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.
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.

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).

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.
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.

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.

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

**Limited Tendering Choice**

<table>
<thead>
<tr>
<th>#</th>
<th>Limited Tendering Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>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) it is a patent, copyright or other exclusive rights or (iii) due to an absence of competition for technical reasons.</td>
</tr>
<tr>
<td>20</td>
<td>To ensure compatibility with existing goods, or to maintain specialized goods that must be maintained by the manufacturer of those goods or its representative.</td>
</tr>
<tr>
<td>30</td>
<td>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 to the consuming entity.</td>
</tr>
<tr>
<td>40</td>
<td>No tenders were submitted or no suppliers requested participation.</td>
</tr>
<tr>
<td>50</td>
<td>No tenders that conform to the essential requirements of the tender documentation were submitted.</td>
</tr>
<tr>
<td>60</td>
<td>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.</td>
</tr>
<tr>
<td>70</td>
<td>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 it does not include quantity production or supply to establish commercial viability or to recover research and development costs.</td>
</tr>
<tr>
<td>80</td>
<td>Work is to be performed on a leased building or related property, or portions thereof, that may be performed only by the lessor.</td>
</tr>
<tr>
<td>90</td>
<td>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 result in government confidentiality, result in the waiver of privilege, cause economic disruption, or otherwise be contrary to the public interest.</td>
</tr>
</tbody>
</table>

**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

**Acknowledgement and Approval**

1. **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**.

![Available Actions](image)

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**.

![Available Actions: Add and go to Cart](image)

***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**.

![Assign Cart: User Search](image)

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 ‘check box’ 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.
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.
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.

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.
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**