Penn Marketplace Enhancements
ABA Presentation
April 23, 2018
Agenda

1. Overall Status Report
2. Getting Started in Penn Marketplace
3. Reminders
4. Resources
Go-Live – By the Numbers

All Penn Marketplace functionality went Live on **Monday, April 16**, with Penn users actively using the system from Day 1!

<table>
<thead>
<tr>
<th>Type</th>
<th>Category</th>
<th>Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data conversion from BEN to Penn Marketplace prior to Go-Live</td>
<td>Number of <strong>Active Suppliers</strong> converted</td>
<td>32,570</td>
</tr>
<tr>
<td></td>
<td>Number of In-Process <strong>Purchase Orders</strong> dating back to October 2016</td>
<td>137,953 POs (311,466 PO lines)</td>
</tr>
<tr>
<td></td>
<td>Number of <strong>Unpaid Invoices</strong> for In-Process Purchase Orders loaded</td>
<td>13,234</td>
</tr>
<tr>
<td></td>
<td>Number of <strong>Paid Invoices</strong> loaded</td>
<td>211,013</td>
</tr>
<tr>
<td>Post Go-Live Activity Numbers</td>
<td>Number of <strong>people trained</strong> (as of 4/20 at noon)</td>
<td>1,271 Preparers 517 Approvers</td>
</tr>
<tr>
<td></td>
<td>Number of <strong>New Supplier Requests</strong> (as of 4/20 COB)</td>
<td>949</td>
</tr>
<tr>
<td></td>
<td>Number of <strong>supplier registrations</strong> (as of 4/20 COB)</td>
<td>335 invited 117 in progress 308 approved</td>
</tr>
<tr>
<td></td>
<td>Number of <strong>Non-PO Payment Requests</strong> sent to “ok to pay” (as of 4/20 COB)</td>
<td>442</td>
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Getting Started in Penn Marketplace

Here are a few important considerations for getting started in Penn Marketplace:

1. If you’re a Preparer or Approver, confirm the link to create Non-PO Payment Requests is available.

2. Go to “View My Profile” to review and personalize your settings:
   – **Defaults for Approving Org & Chart of Accounts** can be updated and added as needed.
     • Found at View My Profile>Default User Settings>Custom Field and Accounting Code Defaults> Code Favorites.
   – **Defaults for Notifications** can be set as desired.
     • Found at View My Profile>Notification Preferences.

Before users submit a New Supplier Request, they should do a **supplier search** in Penn Marketplace.

If a supplier appears in Penn Marketplace, they are an existing supplier.

If a user would like to get an existing supplier registered before their assigned wave, 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.

User will be able to do a supplier search to see when the supplier is invited under “registration status.”
Two stages to onboarding a **new** supplier: **Request** and **Registration**.

"My Supplier Requests" dashboard on Penn Marketplace shows Penn user helpful statuses - [Definition of Supplier Registration Statuses](#) outlines these statuses in these two stages.

- On the dashboard, use the “book icon” to view the legend of statuses.
- Once the supplier’s registration is approved by Purchasing, it can take up to an hour for statuses to be updated.
- Once the new supplier is active in the Marketplace, the Penn user can create the PO or Non-PO Payment Request.
How to Find Your “My Supplier Request” Dashboard

Users can see all of their New Supplier Requests on a dashboard by clicking on the “My Supplier Requests” link OR by scrolling down to the bottom of the homepage and clicking the “Supplier Request” link under “My Form Requests.”
My Supplier Request Dashboard

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Student Awards

All students receiving awards from the University must be onboarded and registered in Penn Marketplace as Non-PO Payees.

Is the award intended to be a surprise to the student at time of presentation?

Yes

1. Penn staff collects student’s W-8, or equivalent for foreign nationals
2. Penn staff completes the New Supplier Request Form as a proxy registration for the student
3. Preparer creates the Non-PO Payment Request for Award, and indicates on the form that a “Will Call” check is needed

No

1. Penn staff completes New Supplier Request to onboard student
2. The student registers in the portal and selects preferred payment method
3. Preparer completes Non-PO Payment Request for Award
4. Student is paid via his or her preferred payment method
Non-PO Payment Requests Reminder

Below are a few helpful reminders when completing the Non-PO Payment Requests.

1. **Invoice #** - Use capital letters (e.g. ALPHA) and numeric characters. Do **not** include any special characters (-, /, ;, * etc.).

2. **Utility payments** – Start the description field off with the account number.

3. **Guest travel reimbursements** - Add the word “receipts” in the description for the GTR worksheet.

4. **Will Call Pickup** – Whoever picks up the will call check form AP needs to know the supplier name, dollar amount and invoice number.
1. Non-PO/SP Hierarchy Maintenance

- All changes should be requested by the (new) Preparer or Approver by submitting the [BEN Financials / Penn Marketplace Access Request e-Form](#) after completing the appropriate training.
  - Central has a significant number of e-Forms since Go-Live, so there may be a brief wait time.
- Changes can include:
  - Adding, modifying or removing Preparers or Approvers
  - Adding or removing ORGS for Approvers
  - Changing dollar authorizations for Approvers
- The e-Form will be approved by the supervisor selected on the form and access will be granted by the School/Center Access Administrator.

2. Quick Reference Guides and Q&A Sessions

- Two new QRGs on "Submitting a Non-PO Payment Request" and "Getting Started in the System" are available [here](#).
- Two additional Q&A sessions have been created. Users can register [here](#).
Do you have any additional questions about Penn Marketplace functionality or regarding process change?

Remember: Users can always contact BEN HELPS for user support!
Questions?