The Enhanced Penn Marketplace

The enhanced Penn Marketplace offers new functionality, suppliers, and products to further streamline ordering via BEN Buys.

The Requisition and Purchase Order Process is not changing. Only the online catalog where you can search and select items will be different.

You will access the Penn Marketplace just as you do today (through the BEN Buys Requisition Home Page), but will have more features available to assist you in meeting the purchasing needs of your School or Department.

Over 2,000,000 products and approximately 75 suppliers will be available through the enhanced Penn Marketplace.

Having more products available in the Penn Marketplace streamlines the ordering process and helps reduce time spent creating requisitions.

New Features: Overview

The ability to create your own “Favorites” lists.

An “Advanced Search” tool, providing several search options that can be used individually, or in combination.

A “Quick Order” enables the selection of items with a minimum of keystrokes.

The ability to “Punchout” directly to supplier sites.

“Specialized Laboratory Search” fields are available for researchers and lab assistants who wish to search based on Chemical Compounds, Antibodies, and Columns (those interested in this feature can find more information on the Penn Marketplace Specialty Laboratory Search page).
New Features: Favorites

The ability to add items to a list of favorites has been one of the features most requested by BEN Buys users. The enhancements to the Penn Marketplace include several options for creating favorites.

The “My Favorites” lists is completely managed by you:

- Frequently ordered items can easily be added to your own individual list of “My Favorites”.
- Your list of “My Favorites” is easily accessible each time you enter the Marketplace.
- You may create additional lists as needed to meet your procurement needs.

In addition, a separate University “Favorites List” that provides information on best buys and values from approved contract suppliers within the Penn Marketplace.

New Features: Advanced Search

The entire contents of the Marketplace catalog are divided into five main Categories from which you can perform an “Advanced Search”.

Categories include “Laboratory”, “Office/Computer”, “MRO/Facilities”*, “Furniture”, and “Services”

In addition to product categories, several Product Description Fields are available as part of “Advanced Search”. When in the Marketplace, simply click on any field name for a pop-up help window with a description of the field.

*MRO = Maintenance/Repair/Operational items
New Features: Quick Order

“Quick Order” allows you to enter items with a minimum of keystrokes. If you know the catalog number of an item, just enter it in “Quick Order” and you can add it to your cart with one click.

“Quick Order” uses the same Category listing as “Advanced Search”.
If the search engine finds one exact match when entering a “Quick Order”, you will get a confirmation message and the item will be automatically added to your cart.
If more than one result is found when entering a “Quick Order”, you will be able to review the items in the search results before selecting which item to add to your cart.

New Features: Punchouts

“Punchout” is a way of accessing a supplier’s web site from within the Penn Marketplace.

Accessing a supplier’s website via “punchout” through the Penn Marketplace allows you to see University-specific pricing.

For example, by using “punchout” to access a computer supplier’s web site, you could:
- Find and configure a computer on their web site.
- Pull your configured PC back into your Marketplace Shopping Cart as a single line item.

University Procurement & Disbursements

While the Penn Marketplace will have a new look and functionality, procurement and disbursement policies and procedures are not changing.

All BEN Buys users must continue to conduct their purchasing activity in accordance with University financial policies and School and Center specific guidelines.
Requisitions and Purchase Orders

Remember that Requisitions and Purchase Orders are different documents, with different purposes.

Requisitions...
- are internal documents to be used only for initiating and tracking your request within the University.
- can be created either by “Requisitioners” or “Purchase Order Managers”.
- can only become Purchase Orders when approved by a “Purchase Order Manager”.

Purchase Orders...
- are legally binding documents to external suppliers for goods and services.
- can only be generated by first creating, and then appropriately approving a Requisition.

BEN Buys users may not use Requisition or PO numbers to place a “verbal order” with a supplier. University suppliers are instructed not to accept “verbal orders”.

Marketplace vs. Non-Catalog Items

The Penn Marketplace...
- provides on-line access to catalogs of many commonly ordered items from multiple University suppliers.
- contains accurate product and pricing information for the items listed.

Non-Catalog Requests...
- can be created for goods or services not available in the Marketplace.
- are used for all Repair requests.
- require product and pricing information to be obtained from a University-approved supplier before you can enter your requested items.
Requesting Services

Some Services can be obtained from the Penn Marketplace—temporary staffing, for example.

Many Services are not be available in the Marketplace, and can be entered as Non-Catalog Requests.

Some important tips to remember when adding Services as Non-Catalog Requests:

- **Services/Maintenance**: When you select the Non-Catalog item type "Services/Maintenance", the Unit of Measure will automatically change to "US Dollars".
- Enter the entire dollar amount of the Service/Maintenance item into the Quantity field.
- Always enter a “1” (without quotes) in the Rate Per Unit field.

Requesting Repairs

All Repairs are entered as Non-Catalog Requests.

Some tips to remember:

- **Repair**: When you select the Non-Catalog item type "Repair", the Unit of Measure will automatically change to "US Dollars".
- Enter the entire dollar amount of the Repair item into the Service Amount field.

Competitive Bids

All Purchase Orders with a total dollar value of $5,000 or more are automatically routed to Purchasing Services for final review and approval.

Purchase orders of $5,000 or more for non-contract suppliers require Competitive Bidding Information to ensure timely approval in Purchasing Services. (as per University Procurement/Disbursement Policy # 2308).

A minimum of three bids are required for orders equal to or greater than $5,000.
Competitive Bids: Bid Waiver Justifications

In situations where you are unable to obtain three bids, you must explain the particular circumstances by submitting a request to waive the competitive bidding process—commonly referred to as a “Bid Waiver Request”.

Some tips to remember:
- Since prices for items in the Penn Marketplace have already been negotiated by Purchasing Services, Penn Marketplace and Contract Suppliers are exempt from the competitive bidding requirement.
- Use the Penn Marketplace whenever possible to save time and money.

Attachments: Bid & Bid Waiver Information

Attachments must be used to notify Purchasing Services of any Bid/Bid Waiver information included with your Requisition.

When providing Bid/Bid Waiver information, your attachment should be sent as Attention to “Miscellaneous” (from the drop-down box on the Attachments screen).

Refer to the BEN Buys User Guide for additional details on adding attachments to a Requisition.

Special Shipping Instructions

If you have special shipping instructions relating to your order, the information should be indicated in one of the following ways:

For Non-EDI Suppliers, special shipping instructions should be included as an Attachment to the Supplier (for step-by-step instructions, please refer to www.finance.upenn.edu/ben/benfin/adv_note.doc).

For information on special shipping instructions to EDI Suppliers please refer to BEN Advisory dated 6-25-03 (www.finance.upenn.edu/ben/benfin/advisories.shtml).
Receipting

All Purchase Orders of $5,000 or more are automatically marked in the BEN Buys system as “Receipt Required”. This means that Purchase Orders must be “receipted” in BEN Buys before Accounts Payable can process payment for invoices against PO’s of $5,000 or more.

Some tips to remember:
- “Receipting” should only be done once the goods or service have been received in good condition.
- The original Requisitioner can easily “receipt” the items requested, however Purchase Order Managers are also able to receipt items when necessary.

Additional Info and F.A.Q.’s

The enhanced Penn Marketplace will be available on January 5, 2004.

IMPORTANT—You must use one of the following web browsers to use the online training site:
- Internet Explorer 6.0 SP1 for Windows or Macintosh with Virtual PC.
- Internet Explorer 5.x for Macintosh.

Note that only the above listed browsers will be supported in the BEN environment beginning January 5, 2004.

For updates and answers to questions, check the Enhanced Penn Marketplace F.A.Q.’s page.

Also coming this January:
New Office Products Contract Supplier

As of January 5th, the University’s new Contract Supplier for Office Products will be Office Depot.

Distribution of the new Office Depot office products catalogs will begin the week of November 24, 2003. For more details, please check the following:
- Office Depot Contract Announcement
- Office Depot Contract Information pages on the Purchasing Services web site.