Principles of Procurement at Western
Learning Objectives

Participants will be able to:

• Differentiate between / apply policies and laws that guide the procurement process at Western.

• Apply knowledge to achieve more efficient use of Mustang Market.

• Demonstrate knowledge of appropriate Purchasing Card uses.

• Identify the documentation requirements for importing and exporting goods on campus.
To meet the learning objectives, here are the topics we will cover in the session today:

• Policies, Procedures and General Procurement information that will assist you in making decisions related to the purchase of goods and/or services
• Mustang Market - A brief overview of the tool and the most commonly asked questions that we receive.
• Visa Purchasing Card Program - also referred to as the P-card program. We will be covering the basics of the P-card program including what it is, how to obtain a card, proper use and cardholder requirements for the program.
• And finally, Customs and Logistics - Here we will be looking at importing and exporting requirements, proper documentation procedures, courier selection and personal shipments.
Session Topics

1. Policy, Procedures and General Procurement
2. Mustang Market
3. Visa Purchasing Card Program
4. Customs & Logistics
Procurement Services is a department within Financial Services. We are a group of 12 individuals who all work on the unique requirements of the Procurement process. It is our purpose to ensure that the procurement of goods and services here on campus is fair, open and transparent.

Procurement services does not actually make any purchases ourselves; we facilitate a process that includes the preparation and processing of a demand (which is usually in the form of a purchase order) for a good or a service. When an individual on campus needs to buy something, they usually start by either contacting us or using one of the services that we have in place that will help them in making their purchase.

Another big part of our role is to negotiate contracts which will ensure that Western is receiving the best value for the goods and services that we’re buying. Some of the larger and regularly used contracts include office supplies, travel, computer equipment, scientific supplies, general services and consulting.

We also support the logistics of bringing good and services to campus.
Now that I’ve given you a quick and user friendly introduction to who we are and what we do, here is the more technical version. This is the description that you will see when you visit the Procurement webpage.

“The Procurement Services Department facilitates the best-value procurement of goods and services in support of the research community and the campus at large through the use of strong procurement skill sets, solid win-win supplier negotiations, exemplary customer service and exceptional knowledge of procurement standards and guidelines.” Throughout this presentation we are going to do our best to help you understand what this statement means to you and your role on campus.

Procurement Services is guided by many different policies and procedures. Some are, what are referred to as Manual of Administrative Policies and Procedures (MAPP) that have been developed here at Western and have been approved by the Board of Governors, such as Policy 2.8 and its supplemental procedures that are referenced in this slide. The policy itself looks at “what” the institution does and the procedures map out “how” we intend to carry out operating the policy. Policy 2.8 outlines responsibilities and accountability associated with the purchase of goods and services at Western, it looks at the limits of authority (which means who on campus has the authority to make and approve purchases), the guidelines that we follow that will maximize value for money and a system of accountability. Again, the procedures section looks at more of the “how”- how are we going to carry out the operation of the
Special Resolution 2 and Policy 1.49 (Contract Management and Signing Authority) are also important because they highlight who can sign off on and approve most of the contracts at Western. They also highlight who owns these contracts.

We also have a few policies and directives that have come directly from the federal and provincial governments such as the Broader Public Sector Procurement Directive (BPS) and the Agreement on Internal Trade (AIT). Part of our role is to ensure that we (meaning anyone at Western making a purchase) are compliant with all of these policies and procedures. Doing this can be a fairly difficult process but we do our best to incorporate any requirements into the procurement process—so, as an example, when you’re working within Mustang Market and the system asks you to provide an exception report or asks if you’ve considered any accessibility requirements in your purchase, the answers that you provide are ensuring that we comply with the Agreement on Internal Trade and the Accessibility for Ontarians with Disabilities Act (AODA).
One of the most commonly asked questions that you’ll either receive from us directly or through Mustang Market is “did you obtain quotes for this purchase”. Some people are caught off guard by this question but if you are familiar with Policy 2.8 you’ll know that there are requirements for quotes depending on the dollar amount of the purchase that you’re trying to make. This process is called “competitive bidding” and the intent of it is to solicit fair, impartial and competitive bids. Procurement Services encourages using the RFQ (Request for Quote) form when obtaining prices because it provides a degree of fairness as all suppliers are given the same information and the same amount of time to reply.

Procurement Services needs to be involved for any purchases made that are over $100K. Purchases made that are under $100K are most often left up to the department to handle as long as they understand their responsibilities in the process. The information above is taken directly from the procedures section for Policy 2.8.

Purchases less than 10K- the number of quotes required is at the discretion of the Procurement Services Buyer. In the majority of cases, one quote is sufficient but if for some reason the Procurement buyer feels you need more than one, they can ask you to obtain additional quotes.

Purchases between $10,001 and $25,000 require-2-3 informal quotes, these can be obtained by email.
Purchases between $25,001 and $100,000 require a minimum of 3 formal quotes. Formal quotes means that we need the quotes in writing on the suppliers letterhead or be a response to our RFQ form, rather than pricing simply provided in an email. Securing written quotations is a sound method of obtaining prices, maintaining good supplier relations, and ensuring economical use of University funds.

Anything over $100,000 we are legally required to advertise through an open electronic system for a minimum of 15 calendar days. These are the purchases that Procurement Services must be involved in. If you have a purchase for a good or service over $100K, please contact Procurement and we can put you in touch with the appropriate person.
The one exception to our competitive bidding requirements is consulting services. The BPS Procurement Directive requires us to competitively procure consulting services regardless of the value. This means that any purchase of consulting services between $0 and $100K requires a minimum of 3 quotes or can be advertised as an opportunity online. Anything above $100K, must be advertised and follow the same process as any other purchase over $100K.

The BPS Directive also redefined the term “consulting services”. A consultant is now defined as a “person or entity that under an agreement, other than an employment agreement, provides expert or strategic advice for consideration and decision making”. The portion of that definition that’s most important is “providing expert and strategic advice for consideration and decision making”. If the individual that you’re hiring is not providing expert or strategic advice then they’re not considered a consultant under the BPS directive and they wouldn’t fall under the “consulting services” category which would require you to obtain at least 3 quotes. It would just fall under our general competitive bidding requirements. We would also refer to these individuals as “contractors” as opposed to “consultants”.

For example, an architect could be EITHER a consultant OR a contractor.
1. If the architect is engaged to develop a ten year strategy he or she would be a consultant and you would have to obtain quotes, regardless of the value of the service being provided.
2. However, if an architect is engaged to design a specific building then he or she is only a contractor and you would follow the Goods / Non-Consulting Services guidelines.

Procurement Services has created a workflow document that will assist in determining whether the services you require are consulting or non-consulting as it can be difficult to determine.
In addition to the BPS Procurement Directive, there is another external policy that we need to follow: The Agreement on Internal Trade (AIT), which is an agreement that closely governs the role of Procurement within Canada. While the agreement itself is very lengthy, the Procurement piece is the area that we concentrate on. In case you wanted to do some light reading, the Procurement portion of the agreement can be found in Chapter 5.

While the agreement discusses many different aspects of Procurement such as procedures, confidentiality, and bid protest procedures you will most likely only come into contact with a section of the agreement referred to as Annex 502.4. If you’ve already had some experience using Mustang Market or when we used PeopleSoft to produce POs you should be familiar with the term “exception reports”. Exception reports are linked to Annex 502.4 because sections of the Annex tell us when we are not required to publicly advertise our procurement opportunities or when we are not required to obtain multiple quotes- these are referred to as exceptions.

I’m sure you’re all wondering now what type of exceptions that I’m talking about. In some situations there is only one company that supplies a particular good or service. This is what we call a “sole source” and there is an exception for this. We can’t obtain multiple quotes for something that only one company supplies. In these cases, Procurement does require evidence that only once company can supply this item. This evidence is usually in the form of a patent or distribution agreement.
Compatibility can be another exception. For some of the equipment that is purchased here on campus, it is only compatible with existing equipment. We can’t add on equipment from a different company or supplier because it’s not compatible with what already exists.

When you’re working in Mustang Market and developing your requisition, you are asked if quotes were obtained and if not, then if you have an exception report already in place. If you don’t then you have to tell us why you believe there should be an exception made. Mustang Market has a drop down menu with a list of exceptions to choose from. All of the exceptions come from the Annex that we spoke about in the Agreement on Internal Trade.
One other important issue that we want to touch upon is contracts and who at Western is authorized to sign a contract and “bind” Western to an agreement to purchase a good or a service. Not everyone at Western has this authority and it’s an important point to remember when you are the individual making purchases for your department.

Let’s look at a common example that happens here on campus. Your department is hosting a meeting at one of the local hotels here in London. You work with the hotel to secure space for the meetings, food for meals and breaks and accommodations for all of the attendees. Before proceeding, the hotel provides you with a contract outlining everything that you have arranged. You look over the contract and determine that the document outlines everything that you and the sales rep at the hotel spoke about. The hotel wants you to sign the document and send it back to them before the event is finalized. You sign the document, send it back and your event is booked. Should this have happened? Are you actually authorized to sign an agreement that locks Western into a contract with the hotel? We’re going to talk a bit more about the requirements and then you can decide if this was a good idea.
It is also important to remember that contracts do not need to be in writing to bind the University. Anything that you agree to orally could potentially create legal obligations for Western. As a general rule, any University business should be conducted only through written contracts and agreements. If an individual does not have signing authority under a Board of Governors by-law, resolution or policy than you do not have the authority to bind Western using an oral agreement. This signing authority is different than the signing authority that you’ve been given through your department to make purchases using tools such as Mustang Market. We are going to take a look at those signing authorities on our next slide.

A purchase order is also a type of contract. This may surprise some of you who are used to seeing more traditional and formal contract documents. This is why Procurement stresses over and over again that invoice attached POs are not appropriate. For those of you not familiar, an invoice attached PO is created after goods or services have been received and an invoice provided by the vendor. Without a PO, there is no contract in place with the vendor and we are not legally required to pay them. Always do a PO in advance of obtaining any good or service- this will ensure that the proper documentation is provided and signed off on by the appropriate individuals.
One last note on this slide, the legal name of the University must be used on our contracts. Does everyone know that our legal name is not “Western University”? While it is the name that we use on a day to day basis, all of our legal documents (including diplomas) state “The University of Western Ontario”.
This chart is taken directly from section 9 of Policy 2.8 and looks at the roles that are authorized to commit Western for transactions up to the limits specified.

As you can see, even the President has a dollar limit on how much he is legally authorized to sign off on a purchase for. When your purchase order comes through to Procurement, even though the purchase itself is for (as an example) $30,000 and you are personally authorized to approve requisitions up to $50,000 in your department, the purchase order would have to go to an individual on the slide we’re looking at with at least $30,000 in signing authority. In this case, it would be anyone at a Senior Buyer level or above. As a reminder, a purchase order is considered a contract therefore we need to make sure that the proper individuals are signing off on this contract.
This slide shows common items you should look for before signing a contract.

As discussed, the first step to ensure you are meeting Western policy relating to competitive bids and signing authority. As a reminder goods and services exceeding $10,000 require more than one quote, and authorized personnel within the department have signing authority up to $5,000.

The quote, which is part of the contract, should include a description of the services and goods, price, delivery schedule and terms of contract, the delivery address and identify who is paying for shipping, and finally when payment will be made to the supplier.

The supplier should maintain Basic Liability Protection for bodily injury and property damaged if caused by them. Western’s General Liability Insurance policy covers Western employees and guests whether on or off campus if it is an University sanctioned event. If alcohol will be involved at the event then the proper steps and approvals must occur as outlined in the Campus Alcohol Policy (Western Policy 1.33). Those approvals must be shown to the Corporate Insurance office in order to be covered under Western’s Liability Insurance policy. Companies are also required to have Workplace Safety and Insurance Board (WSIB) coverage if the supplier is providing a service on campus along with auto insurance if driving on campus.
The fine print of a contract may also include other clauses impacting Western’s financial risk. Auto renewal clauses allow the contract to automatically renew, perhaps indefinitely, for the same period unless one of the parties gives notice to end the contract within a specific period of time. Western should not accept agreements that include auto renewal clauses; we should only accept contracts that specify an end date with the option to extend the agreement upon Western sending written notice to the Supplier. Contracts including surcharges, cancellation charges, restocking fees and advance payments should only be accepted if you understand and accept the financial risk associated with these clauses. For example, be cautious when paying in advance for a service or delivery of equipment, as the supplier may not meet their obligations of the contract and it could be difficult to recoup any previous payments. The warranty terms should specify the supplier’s responsibilities if goods become defective after the date of delivery or installation (whichever is later).
Let’s jump back to our example of the meeting we were booking at our local hotel. You received the agreement and signed off on it.

Did you notice that the hotel is going to charge you a 5% surcharge if you don’t fill all 50 rooms that you promised to book, even if the meeting attendees are paying for the rooms themselves? Did you notice that they’ve also included a cancellation charge of $10,000 no matter how far in advance that you cancel the event? Did you notice that the big dinner that you’re hosting is on the same night, in the same room as a wedding that’s taking place at the hotel? They’ve listed this as something “to be determined”. What does this mean?

It’s hard to believe but this example is based on an actual contract, which included the 5% surcharge and cancellation charges.

The correct process to follow would be to send a copy of the contract to Procurement for review if there are concerns. Once the review is complete, have a PO issued for the event, have the agreement signed by both parties (with appropriate signing authority) and have a copy of the PO, with the signed agreement, sent to the vendor.

Upon review of any contract or PO, Procurement Services will ensure not only that proper signing authority is met for each particular contract but also that proper insurance has been provided and legal review completed, if required.
Let's now move on from contracts and discuss a few of the different Acts and guidelines that must be considered when making purchases for goods and/or services.

On January 1, 2013, the Ontario government mandated that accessibility criteria and features must be incorporated into all procurement practices. This mandate is part of the Accessibility for Ontarians with Disabilities Act or AODA.

Accessibility, as defined by the act, is “the responsibility of each staff or faculty member procuring or acquiring goods, services or facilities to consider and apply the appropriate accessibility criteria to their procurement decisions. If it is not practicable to incorporate accessibility criteria or features, you must be ready to provide an explanation upon request.”

For those of you familiar with Mustang Market, you will note that you are asked if you have considered accessibility criteria in your purchase when you are entering a requisition into the system. What does this really mean? It’s not just limited to ensuring that ramps and hand rails are installed in new buildings. When you buy a desk consider who may be using the desk, both now and in the future. Does it make sense for you to buy a desk that can be automatically raised up and down? Are support materials that you purchase such as training guides and manuals available in accessible formats? If you’re hiring someone to conduct research do their surveys and interviews accommodate people with different types of disabilities? Is a company using accessible
signage, audio and/or print materials?

Our webpage on Accessibility provides further information including definitions, criteria to consider when purchasing goods, services or when building a facility. It also includes additional resources such as an accessible procurement toolkit.
In addition to the formal polices we have to follow, there are some additional considerations you need to keep in mind when making a purchase. The first one we are going to talk about is Sustainability and to help with this we developed the: Sustainable Procurement Guide. This is a tool to share our recommendations for purchasing products that balance economic, environmental and social benefits, in an effort to further advance Western’s sustainability efforts.

Obtaining maximum value for every dollar spent on supplies, equipment, and services is very important; however, Western also has a responsibility to procure products with minimal environmental impacts and select products that are ethically sourced. Products that consume fewer natural resources, have minimal waste outputs, and have a long life span are not only better for the environment, but also our pockets. These guidelines look specifically at the purchase of stationery supplies, furniture, computers, cell phones and other electronics and lab supplies. It highlights different considerations to look at when you’re preparing to buy one of these items, different labels that identify products as energy efficient or contain restricted amounts of harmful materials.

This is a great resource if you’re uncertain where to start or want some further information on areas to consider when trying to make more sustainable choices.
We’ve talked a lot so far about the policies, procedures and guidelines that impact Procurement. I want to switch directions slightly and look specifically at research equipment and the tools that we have available to assist researchers with their purchases.

Research is a large part of Western’s activities. When trying to secure funding for research a Principal Investigator, or PI, needs to create a budget outlining how the funds would be used, if their grant application is awarded. To help, Procurement Services has developed an online tool to assist the research community with the development of research project budgets for goods and services. This tool walks them through the application stage which includes creating an application budget, completing costing sheets and finalizing their applications.

Once an award notice is received from the granting agency, competitive quotes must be obtained for whatever they are looking to buy, and we can help with this as well. The Post Award Stage section of the webpage provides information about preparing to purchase, how to determine the successful vendor and how to complete a purchase requisition.

We have staff in Procurement who assist researchers with this process on a regular basis. Let’s take a look at the webpage that we’ve developed as it’s a great tool to direct researchers to as they begin to develop their research project budgets.
Create Application Budget

- Create an equipment list
- PIs should define their equipment specifications and review Budget Considerations when requesting budgetary quotes.
- Use the Request for Quotation (RFQ) template to obtain budgetary quotes; it is recommended that PIs obtain a minimum of two budgetary quotes. The information gathered through the RFQ process will be used to populate a budget costing sheet. PIs should verify that responding vendors have included the appropriate currency, shipping charges (Delivered at Place (DAP) Western), and installation details in their quotes.
- Engage Facilities Management if renovations are required; visit their Project Estimates web page for more information.

Here’s what the Research Equipment Budget page looks like, in the middle you can see is the section labelled Create Application Budget.

The section will assist the PIs with organizing their equipment list into separate groups for reporting purposes. It will also ensure PIs are submitting realistic budgets by identifying additional costs such as taxes, inflation, exchange rates, shipping, installation and renovations. PIs should contact Procurement Services for the applicable inflation and exchange rates when developing Application Budgets.
We’ve talked a lot so far about how to purchase an item but we want to touch on what you do with an item once you no longer have a use for it. What do you do with it? Do you throw it away? Can you just give it to another department? Would you believe that there is yet another policy around the disposal of goods here at Western? Policy 2.9, Disposal of University Assets, is the policy that governs the disposal of university assets.

Let’s talk about what is considered an asset. As a general rule, Procurement tags equipment valued at over $5000 as these are considered assets. In some instances, we will tag items of lesser value. It’s all dependent on the specific item purchased. There are two reasons that we do this: first, we have to capitalize assets for financial purposes and $5000 is the threshold set for capitalization. Second, we tag items for insurance informational purposes.

MAPP Policy 2.9 states that items with a value under $250 can be disposed of by the department, however if the item has a University asset tag, please notify Procurement Services before disposing of that item.

The asset disposal form is available at the Mustang Market home page.

What are some different ways that you can dispose of an item that is no longer required:
Inter-department sale - is preferred if Western can continue to use its own assets by giving them to other departments for use.

Gov Deals – GovDeals is a liquidity services marketplace that provides services to various government agencies that allows them to sell surplus items via the Internet. It essentially allows us to advertise any items we have for sale online and advertises it to a wider audience than we would be able to reach on our own. I would compare it to Kijiji-same sort of idea except that it’s an auction and it’s only open to other government agencies, not the general public.

Donation – if no internal buyers can be found, donations are a great way to give back to the community. Procurement Services can assist you in finding charities to donate your items.

Recycle- depending on the item, Procurement Services can assist you in finding out if there’s a recycling program available for the item(s) that you’re looking to dispose of.
Session Topics

1. Policy, Procedures and General Procurement

2. Mustang Market

3. Visa Purchasing Card Program

4. Customs & Logistics
Mustang Market

• Introduction
• Training and Resources
• Preferred Vendor Catalogues
• When to Use a Form
• Notes and Attachments
• Document Search
• Order Status and Workflow
• Approvals
• Other Resources

We will take a look at:

• A brief introduction to Mustang Market
• Where you can find training materials and resources
• How to order from our preferred or contracted vendors
• When to use the forms and how to determine which form to use
• How to use notes, comments, and attachments
• How to search for your orders and invoices
• How to check your order’s status and if it waiting for approval
• And how to approve your order from your email or smartphone
Mustang Market is Western’s eProcurement System implemented in 2014. One of the main features of this system is that many of our preferred vendors are showcased and have electronic catalogues which can be easily accessed and shopped from. The system also allows you to create orders for vendors that do not have catalogues loaded onto the system. Another key feature is the built-in workflow, which includes order approvals, we will look at this in a few minutes.

There are three possible roles in Mustang Market – A shopper which has the ability to create but not submit a cart, a requisitioner who can both create and submit carts, and an approver who approves orders that others have submitted. You can have one role or all roles.
I am going to run through a very quick example of shopping from Hosted and Contract catalogues in Mustang Market. These are catalogues that are directly loaded onto Mustang Market, versus punch-out catalogues which are essentially links to the Western version of a vendor’s website. In this example, I am searching for a chair. I enter my search term in the search field on the homepage and once I find a chair I want to buy, I will click “Add to Cart”.

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**Intro to Mustang Market**

**Shopping Homepage:**

**Product Search Results:**
To access my virtual shopping cart, I will click on the cart icon at the top right corner of my screen. At this point, I can checkout my order, by clicking on the Proceed to Checkout button, and the system will ask me for my speed code and shipping information.

Once all required information is complete, I will submit my requisition.
Once my requisition is submitted, it will go through workflow and approvals. This is an example of a basic workflow. The requisition is first budget checked, then it is approved by someone with signing authority on the account being used. Once that is completed, a purchase order will be created and sent to the vendor.

For more complex or higher value orders, there might be additional workflow steps such as Procurement or Research Finance reviews.

That concludes my brief and very basic demonstration of how Mustang Market works.
We have developed many online resources for training and quick reference which can be accessed on our website. A link is also available on the Mustang Market homepage which I have outlined in this slide.

For step-by-step instructions on many of the shopping and ordering tasks, I would recommend checking the Requisitioner User Guide. We also have guides for

• when to use forms and how to use them
• how to approve orders in Mustang Market, or from your email or smartphone
• how to assign a substitute approver
• and how to fix browser problems, to name a few.

If you cannot find the information or help you are looking for, please email us at procurement@uwo.ca.
Western has negotiated discounted pricing with many of our preferred vendors and these catalogues are displayed on the homepage of Mustang Market, such as the ones on this slide. It is important that **all** orders for these vendors go through Mustang Market to ensure that you are receiving this discounted pricing. Another important feature of Mustang Market is that it captures the appropriate approvals as required by the tri-council for research grants and by Western for operating funds. Placing an order by phone or email using a speed code or P-card is no longer an option for these vendors due to these reasons.

On the training link I just showed you, there is a **Catalogue Vendor Ordering Guide** available which has unique ordering requirements, customer service contacts, and shipping charges if they apply, for these vendors.

A key feature of a catalogue order is that it is usually sent completely electronically which means quicker processing. However, this also means that some vendors cannot read external notes and they **do not** receive attachments for these catalogue orders.

To find out if the vendor can read external notes, you can reference this guide. Please also be aware that most catalogue orders are not reviewed by Procurement and are sent straight to the vendor.
We also have a number of forms in Mustang Market that you will use for other ‘purchasing related needs’,
1. The catalogues should be used for ordering as much as possible due to compliance, controls, and streamlined processing that I discussed previously. Forms can be used when a product is not available in one of the catalogues, when you need to make a change to a purchase order, or
2. When you have an invoice.

Please note that non-catalogue, or form orders, as well as invoices, need to be at least $100 to be processed through Mustang Market, otherwise they should be paid by P-card.
This minimum only applies to forms. Ordering from a catalogue vendor should be done through Mustang Market, regardless of the value, but orders should be kept over $50 if possible for efficiency purposes and so that vendors do not try to negotiate shipping fees in the future due to high volumes of inefficient order processing and delivery costs.

For exceptions, such as when a vendor does not accept P-card, you can email Procurement and we will help you process your order through Mustang Market.
Starting with the Order Forms, these should be used in the cases listed here. The first point – pricing is different from the catalogue, is important because often, a catalogue order is created along with a quote or discount code but there are a couple of problems with this.

First of all, not all vendors can read notes or receive attachments for catalogue orders so there is a chance they will miss the discount code or quote. Secondly, the price on the purchase order document will **not** be the discounted or the quoted price so the vendor will not see the correct net price on the purchase order. For these reasons, any time you have different pricing than what is in the catalogue you should use an Order Form to place your order. And you can indicate the quote number and attach a quote directly to this form.

Orders over $10k require quotes or an exception as explained earlier in this presentation, so these must go on the over $10k Order Form so that the competitive bid requirements can be entered along with the order.

One last comment on this form – Do not use this form to submit an invoice for payment. Using this form will send a purchase order to the vendor and Accounts Payable will not be aware that there is an invoice that needs to be processed.
In the rare circumstances where you have an invoice but a purchase order has not yet been created, you should submit the invoice on the Invoice Attached form. A common error that we see is that invoices are submitted on the regular order form which will send a purchase order to the vendor. If the Invoice Attached form is used, a PO will not be sent to the vendor but instead a notification will be sent to Accounts Payable to let them know that there is an invoice for them to process. They will not be notified of this invoice unless this form is used.

If you require a change to an existing purchase order, you must submit a Change Order Request form. Possible changes include increasing or decreasing the amount of the order, adding a new line, cancelling an order or line, or changing the speed code. Please note that once a PO has been invoiced, we cannot change the speed code – this must be done through a journal entry. You can use this form to request that a PO be closed or cancelled, but you can also email Procurement directly if that is easier. It is really important that we close POs that have been cancelled so that budget encumbrances are released and free for other purchases.
There are several notes, comments, and attachment fields available and it is important that they are used correctly. There are External Notes and Attachments which are sent to the vendor along with the purchase order, and there are Internal Notes and Attachments which are not sent to the vendor. You might use External notes to send delivery instructions to the vendor and External attachments to send a quote along with your order. Internal Notes should be used to communicate order or invoice processing requirements to Procurement and Accounts Payable, such as specific payment instructions or requests.
External attachments can be entered either on the Order Form or on the requisition under the Summary tab.

If you are creating a requisition for more than one vendor, you will need to add the notes or attachments either to the form or at the line level on the requisition to make sure they only go to the vendor that you want to see them.

I have an example on my screen of a requisition that includes two different vendors. In this example, I am buying two chairs from two different vendors where I have a quote for the first vendor but not the second vendor. I also want to include specific delivery instructions for this first chair.

To add my quote and note for the first vendor, I will use the fields available on that vendor's line. This will ensure that only this vendors will receive these.
Another powerful tool in MM is the ability to add comments. There is also a Comments tab which can be used for internal communicating. If you want to ask someone a question about an order, you can use Comments to send this to a specific person and they will receive an email with your comment. To reply to this comment, you can click on the link provided in the email which will take you to the Comments tab, where you can then enter your reply.

Comments are also a good way to keep track of order changes that you or anyone else who has access to the document, such as Procurement, might want to reference in the future.

Please note that vendors do not have access to view anything entered in this Comments tab. We see instructions meant for the vendor entered in the Comments tab a lot so I just want to emphasize again that these have to be entered in the External Notes field.
The Document Search tool or the Quick Search magnifying glass icon can be used to look up your requisitions, purchase orders, or invoices. You can add search terms and filters such as document number, vendor name, and date ranges. You can also export your search results into Excel or save the search criteria for future use. A brief training document is available under the links on the Mustang Market homepage but I will do a quick demo of how you might look up an order or invoice in the system.
From the Document Search screen, you have a few options. You can specify which type of document you are searching for – a requisition, PO, or voucher, and you can narrow down your search results by using the “advanced search” option. Here you can search by additional criteria such as vendor name, date ranges, or form type for example. Once you have performed your search, you will see a list of documents available. You can click on the document number, so in this case a PO number, to view the details on this document.

In this example, I am looking up all of my orders for Staples for the last month. To do this, I will select Purchase Orders from the Document Type drop-down list and then I will click on Advanced Search.

From this screen, you can enter your search criteria, such as a Vendor and Date Range, and then click “Go” to perform your search.
Once you have performed your search, you will see a list of your documents available. You can click on the document number, so in this case a PO number, to view the details on this document. To save the search criteria or export the details of these orders to Excel, use the buttons on the left side of this screen, as outlined in this slide.
From the opened purchase order document you can see all of the order details. If you open a purchase order document, you can see if any invoices have been processed against it on the Vouchers tab. From here, you can see the payment status or due date and you can click on the voucher number to open up the Voucher document. The voucher document will have more payment information and for non-catalogue orders you can also get a PDF copy of the invoice on this document.
As I mentioned during the Mustang Market overview, after a requisition is submitted, you can check the status to see if a purchase order has been created yet or if approvals are still required. We do get a lot of questions concerning the status of a requisition and who needs to approve it, and if you submitted the requisition then you can actually look this up.

To view the status, go to the tab called PR Approvals on the Requisition document. Here, you will see
- which workflow steps have been completed which have green checkmarks
- which step is active
- and any future steps.

The Validation steps are budget checks. If you would like to see who needs to approve for a specific step, click on the “view approvers” link and it will give you the name of people who can approve this requisition. You can use this information to reach out to one of the individuals and ask them to approve your order.

If you see that the workflow has been completed and a PO has been created, you can find the PO number by going back to the Requisition Summary tab – the PO number and a link to the document are available right on that page.
Email Approval

- Requisitions can be approved via email
- PIN required
- Reference guide available on training website

I also wanted to mention the option for approvers to approve requisitions right from their email or smartphone. This is useful for someone who approves orders often or is not at their desk regularly, or who may be travelling. This type of approval requires a code to be created on your profile in Mustang Market. Once you have set up your code, you can enter it on the email notification you receive for a requisition pending your approval. A reference guide is available on our training website. I would strongly recommend you share this efficient tool with approvers in your area.
Key resources on our website:
- Here you can access forms to set up an employee with access to Mustang Market:
  - MM Authorization Form which you can use to give someone a Shopper or Requisitioner role, or signing authority to department accounts
  - Research Delegation of Signing Authority Form which will give someone the ability to order and have signing authority on a research account
- Print or save a copy of the PO document, in case you need to email a copy to the vendor
- Requisitioner User Guide has many step-by-step instructions, including how to assign multiple speed codes to an order
Session Topics

1. Policy, Procedures and General Procurement
2. Mustang Market
3. Visa Purchasing Card Program
4. Customs & Logistics
Purchasing Card

• What is the P-card
• Eligible Expenses
• Ineligible Expenses
• Travel Coordinator Role
• P-card Audits
• CentreSuite (management, reconciliation and approval)

Good afternoon, we will take a look at:

• What is the purpose of the Western ScotiaBank Purchasing Card

• What types of transactions are eligible and ineligible to be put through on the P-card

• The policy and guidelines around the added Travel Coordinator Role that can be added to a P-card

• P-card Audits

• CentreSuite – This is the website where all P-card transactions are managed, reconciled and approved.
What is the P-card?

- The P-card is a ScotiaBank Visa credit card
- It is a payment method that allows you to obtain your goods quickly and pay for them immediately
- It is a good alternative to petty cash or a purchase order for your low dollar purchases.

Ask: Is there anyone here that has a P-card? Ask: for those of you that do have one, what do you use it for?

So What is the P-card

- The P-card is a ScotiaBank Visa credit card
- It is a payment method that allows you to obtain your goods quickly and pay for them immediately while providing you the flexibility to make purchases at your convenience
- It is a good alternative to petty cash or a purchase order for your low dollar purchases.
- Items under $100 cannot be processed in Mustang Market and we recommend paying for these low dollar purchases on your P-card
- It is important to note that the P-card is not intended to be a mechanism to avoid or bypass Purchasing policies or procedures as stipulated in the Board of Governors policy 2.8, this program is intended to complement existing processes available within policy.
What is the P-card?

- The card may be used at any authorized vendor who accepts Visa and there is no cost to you to use this program.
- The card can be used for in-store purchases, and orders placed by phone, or over the internet.

We know that the P-card is the preferred method of payment for low dollar purchases

- The P-card may be used at any authorized vendor who accepts Visa (provided the purchase falls within the guidelines of acceptable purchases). There is no cost to you to use this program and is a great method of purchasing when Mustang Market is not an option.

- The P-card can be used for in-store purchases and orders placed by phone or over the internet (and also by mail or fax). You cannot email your P-card information to a vendor as it is not PCI compliant. PCI stands for the Payment Card Industry Data Security Standard.

- The card can be used to purchase foreign tangible goods, but the Cardholder must notify Customs and Logistics, prior to making a purchase.

- Although the card is issued in your name, it is the property of the University of Western Ontario and is to be used exclusively for University business purchases. This card is not for personal use.
To obtain a P-card you simply need to forward a completed P-card Application Form and Cardholder Acknowledgement Form to the Procurement Department. These forms can be found under the form section on the Financial Services website.  
[Forms - Financial Services]

To obtain a P-card you simply need to forward a completed P-card Application Form and Cardholder Acknowledgement Form to the Purchasing Department. These forms can be found under the form section on the Financial Services website.

It is important to remember that the P-card comes with responsibilities and accountabilities for its use and reconciliation. Misuse of this university tool could have serious consequences.
Let’s look at the transactions that are eligible to be paid for with the P-card. This is by no means a comprehensive list but it gives you an example of the type of departmental expenses that the P-card can be used for.

The P-card **MAY** be used for the following:

- Conference registrations
- Flowers
- Subscriptions
- Books
- In store purchases (e.g.) retail operations such as RONA, Home Depot and Canadian Tire
- Telephone/ cell phone bills
- Water
- Shred it
- Reprints
- Memberships

It is important to note that if the expense is being charged to research or other special funds, there may be additional restrictions imposed by the funding source. It is the responsibility of the cardholder to ensure that expenses are eligible on the funds charged against.
Now let’s take a look at the transactions that are not eligible to be paid for with the P-card. Again, this is not a comprehensive list and if you are ever questioning whether you should charge something to a P-card please contact us in Procurement Services and we would be happy to help clarify.

The P-card MAY NOT be used for the Following:

- Travel and entertainment expenses
- Radioactive material, narcotics, dangerous goods and controlled substances
- Goods or services from any employee of the University
- Cash advances
- Personal purchases
- Equipment greater than $5,000
- Western monthly parking permit and parking tickets
- Association Fees (such as CPA- Chartered Professional Accountants, as those are...
personal charges and need to be claimed through a Professional Expense Reimbursement).
We are frequently contacted about purchases on the P-card being declined. There are many reasons that a P-card could be declined and some of the most common reasons for a declined purchase include:

- **Invalid expiration date** - make sure that you are providing the correct expiration date for any purchases you make over the phone or when using the Internet. If you have received a new card you will have a new expiration date. You will need to notify any vendors who have your card number on file of the change.

- **Blocked MCC (Merchant Category Code)** - A merchant category code is a four digit number assigned to a business by credit card companies and this code reflects the primary category in which the merchant does business. If the item you are attempting to purchase falls within one of our blocked category codes (e.g.; travel, hospitality) then your purchase may be declined.

- **Monthly/Single Transaction Limit Exceeded** - Your card will be declined if you do not have enough available credit to complete the purchase. If the purchase you are trying to make exceeds your single transaction limit please contact your plan administrator. We do not want our card holders splitting transactions to get around their transaction limits. Your plan administrator, which is myself, can make adjustments to your P-card limits, either temporarily or permanently, if the purchase is approved by an individual with appropriate signing authority in your area (AO, Budget Head, Dean, Chair).
A Travel Coordinator Role has been developed to give departments the ability to book certain travel and hospitality on P-cards. Only one cardholder per department is permitted to have these privileges on their card.

Only authorized to:
- Book travel for non-University employees
- Pay for group departmental events

As a reminder, this card cannot be used to pay for Western employee travel or other business related travel expenses such as meals or hotel accommodations.

While we have another session that addresses this, I do want to briefly mention that there is a Scotia Bank Travel VISA Card as well, and it can be used to pay for Western travel where FCM is not an option. This card is what we call an “individual pay” card which means that the cardholder is responsible for submitting a travel and expense claim each month for any travel expenses incurred and using the reimbursed funds.
to pay the balance of the credit card. For details about this card contact us, or enroll in the Travel and Expense Claims Operational Excellence session.
CentreSuite is our online P-card management tool.

In CentreSuite cardholders are able to:

- Check monthly statements
- Reconcile transactions
- Create and submit Expense Reports for approval,
  that once approved, are charged directly to the department speedcode
To access CentreSuite cardholders need an unique profile and this is set up for them by the Central Program Administrator in Procurement Services. This will be done during the application process and the cardholder will be emailed their user ID and password.

In order to remain PCI compliant (the Payment Card Industry Data Security Standard) ScotiaBank does require users to reset their password every 90 days.

If a user forgets their password or get locked out of their account, on the home log on screen there is a link to reset or unlock the account, which is highlighted on the screen.
This is the ‘main screen’ you will see when you log into CentreSuite

1. Here is where you would go to access statements up to 1 year old
2. Here is where you go to reconcile the previous month
3. And here is where you go to create / submit your expenses for approval
Reconciliation

- On or about the 16th of each month, cardholders will receive a notice that their statement is available for review
- The cardholder will create an expense report
- The expense report will be forwarded to the designated approver for review and approval in CentreSuite.

As a cardholder it is your responsibility to ensure you reconcile all transactions made on the P-card. Let’s quickly review the reconciliation process at a high level:

- On or about the 16th of each month, cardholders (or appointed reconcilers) will receive a notice that their electronic statement is available for review
- The statement lists each transaction made on the card during that billing period.
- The cardholder will create an expense report and add account coding and descriptions for each transaction
- The expense report will be forwarded to the designated approver for review and approval in CentreSuite.
Procurement Services facilitates monthly P-card Audits to ensure compliance with Western’s policies/procedures as well as the Broader Public Sector Guidelines. To ensure that the purchases fall within the acceptable use guidelines for Western every month a number of transactions are selected at random and are reviewed for the following:

- Travel/ Hospitality
- Liquor
- Foreign goods
- Controlled substances
- Personal Purchases
- Equipment greater than $5,000
- Missing receipts
- Expense Report not submitted/approved by deadline

P- Card transactions are subject to review and audit by the following:

- The Program Administrator
- Internal Audit
- Research Finance
- External Auditors

To ensure YOU meet CRA, BPS and Western policy requirements, all documentation including packing slips, receipts, credit card slips, etc. must be retained with your Visa
statement, at the department level, for a period of seven years. These will be used in
the case of an Audit. If a receipt or packing slip does not include a description of the
purchase, add a handwritten description on the receipt/packing slip.
Tips for Best Practice

1. Print your statements
2. Reconcile throughout the month
3. One Reconciler
4. Centralize Documentation

1. Print off the statement monthly and reconcile your receipts to the statement prior to creating an expense report in CentreSuite.
2. Recommend cardholders with high volumes of transactions be proactive about obtaining receipts and allocating transactions prior to creating an expense report after the 16th. (You can do this anytime by going to Expenses>View Transactions and searching for the appropriate card and date range. Description and account information can be entered and saved from here. Then, when you go to create an Expense Report, you need only fill in the few remaining transactions from the end of the cycle and submit for approval).
3. Have one central person within the department be designated as the reconciler on all P-cards. This individual would be responsible for obtaining receipts, allocating transactions and creating expense reports in CentreSuite.
4. Have all documentation for P-card transactions retained in a central location within your department (for audit purposes). That way if someone leaves Western you know were you can locate receipts, etc. if they are ever requested.
In your role at Western, if you’ve made a business purchase from another country or have ever sent an item to someone outside of Canada, or received an item from someone who is outside of Canada then the item passed through Canada Customs and was subject to Import/Export guidelines.
As a research intensive university, Western imports and exports a surprising quantity and variety of goods and materials. This can range from lab supplies and equipment to chemicals, reagents and biological specimens. We also handle goods for the bookstore, athletics, and administrative units.

Western is the Importer when we bring materials into Canada from any foreign location. This can happen with a purchase, a repair, or research samples.

One of the most common questions we are asked is: I’m working with a collaborator in the US and they are going to send me some samples. What do I need to do? Unfortunately, we often get this type of question when the goods are stuck at Canada Customs.

If you are expecting something to arrive from an address outside Canada, please contact us at customs@uwo.ca as early as possible in the process. This includes “free” samples from suppliers or from conferences/meetings/conventions, etc. All shipments require documentation with specific information.

Western is the Exporter when we send materials out of Canada. This could involve sharing of collaborative materials, repairs, exchanges, or conference materials.
In this section we are going to talk about importing and exporting, as well as Transportation of goods (locally or nationally). Our team can help with arranging pick up and delivery of materials, and acquiring rate quotes. More on this a bit later.
Let’s start with imports ..... 
Universities are considered Commercial Importers. This means that all business transacted across borders is done so under the University’s business number. This includes accounting for goods, paying applicable duties and taxes, and reporting our business activities.

When goods are shipped to Western for Western-related purposes, Customs clearance is arranged and approved by the Customs & Logistics team.
The Importer of Record (IOR)

- The “person” who causes the goods to be brought into Canada
  - “person” can be an individual, partnership, corporation or institution
- The University is the IOR where the goods:
  - Have been purchased through an approved procurement method
  - Are provided free of charge by the shipper

The Importer of Record is the “Person” who causes the goods to be brought into Canada, in our case, the University.
This includes goods that have been purchased through an approved procurement method (i.e. purchase order, P-card), or where provided free of charge by the shipper to the University (i.e. collaborative research materials, product samples, donations, etc.)

We mentioned this a moment ago in the P-card section .... Please be sure to forward details of your foreign p-card purchases to us at customs@uwo.ca
Import Document Requirements

• Must show “The University of Western Ontario” in the first line

When you are providing shipping instructions to suppliers (in the case of P-card purchases or samples and/or collaborative materials), it is important that the “University of Western Ontario” is the first line of your address. The carrier will consider the first line of an address as the Importer of Record (IOR) – if it shows your name or department, it can create unnecessary delays at Customs while the IOR is sorted out.
I’d like to show you two ways to write your address for shipping items….this looks great, right?

- The University of Western Ontario is missing....
We are used to providing our address like we do for our home but this can cause import issues for the University. Appreciating that this may not be your natural approach....This slide is showing the correct way to provide a delivery address for goods coming to Western from outside Canada.

**Correct Import Documentation**

**University of Western Ontario**
Dept of _________
Bldg, Rm (or dock #)
London ON N6A 3K7
Canada
Attn:
Tel: 519-661-2111 x _____
Import Document Requirements

- Permits and/or licenses must accompany the shipment, and a copy provided to the Customs team
- NAFTA or other Certificate of Origin (if applicable)

If the material you are importing requires a permit and/or license, it MUST accompany the shipment. It cannot be an after-thought. Failure to provide permits can result in seizure of the shipment and monetary penalties could be applied against the University. If in doubt, please contact the Customs & Logistics team. We can direct you to the appropriate government website where you can obtain information on import requirements and access application forms.

Every shipment requires a commercial invoice. In the case of purchases, the Accounts Payable invoice with the country of origin shown, is often sufficient. The commercial invoice must show complete shipper & consignee addresses, a detailed description of the goods (including quantity), the unit price of each item, the country of origin of each item, and the reason for export. There is a distinction between the country of manufacture (where it’s made), and the country of origin (where it’s shipped from).

All goods are subject to tax and some goods may be also subject to duty. In this case, a NAFTA or other Certificate of Origin (if applicable) completed by the shipper should accompany the shipment.

Our next slide is an example of what a commercial invoice looks like.
This is what the top section of the form looks like. It provides you with a quick snapshot of the information that is required. The link to the form is provided at the bottom of this slide if you would like to take a closer look on your own.
The Customs & Logistics Team receives notification on updates and changes occurring in relation to Canada Customs activities and regulations.

Many of us have imported goods personally, however Western is very different. Because of the nature of our activities, we are subject to various government acts and regulations that determine what we can import, how much, and from where. If you have ever ventured onto a Government of Canada website you’ll know that they can be very complicated. I’d like to bring the following agencies to your attention as most of our activities are impacted by one of these four agencies.

CFIA is responsible for agricultural products, consumer packaging and labelling, animal feeds, fertilizers, fish, food & drugs, plants & animals, meats and seeds. You would definitely have to visit this one to apply for an import permit.

The mandate of the PHAC is to promote health, prevent and control chronic diseases and injuries, and prevent and control infectious diseases. If you intend to import a strain of a virus (i.e. SARS virus) as part of your research it’s important to ensure your lab is covered by the University’s license. This is a new set of regulations administered through Occupational Health and Safety.

The CNSC regulates the use of nuclear substances to protect the public, workers, and the environment. This site provides information on the use and importation of radioactive materials. Western has a permit that covers the radioactive materials we use.

Global Affairs Canada provides information on controlled goods, Canada’s Trade Agreements, and includes the work of the Canadian Embassy here and abroad; this site
provides information on what type of goods are prohibited for imports, which countries Canada does not trade with, and which goods cannot be exported to certain countries.

If you are feeling particularly adventurous, you can certainly check them out. If you have a specific question, please contact us for more information and guidance. We are a registered user of Export Controls On-line (EXCOL) and can assist with obtaining export permits, licenses or certificates as well as import permits as required. We receive constant updates on any amendments or additions to the various acts and regulations.
Now let’s talk about Exports.
Western exports research materials, supplies and equipment around the world. This could include equipment being sent out for repair, collaborative research materials, Western-owned goods being loaned to a collaborator, or even items used by our faculty and/or students in field research.
Just as with imports, exporting goods out of Canada requires paperwork: permits, licenses and commercial invoices must accompany the shipment at the time of export. Contact the Customs & Logistics Team for assistance preparing your paperwork. There is a link to the Export Requisition Declaration on the Financial Services website, under Forms and we have also added a link to the bottom of this slide.

The export of certain goods, to certain destinations, is considered prohibited under the Export & Import Permits Act. Others types of goods require additional documentation or permits such as where there are quota restrictions, toxic materials or substances, or those which are radio frequency devices. 2 of the most common items we see are the Point of Sale equipment used by Hospitality Services, and computer monitors. These particular items require an additional document called an FCC Declaration indicating that the goods comply with radio frequency regulations.

There is a requirement to report our exports to Customs under a number of specific conditions even though they may not necessarily be under export control. Western is
registered to file these reports electronically and the Customs and Logistics team files these reports on-line.
There are several consequences that can occur if you do not comply with the appropriate guidelines, the first two bullets impact YOU directly:

- items can be delayed in Customs, and after a period of time (generally 5 days) may actually be sent back to the original sender, or incur significant storage charges! They could also perish, resulting in significant expense in research costs and time sensitive experiments.
- items can also be seized or forfeited. This typically occurs when permits have not been obtained and/or do not accompany the shipment.
- But importantly, failure to comply puts Western at risk and could subject the institution to heavy fines and/or an audit. This could have a direct impact on our ability to send/receive goods in the future. I am fairly confident that research funding does not include payment of monetary penalties associated with import or export fines.
Let’s move on to talk about Customs Duty.

You need to be aware that All goods are subject to duty and tax regardless of the reason for import – including gifts of collaborative material that are sent to you.

Some exports may be subject to duty and/or tax at destination.

The good news is that Western qualifies for some overriding provisions basically eliminating duty. This can be based on end use, the specific type of material, or the nature of the business transaction (i.e. goods donated to the University).

We highly recommend contacting our Customs and Logistics team for support in this area.
Moving on to talk about the actual physical movement of goods, our team can also help you select a carrier to use when you send and receive items.

Western has transportation agreements with most major carriers and couriers: Fed Ex, DHL, UPS. We also have agreements with local in-town and long-haul carriers. The choice of carrier rests with the department, but can be influenced by the nature of the goods.

For example, if you are moving something big and bulky (i.e. on a pallet), you would be likely best served by a trucking company.

Be aware that some items might require special handling or ocean freight, and we can also make those type of arrangements for you. Remember: All shipments leaving the country require customs documentation.

Transportation can be very complex. Contact us for assistance.
Courier Selection

**Within London**
- Helix Courier, Dynamex Express

**Within Ontario / Quebec**
- Purolator, Fed Ex

**Within Canada**
- DHL, Fed Ex, Purolator, UPS
- Day & Ross, Manitoulin Transport (truck)

**International**
- DHL, Fed Ex, UPS
- YRC (US only)

Courier selection is up to you. Here, in no particular order, are the couriers we use. Rates are dependent on the type of service requested. You will need to log in to Purolator, DHL, Fed Ex, and UPS to create your shipping label. You can also get an estimate of the shipping cost while you are creating the label. Keep in mind that Purolator does not exist outside Canada and all packages are turned over to UPS at the border.

If you are not already set up with online access at any of these carriers, please contact us at customs@uwo.ca. We will set up your department, linking you to the University’s master accounts. NEVER open your own account – by creating your own account with a transportation company, your department will not be tied to the University’s negotiated rates.
Personal Shipments

• Personal credit card purchases or gifts of a personal nature are NOT considered University business

• Delivery should not be to Western, and should not reference Western in the delivery or “sold to” section of the invoice

• Outbound personal shipments cannot be completed through the customs & logistics team

Personal Shipments should not be addressed to the University, as Western is not involved in the transportation contract nor is Western the importer or exporter of your personal goods.

Purchases made using a personal credit card, or that are subject to professional allowance reimbursement are not considered University business. Whether international or domestic, there are contractual obligations around transportation and/or Customs matters.
It’s always better to ask us for assistance than to have your shipment hung up at the border.

I’ll give you a moment to digest this before moving on to our next topic. Does anyone have any questions?
One final area that I’m sure that you’re thinking about is communication. How does Procurement Services communicate any changes that are made to policies and processes, or highlight important information?

One of the first places that we post information is on the home page of Mustang Market. On the left hand side of the screen is an area that we use for posting updates that will affect Mustang Market users. This is where we announce new contracts and information from our vendors that we feel is important to you.

The Procurement Post is our newsletter which is published a few times per year. The newsletter is full of updates and also provides general information on procurement, new contracts, reminders and upcoming events. You can find current and past issues of the Procurement Post on our website at: http://www.uwo.ca/finance/procurement/procurement_post/index.html

To be notified by email of a new edition of the newsletter you can subscribe to our news feed (found on the Financial Services homepage) or request to be added to the newsletter mailing list by contacting us.

Finally, if we have something big to announce we will occasionally send an email blast. While we do not have a formal mailing list, we typically combine the multiple lists we have access to and ask individuals to pass the information along if there are others in
their area that they feel should be notified.
As a final resource tool for you take with you today, this particular slide provides contact information for each of the areas that we covered. Please feel free to contact any of us if you have any questions.

<table>
<thead>
<tr>
<th>Contact Information</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy, Procedures and General Procurement Questions</td>
<td><a href="mailto:procurement@uwo.ca">procurement@uwo.ca</a></td>
</tr>
<tr>
<td>Mustang Market</td>
<td><a href="mailto:procurement@uwo.ca">procurement@uwo.ca</a></td>
</tr>
<tr>
<td>Visa Purchasing Card Program</td>
<td><a href="mailto:P-card@uwo.ca">P-card@uwo.ca</a></td>
</tr>
<tr>
<td>Customs &amp; Logistics</td>
<td><a href="mailto:customs@uwo.ca">customs@uwo.ca</a></td>
</tr>
</tbody>
</table>
This almost wraps up our session for today. So far, we’ve covered Policy, Procedures and General Procurement, Mustang Market, the Visa Purchasing Card Program and Customs & Logistics. This is a lot of information to take away and we hope you have benefited from today’s session.

Summary

In this session, here’s what we’ve covered:
1. Policy, Procedures and General Procurement
2. Mustang Market
3. Visa Purchasing Card Program
4. Customs & Logistics

This almost wraps up our session for today. So far, we’ve covered Policy, Procedures and General Procurement, Mustang Market, the Visa Purchasing Card Program and Customs & Logistics. This is a lot of information to take away and we hope you have benefited from today’s session.
Thank you!