



Enhancements to the Penn Marketplace

Monday, April 23, 2018

It's been a week since the Penn Marketplace Enhancements went live on Monday, April 16. End users around campus have been successfully using the system and shared information about their experience. This feedback has shaped the specific guidance and resources shared below.

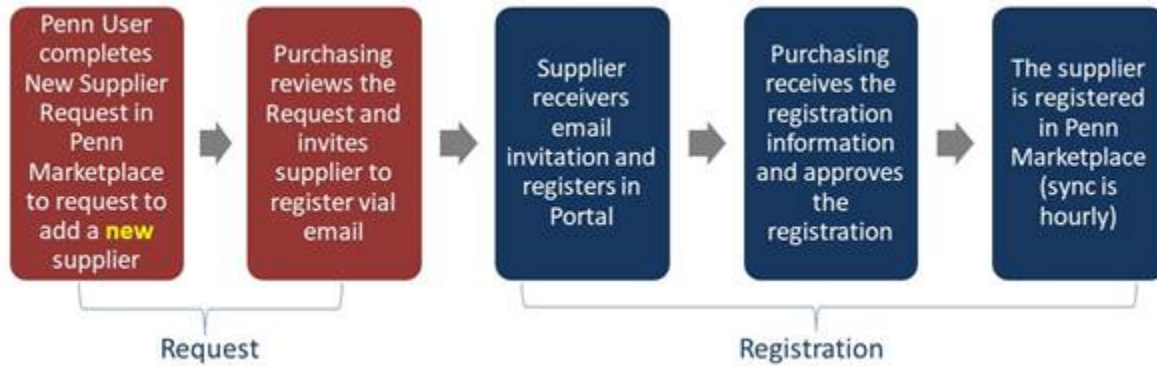
Supplier Onboarding: New Suppliers vs. Existing Suppliers

Before an end user submits a New Supplier Request, a **supplier search** should be conducted to determine whether the organization or individual is an existing supplier already in Penn Marketplace. If the user finds that the supplier is **NOT** present in Penn Marketplace, the user should complete the New Supplier Request Form.

At Go-Live, **Penn's active existing suppliers from BEN were converted into Penn Marketplace** so that users could continue to do business with them. Purchasing Services will send email invitations to these existing suppliers to register in the portal, which will be distributed in waves. This activity is expected to continue throughout the summer months. If a user finds that the supplier appears in Penn Marketplace and would like to have the supplier or payee register before an invitation is issued, **the user can email SupplierSupport@upenn.edu with the supplier's name and contact information.** Purchasing will then email the existing supplier an invitation link to register.

Supplier Onboarding: Statuses

As noted in the process flow below, there are two phases to onboard a new supplier. There is the **Request stage** followed by the **Registration stage**. The user's "My Supplier Requests" dashboard within Penn Marketplace, which can be accessed from the Marketplace homepage on the right-hand side under the "My Supplier Requests" link, shows statuses for each stage. On the Penn Purchasing Services website, the [Definition of Supplier Registration Statuses](#) document outlines these statuses. In addition, a user can use the "book icon" on the dashboard to view the statuses. Once the supplier's registration is approved by Purchasing, **it can take up to an hour** for the user's dashboard status and the supplier's status in Penn Marketplace to be updated.



High Level Supplier Onboarding Process

Non-PO Payment Hierarchy Maintenance

All changes to the Non-PO Payment Hierarchy or the SP Hierarchy should be made by having the new Preparer or Approver submit the [BEN Financials / Penn Marketplace Access Request e-Form](#) after completing the required training for his or her defined role. Access will be granted after training is completed and the School/Center supervisor and Access Administrator have approved the e-Form.

Forwarding Non-PO Payment Requests

Approvers have the flexibility to “forward” a Non-PO Payment Request to any employee with a PennKey, such as a Grant Administrator or Principal Investigator, for review and approval in Penn Marketplace. A notification will be sent via email stating that a Request is pending approval. However, this individual may not have taken training and might be unaware of the steps to take to approve the request. As a best practice, the Approver forwarding the Request should provide advanced notice to the person reviewing the Request and an explanation of his or her role and how to access Penn Marketplace. Also, that person can be directed to the **Approving Non-PO Payment Requests Quick Reference Guide (QRG)** located on the [Reference Guides](#) page of the Purchasing website. The Forwarding function for Non-PO Payment Requests is also addressed in the Approvers training on Knowledge Link. To learn more, please see the [FAQs](#) on the Purchasing Services website.

System Notifications to Approvers

Approvers can set notification preferences in their user profile to receive emails announcing when a form is waiting for approval. The notification emails contain a link, which should lead the Approvers directly to that form. **Approvers must be logged into Penn Marketplace**, however, for the link to function properly. Approvers can also find the items that need their approval under their notifications (the “bell icon”) in the upper right-hand corner of their Penn Marketplace homepage.

New Quick Reference Guides (QRGs)

Two new quick reference guides have been developed to assist users with “**Submitting Non-PO Payment Requests**” and “**Getting Started in Penn Marketplace.**” Both QRGs, along with several others, can be found on the Penn Marketplace [Reference Guides](#) page.

User Support: BEN HELPS and Q&A Sessions

If end users are having technical issues or need user support, they should contact BEN HELPS at 215.746.4357 or enter a ticket via BEN Helps Online Support at <http://BENHelps.finance.upenn.edu>. If a user would like additional information on the Penn Marketplace or to provide feedback about the system, they may contact the Project Team at PennMarketplace@upenn.edu. Finally, two additional Q&A sessions with the Project Team have been scheduled so users can [register](#) and get their questions addressed.