Log into Mosaic (epprd.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.
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.
User’s name, phone number, email, etc. - confirm or enter email address, work and personal phone

**Default User Settings>Custom Field and Accounting Code Defaults**

This allows user to save frequently used chart field strings to their profile for quick selection while creating requisitions.

<table>
<thead>
<tr>
<th>Custom Field Name</th>
<th>Default Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blanket/Service Order</td>
<td>No Default Value</td>
<td>No Default Value</td>
</tr>
<tr>
<td>Purchasing BU</td>
<td>MAC01</td>
<td>MAC01</td>
</tr>
<tr>
<td>VAT Treatment</td>
<td>Ontario - HST</td>
<td>Ontario - HST</td>
</tr>
</tbody>
</table>

Enter default **Purchasing Business Unit** to auto fill in requisitions (Requester role).

Enter **VAT Treatment** to auto fill in MacBuy. This can be edited at the line level in requisitions if tax treatment differs for a specific item.
**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.

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**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
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

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

Use the drop down menu to choose from a list of Assignees on profile or search.
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)
Leave search field blank to receive listing of all suppliers in MacBuy.
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.
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.
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.

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

Frequently used searches and reports can be saved for easy access. Shortcuts can be added as well.