Updates to Mustang Market Forms

On November 7th, the forms in Mustang Market were updated to match the changes, completed in 2021, to the user interface.

What has changed?

- Forms open within the Mustang Market browser window, by default
- Action menu buttons have been updated to match the requisition and order documents
  - Tip: Use the new “Close” button to close your form and return to the requisition document
- Bank account fields are removed for new vendor setups, for improved security of this information
- Required fields are identified with an asterisk (*) instead of bold font
- Increased spacing between fields

For more information, including screen shots of the changes, please refer to the Mustang Market Forms quick reference guide.

For a complete step-by-step guide, covering most tasks in Mustang Market, refer to the Requisitioner User Guide.

Setting up New Vendors in Mustang Market

When setting up new vendors, the vendor information (contact, addresses, etc.) should be completed on the right side of the form, under the New Vendor Details section. If the preferred payment method is known, please indicate this in the applicable checkbox by selecting “EFT or Wire” or “Cheque”. Procurement Services will work with the vendor directly to obtain the required banking information.

Please do not email or attach banking information, unless this is provided on an invoice.
Supplemental Travel Management Company

Procurement Services is pleased to announce the selection of Direct Travel as a supplemental travel management company for Western University.

Direct Travel is a global travel management company that focuses on providing personalized services for business travel. This agreement will provide the following benefits:

- Dedicated team who will be familiar with your needs and Western’s Travel and Expense Policy and Procedures.
  
  ⇒ Email: team77@dt.com
  ⇒ Phone: 1-800-665-8795

- After Hours Support & Emergency Service:
  
  ⇒ North America: 1-888-700-6063
  ⇒ Global: 1-514-855-4263
  ⇒ Email: d24can@dt.com
  Please quote access code 2BH9

- Online booking through Concur (email procurement@uwo.ca to set up)

- Dedicated Groups Team

- Competitive pricing and discounted rates

- Plane and train tickets can be charged directly to your speed code

Action required: If you are interested in booking future travel through Direct Travel, please email procurement@uwo.ca to transfer (from FCM) or set up your new account.

Travel Booking and Expense Claims – Micro Module

A micro-learning module is now available for staff and faculty traveling on Western University business. This module provides important information and resources on travel policies and procedures, booking travel, and expense reimbursement. Link to module: https://www.uwo.ca/finance/restricted/travel_bookingExpense_claims_micro_module1.html

More information on policies, procedures, and expense reimbursements can be found on Corporate Accounting’s webpage: https://www.uwo.ca/finance/accounting/travel_expense_reimbursement.html

More information on booking travel can be found on Procurement Service’s webpage: https://www.uwo.ca/finance/procurement/preparing_to_travel/index.html
Procurement Policy Reminders

Purchase Order before Invoice

Western’s procurement policy is to create a purchase order (PO) before obtaining any goods or services from our vendors. This means that a purchase order needs to be completed in Mustang Market prior to receiving goods or services from the vendor and prior to receiving and submitting an invoice.

<table>
<thead>
<tr>
<th>Purchase Order</th>
<th>No Purchase Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract with Western’s Terms and Conditions</td>
<td>Vendor not aware of Terms and Conditions</td>
</tr>
<tr>
<td>Approval in advance</td>
<td>Department liable for payment</td>
</tr>
<tr>
<td>Delivery and freight terms</td>
<td>Delivery complications</td>
</tr>
<tr>
<td>Budget confirmation</td>
<td>Budget issues</td>
</tr>
</tbody>
</table>

Splitting Orders (Procurements) into Multiple Requisitions

Did you know that splitting orders puts Western at risk?

Orders created for goods or services must contain the amount of the entire purchase. When orders are created for only a portion of the cost, it can cause Western to be non-compliant with procurement laws.

Western is required by law to be fair, open, and transparent in our purchases. By splitting orders, it may appear that we are attempting to bypass the procurement laws that apply to the purchase.

These include:

- Obtaining correct level of approval authority on the order
- Obtaining quotes for orders $10,000 or greater
- Contacting Procurement for goods or services $100,000 or more

Examples of when splitting orders happens frequently:

- Services or project work provided in phases
- Orders where deposits are required
- Multi-year services or subscriptions

Please help Western remain compliant by creating orders for the entire amount of the purchase!

Procurement recognizes in some cases creating an order that contains the entire amount of a project or service can be challenging for the department budget. For those instances, please contact Procurement for solutions to keep Western compliant while not draining the department budget.
Western Book Store Purchases

Western Book Store and Financial Services have a process to allow individuals to make speedcode purchases of up to $500 at the Book Store. To use this service, individuals must have a dollar authority on the speedcode used.

- To purchase with a speedcode from the Book Store the individual must:
  - Provide their Western ONECard ID to the Book Store.
  - Provide the speedcode and account being charged for the purchase

The Book Store will verify the individual’s spending authority against the speedcode provided and may refuse the purchase if:

- The individual does not have authority on the speedcode provided
- The amount of the purchase is greater than the individual’s dollar authority

Departments should ensure that only individuals with spending authority on a speedcode are making Book Store purchases on behalf of the department.

No need to physically go to the Book Store; Mustang Market orders can be placed to the Book Store by using the order forms in the Forms section of the Mustang Market homepage.

Electrical Equipment Certification and Approval

All electrical equipment used on campus must be certified for use in Ontario to minimize the risk of a fire and/or personal harm while operating the equipment.

When purchasing new equipment, ensure the equipment supplier is aware of the required approvals that are acceptable by the Electrical Safety Authority (ESA). There is a higher risk that equipment purchased from overseas countries will not have the correct certification. For example, the CE mark is a European certification not recognized in Canada.

Contact Procurement Services if you receive equipment without the acceptable approvals. Do not use the equipment until it receives an ESA or equivalent approval.


Further information is available at: https://www.uwo.ca/hr/form_doc/health_safety/doc/hazard_alerts/electrical_safety_advisory.pdf
Asset Management

Department Responsibilities
Faculties and Budget Units are responsible for the tagging, control, and safekeeping of their assets as per MAPP Policy 2.9. Processes should be developed internally to inventory and track Capital Assets (this may include logs, locations, security, and processes to move assets within units, etc.).

Physical Asset Tag
As an owner of a University asset, you will be receiving a physical asset tag in campus mail. This will be on an orange letter. This tag must be affixed to the asset or equipment (attach to main component if several pieces).

Disposing of Assets
Units will need to complete an Asset Disposal Requisition form where an asset meets these criteria:
⇒ Fair market value is greater than $2,500; and
⇒ Less than 7 years old

What is considered a capital asset?
Equipment having the following characteristics is included in the equipment inventory:
⇒ An expected useful life of more than two years;
⇒ An original cost of $20,000 or more; and
⇒ An identity that does not change with use.
For more information, including the following, please visit our website: https://uwo.ca/finance/procurement/after_the_buy/index.html
- Managing inventory changes
- Donated or loaned equipment
- Off-campus use of University equipment
- Asset Disposal Requisition (ADR) form
For questions or assistance, please email asset.disposal@uwo.ca.

Adding Attachments in Mustang Market
Attachments only need to be added once to a form or requisition. If the attachment is added as an External attachment for vendor visibility, Procurement and other Mustang Market users (with access to the document) will be able to view the attachment as well. Please only add an attachment once to reduce duplication and risk of the PO not being sent to the vendor due to attachment size.

Tip: Use the “Add to Cart and Return” button to add a 2nd line without adding a duplicate attachment.
Coming soon...

Online Purchasing Card (Pcard) Training Module

Similar to obtaining access to Mustang Market, where the Procurement Basics Learning Modules need to be completed, an online Pcard training module will need to be completed to obtain a Pcard. This module will provide information on important policies and procedures as well as instructions for reconciling transactions and submitting and approving expense reports.

New Punch-out Catalogue in Mustang Market

Introducing Data Integrity Inc.

A new technology vendor in the Mustang Market providing innovative solutions and recommendations with excellent response times and white-glove customer service.

About Data Integrity Inc.

Data Integrity Inc. is a Canadian technology solution provider in business for over 40 years with 20 years of dedicated experience in the Ontario higher education sector.

We collaborate closely with IT Managers, Directors, Faculty, and Administration, with extensive experience configuring computer labs and participating in hardware acquisitions for research and CFI grants.

- Over 65,000 individual SKUs from technology brands you know and trust.
- Expert advice and product knowledge.
- Free shipping to London, ON campus.

Sally Murciano
Client Manager

Throughout her 20 year tenure with Data Integrity, Sally has developed a close association with many educational institutions and has a deep understanding of their policies, regulations, and processes.

Contact Information
sally.murciano@dataintegrity.com
(416) 638 - 0111 x240
**Customs & Logistics**

**Export Controls Refresher**

The Government of Canada under the Export & Import Permits Act controls the export of certain sensitive goods and technology. This is a multilateral regime and is not limited to physical exports. A “deemed” export is the electronic transfer of controlled information and software or consulting services involving controlled goods or information (training, instructing, advising).

Items controlled for export are included on the [Export Control List](#) and includes dual-use items. Dual use means items that are designed for civilian purposes but could have military use or be used to produce military items. An item can also be controlled based on its end-use and/or the country it is being exported to. A permit to export may be required if the goods or technology is on the Export Control List or destined to a country on the Area Control List. Permits are applied for by the Customs & Logistics department.

If you have any questions please reach out to [customs@uwo.ca](mailto:customs@uwo.ca). A helpful guide can also be found here: [Guide to Canada's Export Control List](#).

**Shipping with Purolator?**

Label creation is the trigger for billing unless they are cancelled

- Be sure to cancel labels if you are re-creating / changing carriers etc.
- Check your GL for shipment charges or for vendor created shipments. If a vendor creates a collect label on a Western account but it is unused, we will still be invoiced.
- A credit can be requested for an unused waybill please reach out should you encounter this ([customs@uwo.ca](mailto:customs@uwo.ca)).

**Shipping with FedEx ?**

Discounts are now extended to more services giving you more choice & savings when Express Priority transit times are not required

<table>
<thead>
<tr>
<th>Domestic Services</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Express 2 Day</td>
<td>1-2 business days by 5pm to businesses and 8pm to residences</td>
</tr>
<tr>
<td>Express 3 Day</td>
<td>1-3 business days by 5pm to businesses and 8pm to residences</td>
</tr>
<tr>
<td>Ground</td>
<td>1-7 business days</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>International Services</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Express International Economy</td>
<td>2 business days to most major world markets</td>
</tr>
</tbody>
</table>
Shipping and Freight Costs
Over the past few months, shipping and freight costs have increased with many suppliers. Below are some suggestions to reduce the impact of these costs to your budget.

- Verify if there are any shipping or freight costs prior to placing your order. This may include requesting a quote from the vendor or, if your order is for a preferred vendor, asking Procurement Services.
- Consolidate orders within your unit as much as possible. Many companies will charge a single shipping fee per order.
- Reduce the number of orders by adding commonly used items to your order.

If you are unsure if your preferred vendor charges shipping, contact procurement@uwo.ca.

Toner Recycling
Toshiba, Samsung, and Lexmark Toners (all old and present toners from the OE Canada MFD contract) are eligible for recycling through our existing programs provided by Grand & Toy and Staples.

Empty Toner cartridges can be returned by:

- Grand & Toy - Complete the form at the THINK tile on the Grand & Toy punch-out homepage in Mustang Market
- Staples - e-mail easyservice@staples.com (include Account# 372578)

If you are unable to complete these steps, toners can be given directly to the delivery driver when you receive your next stationary order.

Sustainability with Fisher Scientific
Sustainability is one of our key principles at Thermo Fisher Scientific. That is why we are continuing to seek new ways to ensure environmental responsibility in all that we do – below are just a few:

- Improved shipping containers
- ~40% of Thermo Fisher Scientific sites are currently zero waste facilities and working towards 100% conversion
- Diverted 10,000 metric tons from landfills
- Saved over 3.6 million gallons of water with sustainable manufacturing processes
- Generated 75% of power at our Bridgewater, NJ facility with on-site solar panels
- Reduced greenhouse gas emissions by 12%
- Reduced water usage by 5%
- Recycled more than 4,700 tons of waste

⇒ Look for the Green Leaf icon on the Fisher Scientific punch-out to identify qualified sustainable products
⇒ Learn more about the many sustainability initiatives at https://www.fishersci.ca/content/fishersci/na/en_CA/programs/sustainability-program.html