



Enhancements to the Penn Marketplace

March 19, 2018

Welcome to another Penn Marketplace Enhancements Update, where you can find the latest news and information about preparations underway for Go-Live of Penn Marketplace Enhancements. There is a variety of information presented in these Updates so we encourage all recipients to read through them carefully to understand the wider context of this initiative.

Go-Live Date:

The Project Team is excited to announce that the **enhancements to Penn Marketplace are scheduled to Go-Live on Monday, April 16** with functionality supporting Supplier/Payee Onboarding, Purchase Order (PO) Invoicing, and the Non-PO Payment Request process (formerly the PDA).

Preparers and Approvers of Non-PO Payment Requests:

Penn is moving to an electronic Non-PO Payment Request process where paper PDA forms will be replaced by an online request process through the Penn Marketplace. Schools and Centers have identified individuals who will function as Preparers and Approvers for each ORG's Non-PO Payment Request process. A Preparer is a person who can create and submit Non-PO Payment Requests.

Similar to today's TAC cardholder, an Approver will have the ability to review and approve a Non-PO Payment Request in Penn Marketplace to authorize payment. Each Approver will be assigned a dollar-level approval limit of \$5,000, \$50,000, or \$250,000 by their School and Center. If Approvers have questions about their authorization amounts, they should contact their School or Center's Senior BA. More information on the role of Preparers, Approvers, and the structure of Non-PO hierarchies, please see the [FAQs](#) on Penn's Purchasing Services website.

Note: For suppliers that are paid in foreign currency, a new paper PDA-FC Form should be submitted with all necessary documentation directly to Accounts Payable.

Training Requirements:

Preparers and Approvers **must complete a web-based training** assigned to them on Knowledge Link to gain access to the Non-PO Payment Request forms. The Preparer's course has been designed to take approximately one hour. Approvers will need up to ninety minutes to complete their training. **This training will be launched the week of March 26.** Each Preparer and Approver will receive an email from Knowledge Link directing them to the necessary course modules on their Knowledge Link Learning Plan. Voluntary Q&A sessions will be available on

campus to provide support during the transition. The dates of the Q&A sessions will be announced in a future “Penn Marketing Enhancements Update.”

Preparers and Approvers will have an approximately three-week window to complete training before Go-Live. Individuals who do not complete their required training by **5 p.m. on Friday, April 13 will not be granted access to the new forms and/or the ability to approve forms** in Penn Marketplace at Go-Live. Any questions about the content of the training course may be directed to deoftraining@pobox.upenn.edu.

In addition to the web-based training, end users who are part of their School’s or Center’s Non-PO Payment Request approval process can access a Non-PO Payment Request Quick Reference Guide (QRG). It will be available the week of March 26.

Supplier Onboarding

All new suppliers, which includes individual payees, will be onboarded in the Penn Marketplace using the New Supplier Request form. A Quick Reference Guide about completing the New Supplier Request Form in Penn Marketplace will also be available during the week of March 26. Suppliers will be able to access a QRG that explains how to complete their registration and it will be available on the [Doing Business with Penn](#) website page. Since the Penn user’s view of Penn Marketplace is different than the supplier’s view of the portal, **this guide offers Penn users an understanding of what a supplier/payee will see and complete in the system.**

Additional Resources and Support

School and Center [Change Agents](#) and additional resources about Penn Marketplace are available on the [Purchasing Services website](#) to assist you. As always, the Project Team is available to answer any questions you may have at PennMarketplace@upenn.edu.

The Penn Marketplace Enhancements Project Team
PennMarketplace@upenn.edu