



MacBuy Requester Guide

Requesters can shop, submit their own carts, submit carts assigned to them by **Shoppers**, and edit or return carts. They can approve their own carts if they have the **Approver** role and authorization on the chart field string on the cart.

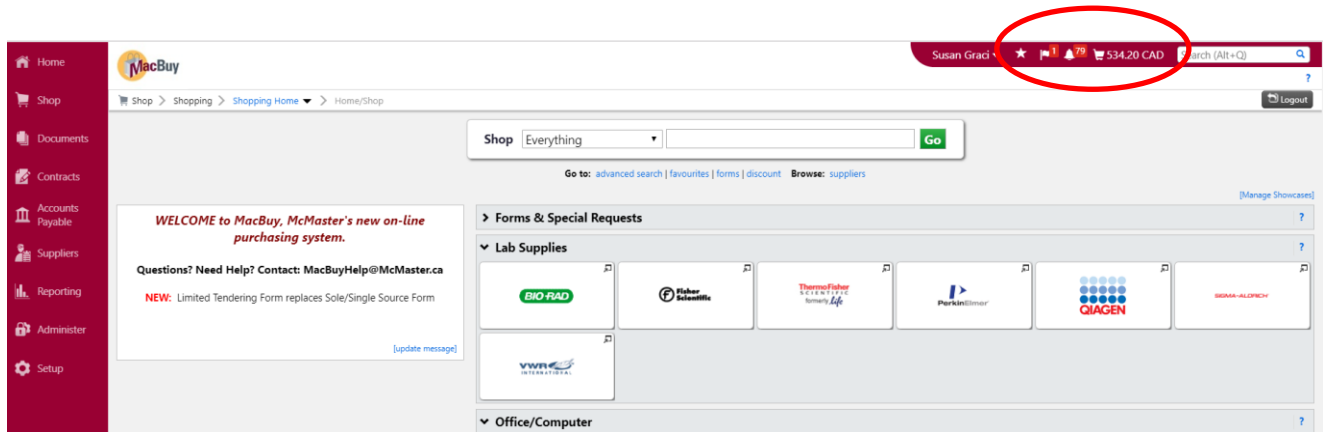
See:

- MacBuy **Shopper** Guide for shopping processes.
- MacBuy **Approver** Guide for approval processes.
- MacBuy **User Profile** Guide for customizing user profile processes.

Log into Mosaic.

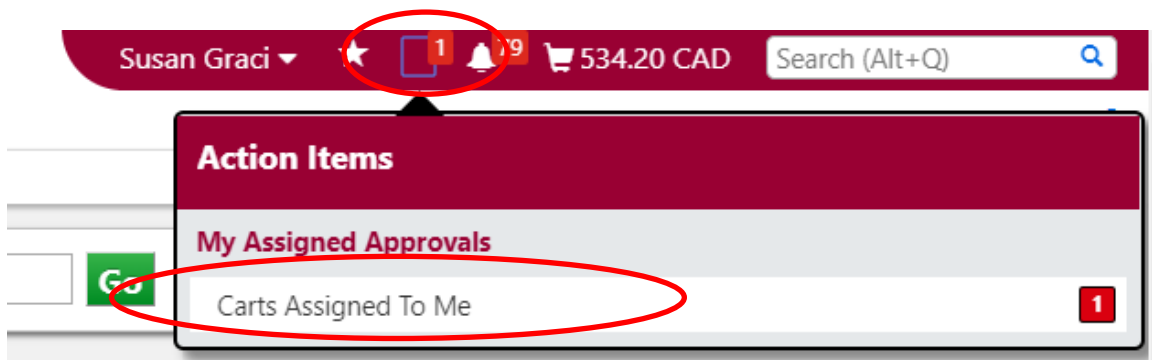


Select the MacBuy tile. This may be on the Home screen or the My Work screen.

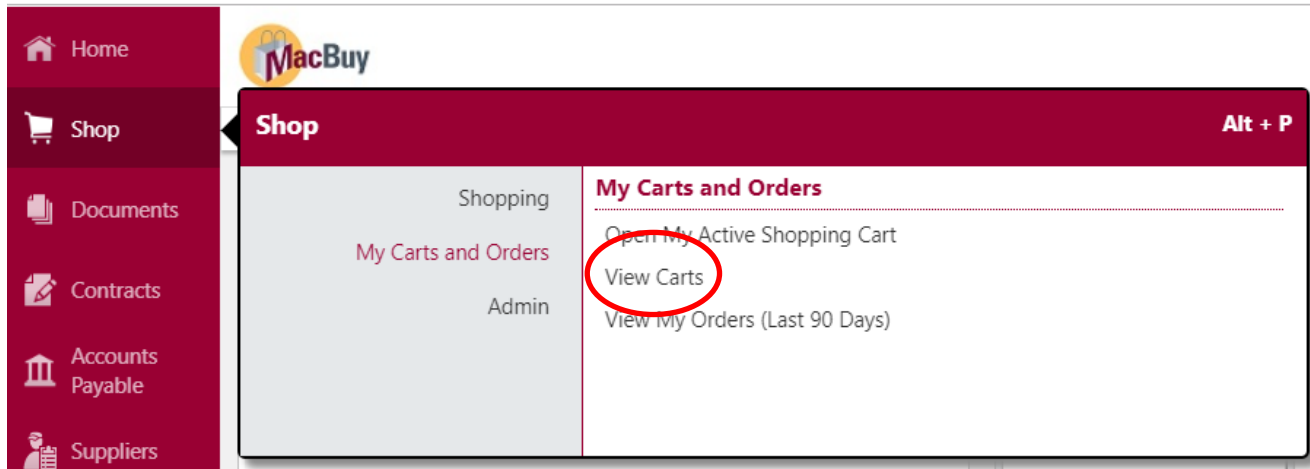


On the Home screen in MacBuy, click on the notification flag in the Notification toolbar, upper right hand portion of screen.

This will show a list of Action Items. The example here is Assigned Carts. A **Shopper** has assigned a cart to the **Requester** to submit. **Shoppers** cannot submit their own carts; they can only assign carts.



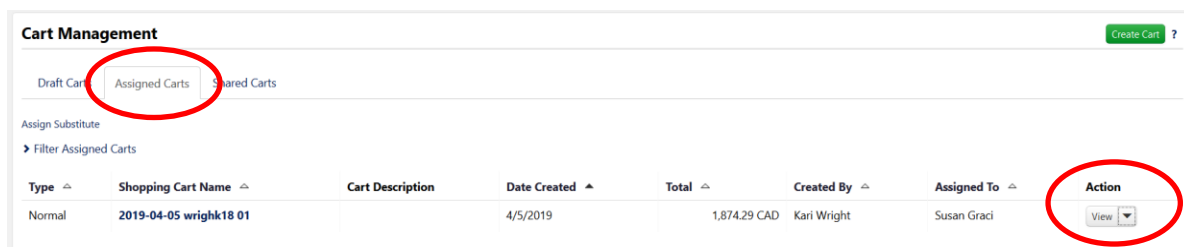
Click on **Carts Assigned to Me** hyper link.



OR Shop>My Carts and Orders>View Carts

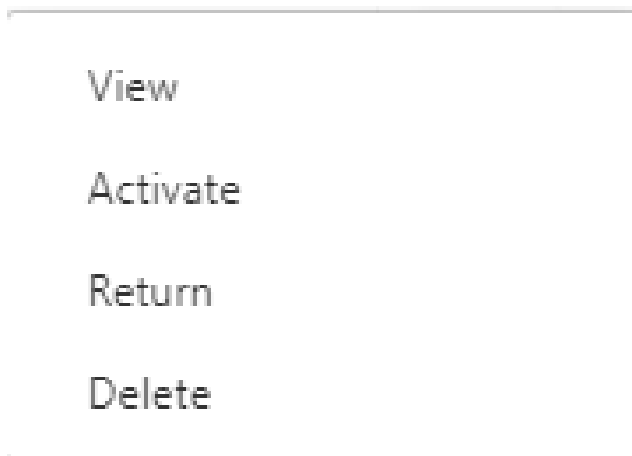
Both processes take the user to the **Cart Management** Screen.

There are 3 tabs: **Draft Carts**, **Assigned Carts** and **Shared Carts**. Select **Assigned Carts**.



Use the **Action** column, far right, to find actions available to process cart.

Actions available are below.



When the **Requester** views a cart, the cart is Activated. At this point the **Requester** can enter chart field strings, VAT, etc. and submit the cart to work flow.

Cart Management Create Cart ?

Draft Carts | Assigned Carts | Shared Carts

Assign Substitute
 > Filter Assigned Carts

Type	Shopping Cart Name	Cart Description	Date Created	Total	Created By	Assigned To	Action
Normal	Active 201-04-05 wrighk18 01		4/5/2019	1,874.29 CAD	Kari Wright	Susan Graci	View

View
 Return
 Delete

Assigned To	Action
Susan Graci	View

View
 Return
 Delete

View – takes Requester into the Activated Cart for editing, naming cart, adding items, entering chart field string, taxes, commodity code (if not completed by supplier), delivery location, etc. and proceeding to checkout.

Delete – Requester deletes cart without going into the cart to review contents

Return – if **Requester** wants the **Shopper** to make changes.

Note, below, that the **Shopper** is notified of the returned cart under the bell icon.

Test Shopper ★ 📢 📧 5 🛒 0.00 CAD Search (Alt+Q)

Notifications

Shopping, Carts & Requisitions

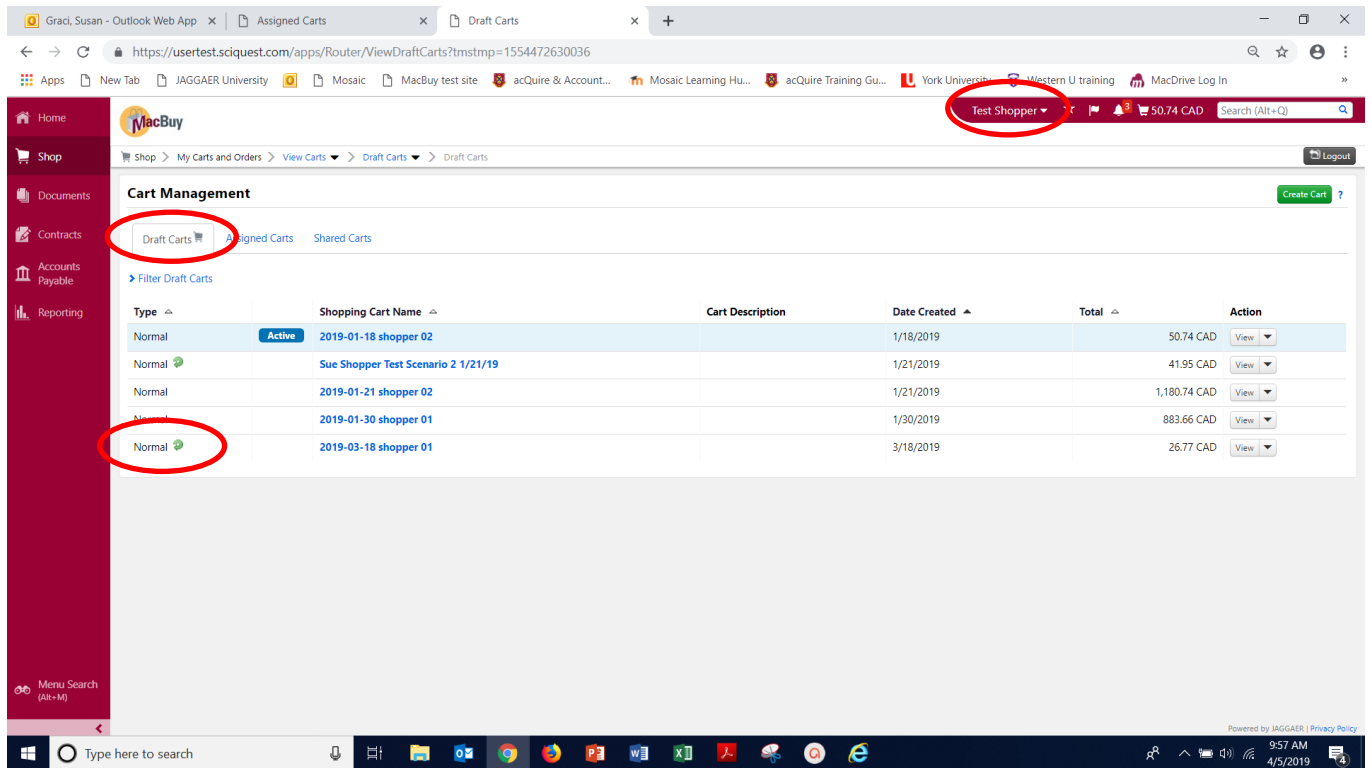
Go

A Requisition You Submitted Has Been Returned

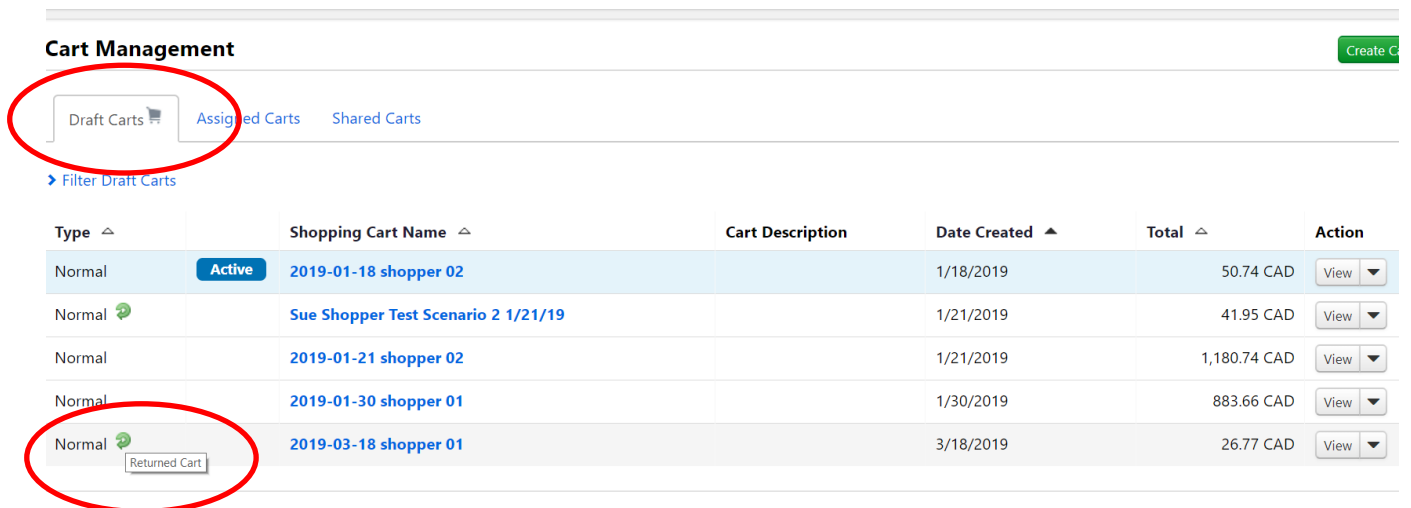
Apr 5

2587823 - 26.77 CAD Returned By Susan Graci

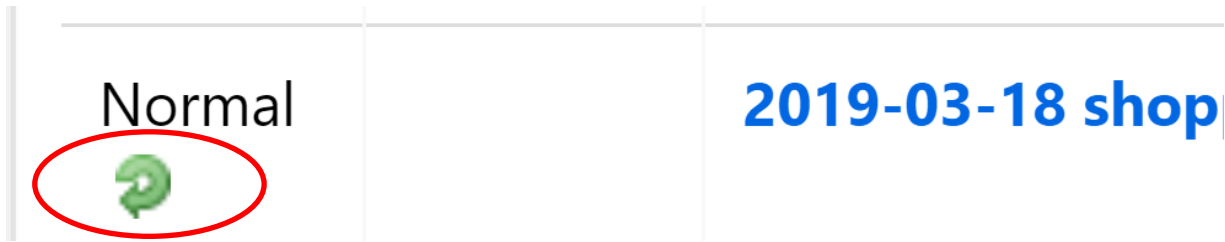
✕



The **returned** cart shows up in the Shopper's Cart Management Draft Cart tab.



Icon reflects that the cart has been returned.



The green circular arrow indicates a returned cart when mouse hovers over icon.

Type ^		Shopping Cart Name ^	Cart Description	Date Created ^	Total ^	Action
Normal	Active	2019-01-18 shopper 02		1/18/2019	50.74 CAD	View
Normal		Sue Shopper Test Scenario 2 1/21/19		1/21/2019	41.95 CAD	View
Normal		2019-01-21 shopper 02		1/21/2019	1,180.74 CAD	View
Normal		2019-01-30 shopper 01		1/30/2019	883.66 CAD	View
Normal		2019-03-18 shopper 01		3/18/2019	26.77 CAD	View

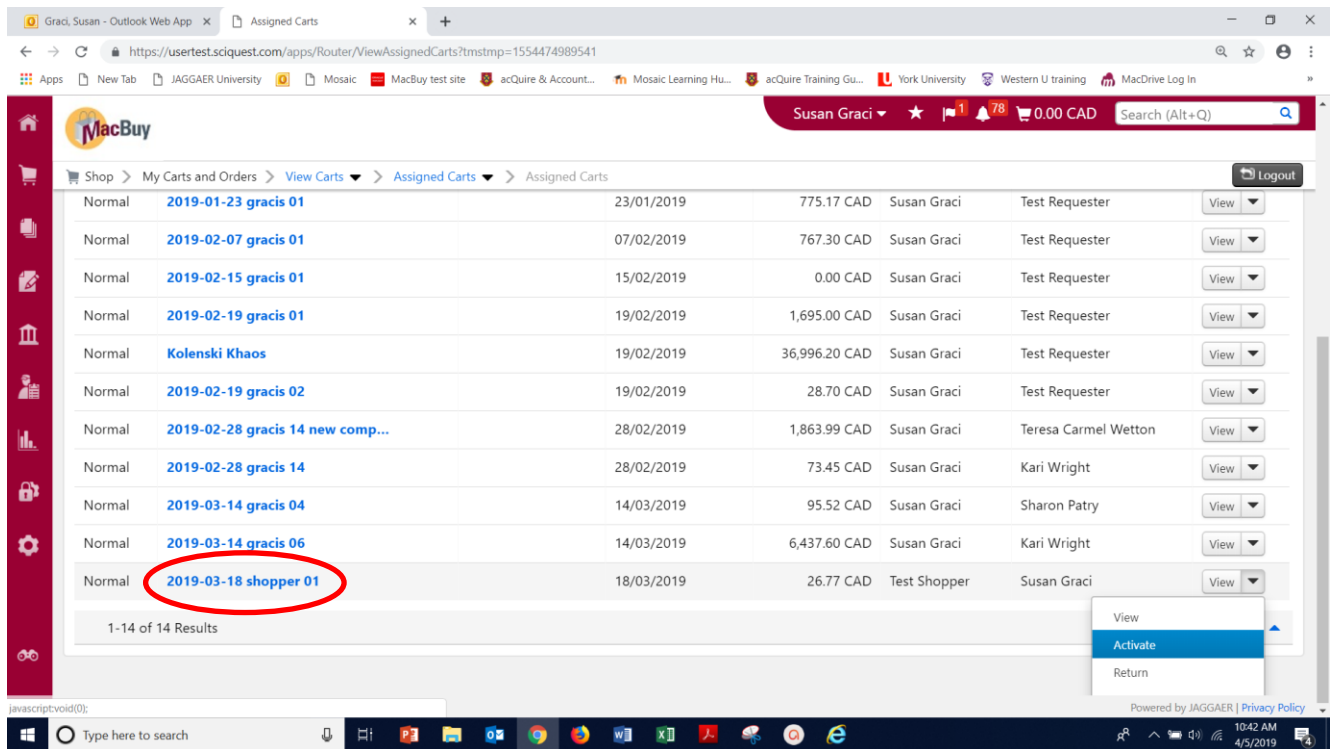
- View
- Activate
- Delete

The Shopper can now choose what to do with the cart, including resubmitting or deleting.

Activating the cart takes the Shopper back into the cart to continue shopping.

TIP: Make the comments clear when returning a cart so the Shopper knows what to do next. If it should be deleted, have the Shopper do this rather than the Requester.

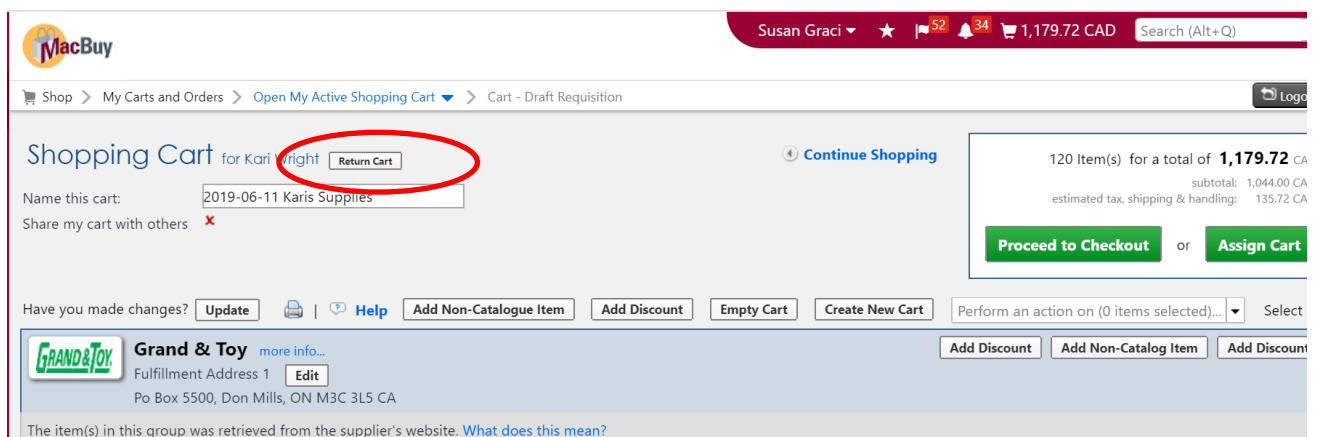
BACK TO THE REQUESTER:



The screenshot shows the MacBuy 'Assigned Carts' page. A table lists 14 carts with columns for status, cart ID, date, amount, requester, and assignee. The cart '2019-03-18 shopper 01' is circled in red. A dropdown menu is open over the 'View' button for this cart, showing options: 'View', 'Activate', and 'Return'.

Status	Cart ID	Date	Amount	Requester	Assignee	Action
Normal	2019-01-23 gracis 01	23/01/2019	775.17 CAD	Susan Graci	Test Requester	View
Normal	2019-02-07 gracis 01	07/02/2019	767.30 CAD	Susan Graci	Test Requester	View
Normal	2019-02-15 gracis 01	15/02/2019	0.00 CAD	Susan Graci	Test Requester	View
Normal	2019-02-19 gracis 01	19/02/2019	1,695.00 CAD	Susan Graci	Test Requester	View
Normal	Kolenski Khaos	19/02/2019	36,996.20 CAD	Susan Graci	Test Requester	View
Normal	2019-02-19 gracis 02	19/02/2019	28.70 CAD	Susan Graci	Test Requester	View
Normal	2019-02-28 gracis 14 new comp...	28/02/2019	1,863.99 CAD	Susan Graci	Teresa Carmel Wetton	View
Normal	2019-02-28 gracis 14	28/02/2019	73.45 CAD	Susan Graci	Kari Wright	View
Normal	2019-03-14 gracis 04	14/03/2019	95.52 CAD	Susan Graci	Sharon Patry	View
Normal	2019-03-14 gracis 06	14/03/2019	6,437.60 CAD	Susan Graci	Kari Wright	View
Normal	2019-03-18 shopper 01	18/03/2019	26.77 CAD	Test Shopper	Susan Graci	View

The Requester activates the cart then selects the cart name hyper link to go into the cart. Or simply click the hyper link on the report title.



The screenshot shows the MacBuy 'Shopping Cart' page for Kari Wright. The cart name '2019-06-11 Karis Supplies' is circled in red. The page includes a 'Return Cart' button, a 'Continue Shopping' link, and a total of 1,179.72 CA. There are also buttons for 'Proceed to Checkout' and 'Assign Cart'.

Shopping Cart for Kari Wright [Return Cart](#)

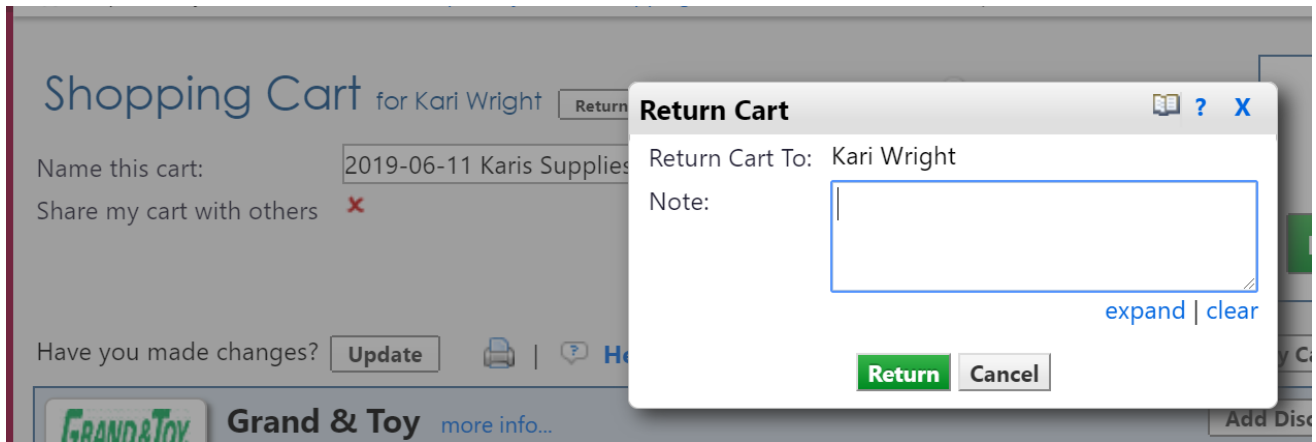
Name this cart: 2019-06-11 Karis Supplies

Share my cart with others

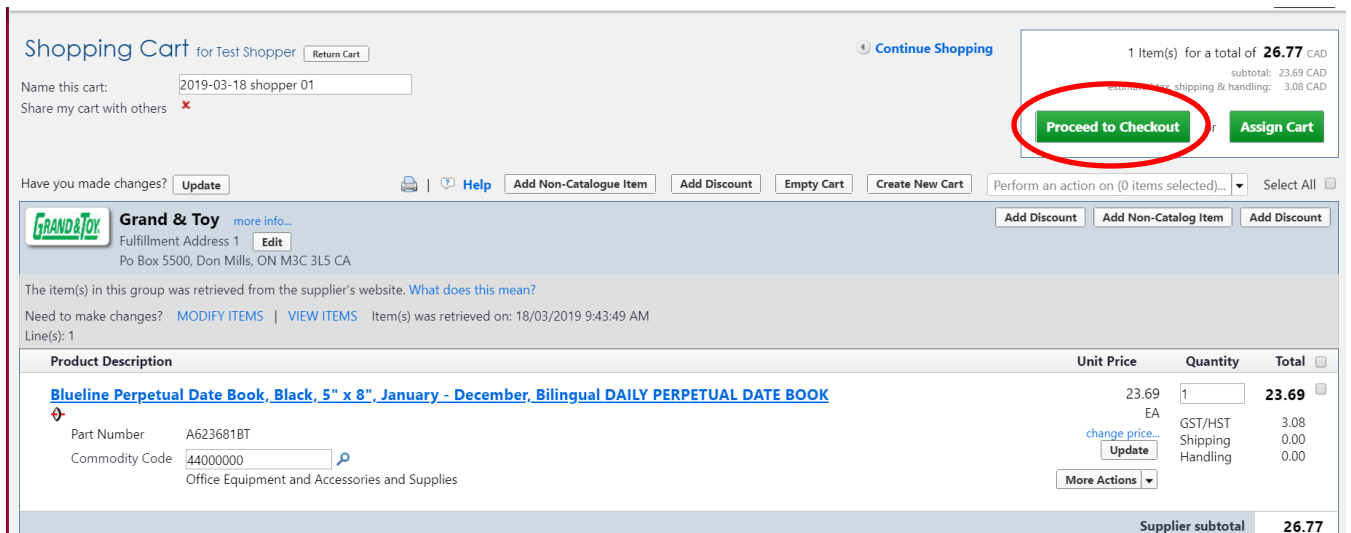
120 Item(s) for a total of **1,179.72 CA**
subtotal: 1,044.00 CA
estimated tax, shipping & handling: 135.72 CA

[Proceed to Checkout](#) or [Assign Cart](#)

The Requester can use the **Return Cart** button to return a cart after reviewing it, while in the cart.



A window appears. Enter a comment on the reason for returning the cart.



If the Requester wishes to continue with the order without changes, click on **Proceed to Checkout** button.

Shopping Cart for Test Shopper Return Cart Continue Shopping

Name this cart: Share my cart with others

1 Item(s) for a total of **26.77** CAD
 subtotal: 23.69 CAD
 estimated tax, shipping & handling: 3.08 CAD

Proceed to Checkout or Assign Cart

Have you made changes? Update Help Add Non-Catalogue Item Add Discount Empty Cart Create New Cart

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: 18/03/2019 9:43:49 AM
 Line(s): 1

Product Description			Total
Blueline Perpetual Date Book, Black, 5" x 8", January - December, Bilingual DAILY PERPETUAL DATE BOOK	23.69	1	23.69
Part Number: A623681BT	EA		
Commodity Code: 44000000	change price...	GST/HST	3.08
Office Equipment and Accessories and Supplies	Update	Shipping	0.00
		Handling	0.00
	More Actions		
		Supplier subtotal	26.77

Perform an action on (1 items selected) Select All

- Add to Favorites
- Remove Selected Items
- Move to Another Cart
- Change Supplier
- Change Commodity Code
- Add to Draft Cart or Pending PR/PO
- Add to PO Revision

Close

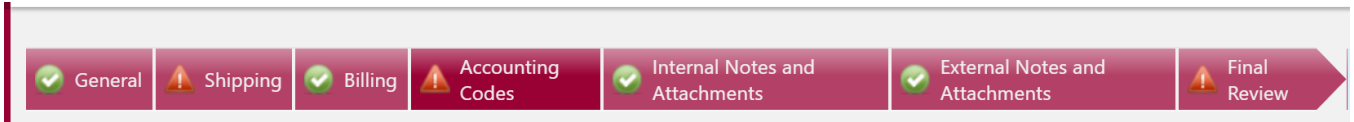
If the Requester wishes to make a change to the order, check the box to right of line item(s) to activate actions available, below.

For selected line items

- Add to Favorites
- Add to Favorites
- Remove Selected Items
- Remove All Items
- Move to Another Cart
- Add to Draft Cart or Pending PR/PO
- Add to PO Revision
- Change Commodity Code

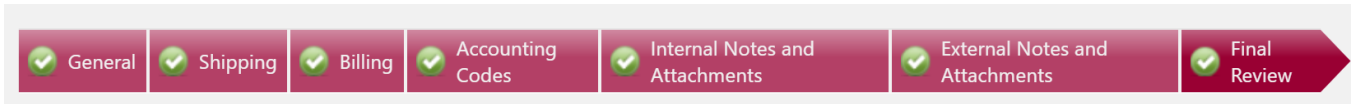
TIP: To use the Add to Favourites option, a Folder must be created.

Click on **Proceed to Checkout** to submit the cart. Use the **ribbon** to guide the process.



Ribbon showing missing fields in Shipping, Accounting Codes and Final Review screens.

Click on each to reach screen to enter required information.



Ribbon showing requisition with all required information completed, ready to Submit Order.

ribbon

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

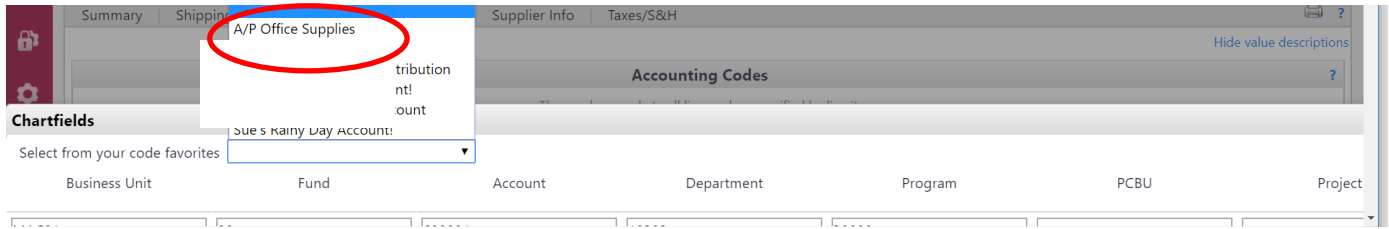
- Required field: Account
- Required field: Business Unit
- Required field: Fund

Business Unit	Fund	Account	Department	Program	PCBU	Project	Project Activity	Analysis Type	Resource Type	Open Item	edit
no value Required field	no value Required field	no value Required field	no value	no value	no value	no value	no value	no value	no value	no value	

Once the **Proceed to Checkout** button has been clicked, the system goes to the above screen.

The ribbon, top above, guides the process. In this example, the chart field string has not been entered. The ribbon explains the missing items in easily understood terms and highlights the fields missing required information. Click on the **Edit** button.

If chart field strings have been set up in the user's profile, they can be accessed using a drop down menu, as shown below, once the first field in the chart field string is selected.

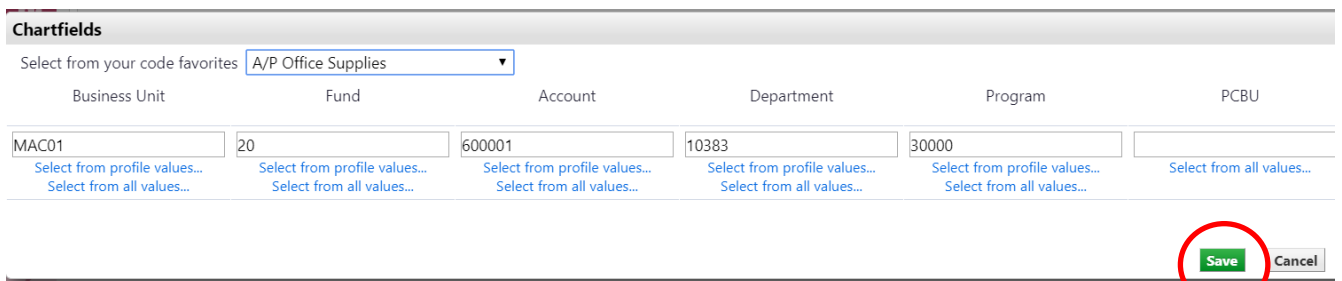


Nicknaming chart field strings makes selecting the correct one very simple. MacBuy requires saved chart field strings to be nicknamed for this reason. There is no limit to the number of chart field strings that can be saved to a profile.

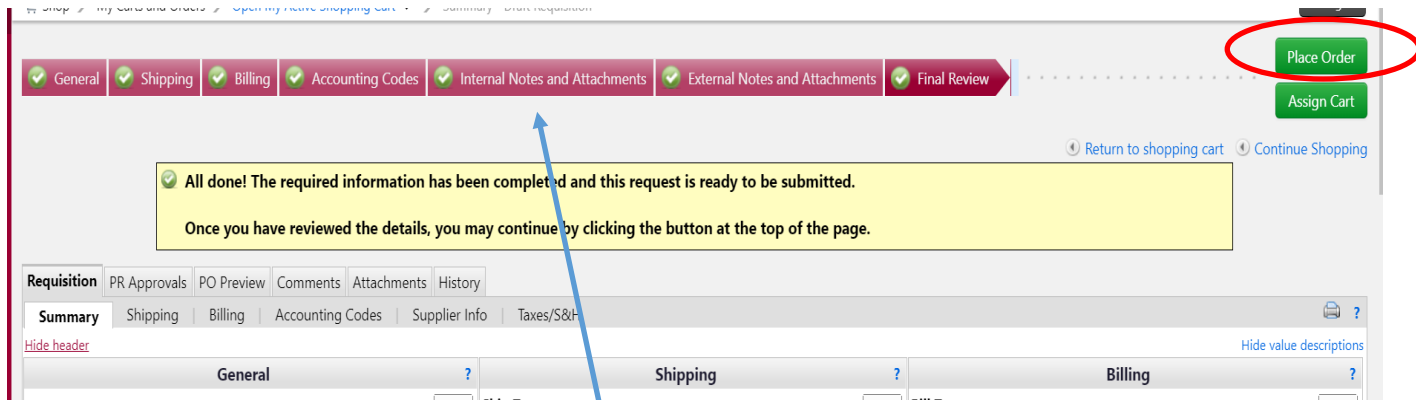
TIP: For information on saving chart field strings on a profile, see the MacBuy User Profile Guide.

TIP: Delete chart field strings from profile as they close (projects) for better management of spending on research accounts.

TIP: Requisitions can be split between chart field strings at the header or line.



Once chart field string is complete, click on the **Save** button.



When all sections of the ribbon have green check marks, the cart is ready to submit (click on **Place Order** button).

Shoppers cannot access the **Place Order** button. Although it will be on their screen, it becomes greyed out when they click on it.

Once the **Place Order** button has been clicked, the system moves to a Summary screen.

Requisition Submitted

Next Steps

You can view or print this at [Requisition 2587823](#), or via the [Document Search](#) page

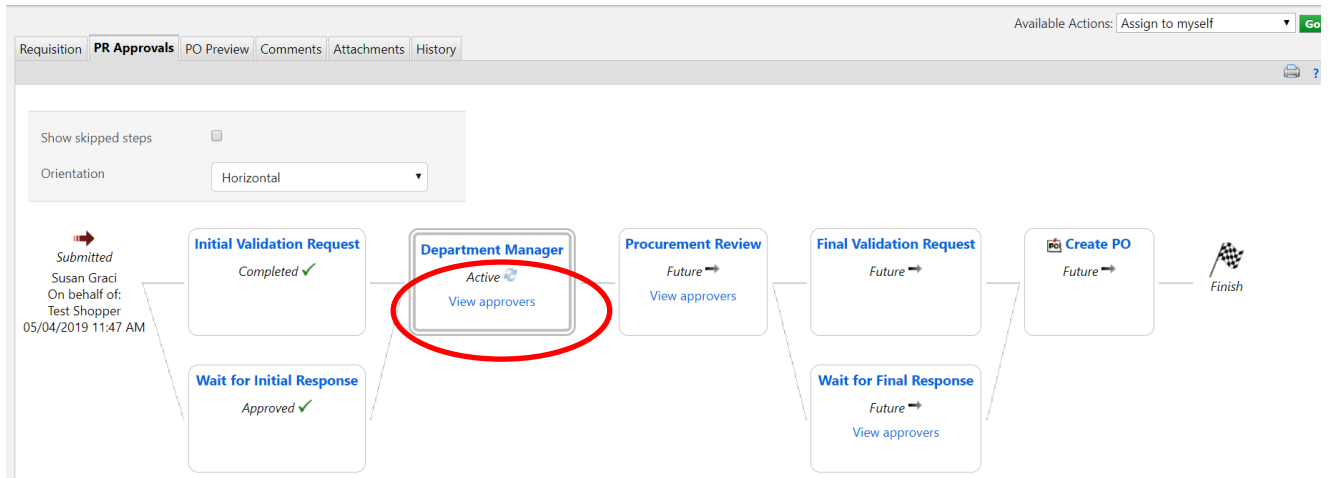
- [View Approval Status](#)
- [Search for another item](#)
- [View order history](#)
- [Check the status of an order](#)
- [Return to your home page](#)
- [Create new draft cart](#)

Requisition Summary

Requisition number	2587823 Quick View
Requisition status	Pending
Cart name	2019-03-18 shopper 01 Sue Requester Guide
Requisition date	05/04/2019
Requisition total	26.77 CAD
Number of line items	1

As soon as the cart has been submitted, it becomes a requisition. MacBuy lists the requisition number and other relevant information.

Work flow can be seen by clicking on the View Approval Status hyper link.



To view the name of an approver (or who is in a pool of approvers) click View approvers hyper link.

Approver name and contact information is displayed.

TIP: If there is a pool of approvers, only ONE of them needs to approve, not all.

TIP: If there is more than one chart field string, approvers from all of them will be shown, divided by the department or program or project they approve for.

For further assistance please contact MacBuyhelp@mcmaster.ca