### Beyond the “101” Basics – Procurement Tips to Make Your Life Easier

<table>
<thead>
<tr>
<th>So you want to..........</th>
<th>Here’s How</th>
</tr>
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<tbody>
<tr>
<td><strong>Requisition</strong></td>
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</table>
| Hide the “Item field” on your requisition home page? The “Item Field” is a dead field within Mosaic. | ![Image](image1.png)  
> Click on Personalize which appears in blue link above the line item.  
> Personalize Column & Sort Order will appear.  
> - Click on Item and select Hidden on the right so it is checked off.  
> - Hit Ok at the bottom. Now the Item field disappears. |
| **Find a Purchase Order Number?** | ![Image](image2.png)  
> Open the Requisition.  
> - Click on Document Status in the Header. A new window will pop-up showing all the activities related to the purchase requisition after it has been converted into a purchase Order. The purchase order, receipt, voucher & cheque payment numbers will all appear once completed. |
| **Check if an invoice has been paid against your requisition?** | ![Image](image3.png) |
| **Check if the goods have been received?** | ![Image](image4.png)  
> Open the Requisition.  
> - Click on Document Status in the Header. A new window will pop-up showing all the activities related to the purchase requisition after it has been converted into a purchase Order. The purchase order, receipt, voucher & cheque payment numbers will all appear once completed. |
| **Know who can sign contracts?** | ![Image](image5.png)  
| **How many quotes do I need? Do I have to do a RFP?** | ![Image](image6.png)  
> The number of competitive quotes required to place a purchase requisition is determined by the SP01 Procurement Policy: SP01: [http://www.mcmaster.ca/bms/policy/purchase/SP-01.pdf](http://www.mcmaster.ca/bms/policy/purchase/SP-01.pdf) |
| **Guide a Sole Source form to AVP (Administration) & CFO for approval.** | ![Image](image7.png)  
> In the Requisition Header select “Requisition Activities” and a new window will appear.  
> - Select “Done” and input the words “Sole Source” under the comments field. |

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Setup a requisition so certain information populates on each line without having to retype each time?

What details populate:
1. Line
2. Schedule
3. Distribution

Receiving

When to receive? Goods shipped to the main campus or HSC receiving docks are received on your behalf by the receiving department. Services, or goods shipped by courier directly to your department must be received in Mosaic by your department.

Receive on a dollar value for a service purchase order? Requisitions should be entered with “Amount Only” clicked off in the “Attributes” tab. This allows for the purchase order to be received against the dollar value, rather than the default quantity. When receiving the dollar value is open to receive against. Be sure to receive value of invoice without the taxes included.

Amend a purchase order already issued?
1. Contact a representative in Procurement to discuss best approach.
2. If they indicate a Change order is required the form can be found under: Finance > Purchasing > Purchase Order > Purchase Order Change Request:
3. Complete form.
   - Attach backup.
   - Hit Save.
   - Hit Submit.
Procurement will amend the purchase order and advise when completed.
### Customs

**What will I have to pay in customs charges if importing from another country into Canada?**

The general rule to estimate customs charges:

- Brokerage will always be $12.41 CAD. This is the standard fee the university pays our broker after the tax discount*.
- Based on USD, you can convert to CAD with an approximate exchange rate of 1.32.
- Now multiply this amount by 5%
- Now multiply this amount by 33%
- Now add this new amount to 12.41 and you have a rough idea of what you can expect to pay.
- Now some items are dutiable, you will need to contact customs@mcmaster.ca to inquire if duty will apply or not.

*Note: Subject to change

### Have you purchased an Item from abroad on your P-Card, or expecting samples from a collaborating party?

Please e-mail customs@mcmaster.ca the following:

- Copy of the billing invoice (if available)
- Chart Field to bill the customs charges
- If the product is not clear to someone outside your profession, please indicate what the product is and if it’s a machine or mechanical, its function.
- Forward your permits (if any).

### Buying a product from outside of Canada that requires a Canadian Food Inspection Agency (CFIA) Import Permit?

Please contact customs@mcmaster.ca. They will advise if you require a permit or not.

If you purchase goods that require an Import Permit from CFIA and if one is not obtained prior to the goods landing on Canadian soil, your shipment will be destroyed or returned to the sender.

**IMPORTANT-CFIA will not issue an Import Permit if on Canadian Soil. This must be done prior to arrival in Canada. (NO EXCEPTIONS)**

### Asset Management

**Assign an asset tag to a large dollar value good?**

Goods valued over $50,000 in value are maintained in the University’s centralized inventory system and must be assigned an Asset Management tag. These tags will be assigned by Procurement after issuance of a purchase order. If you have a good greater than $50k without an asset tag please contact a Procurement Specialist. *Note: Duly signed Letters must be returned to Strategic Procurement in a reasonable time frame.*

### Support

#### Order Entry

spreqbox@mcmaster.ca

If you wish to create a requisition over $10,000.00 Strategic Procurement is happy to assist you by entering the requisition for you, please forward your order information to spreqbox@mcmaster.ca. Please include:

- Chartfield (For entire Req. or each item)
- Delivery/ “Ship to” location
- Name of Requestor (must be valid Requisitioner in Mosaic)
- Quotes (per SP-01)

If required:

- Single/Sole Certificate (duly signed)
- Contract (duly signed)
- ICQ

### Get training for a new staff member? Get some refresher training for yourself?

Strategic Procurement will do one-on-one training session for you and your staff at our One James St. office, or at a location of your preference. Contact the Procurement Supervisor or Manager to make the arrangements.
P2P – Procure to Pay: Requisition to Purchase Order Process

**Process**

1. **Collecting Required Info**
   - Ensure you have the correct # of quotes to satisfy SP01 thresholds. In the absence of the correct number of quotes you will need to complete a Sole Source (S/S) form.
   - Check & see if the supplier is setup in the system. If not, you will need to complete a Supplier Setup Form in Mosaic. The supplier setup form goes into a que and Procurement (“SP”) reviews the form, approves for setup and then sets the supplier up in the system. The supplier setup is approved by Procurement Management. Procurement will advise when the supplier is available in the system. Supplier setup form is found in Mosaic: Purchasing – Requisition – Supplier Set up Change request.

2. **Requisition**
   - A) Enter the requisition (“Req”) into the Mosaic system, ensuring correct backup is attached in the Header to support purchase.
   - Or B) Send all back up to SPREQBOX@mcmaster.ca for Req Entry. (Orders over $10K). Procurement will enter the requisition into the system on your behalf.
   - Mosaic routes the Req to the correct approvers based on the Execution of Instruments.
   - Twice a day the system turns fully approved requisitions into a Purchase Orders (“POs”).

3. **Purchase Order**
   - Procurement reviews the PO to ensure it is compliant with SP01 policies, has the correct backup and relevant instructions are included on the purchase order for the supplier.
   - The Purchase Order is budget checked and is dispatched to the supplier through Mosaic via email.

4. **Shipment > Receiving**
   - If purchasing GOODS, the goods are shipped by the supplier. If they are shipped into Health Science or Main Campus receiving then the receiving departments will receive the goods into Mosaic. If they are shipped directly to your Dept. then, your dept. only knows whether the goods have been received (partially or fully) and is responsible for receiving the goods into Mosaic.
   - If purchasing SERVICES, your dept. only knows whether the services have been performed (partially or fully) and is responsible for receiving the $ value of the services into Mosaic.

5. **Payment**
   - Invoices must go to ACCOUNTS PAYABLE (“AP”) with reference to their PO #, if not listed on the invoice. AP will process the invoice payment against the PO.
   - To find a PO # by click into “Document Status” within the requisitions. By clicking into “Document Status” you can also see at any time whether the PO has been received, invoice processed and if a cheque has been cut against that requisition. “Document Status” allows you to see any action performed against that requisition once it has been created.

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