Introducing ** Mustang Market** – Purchasing on Research Projects

### Overview

Over the last several months Financial Services has been leading an ambitious project that will dramatically improve the way that goods and services are acquired at Western.

Enhancements at the completion of the project include:

- Acquisition of the majority of Western’s goods and services initiated inside an electronic marketplace
- Purchase of many items from online catalogues thus eliminating the need to log into different vendor websites
- Newly negotiated discounts with many vendors on purchases made inside the electronic marketplace

### Background to the change

In order to streamline the procurement processes, reduce processing costs and pass the associated savings on to Faculties and Units, we are implementing an e-Procurement solution/electronic marketplace called **“Mustang Market”** that will operate much like Amazon or e-Bay.

Focus groups, representing the Western Community, have provided input into the development of **Mustang Market** over the past several months.

### Why you need to know

Mustang Market will be introduced to Western in June 2014.

One of a Principal Investigator’s primary responsibilities is to provide written authorization for all expenditures charged to his/her research projects or where applicable, provide written delegation of signing authority. The Mustang Market approval mechanism will ensure this responsibility is adhered to and will provide a means for capturing this authorization, thus fulfilling the requirements of the funding agencies.

Each researcher will be automatically set up in the Market as a shopper, requisitioner and approver (roles defined below). Any current delegates on file will also automatically be set up with these same roles. A researcher can delegate the approval authority at any time by completing the Research Finance Delegation of Signing Authority form (DoSA), if this has not already been completed.

### What stages will a purchase go through

All goods and services that are acquired using **Mustang Market** will flow through a series of stages. These orders will move through each stage electronically using ‘workflow’:

1. Create a Shopping Cart
2. Submit a Requisition
3. Researcher or delegated authority Approves the Requisition
4. Send the Requisition to the Supplier (or to Procurement Services)

### Mustang Market user ‘roles’

There are 3 roles available in the market; the workflow process will move automatically through each of these roles. Researchers have all 3 roles and if an order is placed and all the required information completed, the order will move seamlessly from the shopping cart to the vendor.

- Shopper (can create a shopping cart)
- Requisitioner (can submit a requisition)
- Approver (can approve a requisition)
These roles were designed to provide the necessary flexibility and accountability for a diverse community like Western.

The table below provides a list of activities for the three different roles:

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Allowed Activities</th>
<th>Additional Information</th>
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| Shopper   | • Search vendor catalogues.  
            • Compare pricing.  
            • Create shopping carts and add items.  
            • Complete activities by assigning the shopping cart to a Requisitioner. | • A researcher can request supplies to be ordered by support staff and indicate which account to be charged |
| Requisitioner | • All Shopper activities plus:  
                         • Edit shopping carts submitted to them by others.  
                         • Must assign SpeedCodes and Accounts.  
                         • Complete activities by submitting a requisition for approval. | • The order placed by the shopper is then assigned to a requisitioner who is familiar with the research project or can be directed to the researcher personally |
| Approver  | • Approve requisitions submitted by others.  
            • *Delegated approvals are limited to spending authority amounts.* | • The researcher receives the completed requisition to review.  
                                      At this stage the order can be approved, returned for correction, or denied. Only the researcher can approve on their own research projects unless written delegation of signing authority has been completed |

**Actions you need to take by (date)**

Please review the email indicating the individuals currently delegated on one or more of your research projects.

**Step** | **Action**
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1. | **Review** the list of delegates on file as provided by Research Finance  
   • Is each person involved in the procurement process?  
   • Does each person have the knowledge of the research project to which they have been delegated? |
2. | **Determine** if there are individuals that should be delegated authority for any or all of your Research Projects and  
   • **Complete** the Research Finance Delegation of Signing Authority (DoSA) form for individuals you would like to extend authority to. This form can be found at [http://www.uwo.ca/finance/res-finance/docs/ResearchDelegationOfAuthority.pdf](http://www.uwo.ca/finance/res-finance/docs/ResearchDelegationOfAuthority.pdf) |
3. | **Send** any completed DoSA forms to update delegated authorities to Research Finance on or before **May 23rd, 2014** |

**For further information**

For further details please visit our eProcurement website: [http://www.uwo.ca/finance/mustangmarket/index.html](http://www.uwo.ca/finance/mustangmarket/index.html) or contact Procurement Services at procurement@uwo.ca.  
For information on the DoSA form please contact resfin@uwo.ca.