



# MacBuy Cheat Sheet

Log into Mosaic ([eprd.mcmaster.ca](http://eprd.mcmaster.ca)) and select MacBuy tile.



Shop from one of three types of suppliers: hosted, punch out or non-catalogue.

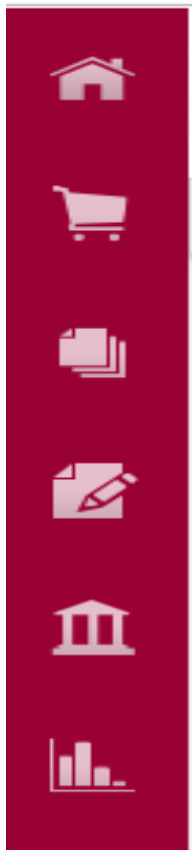
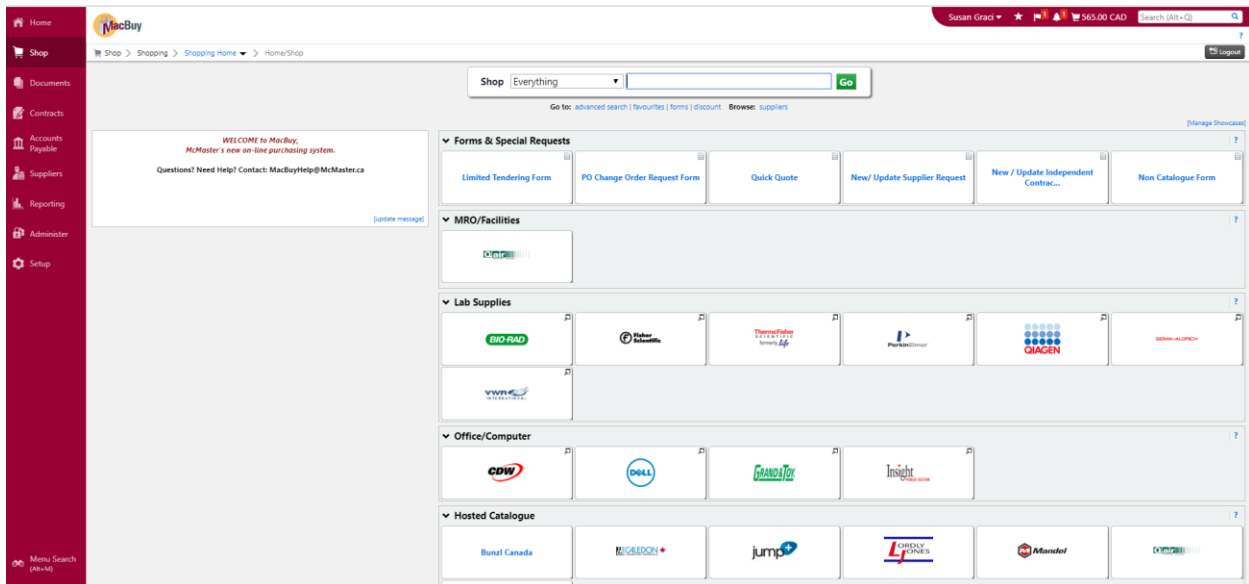
Hosted and punch out suppliers have McMaster contract pricing. They have “tiles” on the home page of MacBuy. Click on the supplier tile to shop with a specific supplier or search by item.

Non-catalogue orders do not have contract pricing. Suppliers have been brought over from Mosaic.

Hosted and punch out suppliers do not require receiving by user for orders under \$100,000.00.

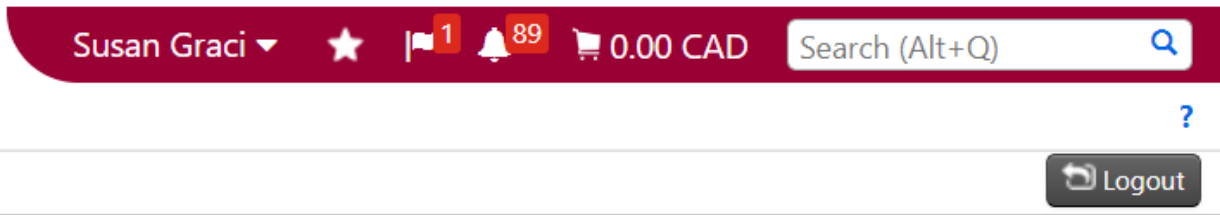
Non-catalogue suppliers do require receiving by user, for all dollar amounts.

# Home page



## Navigation Toolbar

- ✓ Home
- ✓ Shopping
- ✓ Documents
- ✓ Contracts
- ✓ Accounts Payable
- ✓ Reporting



## **Notification tool bar** (upper right of home screen)

**Profile** (Name) – edit personal information, set defaults (i.e. chart field strings)

**Bookmarks** (Star) – create short cuts to frequently used screens, reports, searches, etc.

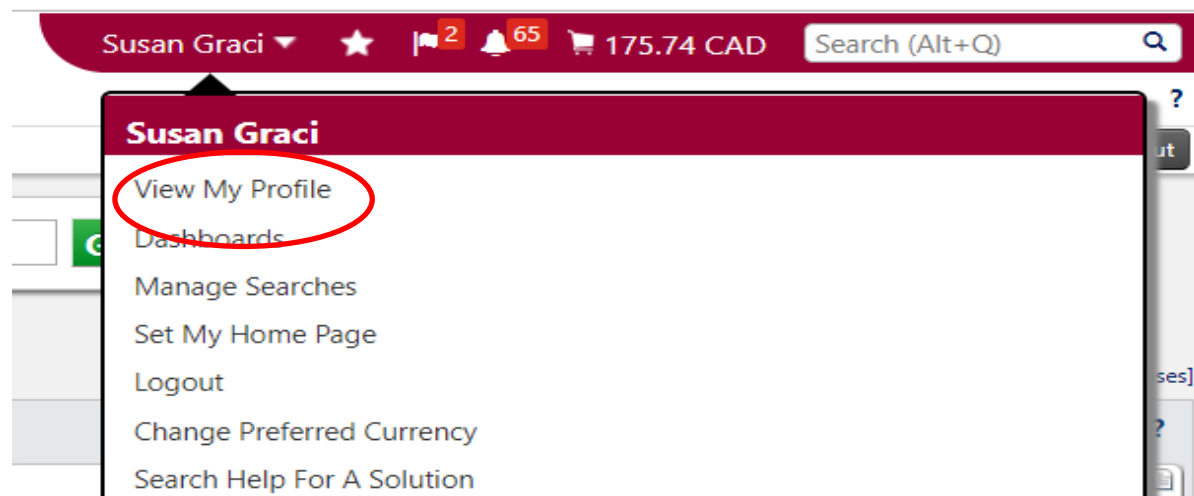
**Action Items** (flag) – cart assigned to user as Requester, approvals required

**Notifications** (Bell) – alerts to returned items, etc.

**Cart** (Shopping Cart) – if dollar figure, draft cart contains item(s), if no dollar figure, draft cart is empty

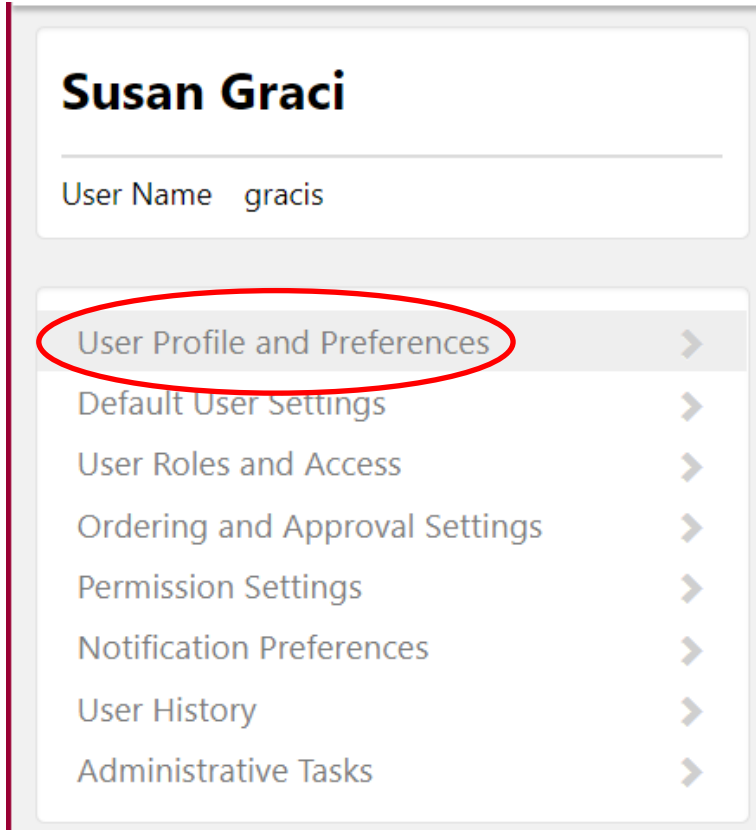
**Search** (Field) – requisitions, Purchase Orders, Invoices, etc.

**Logout** (Button) – returns user to Mosaic

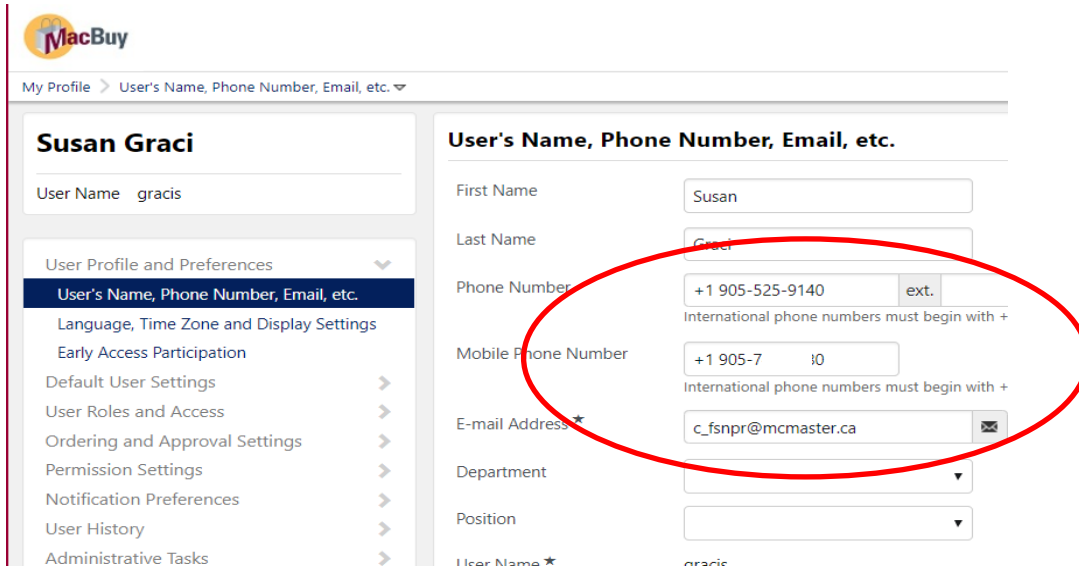


Go to **View My Profile** to add defaults such as chart field strings, Business Unit, tax treatment, and delivery location. This reduces time and key strokes on requisitions.

**TIP:** Pre-populated information comes from Human Resources. Some fields cannot be edited.



Click on User Profile and Preferences, above, to edit parameters.





**Default user settings**>custom field and accounting code defaults>code favourites>add>choose chart field string and enter nickname>save

**TIP:** Account field should be left blank as it is tied to the type of item being purchased.

**TIP:** Do not set any one chart field string as a Default unless only one chart field string is ever used.

The screenshot shows the MacBuy user profile page for Susan Graci. The 'Default Addresses' section is active, and the 'Ship To' tab is selected. A dropdown menu is open, showing a list of addresses. A red circle highlights the 'Select Addresses for Profile' button and the dropdown menu.

**MacBuy**

My Profile > Default Addresses

**Susan Graci**

User Name gracis

User Profile and Preferences >  
Default User Settings >  
Custom Field and Accounting Code Defaults  
**Default Addresses**  
Cart Assignees  
Checkout Settings  
Financial Approvers  
Payment Options  
User Roles and Access >  
Ordering and Approval Settings >  
Permission Settings >  
Notification Preferences >  
User History >  
Administrative Tasks >

**Default Addresses**

Ship To | Bill To

Select an address to edit

**Shipping Addresses**

A. N. BOURNS  
MILLS MEMORIAL LIBRARY  
**ONE JAMES NORTH**

Select Address Template

Select Address Template

**Select Addresses for Profile**

A. N. BOURNS  
ART GALLERY  
BOOKSTORE  
CENTRAL ANIMAL  
CHARLTON MEDICAL CTR  
CHEDOKE HOSPITAL  
DAVID BRALEY RES INS  
DIRECT DELIVERY  
HAMILTON GENERAL HOSPITAL  
HEALTH CAMPUS  
HSC FORSYTH  
IHB INT HEALTH  
INST FOR APPLIED HEALTH  
JURAVINSKI CANCER CENTRE  
JURAVINSKI CTR INT HEALTH  
JURAVINSKI HOSPITAL  
M DEGROOTE CTR LEARN  
MATERNITY CENTRE  
MCMASTER AUTO RES CTR

**Default user settings**>default addresses>create Ship To address favourite(s): Select Address(es) for Profile>drop down menu for choice(s)>select and enter nickname(s)>save

**TIP:** More than one address can be saved to a profile

MacBuy

My Profile > Cart Assignees

**Susan Graci**

User Name gracis

User Profile and Preferences >  
 Default User Settings v  
 Custom Field and Accounting Code Defaults  
 Default Addresses  
**Cart Assignees**  
 Checkout Settings  
 Financial Approvers  
 Payment Options  
 User Roles and Access >

**Cart Assignees**

Add Assignee...

**My Cart Assignees** ?

| Name                    | Action                  |
|-------------------------|-------------------------|
| Teresa Carmel Wetton    | Set as Preferred Remove |
| Wendy Finemore          | Set as Preferred Remove |
| Sharon Patry            | Set as Preferred Remove |
| Sarah Nunes             | Set as Preferred Remove |
| Karen Patricia Campbell | Set as Preferred Remove |
| Kari Wright             | Set as Preferred Remove |
| Test Requester          | Set as Preferred Remove |

Enter Requester(s) for assigning cart (if Shopper). Specify Preferred Assignee.

### Notification Preferences: Shopping, Carts & Requisitions

The in-application notifications are not yet available for all Email Notifications.

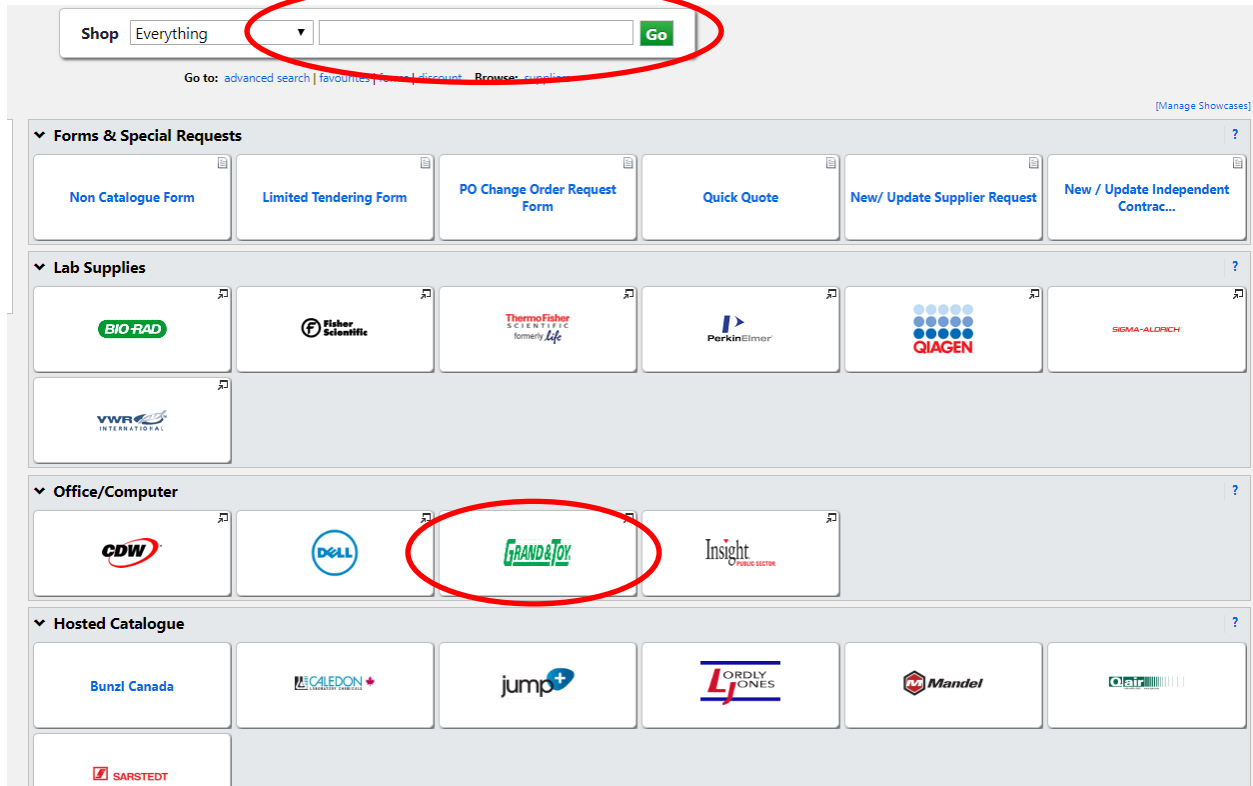
|                                                            |      |
|------------------------------------------------------------|------|
| Prepared By - Cart Assigned Notice ?                       | None |
| Prepared By - PR line item(s) rejected ?                   | None |
| Prepared By - PR rejected/returned ?                       | None |
| Cart Assigned Notice ?                                     | None |
| Receive PR and PO notifications for Carts Assigned to Me ? | None |
| Assigned Cart Processed Notification ?                     | None |
| Assigned Cart Deleted Notification ?                       | None |

Select when email notifications are sent by MacBuy to the user.

In-house notifications are located in Notifications toolbar, upper right of home screen.

# SHOPPING:

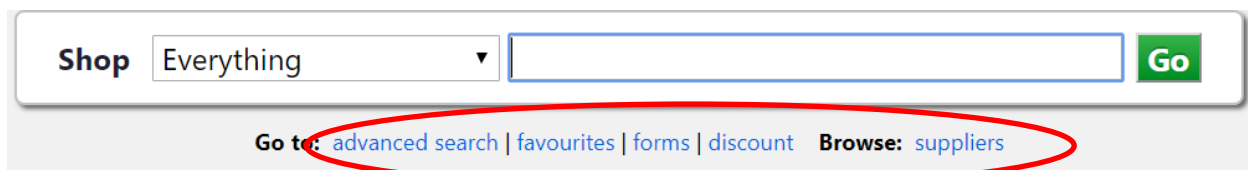
At the Show Case (also known as Gallery) there are several options to choose from.



Use the Shop Everything, top centre of screen, for general searches.

Suppliers are grouped by category (i.e. office/computer, lab supplies).

**OR** click on the tile if shopping from a specific vendor.



Advanced search options are available below the Shop Everything field.



## IMPORTANT TIPS:

- ✓ Punch out catalogues (shopping is done on the vendor's site with 'live' McMaster

pricing) have a logo on the sticker



- ✓ Catalogue and non-catalogue items cannot be placed in same cart
- ✓ Ensure you do not have items in the draft cart (see A, below) If a draft cart is open, (see B, below), choose add to new cart>GO instead of add and go to cart>GO



A



B

The screenshot shows the McMaster-Carr website interface. At the top right, the user is identified as Susan Graci with a shopping cart value of 6,437.60 CAD. The main heading is 'Shopping Cart' for user 'graci'. The cart name is '2019-03-14 graci 06'. The cart contains one item: 'Keurig Eccellenza Touch Bean-To-Cup Single Cup Coffee Maker KEURIG ECCELLENZA TOUCH' with a unit price of 5,696.99 and a quantity of 1, totaling 5,696.99. The subtotal is 5,696.99 CAD, with GST/HST of 740.61 CAD, shipping of 0.00 CAD, and handling of 0.00 CAD, resulting in a final total of 6,437.60 CAD. The 'Proceed to Checkout' button is highlighted with a red circle. The commodity code '52140000' is also circled in red.

| Product Description                                                                 | Unit Price | Quantity | Total           |
|-------------------------------------------------------------------------------------|------------|----------|-----------------|
| Keurig Eccellenza Touch Bean-To-Cup Single Cup Coffee Maker KEURIG ECCELLENZA TOUCH | 5,696.99   | 1        | 5,696.99        |
| EA                                                                                  |            |          | 740.61          |
| GST/HST                                                                             |            |          | 0.00            |
| Shipping                                                                            |            |          | 0.00            |
| Handling                                                                            |            |          | 0.00            |
| <b>Supplier subtotal</b>                                                            |            |          | <b>6,437.60</b> |

Name the cart, complete Commodity Code if not auto filled by the supplier, assign to Requester (Shopper role) or proceed to check out (Requester or Approver role).

## To Assign a Cart to a Requester

### Assign Cart

Select from profile values ?  Search for an assignee

Select from profile values ?

Note To Assignee:

**Assign** **Close**

Use the drop down menu to choose from a list of Assignees on profile or search.

Shopping Cart for Susan Gracl Continue Shopping

Name this cart: 2019-03-14 gracl 06 Share my cart with others

Have you made changes? Update

**Grand & Toy** more info...  
Fulfillment Address 1 Edit  
Po Box 5500, Don Mills, ON M3C 3L5 CA

The item(s) in this group was retrieved from the supplier's website. [What does this mean?](#)

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on 20/03/2019 2:56:48 PM

| Product Description                                                                                 | Unit Price | Quantity | Total          |
|-----------------------------------------------------------------------------------------------------|------------|----------|----------------|
| <a href="#">Keurig Eccellenza Touch Bean-To-Cup Single Cup Coffee Maker KEURIG ECCELLENZA TOUCH</a> | 5,696.99   | 1        | 5,696.99       |
| Part Number: 50-99016                                                                               | EA         |          | GST/HST 740.61 |
| Commodity Code: 52140000 <span>Domestic appliances</span>                                           |            |          | Shipping 0.00  |
|                                                                                                     |            |          | Handling 0.00  |

Supplier subtotal **6,437.60**

General Shipping Billing Accounting Codes Internal Notes and Attachments External Notes and Attachments Final Review

Place Order Assign Cart

Return to shopping cart Continue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required Field: Account

Requisition PR Approvals PO Preview Comments Attachments History

Summary Shipping Billing Accounting Codes Supplier Info Taxes/S&H

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 | Open Item |
|------------------------------|----------------------|----------------|------------------------------|------------------|----------|----------|------------------|---------------|---------------|-----------|
| MAC01<br>McMaster University | 20<br>Operating Fund | Required Field | 10383<br>RA Accounts Payable | 30000<br>Generic | no value | no value | no value         | no value      | no value      | no value  |

For selected line items: Add to Favorites

Grand & Toy

Fulfillment Address 1  
Pc Box 5500, Deer Mill, ON, M3C 3L5 CA

| Product Description                                                                   | Catalog No | Size / Packaging | Unit Price | Quantity | Est. Price   |
|---------------------------------------------------------------------------------------|------------|------------------|------------|----------|--------------|
| 1 Keurig Eccellenza Touch Bean-To-Cup Single Cup Coffee Maker KEURIG ECCELLENZA TOUCH | 50-99016   | EA               | 5,696.99   | 1 EA     | 5,696.99 CAD |

Chartfields (same as header)

|                   |              |
|-------------------|--------------|
| Supplier subtotal | 5,696.99     |
| GST/HST           | 740.61       |
| Shipping          | 0.00         |
| Handling          | 0.00         |
| Supplier total    | 6,437.60 CAD |
| Subtotal          | 5,696.99     |
| GST/HST           | 740.61       |
| Shipping          | 0.00         |
| Handling          | 0.00         |
| Total             | 6,437.60 CAD |

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Chartfields

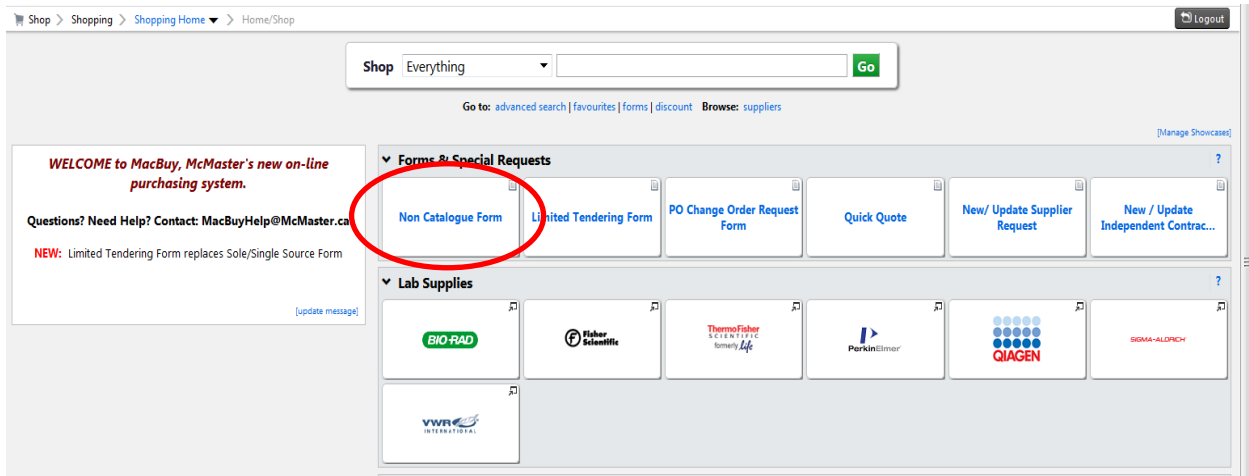
Select from your code favorites

| Business Unit                                              | Fund                                                       | Account                                                    | Department                                                 | Program                                                    |
|------------------------------------------------------------|------------------------------------------------------------|------------------------------------------------------------|------------------------------------------------------------|------------------------------------------------------------|
| MAC01                                                      | 20                                                         | 650000                                                     | 10383                                                      | 30000                                                      |
| Select from profile values...<br>Select from all values... | Select from profile values...<br>Select from all values... | Select from profile values...<br>Select from all values... | Select from profile values...<br>Select from all values... | Select from profile values...<br>Select from all values... |

**Entering Chart Field String in Cart:** can be entered field by field, or use saved values from user profile (drop down at “select from your code favourites”)

**Attachments:** Add before Proceeding to Checkout. Word documents, Excel or PDF

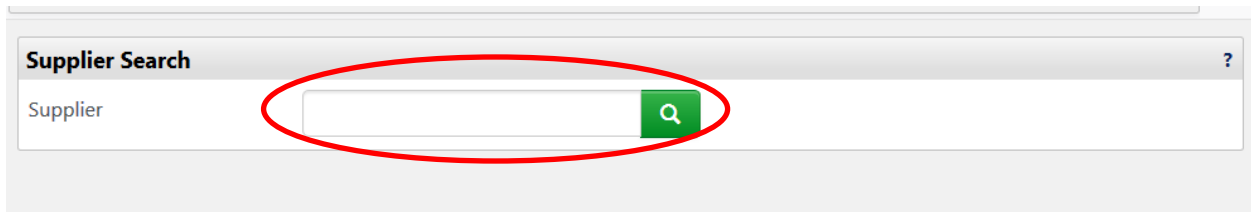
# Non-Catalogue Ordering:



## Show case>Forms & Special Requests>select Non-Catalogue Form sticker (tile)

**Non Catalogue Form** Available Actions: Add and go to Cart


| Supplier Info                                                                                                                                                                                                                                                         | Justification                                                                           |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
| <p>If the supplier is not known, enter "UNKNOWN" in the supplier name field.<br/>The buyer will select the best buyer for the item.</p> <p>Enter Supplier <input type="text"/></p> <p>or<br/>Supplier Search   Enter Manually</p> <p>Currency: CAD</p>                | <p><input type="text"/></p> <p>500 characters remaining <span>expand   clear</span></p> |
| General Info                                                                                                                                                                                                                                                          |                                                                                         |
| <p><b>Item Information</b></p> <p>Catalogue No. <input type="text"/></p> <p><b>Good or Service Description</b></p> <p><input type="text"/></p> <p>254 characters remaining <span>expand   clear</span></p> <p>Need by Date <input type="text"/></p> <p>mm/dd/yyyy</p> |                                                                                         |
| <p><b>Unit Price</b></p> <p><input type="text"/></p>                                                                                                                                                                                                                  | <p><b>Quantity</b></p> <p><input type="text"/></p>                                      |
| <p><b>Additional Item Information</b></p> <p>Manufacturer Name <input type="text"/></p> <p>Manufacturer Part No <input type="text"/></p> <p>Notes <input type="text"/></p>                                                                                            |                                                                                         |



Supplier Search

Supplier

Results Per Page 20 Suppliers found: 30 Page 1 of 2

| Supplier Name/Address                                                                                                                                              | Select           |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|
| <b>Agilent</b><br>Fulfillment Center 1: 6705 Millcreek Drive Unit 5 Mississauga, ON L5N 5M4 CA<br>Genomics: 6705 Millcreek Drive Unit 5 Mississauga, ON L5N 5M4 CA | Select<br>Select |
| <b>Bio-Rad Canada</b> <br>No Address                                              | Select           |
| <b>CDW Canada</b><br>No Address                                                                                                                                    | Select           |
| <b>CORE CRYOLAB INC</b><br>Fulfillment Center 1: 585 University Ave St Toronto, On M5G 2N2 CA<br>Primary: 585 University Ave St Toronto, On M5G 2N2 CA             | Select<br>Select |
| <b>Dell Canada</b><br>No Address                                                                                                                                   | Select           |
| <b>Fisher Scientific Company Canada</b><br>No Address                                                                                                              | Select           |
| <b>Grand &amp; Toy</b><br>No Address                                                                                                                               | Select           |
| <b>Insight</b><br>No Address                                                                                                                                       | Select           |

Leave search field blank to receive listing of all suppliers in MacBuy.

**Supplier Search** ?

Supplier

---

Results Per Page  **Suppliers found: 1** Page 1 of 1 ?

| Supplier Name/Address                                                                                                                                         | Select                                                                         |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| <b>CORE CRYOLAB INC</b><br><b>Fulfillment Center 1:</b> 585 University Ave St Toronto, On M5G 2N2 CA<br>Primary: 585 University Ave St Toronto, On M5G 2N2 CA | <input type="button" value="Select"/><br><input type="button" value="Select"/> |

Enter the supplier name in the search field then click the magnifying glass. Only information matching the entry will appear. Select the supplier.

Select the Fulfillment Centre option if more than one option is presented.

| Supplier Info                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Justification                                                                                                                    |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| <p>If the supplier is not known, enter "UNKNOWN" in the supplier name field. The buyer will select the best buyer for the item.</p> <p><b>Recommended Supplier</b> CORE CRYOLAB INC <small>more info...<br/>select different supplier</small></p> <p><b>Fulfillment Address</b> Fulfillment Center 1: (preferred)<br/>585 University Ave St<br/>Toronto, On M5G 2N2 CA<br/><small>select different fulfillment center</small></p> <p>Supplier Phone +1 416-260-2673<br/>Currency CAD</p> <p><b>Distribution</b><br/>The system will distribute purchase orders using the method(s) indicated below.<br/>Check this box to customize order distribution information. <input type="checkbox"/></p> <p>Fax +1 919-659-6100</p> | <p><input type="text" value="test item required for example"/></p> <p>470 characters remaining <small>expand   clear</small></p> |

| General Info                        |                                         |
|-------------------------------------|-----------------------------------------|
| <b>Item Information</b>             |                                         |
| Catalogue No.                       | <input type="text" value="123456"/>     |
| <b>Good or Service Description</b>  | <input type="text" value="test item"/>  |
| Need by Date                        | <input type="text" value="04/05/2019"/> |
| <b>Unit Price</b>                   | <b>Quantity</b>                         |
| <input type="text" value="199.99"/> | <input type="text" value="12"/>         |
| <b>Additional Item Information</b>  |                                         |
| Manufacturer Name                   | <input type="text"/>                    |
| Manufacturer Part No                | <input type="text"/>                    |
| Notes                               | <input type="text"/>                    |

Complete at minimum the following fields (others are optional):

**Justification**

**Catalogue Number**

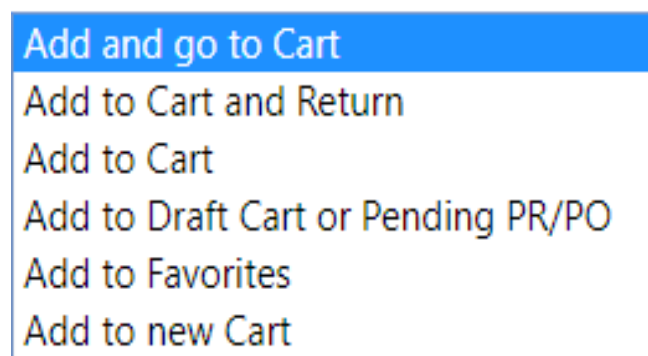
**Good or Service Description**

**Need by Date**

**Unit Price**

**Quantity**

**Options when placing order in Non-Catalogue Order form (upper right of Non-Catalogue form)**



- A adds item and goes to current cart
- B adds to cart, remains in form, new item
- C adds to cart w/out leaving form or item
- D add to cart in drafts not in Notification Bar
- E Adds item to favourites folder
- F Add item to new cart, not open or draft

Choose **Add** and go to Cart if order can be placed.

A cart is now created with that item in it.

The screenshot shows a shopping cart interface for "Susan Graci". The cart title "Shopping Cart" is circled in red. Below it, the name "Name this cart:" is followed by the value "2019-04-02 gracis 01". The cart contains one item: "text item" with a quantity of 12 and a unit price of 199.99, resulting in a total of 2,399.88. The "Part Number" field is circled in red and contains the value "123456". The "Commodity Code" field is also circled in red and has a "Required field" error message. The interface includes buttons for "Proceed to Checkout" and "Assign Cart", and a table showing the item details and totals.

| Unit Price | Quantity | Total      |
|------------|----------|------------|
| 199.99     | 12       | 2,399.88   |
| GST/HST    |          | 311.98 CAD |
| Shipping   |          | 0.00 CAD   |
| Handling   |          | 0.00 CAD   |

Supplier subtotal: 2,711.86 CAD

Name the cart, select Commodity Code and Proceed to Checkout or Assign Cart to a Requester.

## COMMODITY CODE

Use the search function to select the Commodity Code. This is the equivalent of the Category Code in Mosaic. Enter a description or let the system do a full search of all Commodity Codes.

**Commodity Code Search** ?

Code starts with...

Description contains...

**Click to filter search results ?**

Results Per Page 20 Results 5 Page 1 of 1 ?

| Code     | Description                                                  |                                       |
|----------|--------------------------------------------------------------|---------------------------------------|
| 41000000 | Laboratory and Measuring and Observing and Testing Equipment | <input type="button" value="select"/> |
| 41100000 | Laboratory and scientific equipment                          | <input type="button" value="select"/> |
| 41120000 | Laboratory supplies and fixtures                             | <input type="button" value="select"/> |
| 81101706 | LAB EQUIPMENT MAINTENANCE                                    | <input type="button" value="select"/> |
| 85121804 | PATHOLOGICAL LABORATORY SERVICES                             | <input type="button" value="select"/> |


**Shopping Cart** for Susan Graci Continue Shopping

Name this cart:  12 Item(s) for a total of **2,711.86** CAD  
Share my cart with others: No user groups available. Click here to create shared cart user groups. subtotal: 2,399.88 CAD  
estimated tax, shipping & handling: 311.98 CAD

Have you made changes?      Perform an action on 0 items selected

**CORE CRYOLAB INC** more info...

Fulfillment Center 1   
585 University Ave St, Toronto, On M5G 2N2 CA

| Product Description                                                                                                                       | Unit Price                                  | Quantity            | Total           |
|-------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------|---------------------|-----------------|
|  test item<br><input type="button" value="open form"/> | 199.99                                      | 12                  | <b>2,399.88</b> |
| Part Number: 123456                                                                                                                       | <input type="button" value="Update"/>       | GST/HST: 311.98 CAD |                 |
| Commodity Code: <input type="text" value="41000000"/> <input type="button" value=""/>                                                     | <input type="button" value="More Actions"/> | Shipping: 0.00 CAD  |                 |
| Laboratory and Measuring and Observing and Testing Equipment                                                                              |                                             | Handling: 0.00 CAD  |                 |

Supplier subtotal **2,711.86** CAD

The cart can now be completed (click on Proceed to Checkout button) or assigned to a Requester to complete (click on Assign Cart button).



▼ Forms & Special Requests

Non Catalogue Form

Limited Tendering Form

PO Change Order Request  
Form

Quick Quote

New/ Update Supplier  
Request

Use forms to search for items that are not in any catalogues in MacBuy.

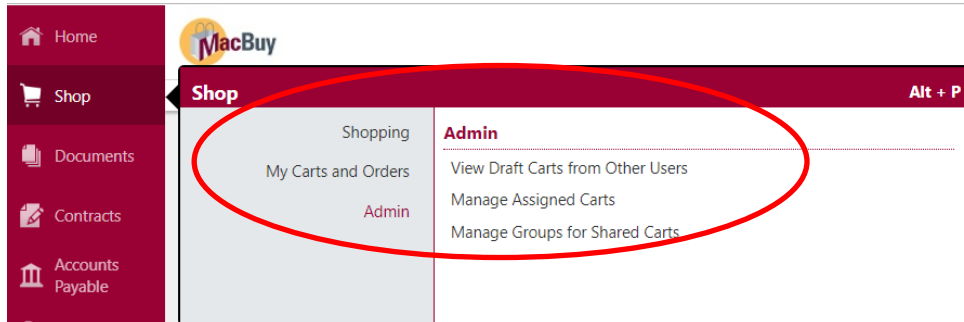
**Limited Tendering Form** replaces Sole Source Form.

**PO Change Order Request Form** for changes to an existing Purchase Order.

**Quick Quote** can be used for suppliers not set up in MacBuy as well as those listed. Attach as much information as possible.

**New/Update Supplier Request Form** to set up or change existing suppliers.

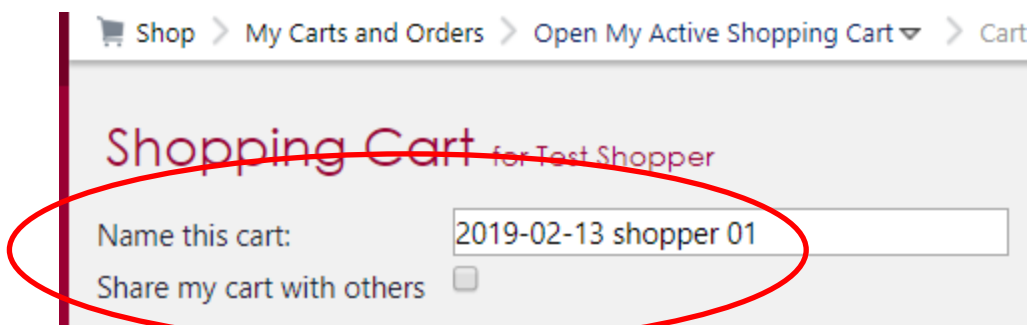
## Shopping with Shared Carts



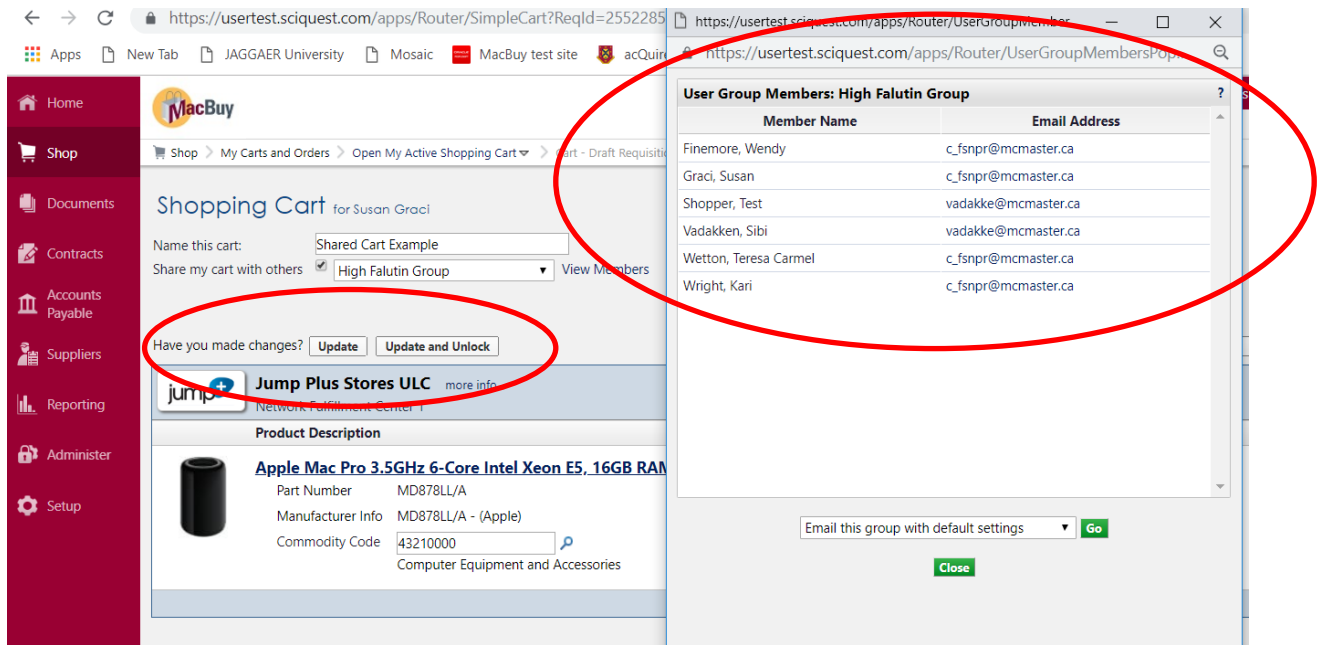
### To Share an Existing Cart

First create a group or groups that will be sharing carts.

In order to share a cart, shop and add an item to a new cart **OR** open the active (draft) cart you wish to share.



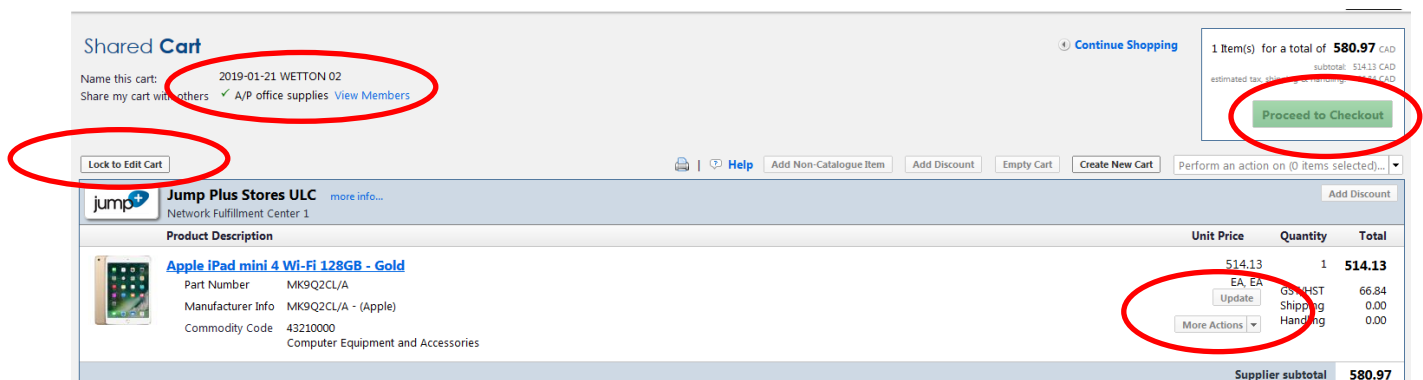
Once the cart is opened, name the cart (choose something that will be meaningful to the group) and check the box "Share my cart with others".



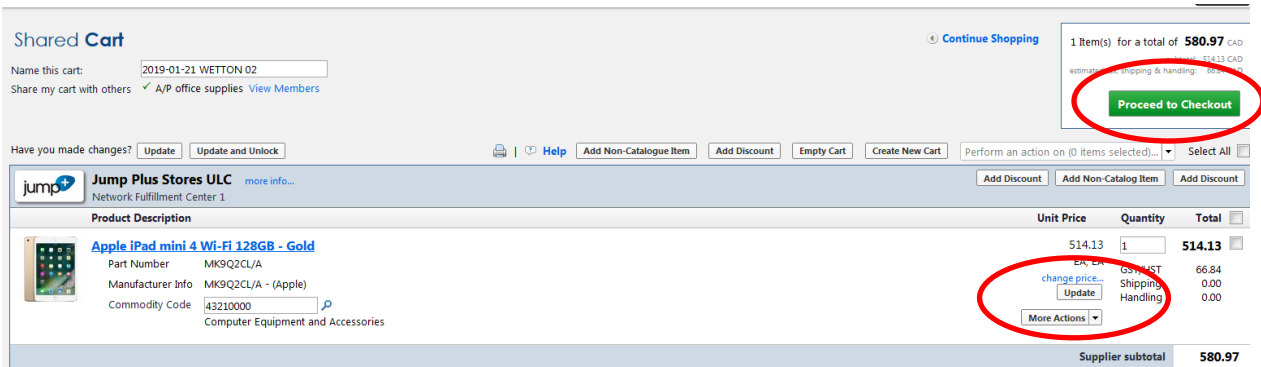
Select a group; members can be seen when choosing.

Use Update and Unlock button to save your items to the cart and allow others in the group to add items to the same cart. To add items to the cart, members in the group must lock to edit. Until this is done, they cannot access it. The fields are greyed out and cannot be edited.

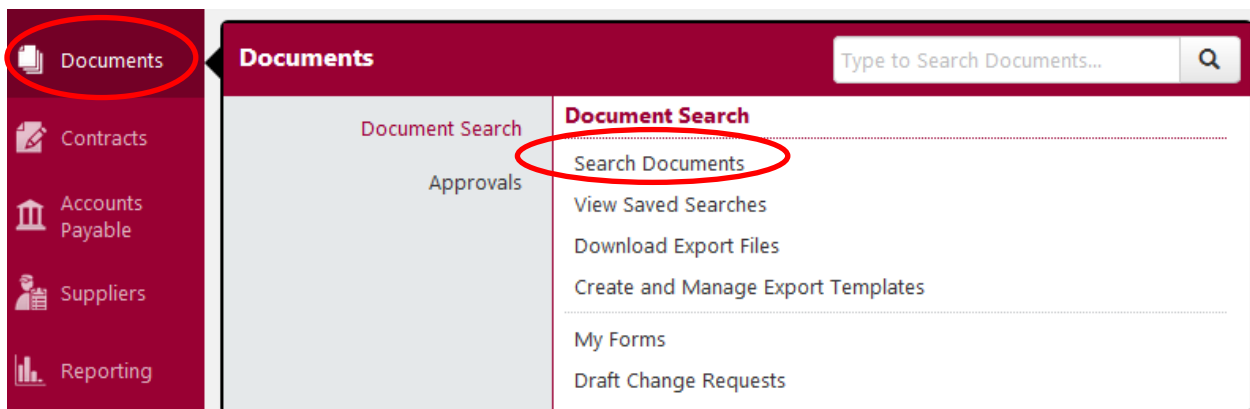
Members of the group can be viewed at any time (above).



Note the fields are greyed out because Lock to Edit Cart button has not been clicked.



Once the cart is Locked to Edit, items may be added or the cart can be completed and submitted. Remember, Shoppers can only assign to a Requester. The Assign button will appear when the Proceed to Checkout button is selected if a Shopper is the one initiating this action.



## **Search Options:**

**Searches** begin in Documents on Navigation Tool Bar

**Search** parameters can be named and saved, exported to Excel

**Access:** navigation tool bar>documents>document search>view saved searches>**GO**>save results

**Export:** navigation tool bar>documents>download export files>select file

**Approvals** searches – as above but choose Approvals

**Functions:** refine search results, save favourites, export to excel

Documents > Document Search > View Saved Searches > Document Search

Add New

- Top level personal folder
- Top level shared folder
- Subfolder of selected folder

Shared

Sue

### Customized Searches

Folder Actions ?

Saved search parameters

| Search Name                                                             | Actions                                                     |
|-------------------------------------------------------------------------|-------------------------------------------------------------|
| Quick Quotes 1/1/19-1/31/19                                             | Add Shortcut   Export   Go   Edit   Move   Copy   Delete    |
| Requisition Search YTD<br>Look up all requisitions created year to date | Remove Shortcut   Export   Go   Edit   Move   Copy   Delete |

## Favourites

Frequently used searches and reports can be saved for easy access.

Shortcuts can be added as well.

Documents > Document Search > View Saved Searches > Document Search

Add New

Expand All | Collapse All

- Personal  
Customized Searches
- Shared  
Sue

### Customized Searches

Folder Actions ?

Saved search parameters

| Search Name                                                             | Actions                                                     |
|-------------------------------------------------------------------------|-------------------------------------------------------------|
| Quick Quotes 1/1/19-1/31/19                                             | Add Shortcut   Export   Go   Edit   Move   Copy   Delete    |
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