



Enhancements to the Penn Marketplace

Tuesday, April 3, 2018

Welcome to the Penn Marketplace Enhancements Update, which details the latest information on this initiative. Please review the communication carefully as it covers **important dates** and **relevant procedural changes** before and after Go-Live on Monday, April 16.

Training is Here:

Preparers and Approvers in the Non-PO Payment Request process were sent their assigned web-based training from Knowledge Link on Wednesday, March 28. **Preparers and Approvers should complete the training by Friday, April 13 at 5p.m** to gain access to the Non-PO Payment Request form at Go-Live and, if applicable, the SP Payment Request form in Penn Marketplace. If training is not completed on time, individuals will not be granted access to these forms on April 16 and Preparers or Approvers will need to **submit a BEN Financials and Penn Marketplace Access Request e-Form** to request access once their training is successfully completed. Schools and Centers have selected their Preparers, Approvers, and the Approvers' dollar authorizations. If Penn staff have any questions about these designations, they should contact their Senior Business Administrator for clarification.

Q&A Sessions

In addition to the training, users can opt to register for an upcoming **Q&A Session facilitated by the Project Team** to address questions about **any of the functionality** in Penn Marketplace. These sessions will address questions about the general navigation of the system, the Non-PO Payment Request process, onboarding new PO and Non-PO suppliers/payees, and PO invoicing. These hour-long sessions are open to any users on campus and will be held at least once a week beginning the week of Monday, April 2. Clicking on this [registration link](#) will allow users to view the session schedule and register to attend.

Non-PO Payment Hierarchy Maintenance

Before Go-Live

The final Non-PO Payment Hierarchy and SP Payment Hierarchy have been submitted to the technology vendor, Jaggaer, to load into Penn Marketplace for Go-Live. It is, therefore, **not possible** to make any changes to this hierarchy until after Go-Live. However, if any individual in the Schools or Centers needs guidance or clarity on their role, access, or dollar authorization as a Preparer or Approver, **they should contact their School or Center local administrators**, who are listed in the attached document. If Schools or Centers wish to add or modify their Preparers and/or Approvers at this time, they should advise their new designees to complete the training **before Go-Live**. These individuals can self-assign the training in Knowledge Link or Supervisors can assign training for others as needed in Knowledge Link. After taking the training, the BEN

Financials and Penn Marketplace Access Request e-Form can be submitted starting Monday, April 16 to gain access as quickly as possible.

After Go-Live

After Go-Live, **all changes** to the Non-PO Payment Hierarchy or the SP Payment Hierarchy should be made by having the new Preparer or Approver submit the **BEN Financials and Penn Marketplace Access Request e-Form**. If a new Preparer or Approver is being added, they also should complete the necessary training for their role. Once the e-Form is approved and training is complete, access to the necessary forms will be granted to new Preparers or Approvers by Central Administration.

Important Dates:

Below are important dates to carefully consider over the next few weeks.

- ✓ **Wednesday, March 28** – Web-based training launched for Preparers and Approvers on Knowledge Link
- **Friday, April 6** – Q&A Sessions begin and run through the next four weeks
- **Sunday, April 8** – Multiple ship-to functionality on a single purchase order is removed in BEN
- **Wednesday, April 11** (5 p.m.) – No **new suppliers** may be submitted on paper PDA forms to Accounts Payable. No new suppliers will be added into BEN
 - All supplier onboarding will commence on **Monday, April 16** in Penn Marketplace
- **Friday, April 13** –
 - (3:00 p.m.) All **“in-process” Purchase Orders** should be approved to avoid rejection from Purchasing Services
 - (5:00 p.m.) **BEN Financials will be unavailable** until Go-Live on Monday 4/16 at 8 a.m.
 - (5:00 p.m.) Preparers and Approvers should complete web-based training
- **Monday, April 16** –
 - (8:00 a.m.) **Go-Live** - all functionality is available including Supplier Onboarding, PO Invoicing, and Non-PO Payment Requests
 - (8:00 a.m.) BEN Financials will be available
 - First wave of existing suppliers can be invited by Purchasing Services to register on Penn Marketplace
- **Monday, April 23** – Historical paid invoices and invoice statuses become available to registered suppliers in the portal

We look forward to collaborating with you further as we approach Go-Live in two weeks!

The Penn Marketplace Enhancements Project Team

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“Electronic submission (of Non-PO Payment Requests) and direct deposit will greatly reduce the processing time for Non-PO payments.”

Ian Semmler; Senior Business Administrator, Penn Law