



Limited Tendering Shopping Guide

MacBuy is an eProcurement program for online shopping with direct charges to chart field strings. This is one of the various ways we can make purchases at McMaster in addition to Non-PO Voucher and Pcard. Requisitions will be entered and approved within MacBuy before they become a Purchase Order. This replaces the requisition module in Mosaic. MacBuy results in fewer Pcard charges creating a more efficient reconciliation process. Negotiated premier pricing is in place for Show Case suppliers (Punch-Out and Hosted). All other requisitions will be entered via Non-Catalogue or a Limited Tendering form.

Ways to shop in MacBuy:

1. **Hosted Catalogue – premier pricing**
2. **Punch-Out Catalogue – premier pricing**
3. **Non-Catalogue Form**
4. **Limited Tendering Form**

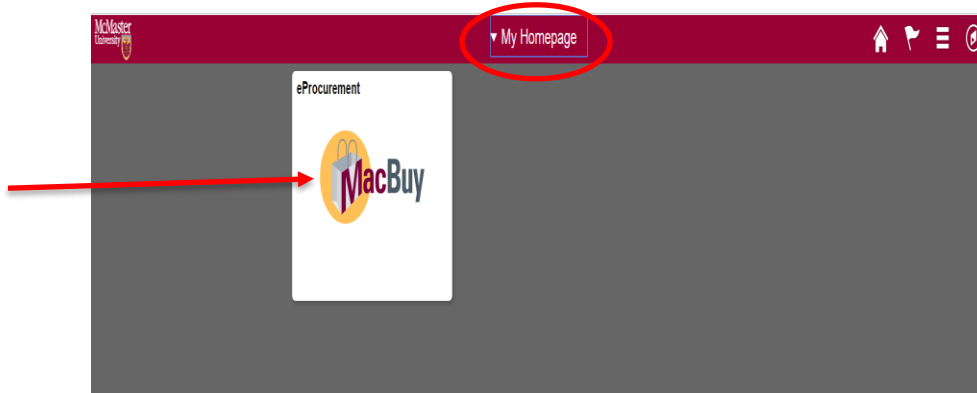


1. Hosted Supplier: click the supplier's tile and shop their premier catalogue directly within MacBuy
 - *Under \$100,000 = 2 way match, no receiving, no additional documentation required
 - Punch-out and Hosted products can be mixed in the same cart
 - Identified by **no** arrow in the top right corner of the supplier's tile
2. Punch-Out Supplier: click the supplier's tile and be taken externally to their website reflecting our premier pricing. Once all items are added to the cart, follow prompts to checkout. You will be brought back into MacBuy with the selected items in your cart to complete the requisition entry.
 - *Under \$100,000 = 2 way match, no receiving, no additional documentation required
 - Punch-out and Hosted products can be mixed in the same cart
 - Identified by the arrow visible in the top right corner of the supplier's tile
3. Non-Catalogue Form: click the Non-Catalogue Form to initiate a requisition to every other supplier who does not appear on the showcase. Suppliers must accept a purchase order and must be setup as a supplier in Mosaic (No T4A suppliers). Complete the required form and add it to your shopping cart.
 - All dollar values = 3 way match, added step of receiving required for payment to be issued to supplier
 - Backup documentation required i.e quote/price justification
 - Standard purchasing thresholds will apply – competitive quotes required for purchases over \$10,000 before tax – see SP-01 Policy for threshold requirements.
 - Exclusive to own cart – cannot be mixed with hosted/punch-out
4. Limited Tendering Form: click the Limited Tendering Form to initiate a limited tendering request. Complete the required form and add it to your shopping cart. All required backup and approvals will be requested/routed directly with the submission of the form.
 - All dollar values = 3 way match, added step of receiving required for payment to be issued to supplier
 - Backup documentation required i.e quote/price justification
 - Standard purchasing thresholds will apply – competitive quotes required for purchases over \$10,000 before tax – see SP-01 Policy for threshold requirements.
 - Exclusive to own cart – cannot be mixed with hosted/punch-out

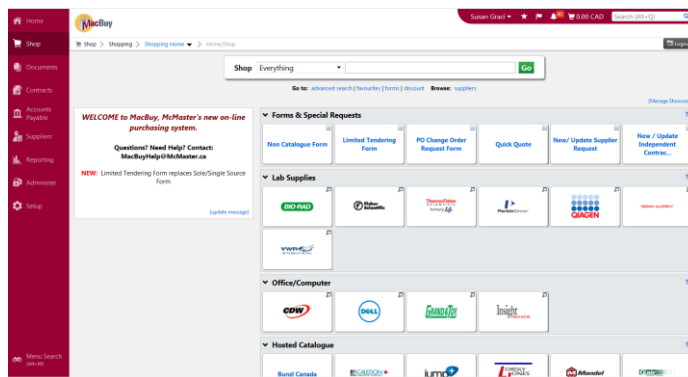
Shopping in MacBuy with a Limited Tendering Form

Log into Mosaic and select the MacBuy tile:

This will either appear on your **My Homepage** screen or your **My Work** screen. To navigate to your **My Work** page click on the arrow next to **My Homepage** and select from the drop-down list.



After clicking the MacBuy tile, you will be redirected to the MacBuy home screen as shown below.



TIP: All 4 shopping methods will be initiated from this home screen

TIP: Prior to starting the shopping process, be sure your active cart has a balance of \$0.00 to ensure there are no previous items already in your shopping cart. The first item selected creates a cart if a cart is not already open (a cart containing at least one item).



1. Click on the Limited Tendering Tile on the MacBuy Showcase:

2. A fillable form will load onto the screen. First, under the **purchase details**, either start typing the name of your supplier for a list of available options or use the supplier search hyperlink to find your supplier by typing in the partial or full name and click search. From the list of available options select the appropriate supplier.

Limited Tendering Form

Form Instructions
Strategic Procurement
Limited Tendering Approval Form

To be compliant with the applicable laws, regulations, public policy and McMaster University's Strategic Procurement Policy **SP-01**, all acquisitions must be subject to competitive bidding. In rare, specific or exceptional circumstances, it may be able, or capable, of providing the required goods or services. The Strategic Procurement Policy and related procedures apply to expenditures from all funding sources including operating, research, ancillary, capital and trust. A Strategic Procurement Policies and Processes can be found in the following brochure "https://financial-affairs.mcmaster.ca/app/uploads/2019/02/New-SP-Brochure-Fall-2018-1.pdf"

Purchase Details
Enter Supplier

Currency: CAD

Good or Service Description

Estimated Total Value \$ (after discounts, before taxes and over contract terms)

Original Value \$
Added Value \$
Funding Source

In-Kind Contribution (if applicable)

NOTE: A Fair Market Value (FMV) Assessment is required for all research-funded purchases valued at \$50,000 or greater, particularly those that are CFI-funded. This is done to demonstrate value for money, which is typical competitive procurement process. Please attach the appropriate FMV supporting documentation which is described in our FMV Brochure - "https://financial-affairs.mcmaster.ca/app/uploads/2018/07/Fair-Market-Brochure-Limited-Tendering"

Purchase Details
Enter Supplier

agilent

OR

Supplier Search

Supplier: agilent

Results Per Page: 20 Suppliers found: 1 Page 1 of 1

Supplier Name/Address	Select
Agilent Fulfillment Center 1: 6705 Millcreek Drive Unit 5 Mississauga, ON L5N 5M4 CA Genomics: 6705 Millcreek Drive Unit 5 Mississauga, ON L5N 5M4 CA	Select Select

3. Once the supplier is selected the Supplier Name, Address, Currency and Email Address will populate into the form. Select the proper **currency** using the drop down menu if available. Change the **email address** that the PO will be sent to by using the **Customize Order Distribution Information** box.

Purchase Details

Recommended Supplier Agilent more info...
select different supplier

Fulfillment Address Fulfillment Center 1: (preferred)
6705 Millcreek Drive Unit 5
Mississauga, ON L5N 5M4 CA
select different fulfillment center

Supplier Phone +1 800-688-4360

Currency CAD

Distribution
The system will distribute purchase orders using the method(s) indicated below:
Check this box to customize order distribution information.

Email (HTML Body) orders@agilent.com

TIP: If you select the wrong supplier, use the **select different supplier** hyperlink, to start over.

4. Fill out the **Good or Service Description** for the line item you are issuing the limited tendering request for (this will come from the supplier's quote).

Good or Service Description

254 characters remaining expand | clear

5. Fill out the **Estimated Total Value** (before taxes) section as it pertains to your order. Be sure to select the **Funding Source**. For CFI funded projects, please be sure to provide the value of the **In-Kind Contribution**. A reminder that these values would come from the quote or price justification provided by the supplier.

Estimated Total Value \$ (after discounts, before taxes and over contract terms)

Original Value \$

Added Value \$

Funding Source

In-Kind Contribution (if applicable)

NOTE: A Fair Market Value (FMV) Assessment is required for all research-funded purchases valued at \$50,000 or greater, particularly those that are CFI-funded. competitive procurement process. Please attach the appropriate FMV supporting documentation which is described in our FMV Brochure - "https://financial-a

6. Under the **Limited Tendering section**, read through the available limited tendering options, 10-100, and use the drop down field to make your selection.

Limited Tendering Choice ▼

#	Limited Tendering Reasons
10	The goods and services can be supplied only by a particular supplier and no reasonable alternative of substitute goods or services exist for any of the following reasons (i) the requirement is for a work of art;(ii) the patents, copyrights or other exclusive rights or (iii) due to an absence of competition for technical reasons
20	To ensure compatibility with existing goods, or to maintain specialized goods that must be maintained by the manufacturer of those goods or its representative
30	For additional deliveries by the original supplier of goods or services that were not included in the initial procurement if a change of supplier for such additional goods or services : (i) cannot be made for economic reasons such as requirements of interchangeability or interoperability with existing equipment,software, services or installations procured under the initial procurement; AND (ii) would cause significant inconvenience or substantial duplication of costs for the procuring entity
40	No tenders were submitted or no suppliers requested participation
50	No tenders that conform to the essential requirements of the tender documentation were submitted
60	Work is to be performed on property by a contractor according to provisions of a warranty or guarantee held in respect of the property of the original work
70	If a procuring entity procures a prototype or a first good or service that is developed in the course of, and for, a particular contract for research, experiment, study, or original development. Original development of service may include limited production or supply in order to incorporate the results of field testing and to demonstrate that the good or service is suitable for production or supply in quantity to acceptable quality standards does not include quantity production or supply to establish commercial viability or to recover research and development costs
80	Work is to be performed on a leased building or related property, or portions thereof, that may be performed only by the lessor
90	If goods or consulting services regarding matters of a confidential or privileged nature are to be purchased and the disclosure of those matters through an open tendering process could reasonably be expected to compromise government confidentiality, result in the waiver of privilege, cause economic disruption, or otherwise be contrary to the public interest

7. Navigate to the **Justification** text field to highlight in detail your limited tendering scenario and why only one supplier can satisfy the good or service request. Should you need more than 500 characters, please make a note for reviewers to reference the internal attachments and attach a separate document there during the checkout process. Ex. Please reference internal attachments for more information.

Justification
 Explain in detail why you are requesting a non-competitive procurement. If the Recommended Supplier is the only one that can (Attach additional pages if necessary).

500 characters remaining

8. Read through the **Acknowledgement and Approval** section to be sure that your purchase complies with University policies.

Acknowledgement and Approval

- I have read and understand the University's Strategic Procurement Policy **SP-01**, which can be found here – "https://financial-affairs.mcmaster.ca/app/uploads/2019/02/SP_01-SEPT-2019-1.pdf". The Strategic Procurement Policy is and Provincial laws (i.e. trade agreements) that govern competitive bidding practices in Canada; and to protect both the University and the individual purchaser from liability that could result from a challenge to a contract award. A minimum number of required competitive written quotations are not solicited, a duly signed **Limited Tendering Approval Form** must be completed and forwarded to Strategic Procurement as part of the supporting documentation for the purchase. I have attached the required documentation in support of the selected non-competitive condition(s).
- I abide by the University's **Conflict of Interest Policy for Employees** as it relates to this procurement - https://www.mcmaster.ca/policy/Employee/Conflict_of_Interest_Policy.pdf.

Consulting Services

Where the above transaction is for "Consulting" services defined by the Broader Public Sector as "a person or entity that under an agreement, other than an employment agreement, provides expert or strategic advice and related services or decision-making". The following approvals are required

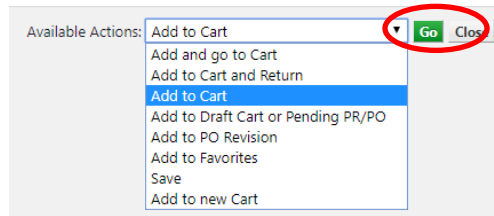
\$0 up to but not including \$1,000,000: President Approval required

\$1,000,000 or greater: President and Board of Directors Approval required

Total	0.00
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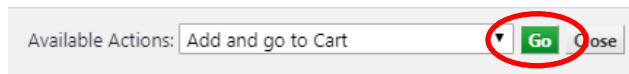
TIP: All required approvals will be routed in directly within the MacBuy workflow once the requisition is placed in the system.

9. Scroll to the top of the page to the **Available Actions** drop down menu. Here you will have a few options depending on what action you need to take next. To add the current item to your cart and return back to the Limited Tendering form to add in the next line item select **Add to Cart**.



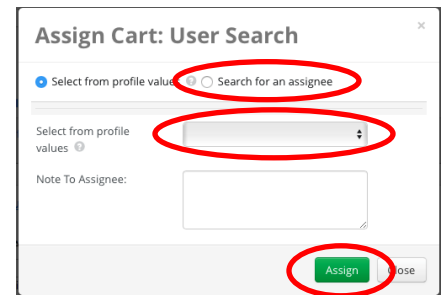
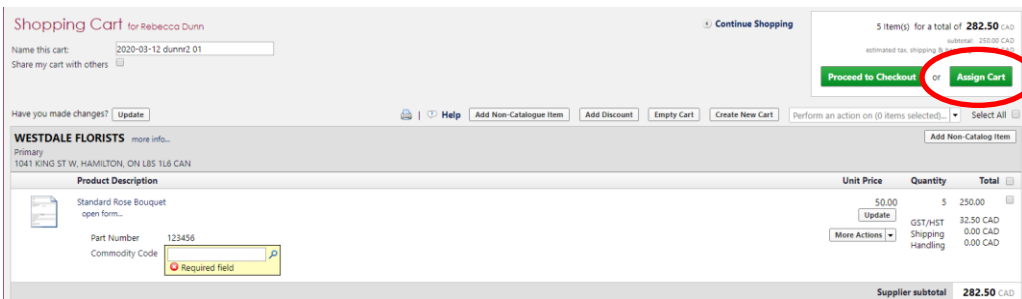
You'll now be able to modify the **Good or Service Description** to reflect the next line item on your quote/price justification.

When you've entered all line items and are ready to proceed to your Shopping Cart, select **Add and Go to Cart** and hit **Go**.



***If you are a Requester skip to step #11.

10. Draft Requisition: At this point, a Shopper may assign the cart to their Requester or proceed through the checkout process if they are familiar with commodity codes, shipping addresses, chart fields and tax treatments. To assign the cart, click the green **Assign Cart** button. Select from your **profile values** or use the **search for assignee** button and hyperlink to search for your requester by name. Click **Assign**.



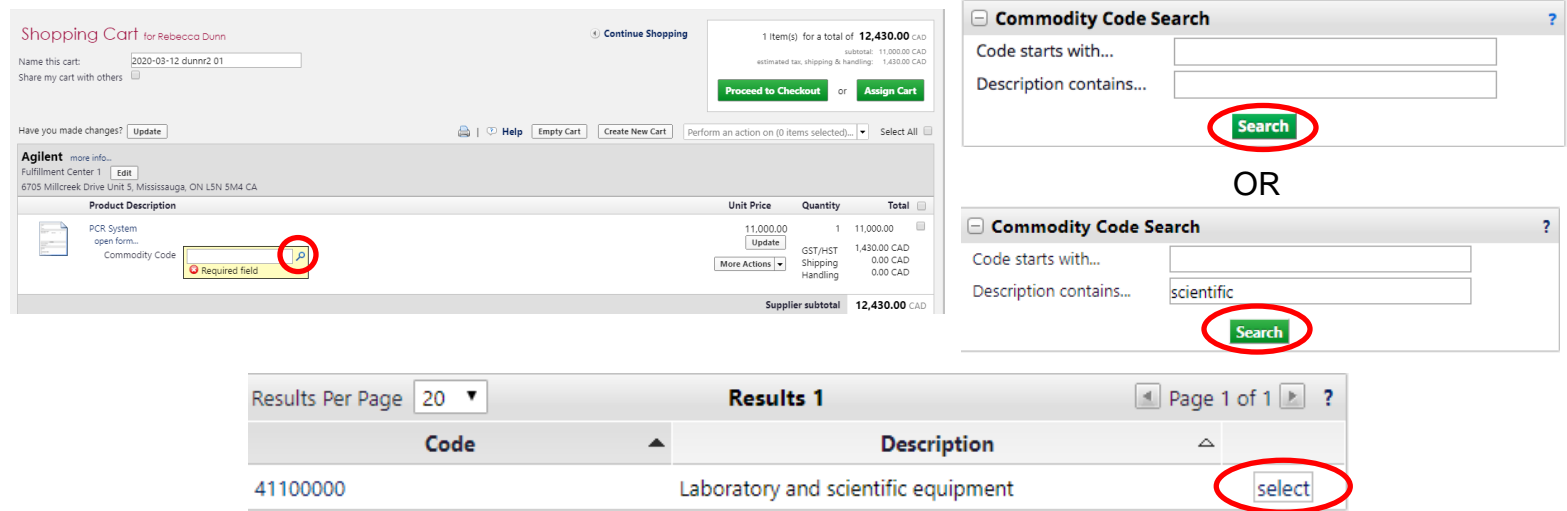
The cart has now been assigned to a Requester who will review the cart and complete any missing information during the checkout process. Once the Requester places the order, the requisition will enter into workflow for approval.

***The following instructions are not required steps by those with a Shopper role but can be completed if preferred. Requesters are required to complete the following steps.

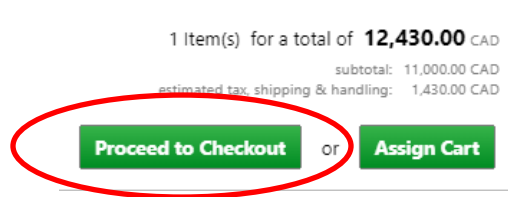
Within the draft requisition, you can assign a name to your cart, share your cart with others and assign a commodity code to your line items. The 'Update' button and 'More Actions' drop down together with the 'checkbox' on each line item can be used to update quantities, add to favourites or remove line items if needed. If left blank the assigned Requester will have the ability to modify these fields.



11. Assign a Commodity Code: Click on the magnifying glass and either click the **Search** button for a complete list of all 165 commodity codes OR search by a descriptor for a narrowed search. Use the select button to pick a commodity code with a good fit.

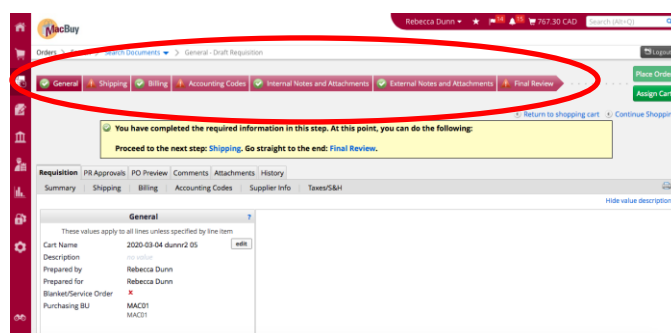


12. Click the green **Proceed to Checkout** button to complete the requisition.

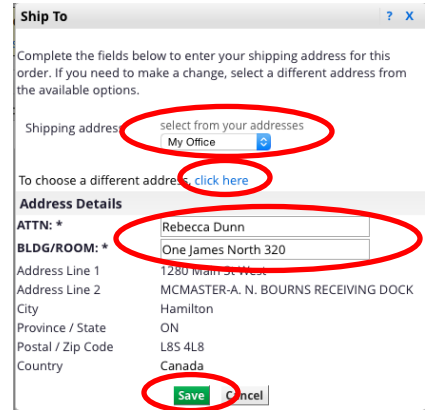
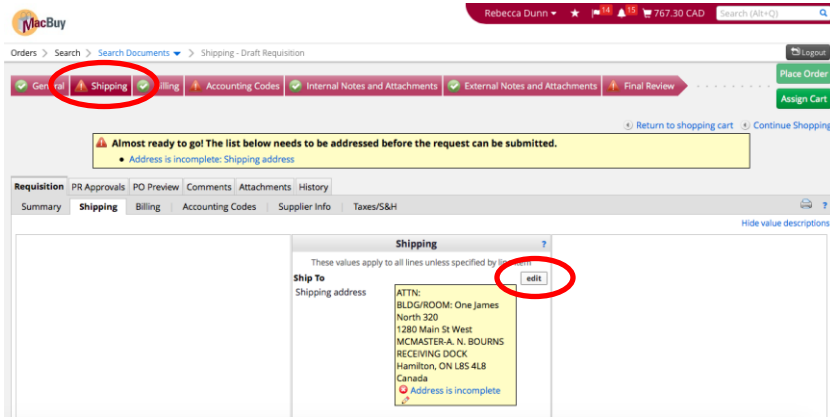


13. Follow the ribbon on the checkout screen to guide the submission process. A green checkmark will need to be present on each tab in order for the requisition to be submitted.

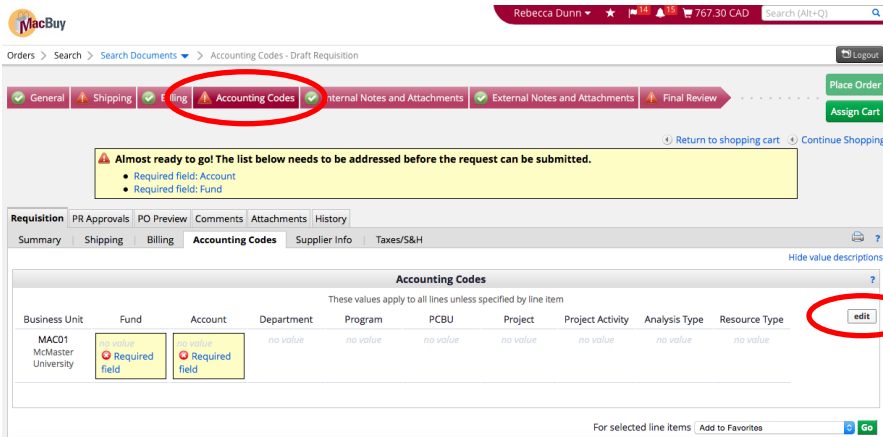
Reminder: Shoppers will still only have the ability to **assign** to a Requester. Those with the Requester role will be able to hit the green **Place Order** button to submit the cart into workflow.



14. Navigate to the shipping tab to confirm/enter the ship to address. Select the **Edit** button to choose from profile defaults OR select the click here hyperlink to present a drop down list of all organizational address templates. Once the correct template is selected, enter in the **ATTN** and **BLDG/ROOM** lines and select **Save**.



15. Navigate to the Accounting Codes tab to enter in the chart field(s) applicable to the requisition lines. Use the **Edit** button to enter in a chart field at the Header if you want the same chart field applied to all of your requisition lines. Use the **Edit** button on each of your requisition lines if you want to assign a different chart field to each line.



OR

Agilent [more info...](#)
 Fulfillment Center 1
 6705 Millcreek Drive Unit 5, Mississauga, ON L5N 5M4 CA

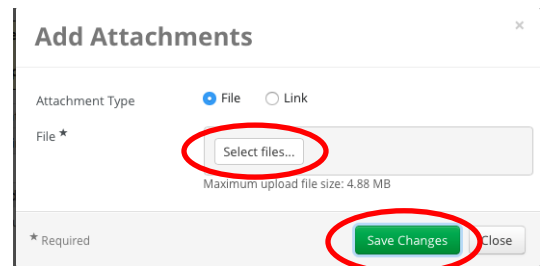
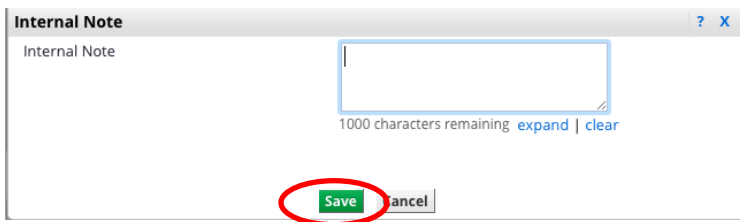
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Estimated Total Value \$ (after discounts, before taxes and over contract terms)			11,000.00	1	11,000.00 CAD
Chartfields (same as header)					edit
Supplier subtotal					11,000.00
GST/HST					1,430.00
Shipping					0.00
Handling					0.00
Supplier total					12,430.00 CAD

When inputting a chart field in either spot, you can choose from your drop-down list of code favourites (if you have defaults set to your profile) OR you can enter in the full chart field. Once the chart field is entered, select **Save**.

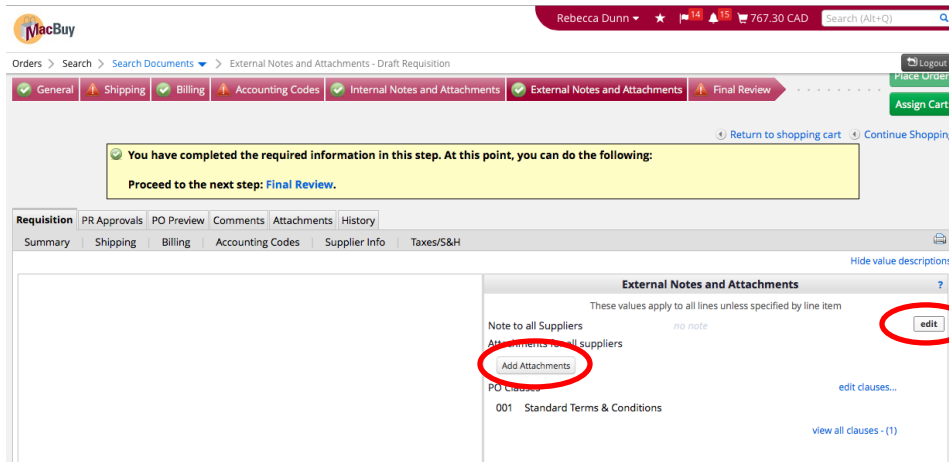
TIP: Use the ‘Add Split’ button at the end of the chart field entry if you want to split the cost between two or more chart fields.

TIP: For orders with Gift in Kind contributions (CFI), please be sure to select **GFTIK – Gift in Kind** under the Resource Type heading in the chart field string.

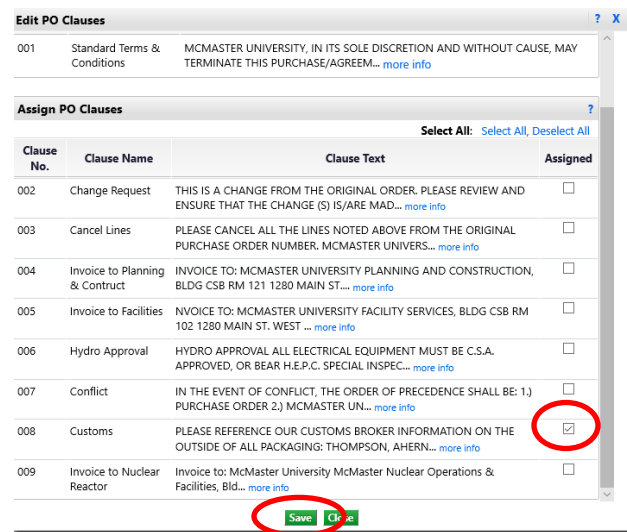
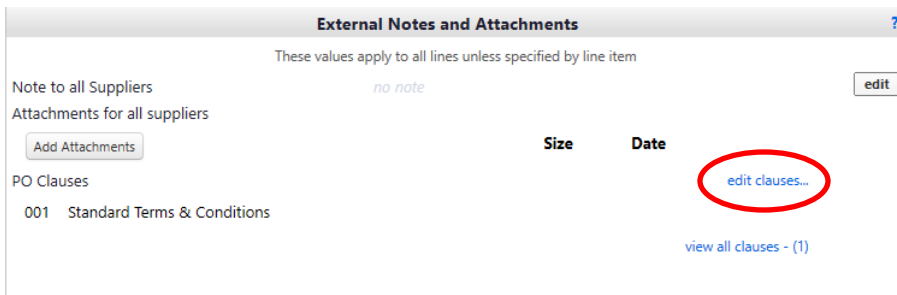
16. Navigate to the Internal Notes and Attachments tab. Use the **Edit** button to add a note that can be seen internally i.e all McMaster employees with access to this requisition (requester, approver, buyer etc.). Be sure to select **Save** once your note is completed. Use the **Add Attachments** button to select any file from your computer. Be sure to select **Save Changes** once your attachment is added. For Limited Tendering orders, this is where you can attach additional justification.



17. Navigate to the External Notes and Attachments tab. Here, notes and attachments can be added that can be seen externally i.e a supplier will be sent a copy. The same process as shown above for Internal Notes and Attachments is used. For Limited Tendering orders, this is where the successful quote will be attached.



TIP: For orders made outside of Canada, add Clause No. 008 to include McMaster's Customs Broker information on the PO. Select the **edit clauses** button, check off the box on line #008 and **save**.



18. Navigate to the Final Review tab. Here a summary of all the information previously entered will be available all in one spot. VAT treatments are also adjusted at the line level on this page. Scroll to line you want to change the tax treatment for and select the **Edit** button. Beside **VAT Treatment**, click the **Select from all values** hyperlink and choose the appropriate tax treatment. Remember to select **Save** once the correct VAT treatment is selected.

Agilent [more info...](#)
 Fulfillment Center 1 [Edit](#)
 6705 Millcreek Drive Unit 5, Mississauga, ON L5N 5M4 CA

PO Number To Be Assigned [edit](#)
 Quote number no value [View/edit by line item...](#)

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	edit
1 Estimated Total Value 5 (after discounts, before taxes and over contract terms)			11,000.00	1	11,000.00 CAD	edit

Commodity Code 41100000 Laboratory and scientific equipment
 Internal Note no note
 Internal Attachments
 Add Attachments
 HST Registered Supplier (Do Not Change)
 External Note no note
 Attachments for supplier
 Add Attachments
 VAT Treatment Ontario - HST
 Ontario - HST
 PO Clauses no clause
 edit clauses...

Edit Line [?](#) [X](#)
 Select price or contract...
 1 Estimated Total Value 5 (after discounts, before taxes and over contract terms) 11,000.00 1 11,000.00 CAD
 Select price or contract...

Commodity Code 41100000 Laboratory and scientific equipment
 Internal Note
 1000 characters remaining expand | clear
 HST Registered Supplier (Do Not Change)
 External Note
 1000 characters remaining expand | clear
 VAT Treatment Ontario - HST
 Select from all values...
 Clear selected value...

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

TIP: For all foreign orders coming from outside of Canada, for goods (tangible) remember to select Ontario - Self-Assess 8% (OHST) on Goods, and for services (intangible) select Ontario - Self-Assess 13% (HST) on Services as your VAT Treatment.

Lastly, on the Final Review page, scroll to the supplier information and input the quote number you are ordering from (if applicable) by using the **edit** button. Don't forget to select **save**.

Supplier / Line Item Details [?](#)

Hide line details For selected line items [Add to Favorites](#) [Go](#) [edit](#)

WESTDALE FLORISTS [more info...](#)
 Primary
 1041 KING ST W, HAMILTON, ON L8S 1L6 CAN
 Add non-catalogue item for this supplier...

PO Number To Be Assigned [edit](#)
 Quote number no value [View/edit by line item...](#)

Supplier only fields [?](#) [X](#)
 PO Number To Be Assigned
 Quote number
[Save](#) [Cancel](#)

19. At this point, if you are a Shopper, you will select the green **Assign** button to assign the requisition to your Requester. If you are a Requester, since the ribbon is completed with all green checkmarks, you may select the green **Place Order** button to submit the requisition into workflow for approval.

MacBuy Rebecca Dunn 767.30 CAD [Search \(ASH-C\)](#)

Orders > Search > Search Documents > Accounting Codes - Draft Requisition [Refresh](#)

General Shipping Billing Accounting Codes Internal Notes and Attachments External Notes and Attachments Final Review [Place Order](#) [Assign Cart](#)

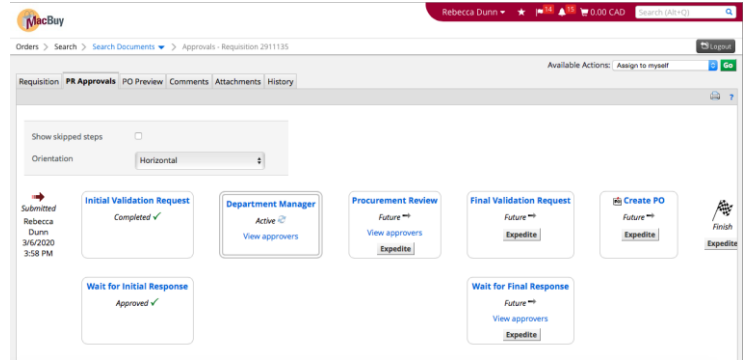
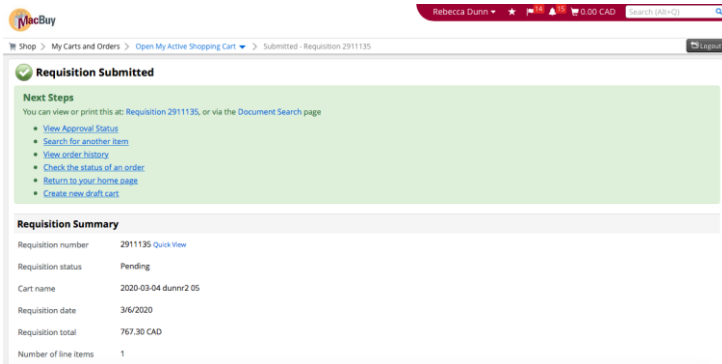
You have completed the required information in this step. At this point, you can do the following:
 Proceed to the next step: [Internal Notes and Attachments](#). Go straight to the end: [Final Review](#).

Requisition PR Approvals PO Preview Comments Attachments History
 Summary Shipping Billing Accounting Codes Supplier Info Taxes/S&H [Hide value descriptions](#)

Accounting Codes
 These values apply to all lines unless specified by line item

Business Unit	Fund	Account	Department	Program	PCBU	Project	Project Activity	Analysis Type	Resource Type	edit
MAC01 McMaster University	20 Operating Fund	600001 Materials & Supplies	10376 eProcurement	30015 Special Projects	no value	no value	no value	no value	no value	

20. Requisition Confirmation: The requisition confirmation screen will present you with a **requisition number** that can be used to track the status of your requisition. When selected, the **View Approval Status** Hyperlink will present the current workflow for your requisition and will show you the routed approvers. Since a limited tendering form was used, the system will automatically route in the additional approvers required for these scenarios. Once fully approved, the requisition will turn into a purchase order. A purchase order number will be generated and sent to the supplier. At this time the commitment for the order will hit the chart field used.



21. 3-Way Match: Since Non-Catalogue suppliers follow a 3-way match for all dollar amounts, Accounts Payable will not make payment to the supplier until the goods or services are received in MacBuy. Please reference the Receiving Guide for further instructions.

TIP: The checkout process will be the exact same for Hosted, Punch-Out, Non-Catalogue and Limited Tendering orders.

For further assistance, please contact macbuyhelp@mcmaster.ca