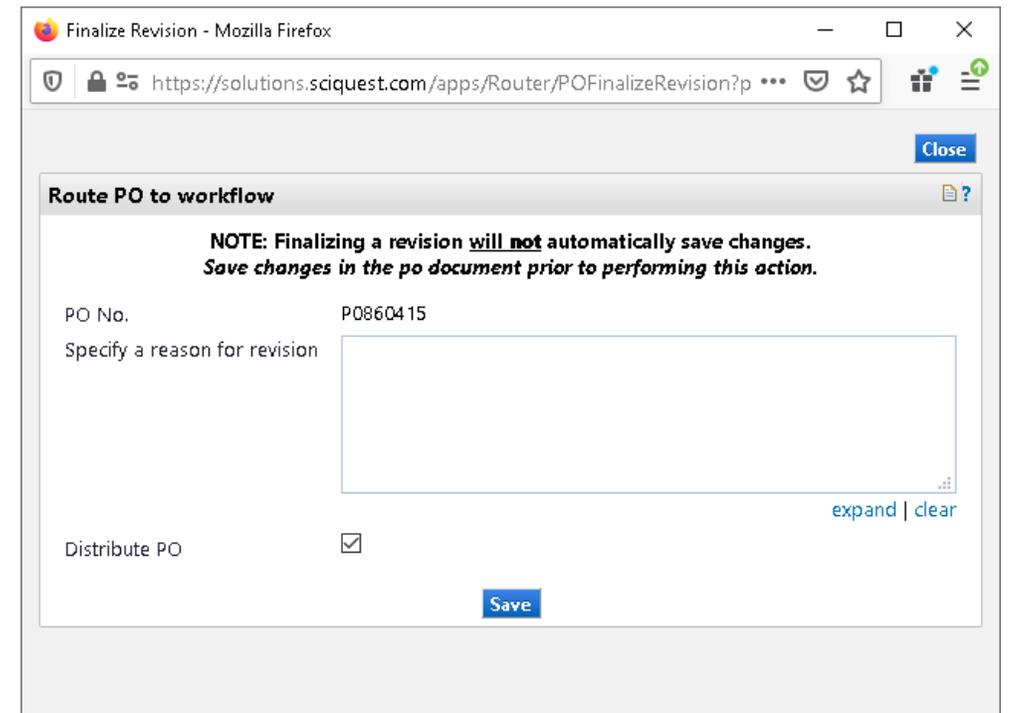
Save Cancel

Increasing a Purchase Order Amount

- Go to **Available Actions**
- Select **Finalize Revision**
- select **GO**



- Indicate a reason for the Revision
- PO **must** be distributed to the supplier
- Check Distribute PO box
- SAVE and Close



Increasing a Purchase Order Amount

- The change order will move through various workflows
- A Procurement Administrator will review the change order once in the CO Procurement Review box
- Once approved, the PO will then move onto Revise PO, PO Export and then PO change Response where it will remain pending until approved in Minerva by the FFM/delegates, PI, and FA.
- Once approved, the change order will then post to Banner and complete the final step by distributing a Revised Purchase Order to the supplier.
- A notification is sent to both the requestor and supplier to advise them of the revision.
- The change order is then complete.



Viewing a Pending Change Order

- It is the responsibility of the requestor to ensure the change order has been completed and posted to Banner
- To view the approval history of a particular purchase order (either issued by you or someone else in your unit), please do the following:
 - Log into **Minerva**
 - Go the "**Finance**" menu
 - Click "**View Document**"
 - Select "**Purchase Order**" in "**Choose Type**",
 - Enter the Purchase Order number # in "**Document Number**"
 - Select "**Change Seq#**"
 - Click the "**Approval History**" button to view the approval/disapproval details of the document.
 - Approvals required as well as Approvals recorded will be displayed

Viewing a Pending Change Order



Orders > Approvals > Purchase Orders to

[Back to Approvals](#)

 You are viewing a purchase order that

PO No. **P0857817 Revision 1**

View Document

To display the details of a document enter parameters then select View document feature. This enables you to perform a query and obtain a list of document numbers. You can now view invoice document images. Click on the **HELP** link at the top of the page.

Choose type: Document Number

Submission#:

Change Seq#

Display Accounting Information

Yes No

Enter Change Order Sequence as displayed on MMP PO Revision

Display Document/Line Item Text

All Printable None

Display Commodity Text

All Printable None

What Happens if the Change Order is Denied

- Follow steps shown in “Viewing a Pending Change Order”
- In the “Approvals Recorded”, the document Queue will display DENY alongside the person’s name
- You must contact the user that disapproved the change order to inquire on the reason and required changes
- You must also email feedback.purchasing@mcgill.ca in order to cancel the initial change order and cc orders@security.mcgill.ca so they are aware of the status.
- You will receive an email from the Procurement helpdesk to advise when the change order has been cancelled.
- You may then re process the change order in MMP
- For inquiries, please contact feedback.purchasing@mcgill.ca or at extension 2840.

View Document

Document Identification

Document Number	P0799097	Type	Purchase Order
Originator:	NORSIN1	Nadia Orsini	

✓ There are no approvals required at this time

Approvals recorded

Queue	Level	Date	User
DENY	0	Apr 26, 2019	
4NEA	10	Jun 05, 2019	
4NEA	1	Apr 26, 2019	Auto Approved
4NEA	1	May 17, 2019	Auto Approved