Future Enhancements to the Penn Marketplace
(Supplier Portal Initiative)

ABA Meeting

September 28, 2017
Agenda

1. Project Objectives & Timeline
2. Anticipated Benefits
3. The Value of Change Agents
4. Resources
5. Next Steps
The Goal...

This initiative outlines meaningful objectives for Penn and its suppliers including:

- **Providing greater visibility** into the status of onboarding, invoicing, and payment transactions for end users and suppliers;
- **Improving efficiencies** through automation and supplier self-service; and
- **Enhancing Penn’s controls** through improved, electronic procure-to-pay workflows.
Timeline

- Executed 47 S/C + central interviews, shadow sessions, Supplier Council meetings.
- Held 28 quick briefs w/new Workshop participants, 13 Workshops, and 3 sessions with 2 peer universities.
- Using the data collected, presented business case to Steering Committee on March 24 for unanimous decision.
- During pre-implementation, established governance and working groups to clarify items for implementation.
- Jaggaer began July 10 followed by two-week Planning and 18-week Configuration phases.
- Go Live and associated training targeted for **Go-Live transition in Q3 FY2018**.
Anticipated Benefits

We anticipate the system will reduce or eliminate inefficiencies identified in the Impact Study. The new processes are expected to reduce steps, eliminate re-work, and increase automation.

**Improvements to Onboarding**
- Increased visibility – workflow
- Less research into status
- Automatic reminders/notification to end users/suppliers
- Data security for suppliers

**Improvements to Invoicing**
- Increased visibility into payment status
- Reduced supplier data entry mistakes – fewer holds
- Quicker submission – electronic methods (PO Flip etc.)

**Improvements to the PDA Process**
- Increased visibility - workflow
- Visible status to payment
- Elimination of TAC cards
- Elimination of physical routing
- Quicker processing in AP
- Reduction in duplicates
- Reduced data entry mistakes/returns
- Elimination of Intramural mail for PDAs
- Elimination of Loss
Future Enhancements to the Penn Marketplace

**New Functionality**

- All new functionality can be accessed in the enhanced Penn Marketplace
- Similar look and feel
- Intuitive, easy-to-use system
- Wizard-like features
- Dashboards

*Configuration for Penn’s system is underway; this is a mock up.*
The Value of Change Agents

Change Agents are a critical component of Penn’s Change Management efforts. There are **60 Change Agents** across the university participating in this effort. The main roles of the Change Agent can be explained in the following categories.
Current Resources

Penn Marketplace enhancements pages launch today at [www.upenn.edu/purchasing](http://www.upenn.edu/purchasing).

**Navigation**

- Go to main Penn Purchasing website
- Click on “Marketplace Enhancements” under Quick Links

**Topics**

- History and Governance
- Change Agent Network Resources
- Training Resources
- FAQs & quick reference guides
- News & Announcements
Other Resources

- If you have questions at any time, contact the Project Team at PennMarketplace@upenn.edu
- Contact a Change Agent (see Appendix) for more information
- Seek out the broader community involved, including the Core Team and Steering Committee (see Appendix)
Next Steps

Between beginning of Q2 FY2018 and end of Q2 FY2018

1. Continue configuration discussions and future business process design

2. Walkthrough with Change Agents of partially configured (30-40%) System
   - Incorporate feedback from walkthrough

3. Final configurations and technical integration
   - System validation
   - Training design & development
   - Supplier notification

4. Preparation for training user community
   - Continuation of supplier migration
   - Change Agent preparation

- Not allow honoraria with Corporations (individuals)
Change Agent Network Walkthrough

• Yesterday, there was a successful walkthrough/demo of the partially configured enhanced Penn Marketplace
• ~50 Change Agents provided feedback and posed questions on the new processes and technology
• We covered 10 unique business scenarios including:
  – General Navigation & Set Up
  – Supplier Onboarding
  – PO Invoicing
  – Non-PO Payment Requests (current PDA process)
• We are currently collecting, codifying, and addressing feedback and questions
• Overall feedback was generally positive with constructive suggestions on ways to clarify and improve the tool
• Validation expected to start mid-November
Please email the Project Team at PennMarketplace@upenn.edu or visit the website at www.upenn.edu/purchasing.
Appendix
# Steering Committee Members

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<tr>
<th>Name</th>
<th>Schools/Center</th>
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<tr>
<td>John Horn</td>
<td>Finance</td>
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<td><strong>(Executive Sponsor)</strong></td>
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<td>Tom Murphy</td>
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<td>Marie Witt</td>
<td>Business Services</td>
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<td>Amy Collins</td>
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<td>Dallas Grundy</td>
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<td>Dave Ishmael</td>
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<td><strong>(Team Leader)</strong></td>
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<td>Matt Lane</td>
<td>SAS</td>
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<tr>
<td>Trevor Lewis</td>
<td>Office of Budget and Management Analysis</td>
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<td>Tracey Longs</td>
<td>PSOM</td>
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<td>Jackie Lowry</td>
<td>Nursing</td>
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<td>Maureen McGinness</td>
<td>Wharton</td>
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<td>Mark Mills <strong>(Team Leader)</strong></td>
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<td>Julie Shuttleworth</td>
<td>HCM</td>
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<td>Tom Slavinski <strong>(Team Leader)</strong></td>
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## Core Team Members

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<td>Sandy Ardis</td>
<td>Communications, Business Services</td>
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<td>Chris Bristow</td>
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<td>Brian Caputo</td>
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<td>Janet Dwyer</td>
<td>President's Center</td>
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<td>Carol Henderson</td>
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<td>Vira Homick</td>
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<td>Jason Nestor</td>
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<td>Kristy Owen</td>
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<td>Mike Popko</td>
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<td>Elyse Saladoff</td>
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<td>Ian Semmler</td>
<td>Law</td>
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<td>Renee Smith</td>
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Change Agents

- Danielle McAdams, Annenberg Center
- Katie Xhori, Business Services (RHS)
- Rosalind Carter, Provost (College House)
- Bill Melleby, Dental
- Amanda Wood, Design
- Larry Boggs, Provost (DRIA)
- Liz Jordan, Provost (DRIA)
- Pat Guinan, EVP
- Carol Mercaldo, FRES
- Karen Di Maria, FRES
- Mike Vasco, FRES
- Sam Frenkel, GSE
- Bronwyn Gurley, HR
- Shannon Freitas, Provost (Institute Contemporary Art)
- David Mongeluzi, ISC
- Geoff Filinuk, ISC

- Andrew Beal, Provost (Kelly Writer’s House)
- Jerel Wohl, Law
- Karen Owens, Business Services (Morris Arboretum)
- Matt MacGregor, Museum
- Arlene Kaufman, Nursing
- Jerrie Baker, Nursing
- Candace McMullen, Nursing
- Drew Cahan, Provost (Penn Global)
- Gearline Robinson-Hall, Provost
- Lee Taggart, President’s Center
- Terry Sacksith, President’s Center
- Kaitlyn Ranieri, Presidents Center (DAR)
- Jeannie Williams, President’s Center (OGC)
- Shawn Flack, President’s Center (OGC)
- Christine Rhodes, President’s Center (WXPN)
Change Agents

- Beth Johnston, *PSOM*
- Donna Seravello, *PSOM*
- Ellen Solvibil, *PSOM*
- Jason Molli, *PSOM*
- Jeff Gray, *PSOM*
- Joanne Gorman, *PSOM*
- Karen Moore, *PSOM*
- Liz Butler, *PSOM*
- Marley Goldschmidt, *PSOM*
- Merceda Reale, *PSOM*
- Leslie Tyler, *Public Safety*
- Bruno Fiorenza, *SAS (Chemistry)*
- Yvonne Kline, *SAS (Chemistry)*
- Krysta Hayle, *SAS (Humanities)*
- Susan Cerrone, *SAS (Humanities)*
- Phil Thomas, *SAS (Social Sciences)*
- Kim Peurifoy, *SAS (Social Sciences)*
- Amy Deitz, *SEAS*
- Donald Sokalczuk, *SEAS*
- Ellen Mauer, *SP2*
- Preston Smith, *SP2*
- Jan Kee-Scott, *Provost (University Life)*
- Rob Sadoff, *Veterinary*
- Stephanie Mahan, *Veterinary*
- Bill Lockard, *Wharton*
- Dan Lynam, *Wharton*
- Denise Mount, *Wharton*
- Gloria Chapman, *Wharton*