Requisitioner
User Guide

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Objectives

Upon completion of this section, you will:

- Have an overview of BEN, BEN Financials and BEN Buys
- Know the desktop requirements for BEN Financials
- Understand the role of the Requisitioner Only responsibility
- Learn the policies surrounding the requisition and purchase order process
- Know how to access the Requisitioner responsibility
- Understand how to create Marketplace and/or Non-Marketplace requisitions
- Learn how to manage requisitions (i.e. approve, reject, etc.)
- Understand how to enter and view receipts using the Requisitioner responsibility
- Learn how to manage Notifications
- Understand how to research requisition and purchase order information
- Know how to utilize BEN Helps
- Learn how to find information about Suppliers
- Understand how to log off from BEN Financials
Overview of BEN

Business Enterprise Network (BEN)
Penn’s business and financial management systems which includes
- Web-enabled applications and tools
- Support structure

Desktop Configuration
Consistent with current University standards
http://www.finance.upenn.edu/ben/benfin/desktop Req/
Local Support Providers (LSP’s)
https://www.isc.upenn.edu/
- List of primary computer support assigned by Center and by Department

Access/Security
Penn eForms
- http://www.upenn.edu/computing/da/eforms/

Important Web Addresses
U@Penn Portal
http://medley.isc-seo.upenn.edu/penn_portal/u@penn.php
- Access to a wide variety of University web sites and information including those listed below
BEN Financials Homepage
http://benapps.isc-seo.upenn.edu
- Access to BEN Financials, BEN Deposits, and BEN Reports
Business Enterprise Network
https://www.finance.upenn.edu/content/business-enterprise-network
- News, Calendar, BEN Reps, BEN Knows, Frequently Asked Questions, Support Information, etc.
Financial Training Department Web Page
https://www.finance.upenn.edu/financial-training-department
- Information regarding courses offered, register for training, view the Bottom Line Newsletter, etc.
Audit and Compliance Web Page
http://www.upenn.edu/oacp/
- Information on controls, compliance mechanisms, and technologies to manage risk as well as providing guidance on the stewardship of University resources
Environmental and Radiation Safety (EHRS)
http://www.ehrs.upenn.edu
- Procedures for purchasing hazardous and radioactive materials
Overview of BEN (continued)

Purchasing Services Web Page
https://cms.business-services.upenn.edu/purchasing/
- Information about BEN Buys, the Commodity Matrix, Supplier information, etc.

Purchasing Forms
https://cms.business-services.upenn.edu/purchasing/policies-a-forms/forms.html
- Request to Add a New BEN Buys Ship-To-Location
- Request for University Tax Exemption Certificate
- Request to Resend Approved Purchase Order to Supplier
- And more...

Need Help?
Dial 6-HELP (6-4357 or 215/746-4357)
- Enter your two-digit School or Center code
- BEN Helps is available 9:00 a.m. to 5 p.m. Monday through Friday

BEN Knows Web Page
https://www.finance.upenn.edu/content/ben-knows-0
- Web site to browse and search for possible solutions to your BEN Financials and BEN Reports questions

Penn eForms
Penn eForms are required for entry to most University financial systems. These eForms should be processed promptly to ensure system access following training. **If an eForm has not been processed within 60 days or more of attending a training course, you will be required to repeat the course to obtain access.**
Glossary of Terms

Accounts Payable

The University's Accounts Payable department is responsible for the timely processing of Supplier invoices issued against University approved purchase orders. Upon shipment of products, or services performed as requested on the official University purchase order, the Supplier is required to submit all corresponding invoices in a timely manner directly to Accounts Payable (within 1 or 2 business days from shipment or service) as instructed on the purchase order. In order to be processed by Accounts Payable, the supplier invoice must reference the same supplier information contained on the purchase order, a unique invoice number, the invoice date, and the appropriate University purchase order number.

Additional Information

A field on the requisition to allow more information to be included on the PO sent to the Supplier, e.g. Quote #.

Approver

A person with the authority to verify that the contents of a requisition are correct and representative of an appropriate University expenditure – can be either a PO Manager or a Requisitioner. A Requisitioner has only internal approval authority. PO Managers have unlimited requisition dollar approval and are given the authority to approve purchase orders in varying amounts. Purchasing Services is the final approver for all purchase orders greater than or equal to $10,000.

Approver Check Out

Check out option used by the PO Manager in order to add account information to a requisition. Only necessary if the budget information was not entered by the Requisitioner.

Assignee

A person who picks-up the Shopper’s cart from the Penn Marketplace and completes the order process through BEN Buys. The Assignee must have access to BEN Buys and thus must be either a Requisitioner or Purchase Order Manager.

Attachment

Attachments are additional information that applies to the record being viewed. (See Appendix B for more detailed information.) There are two types of attachments:

a. Notes - Additional descriptive information about your requisition sent to the Approver, Purchasing Services or Supplier that will be included on a Purchase Order. The attachment may take the form of a URL or text.

b. Scanned image of an invoice or a C-368 form.

Buyer

This individual is the first person to actually approve a requisition which systematically creates the PO; this individual must be a PO Manager. For example, if a Requisitioner creates a requisition, the requisition is automatically routed to their default approver, i.e. a PO Manager. When the PO Manager approves the requisition a PO is created. The PO Manager is the Buyer for this PO.

Category

The code used to group items with similar characteristics. For example: Office.Supplies, Computing.Desktop, Research.Laboratory or Services.Catering.

Checkout

Processing workflow for completion of a requisition used by the PO Manager and the Requisitioner Only to include University Contact information, Delivery, Accounts and Attachments to the requisition. Also used by the Requisitioner Only responsibility with the ability to bypass account entry.
Glossary of Terms (continued)

Default Approver
The individual to whom your Requisition or PO is automatically routed for additional approval. Each individual’s Default Approver is determined by their School, Center, or Department and is set up at the time a user submits their BEN Financials Application Logon Request eForm found at the link below: http://www.upenn.edu/computing/da/eforms/

Deliver-To Location
The location where goods or services are to be delivered by the Supplier. The default deliver-to location can be changed by navigating to the My Profile page. This default location is used on all your requisitions, but you can change the deliver-to information manually on any requisition or any item(s) on a requisition.

EDI Suppliers
Penn Marketplace Suppliers that have agreed to electronically receive University purchase orders and/or submit electronic invoices via Electronic Data Interchange.

Edit Lines
The place within the requisition to enter Delivery, Accounts, and Attachment information to the requisition. All PO Managers must go to [Edit Lines Next] to enter the appropriate information. Individuals with Requisitioner Only responsibility may bypass entering this information or click on [Edit Lines] to enter the appropriate information. If the information is not added, their PO Manager will be required to add the information upon review of the requisition.

Invoice
The Supplier document sent to the University’s Accounts Payable Department to initiate payment for goods and/or services provided by the Supplier.

Item Description
A detailed description of the goods and/or services required.

Item Type
Used in non-Marketplace requests to further describe the type of item you are requesting as either a Goods billed by quantity, Goods or service billed by amount, Services billed by quantity.

Need-By Date
The date when you need the item or service delivered. Default value is set by navigating to the My Profile page. The date is based on order date plus a given number of days. The default need-by date is used on all requisitions, however you can change the need-by date manually on any requisition or any line item(s) on a requisition.

Non-Catalog Request
Items that are not listed in the Penn Marketplace, but are provided by a Marketplace Supplier can be created in the Penn Marketplace.

Non-Marketplace Request
A requisition created for items not available in the Penn Marketplace. It is possible to include both Marketplace and Non-Marketplace items on the same requisition. See Item Type above for additional information.

Notes
Additional information or special instructions about the requisition that you want to bring to the attention of the approver. See the Appendix of this User Guide for additional information.
Glossary of Terms (continued)

**Notification**
System generated information to notify you of an action you are **To Do (Approve or Rejected)** or that an action has been completed (**FYI – PO has been approved**) or is to be completed in the future (**FYI – Receipt Required**).

**Penn Marketplace**
The Penn Marketplace provides an efficient and user friendly process for faculty and staff to order most commonly required products and specific services from University contract and preferred suppliers. Hosted by SciQuest Incorporated, the Penn Marketplace streamlines the order creation process, promotes utilization of strategic supplier relationships, provides cost savings opportunities, and increases customer satisfaction. All Penn Marketplace items will reflect University contract pricing.

**PO Manager**
Person who has been given authority to purchase goods and services on behalf of the University. The **PO Manager** has the authority to **create** and **approve** a requisition thus generating a **Purchase Order** which will be sent via Electronic Data Interchange (EDI), fax, or US mail to the **Supplier**.

**Pre-Approved**
Status given to a requisition or purchase order that has been approved by a University delegate with an authorized dollar approval limit. If the document is forwarded from one individual to another for additional approval, **not** in the creators ‘approval hierarchy’, its status is considered ‘pre-approved’.

**Procurement Credit Card (Penn Purchasing Card)**
A corporate credit card issued to an employee to purchase items directly from a **Supplier** instead of creating a requisition or purchase order. (Refer to the Commodity Matrix [http://cms.business-services.upenn.edu/purchasing/making-purchases/purchasing-basics/commodity-matrix.html](http://cms.business-services.upenn.edu/purchasing/making-purchases/purchasing-basics/commodity-matrix.html) for guidelines for processing transactions.)

**Notice Regarding Penn Purchasing Card** - All purchasing activity with **Penn Marketplace** Suppliers **MUST** be processed via the BEN Buys purchasing system. For more information regarding the Penn Purchasing Card consult the Purchasing Service web site at [http://cms.business-services.upenn.edu/purchasing/making-purchases/purchasing-basics/card-programs/purchasing-card.html](http://cms.business-services.upenn.edu/purchasing/making-purchases/purchasing-basics/card-programs/purchasing-card.html).

**Purchasing Services**
Purchasing Services is a Supply Management department under the auspices of the University’s Division of Business Services. Purchasing Services is responsible for appropriately $750 Million of annual direct spend and an additional $300 Million of annual indirect spend leveraged collaboratively with other supply and fulfillment related departments.

**Purchase Order (PO)**
Document sent electronically or via fax to the **Supplier** to fulfill your requisition. Each Purchase Order is given a unique number and is an agreement from the University to the **Supplier** that funds have been encumbered for the purpose of acquiring the specified goods and services from that **Supplier**.

**Receipt**
Electronic document created by the **Requisition Creator or a PO Manager** for items received or services performed in a satisfactory manner.

1. Goods received as requested - Positive receipt of goods and services is required by the **Requisition Creator or a PO Manager** for all purchase orders valued at $10,000 or greater. Positive receipt of goods and services is required regardless of the purchase value if "Receipt Required" is activated.
Glossary of Terms (continued)

2. Damaged goods - The designated receiving agent (Requisition Creator or a PO Manager) is responsible for notifying the supplier and the freight transport company immediately upon the discovery of damaged goods, and notifying the Accounts Payable Department in any instance where goods or services are discovered to be in less than satisfactory condition or are not in accordance with the terms of the purchase order.

Receipt Quantity
The quantity of items or services received in a satisfactory condition from a Supplier. The Supplier may ship the total quantity you requested in several shipments. In such cases, the receipt quantity will not equal the total quantity you requested until the final shipment is received and receipted.

Requisitioner ("Requestor")
An individual (PO Manager or Requisitioner Only) who has been given authority by the University to submit electronic requests (Requisitions) for items or services from approved University Suppliers.

Requisition
An electronic request created by the system when a user saves the contents of a BEN Buys Shopping Cart which can hold items from the Penn Marketplace and/or Non-Marketplace requests. The requisition is the document from which purchase orders are created. A single requisition may result in multiple purchase orders.

Shopper
An individual who does not have access to BEN Buys but creates a Penn Marketplace shopping cart through the Purchasing Portal. The Shopper must assign the cart to an individual who has access to BEN Buys (see Assignee) so that the order can be completed through the BEN Buys checkout process.

Shopping Cart
An electronic "basket" used for holding items until the Requisitioner instructs the system to enter (save) them into a requisition. A Penn Marketplace Shopping Cart holds items requested from the Penn Marketplace during one session. Items from the Penn Marketplace are moved to the BEN Buys Shopping Cart when the [Place Order] button is activated. The BEN Buys Shopping Cart holds items and services from both the Penn Marketplace and Non-Marketplace requests.

Supplier
A company that provides a product or service to the University in exchange for money.

Supplier Item Number
The number the Supplier uses to identify an item.

Unit of Measure (UOM)
Designation such as EACH, BOX, PACK, etc. that specifies the unit or volume in which the product may be purchased. BEN Buys recognizes the United Nations (UN) standardized UOM codes. A Unit of Measure is pre-set for items in the Penn Marketplace.
Requisition vs. Purchase Order

A **REQUISITION** is an *internal* electronic request for goods and services.
- Provides a review control mechanism without committing University funds.

A **PURCHASE ORDER** is a legally binding document to an *external* Supplier for goods and services.
- Provides further review and allows for appropriate authorization based on dollar approval limits.
- Functions as a control mechanism in committing University funds for a purchase.
- Provides **SUPPLIER** with a document guaranteeing payment for goods received or services rendered.

<table>
<thead>
<tr>
<th>Action</th>
<th>Requisitioner</th>
<th>PO Manager*1</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a Requisition</td>
<td>Y</td>
<td>N*1</td>
<td>All procurement requirements are created in Requisitioner responsibility</td>
</tr>
<tr>
<td>Create a PO</td>
<td>N</td>
<td>N*2</td>
<td>POs are created upon approval of Requisition by a PO Manager</td>
</tr>
<tr>
<td>Approve/Reject a Requisition</td>
<td>Y</td>
<td>Y</td>
<td>Requisitioner approval will still require approval by a PO Manager</td>
</tr>
<tr>
<td>Approve a Purchase Order</td>
<td>N*3</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Reject a Purchase Order</td>
<td>N*3</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Edit Rejected Purchase Order</td>
<td>N</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Cancel a PO or a PO Line</td>
<td>N</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Finally Close a PO</td>
<td>N</td>
<td>N</td>
<td>Finally Close only done by Accounts Payable</td>
</tr>
<tr>
<td>Invoice Inquiry</td>
<td>N</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Receipts</td>
<td>Y</td>
<td>Y</td>
<td><strong>Requisitioner</strong> can only process receipts for the requisitions they created. <strong>PO Manager</strong> can process receipts for: 1) requisitions they created; 2) any persons who may have left the University or are out on an extended leave of absence.</td>
</tr>
<tr>
<td>Manage Oracle Alerts</td>
<td>N</td>
<td>Y</td>
<td>Alerts are processed via MarkView. Only Buyers receive Oracle Alerts.</td>
</tr>
</tbody>
</table>

*1 This is a comparison of actions in each responsibility. PO Managers will have both the Requisitioner and PO Manager responsibility.

*2 POs are generated when the PO is approved by a PO Manager. POs can’t be created independently.

*3 This function is performed only from the PO Manager responsibility.
Hierarchies

Requisition Hierarchy

- A Requisitioner creates a requisition which is then systematically routed to their Default Approver for further approval. When a PO Manager creates a requisition it is systematically approved.

- Requisition Reviewer may be inserted into the hierarchy, depending on the requirements of your School/Center. This person could possibly be a Requisitioner or a PO Manager. In this capacity the Requisition Reviewer only reviews the requisition. The requisition must be forwarded on via the requisition hierarchy for further approval.

- This option may be useful, for instance, in laboratories where technicians may create a requisition, which then requires approval by the principal investigator before being converted to a purchase order. Note: This individual approving the requisition must have access to the BEN Buys system.

- The first PO Manager to approve a requisition will ultimately become the buyer on any purchase orders resulting from that requisition.

- Requisition Approver will be the last person to receive the requisition, review it, and subsequently approve it. In many cases, they will be required to enter all required account information, based on notes that have been completed by the creator or reviewer. Note: This individual must have the PO Manager responsibility, as their approval will cause this requisition to transition into a Purchase Order(s).

Purchasing Hierarchy

- The Buyer is the first person to actually approve a requisition which systematically creates the PO. Depending on the approval dollar limit, the PO will either automatically forward to the Supplier or be routed on for the next level of approval. Once a requisition is approved, no action is required by the Buyer to move the document forward.

- The Buyer will receive all Oracle Alerts for their POs.

- The Purchase Order ‘Default’ Approver is required when the total dollar value of the PO exceeds the approval dollar limit of the buyer.

- Purchasing Services must approve purchase orders that exceed $10,000.

- If a PO Manager has an approval dollar limit greater than $10,000, any POs less than their dollar limit, but greater than $10,000, the PO will still be systematically routed to Purchasing Services for final approval

**PO ‘Default’ Approver Unavailable?**

If a Requisitioner or PO Manager would like to designate another PO Manager as their ‘default approver’ when their original ‘default approver’ is on vacation, etc., please complete the Request to Add a Vacation Rule and/or Alternate Assignment form:

[https://cms.business-services.upenn.edu/purchasing/policies-a-forms/purchasing.html](https://cms.business-services.upenn.edu/purchasing/policies-a-forms/purchasing.html)

If a Requisition or PO has already been sent to the ‘default approver’ and the ‘default approver’ is not available, i.e. on vacation, etc., the originator of the PO must contact Purchasing Services at procure@upenn.edu so the Requisition or PO can be routed to another Approver.
## Hierarchy Structure: Requisitioner vs. PO Manager

<table>
<thead>
<tr>
<th>Responsibility</th>
<th>Requisition Hierarchy</th>
<th>Purchase Order Hierarchy</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisitioner Only</td>
<td>No $ approval</td>
<td>N/A</td>
<td>• Can create a requisition to be approved by a PO Manager</td>
</tr>
</tbody>
</table>
| PO Manager             | Unlimited             | $ Approval Limit*        | • Can create and approve a requisition, resulting in a purchase order  
|                        |                       | *As set by the PO Manager’s Department                        | • Can approve/reject requisitions forwarded to them  
|                        |                       |                          | • Can approve/reject POs forwarded to them  
|                        |                       |                          | • All POs >$10,000 require Purchasing Services approval                                                                                     |

Two Hierarchies result in two workflows:

<table>
<thead>
<tr>
<th>Requisition Status</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Process</td>
<td>The requisition is awaiting final approval from a PO Manager. The Requisitioner can ‘change’ this requisition in this status.</td>
</tr>
<tr>
<td>Incomplete</td>
<td>The requisition is not been complete i.e. the checkout process has not been started.</td>
</tr>
<tr>
<td>Pre-Approved</td>
<td>The requisition has been forwarded to either a Requisitioner or a PO Manager who is not in the Requisitioners’ approval hierarchy.</td>
</tr>
<tr>
<td>Rejected</td>
<td>The requisition was rejected by the next person in the hierarchy and sent back to the Requisitioner. The Requisitioner can either edit and resubmit or cancel this requisition.</td>
</tr>
<tr>
<td>Approved</td>
<td>Once the Requisition is approved, a PO will be created, and have a status as listed at right:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PO Status</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Process</td>
<td>The purchase order is over the dollar limit of the requisition approver and is waiting for the approval of the next person in the approval hierarchy.</td>
</tr>
<tr>
<td>Incomplete</td>
<td>The requisition is not been complete i.e. the checkout process has not been started.</td>
</tr>
<tr>
<td>Pre-Approved</td>
<td>The purchase order has been sent to a PO Manager not in the person’s approval hierarchy.</td>
</tr>
<tr>
<td>Rejected</td>
<td>The purchase order was rejected by the next person in the hierarchy and sent back to the Buyer of the purchase order.</td>
</tr>
<tr>
<td>Approved</td>
<td>The purchase order has been sent to the Supplier electronically, fax or US mail.</td>
</tr>
</tbody>
</table>
Workflow between Requisitioner, PO Managers, and Suppliers

*BEN Buys Workflow w/Requisitioner Staff
Requisition a.k.a. Internet Procurement (IP)

Requisition Document

Requisitioner Only Staff

Creates Requisition

PO Manager A

Creates Requisitions
also Reviews & Adds Account Info via Approver Checkout for Req Only

Requisition Document

Notes:
- Requisitioner is Responsible for Entering Receipts in BEN Buys

Purchase Order a.k.a. Application

Supplies/Services Delivered to Requisitioner

Note - Requisitioner is Responsible for Entering Receipts in BEN Buys

PO Manager B

PO Manager B routed to PO Manager B via Approval Hierarchy

Supplies/Services Delivered to Requisitioner

Note - all PO's greater than or equal to $5,000 will be sent to Purchasing Services for their final review and approval

Purchase Order below limit of PO Manager A*

Approved PO Send

Purchase Order above limit of PO Manager A*

Approved PO Send

PO Manager B

Note - all PO's greater than or equal to $5,000 will be sent to Purchasing Services for their final review and approval

Supplier A

Supplier B
Purchasing Policies

Competitive Bids*

- Competitive bids are **not** required for purchases from University contract Suppliers and Penn Marketplace participants. However, Purchasing Services is authorized to require competitive bids on **non-Marketplace requests** from University contract Suppliers, if in its judgment, cost savings may be realized or other University objectives achieved.

- Purchases from non-contract Suppliers, not participating in the Penn Marketplace, with an aggregate value of $10,000 or more must be competitively bid.

- Three bids from competent sources of supply will be required. However, circumstances may exist when fewer than three bids or more than three bids may be appropriate.

Bid Waivers*

- Purchase orders for which at least three bids cannot be obtained must be accompanied by a "Request to Waive the Competitive Bidding Process” or a "Bid Waiver Justification.” This request must be entered into BEN Buys via the **Attachment** tab, Attention to: **Purchasing** at the line level for review and approval by Purchasing Services. See the Appendix of this User Guide for additional information.

Service Contracts*

- Purchasing Services analyzes all Supplier contracts/agreements and acts as University signatory authority for all Supplier contracts/agreements, such as lease agreements, maintenance and consulting contracts, etc.

- If a Supplier requires a signed contract to deliver their goods or services, enter a requisition with an attachment to Purchasing Services (Purchasing) informing them the contract will be delivered under separate cover. Forward the original contract to Purchasing Services for signature. Be sure to note the resulting PO# on all pages of documentation prior to forwarding the document to Purchasing Services.

Funds Checking

When an account number is entered on a requisition, BEN Buys verifies that funds are available for the items you wish to purchase.

- Everyone is to heed advisory warnings and to manage all expenditure transactions within available resources.

- If your transaction fails funds checking, always check the account combination being used to ensure that a number has not been entered incorrectly.

- When the fail funds checking with an advisory warning:
  - Use a different and allowable source of budgeted funds
  - Do not execute the transaction

* An option for all Purchase Order documentation, competitive bids, requests for waivers and/or contracts which require signature by Purchasing Services staff, is to send these related documents as an attachment to sourcing@upenn.edu. Please include the associated Supplier Name and the PO number (if any) in the subject line of your email so that Purchasing may easily identify the proper routing of the paperwork.
Logging on to BEN Financials

From the U@Penn Portal Business Tab (http://medley.isc-seo.upenn.edu/penn_portal/u@penn.php)

- Click on BEN Financials>BEN Financials Homepage or type http://benapps.isc-seo.upenn.edu/

These are websites you may want to create a “bookmark” or “favorite” in your web browser

Included on this page is the following information:

Across the Top

- **Contacts** – takes you to information regarding BEN Helps and links to the Local Support Providers, Frequently Asked Questions, and the Financial Training Department
- **News** – takes you to all the published communications regarding BEN
- **Related Links** – takes you to the links for BEN Helps, Desktop Requirements and Setup, Hardware and Software Requirements, BEN Applications, Documentation, Training Information, Purchasing Services, Information Systems and Computing, Office of the Comptroller, and Office of the Vice President for Finance

Along the Side

- **Access and Forms** – takes you to the Document Forms Library which includes forms for BEN Reports, BEN Financials Printers, and Access Request eForms
- **BEN Helps** – takes you to the procedures for BEN Helps and includes a list of the 2 digit code for each School and Center
- **Desktop Requirements** – takes you to the Hardware and Software requirements, installation of the J-Initiator plug-ins for Internet Explorer and installation of MarkView Web Client
- **Documentation** – takes you to the documentation for BEN Balances, BEN Buys and BEN Reports
- **FAQ** – takes you to the ‘Frequently Asked Questions’ for all the BEN activities including BEN Helps, BEN Teaches, and General Usage
- **Training** – takes you to the Financial Training Department homepage
- Click on the **BEN Financials** link to login to BEN Financials

Check here for important system availability messages, etc.
BEN Financials Login Window

- Enter your application User Name and Password
- Click on [Login] or press [Enter]

³ You will see the message below if you enter an incorrect User Name and/or Password

⚠️ Error
Login failed. Please verify your login information.

- If you forget your User Name and/or Password, click on ‘Login Assistance’ and complete the appropriate information
When you click any one of the Responsibilities, or the plus icon to the left of a responsibility, the system displays the navigation paths beneath the selected responsibility.

1. **Requisition Home Page** link is where to begin shopping for goods and services.
2. **Supplier List** link is a listing of all the University Suppliers and information such as PO Sites (including FAX number), Pay Sites, Contract or Non-Contract Supplier, etc.
3. **PO Action History** link is basic information regarding the purchase order such as Date, Amount, Supplier, Status and Buyer.
4. **Shipment Information** link is additional information regarding the purchase order such as Ship-To Location and Contact Info.
1. **Shop at Penn Marketplace** link (a.k.a. Marketplace Request) is your first step in creating a requisition for Marketplace or Punchout Suppliers

2. **Create Non-Marketplace Request** - link is used to requisition goods or services not available through the Penn Marketplace

3. **My Requisitions** – contains a brief listing of the most recent Requisitions created by the user including the Requisition Number, Description, Total, Status and Change
   - Click on the **Requisition Number** or **Description** to view Requisition details — including **PO Number(s)** generated when your Requisition is approved
   - Click on **Status** to go directly to **Approval History** for that specific requisition
   - For additional information and/or search options click on the **Requisition tab** or [**Full List**]

4. **My Notifications** – contains a brief listing of the most recent **FYI** and **TO DO Notifications**. These notifications may or may not require an action by the receiver of the notification, e.g. approval or receipting of a requisition or a purchase order. For additional information and/or more Notifications click on [**Full List**]

5. **Links** – displays useful Purchasing Services links at the bottom of the homepage

6. **Shopping Cart** - link to retrieve saved shopping carts or return to an “In process cart”

7. **Home** – link to return to menu with list of responsibilities available to the user

8. **Logout** – link to sign on to BEN Financials again

9. **User Preferences** – link to change password, select Notifications Email Style and set up user Profile, i.e. Requestor Name, Deliver-To Location and Favorite Charge Account(s)

10. **Help** – will provide you with access to Oracle help documentation
Requisitions Home Page (continued)

11. Shop Tab – this tab brings you to the Requisitions Home Page

12. Requisitions Tab - contains the following sub-tabs

- **Requisitions** – provides a complete list of requisitions created by the user including the Requisition Number, Description, Total, Creation Date, Status and (PO) Order Number and (PO) Order Status

- **Notifications** – BEN Buys creates various types of Notifications for viewing and/or performing certain activities
  - **FYI Notifications** - are typically for informational purposes and do not require action, other than closing.
  - **TO DO Notifications** - require action on the part of the receiver such as approving or rejecting a requisitions and/or purchase orders and/or adjusting rejected requisitions and/or purchase orders.

- **Approvals** – list of requisitions either ‘to Approve’ or that ‘I Have Approved’

13. Receiving – list of all requisitions created by the user for which a systematic receipt is required when the goods or services have been received as well as a list of all requisitions that have already been systematically received

14. Shopping Cart – Displays the number of lines in your current shopping cart prior to clicking on [View Cart and Checkout]

15. Purchasing News – news items related to purchasing regarding procedures, tips and Supplier updates provided by Purchasing Services.
Requisitions Home Page (continued)

User Preferences – My Profile

- Prior to entering and/or approving your first requisition, you must click on the 'User Preferences' tab then click on the 'My Profile' link to verify your default information.

  The Requestor Name and the Deliver-To Location will be blank and must be updated upon receipt of your username and password.

- When you click on User Preferences you arrive at the Change Password screen.
- From here click on My Profile.
- Enter your Requestor Name, i.e. - User Name = MURRAYB
  - Requestor Name = MURRAY, BARBARA 10051234
- Add a Deliver-To Location
- Add a Favorite Charge Account(s) if desired, by clicking on [Add a Row]

  Add as many accounts as needed. Be sure to click on [Apply] periodically.

- When finished updating defaults click on [Apply]
- A confirmation message appears indicating you will need to logout and login to see your defaults activated.

  Note: The Need By Date Offset defaults to 2 days automatically. Feel free to change here or per request.

Be sure to click on [Set as Primary] for one of the Favorite Charge Accounts.

Note: The magnifying glass icon which indicates there is a list of values for this field. Type in a partial value or keyword, click on the magnifying glass and select the desired value.

You may need a wildcard % for certain fields. ABC% finds all values that begin with ABC. %ABC% finds all values that include ABC. %ABC finds all values that end in ABC.
Shop at Penn Marketplace
Penn Marketplace - Home Page

The Penn Marketplace provides an efficient and user friendly process for faculty and staff to order most commonly required products and specific services from University contract and preferred suppliers. Hosted by Jaggaer (formerly SciQuest), the Penn Marketplace streamlines the order creation process, promotes utilization of strategic supplier relationships, provides cost savings opportunities, and increases customer satisfaction.

Click on Shopping Cart to see summary of items selected and View My Cart or Checkout

Click on the ? for information on any screen accessed from the Penn Marketplace Homepage

The Penn Marketplace is enhanced periodically therefore it is best to use their online help for instructional information.

Click on Username to View My Profile or Close Penn Marketplace to leave the Marketplace without making a selection
Shop at Penn Marketplace (continued)

- The screen below is a summary of an active cart, i.e. your Penn Marketplace shopping cart.

   To retrieve a shopping cart, click on the shopping cart icon 🛒 -> My Carts

   ![Shop at Penn Marketplace screenshot]

   - Sort Options includes Price
   - Refine search here by Keyword, Supplier, Category, or UOM

   Name your draft cart if you are not ready to checkout

   Click on [Place Order] to begin the Checkout process or click on Continue Shopping

   **Note:** This item was selected from a Punchout Supplier. You should not use the quantity here. Go back to the Punchout if you need to add additional items. **Tip:** Make the order from a Punchout at least $25 or greater.
Non-Catalog Item

- Non-Catalog Items can only be used with Marketplace Suppliers.
- The feature allows for ordering an item not listed in the Marketplace but supplied by a Marketplace Supplier.
- Item information must be obtained from Marketplace Supplier before non-catalog (a.k.a. freeform) item can order be entered.

- Click on Non-Catalog Item

  - Enter item number in the Part Number (SKU) field

  - Click on search icon

  - Click on [Continue with Non-Catalog Process]

  - Select a Supplier

    - Reminder – the Supplier must exist in the Marketplace

  - Enter the item information, i.e. Product Description, Catalog No. Quantity, Price and Unit of Measure

    - Feature may also be used to request special handling/shipping needs for EDI suppliers by adding the desired information into the Product Description

- Click on [Save and Close]

  - Click on [Close] to cancel out of the Non-Catalog Item screen

- Click on the Shopping Cart in the upper right hand side of screen to see non-catalog item added to the list

- Click Continue Shopping or [Place Order]
Shop at Penn Marketplace (continued)

Assignee – Pick Up an Assigned Shopper Cart

- A Shopper assigns a Marketplace cart to a BEN Buys user, Requisitioner or Purchase Order Manager
- The Assignee receives an email advising that a Shopper has assigned a cart
- The Assignee goes to the Penn Marketplace and clicks on the link *Action Items > Carts Assigned to me* and reviews the cart contents and comments

- The Assignee can ‘accept’ the cart by clicking on ‘Carts Assigned to Me’ under the ‘Action Items’.
- Click on the link under ‘Shopping Cart Name’
- Click on [Place Order] to complete the processing of the accepted Shopper Cart

- The Assignee can also reject the cart by click on [Return Cart]. The cart will then go back to the Shopper.
Non-Marketplace Request

To purchase goods or services from an authorized University of Pennsylvania Supplier (with a PO site) that is **NOT** in the Penn Marketplace, click on the tab **Non-Marketplace Request** from the Requisition Homepage.

* All fields marked with an **asterisk** are required for entering a Non-Marketplace Request.

1. **Item Type** – click on the drop down to indicate whether the requested goods or services are as follows:
   - Goods billed by quantity
   - Goods or services billed by amount
   - Services billed by quantity

2. **Item Description** – enter as complete a description of the goods and/or services as possible

3. **Category** – enter the appropriate commodity group
   - By clicking on the search icon you can see all the choices available in the List of Values

4. **Quantity** – enter the appropriate quantity, if applicable
   - For Goods billed by quantity – enter the number of items needed
   - For Goods or services billed by amount – quantity field replaced by amount
   - For Services billed by quantity – enter the number of hours, days, etc.

5. **Unit of Measure** – enter the appropriate unit of measure, e.g. each, box, day, etc.

6. **Unit Price** – enter the appropriate cost per unit of measure

7. **Supplier Name** – enter the appropriate Supplier name
   - By clicking on the search icon you can see all the choices available in the List of Values.

8. **Site** – this field will automatically populate when you select the Supplier Name from the List of Values

9. **Supplier Item** – Optional field, but it is highly recommended you include the Supplier Item # here.

10. **Additional Information** – Optional field to enter Quote #, Promo Code, etc.

11. **Supplier Contact Name** – Optional field for the Supplier Contact Name

12. **Supplier Contact Phone** – Optional field for the Supplier Contact Phone number

13. **[Add to Cart]** – click on this button when request is complete with all required information
Non-Marketplace Request (continued)

Goods billed by quantity

- Example: Athletics needs 10 (Quantity) basketballs at $50 each (Unit of Measure)

Goods or services billed by amount

- Example: Consulting Services for $5,000

Goods or services billed by quantity

- Example: Plant watering for 12 months (Quantity) at $250 (Rate per Unit) per month (Unit of Measure)

Note: The Contact Name and Phone do not transition to the Purchase Order
BEN Buys Shopping Cart – Checkout Process

Shopping Cart

Features included on the Shopping Cart page include the following:

1. **Return to Shopping** – link to return to the Requisition Home Page to allow you to continue adding items to your requisition.

2. **Quantity** – allows you to change the quantity of the items ordered
   
   For Punchout Suppliers, you should not update the quantity here. Go back to the Punchout site if you need to add/change items.

3. **[Save]** – click here to save your requisition to return at a later time and checkout

4. **[Checkout]** – click here to begin the checkout process, i.e. Delivery, Account, and/or Attachments

5. **Delete Icon** – click here to remove an item from your shopping cart

Saving a Requisition

1. **Requisition Description** – enter a brief description (Note: Defaults to descriptions of first line)

2. **[New Cart]** – click here to begin shopping again

3. **[Continue with Checkout]** – click here to checkout with the original items

To retrieve the 'Incomplete' requisition at a later time and either complete or delete, click on the Requisition # or Description from the Requisition Homepage
BEN Buys Shopping Cart – Checkout Process (continued)

Checkout: Requisition Information

From the Shopping Cart screen, after clicking [Checkout], the screen below appears:

- The following fields will default from the ‘My Profile’ screen under User Preferences:
  - Need-By Date
  - Requestor
  - Deliver-To Location
  - Name
  - Email
    - This will also be on the PO
  - Area Code – need to enter the full number before proceeding or the error message to the right will appear
    - These fields may be changed as desired and the defaults will still remain on future requisitions

Note the magnifying glass icon which indicates there is a list of values for this field. Type in a partial value or keyword, click on the magnifying glass and select the desired value.

You may need a wildcard % for certain fields. ABC% finds all values that begin with ABC. %ABC% finds all values that include ABC. %ABC finds all values that end in ABC.

1. [Cancel] – click here to return to the Shopping Cart
2. [Save] – click here to save your requisition to return at a later time and checkout
3. [Edit Lines Next] – click here to add Delivery, Account, and/or Attachments

[Edit Lines] is optional for all Requisitioner Only responsibility and required for all PO Managers. The requisition shown above was created by a PO Manager. For a Requisitioner Only responsibility it will read [Edit Lines]. If the Requisitioner is not required to ‘Edit Line’, they are able to click on [Next].
BEN Buys Shopping Cart – Checkout Process (continued)

Requisition Information: Edit Lines

- [Edit Lines] or [Edit Lines Next] allows users to update the following information by clicking on the following links:
  - Delivery
  - Accounts
  - Attachments

- Delivery – this is where the following fields can be updated here as desired
  1. **Description** – from the Penn Marketplace or typed freeform for Non-Marketplace orders
  2. **Need-By Date** – defaults from My Profile – ability to change per line as needed
  3. **Receipt Required** – used for item/purchase order less than $10,000 for which Requestor would like to acknowledge in BEN Buys systematically that they have in fact received the goods or services ordered, i.e. Subcontract purchase orders

  - All purchase orders over $10,000 are automatically marked receipt required. This box is only to be used to marked goods or services less than $10,000 when necessary.

---

**Important Note Regarding [Edit Lines] and [Edit Lines Next]**

Upon entering [Edit Lines] it is important to enter information sequentially based on the order of the tabs, i.e. Delivery first, Accounts and/or Attachments second and/or third respectively.
BEN Buys Shopping Cart – Checkout Process (continued)

Requisition Information: Edit Lines (continued)

- **Accounts** – this is where the charge accounts are entered for the requisition. When arriving at this screen, all segments of the charge account will display zzz’s except the object code.

  - The object code defaults based on the Category field, i.e. commodity group. Review the object code here and change if necessary.

- To update the Charge Account(s) click on the first charge account link.

  - Entering the Charge Account is optional for all Requisitioner Only responsibility and required for all PO Managers.

  - Click on [Next]

  - Select a Charge Account from a Nickname (a.k.a. Favorite Charge Account created in My Profile or create and select a new one as needed)

  - Click on [Add Another Row] to 'Split' the cost between accounts

  - Click on **Apply this Cost**...if account is to be charged to all lines

  - Click on [Next]
BEN Buys Shopping Cart – Checkout Process (continued)

Requisition Information: Edit Lines (continued)

- The Charge Account(s) are now entered

  - Note the object code for the Freezer has been manually changed to 1872. The University requires that all items over $5,000 with a useful life of more than one year for which the University retains title must be classified as an asset, i.e. the 18XX object code.

  - See the Appendix section titled ‘Property Management’ for more information regarding the addition of assets in BEN Buys.

1. [Copy] – Select a line or click on Select All to copy
2. [Delete] – Select a line or click on Select All to delete

Important Note Regarding Charge Accounts

If the BEN Buys assigned line item object code is different from the object code selected in ‘My Profile’, for ‘one time only’ you will need to enter the entire account combination and click on [Create]. Once this new account combination is established, it won’t be necessary to create the combination again.

Important Note Regarding Saving a Requisition

If at any time throughout the checkout process you will like to stop, click on [Cancel] and [Save] depending on where you are in the process. Your requisition will be kept in an ‘Incomplete’ status until deciding to complete or delete the requisition.
BEN Buys Shopping Cart – Checkout Process (continued)

Requisition Information: Edit Lines (continued)

Check Funds

- Once the accounts are entered, click on [Check Funds]

  ✔ While [Edit Lines] is not required for Requisitioner Only users, they will be required to click on [Check Funds] in order to continue with the requisition

  ✔ Upon checking funds, one of the two messages below will appear

<table>
<thead>
<tr>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check Funds completed successfully.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Warning</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Check Funds completed with warnings.</td>
</tr>
<tr>
<td>2. Line #1 Distribution #2 The detail account causes a summary account to fail budgetary control in advisory mode</td>
</tr>
</tbody>
</table>

  ✔ If there are multiple accounts on the requisition line and a ‘Warning’ message appears, BEN Buys does not provide which account fails funds check on that line

Options:

- If a ‘Check Funds completed successfully’ message appears, click on [Continue]

- If a ‘Check Funds completed with warnings’ message appears, DO NOT COMPLETE the requisition until an account with available funds has been entered. This is UNIVERSITY POLICY!

⚠️ Do not continue with the requisition if you receive a ‘Check Funds completed with warnings’ message. Find another allowable source of funding the requisition or remove the account from the requisition. You are violating University Policy if you continue with the ‘failed’ account.
BEN Buys Shopping Cart – Checkout Process (continued)

Requisition Information: Edit Lines (continued)

- **Attachments** – this is where to enter notes to the Supplier and/or, for PO Managers only, notes to Purchasing

- **For a list of all the Attachments go to the Appendix section titled ‘Notes and Attachments’**

- Click on the Attachment icon to add an attachment

- A brief description is required

- Entered either a required URL or Text. See required ‘text’ for the ‘To Purchasing’ Notes in the Appendix section titled ‘Notes and Attachments’

- Click on [Apply] to complete adding an attachment

- **Note:** More than one attachment can be placed on a requisition line

- Click on [Continue]
BEN Buys Shopping Cart – Checkout Process (continued)

Checkout: Review Approver List

For **PO Managers**, the screen below appears as PO Managers have unlimited approval authority on requisitions

For **Requisitioner Only**, the name of the default approver based on their approval hierarchy appears under Approver

**Note:** This is the default approver name entered on the BEN Financials Access Request eForm

1. Click on **[Manage Approvals]** if you need to:
   - Insert Approver – use to add an additional approval if desired
   - Change Managerial Approver - For Requisitioners Only, change first approver if:
     - The default approver is unavailable
     - The requisition requires additional internal approval
     - The ‘approver’ selected must have access to BEN Buys
   - Reset Approval List – upon approval of the requisition, this will reset automatically

2. **Note to Approver**
   - For **Requisitioner Only**, enter a desired note such as ‘Please approve asap’ or ‘Charge my grant’, etc.
   - For **PO Managers**, not required as the PO Manager is the ‘approver’ of the requisition

3. **[Add Attachments]** – use to add an attachment to the requisition
   - The attachment added here will be included on each line of the requisition i.e. to all Suppliers, etc.
   - See the Appendix section titled ‘Notes and Attachments’ for additional information

   - Click on **[Next]**
BEN Buys Shopping Cart – Checkout Process (continued)

Checkout: Review and Submit Requisition

The requisition is almost ready to be submitted! On this screen, review the information entered on the requisition.

- Click on [Show] to review each line

1. **[Save]** – click here to save the requisition and submit at a later date
2. **[Printable Page]** – click here to print a copy of the requisition
3. **[Back]** – click here to go back to ‘edit’ the requisition
4. **[Submit]** – click here to submit the requisition.
   - For PO Managers, the requisition becomes a PO
   - For Requisitioner Only, the requisition is electronically sent to the default approver

This message will appear again if you did **not follow University policy** and clicked on [Submit]. Click on [No] & save the requisition until an account number with sufficient funds is entered.
Property Management

The following screen is activated if the Buyer/PO Manager changes the object code to the 18XX series.

- This is required for all items with a purchase value of $5,000 and over and has a useful life of one year

- See the Appendix section titled 'Property Management' for more detailed information

- When all the required fields are complete, click on [Apply]

Radioactive Materials (RAM) Number

To ensure compliance with appropriate agency regulations related to the purchase of radioactive materials as outlined in University Policy #2313, the RAM # must be entered in the following format XXXX-YYYY-ZZ. This number is provided by the office of Environmental Health and Radiation Safety (EHRS).
Requisitions Tab

When clicking on the Requisitions tab all of your requisitions are available for viewing. This page provides a Search feature and the following additional features:

1. [Cancel Requisition] – For Requisitioners Only, an 'In Process’ or ‘Rejected’ requisition may be ‘cancelled’
2. [Change] - For Requisitioners Only, an 'In Process’ or ‘Rejected’ requisition may be ‘changed’
3. [Complete] – For both Requisitioner Only & PO Managers, 'Incomplete’ requisitions may be completed or deleted at a later date
4. Status - See the section titled ‘Hierarchy Structure: Requisitioner vs. PO Manager’ at the front of this User Guide for detailed information regarding the requisition statuses
5. Order – the PO Number will appear here when the final PO Manager (i.e. Default Approver) has approved the PO.
6. Order Status - See the section titled ‘Hierarchy Structure: Requisitioner vs. PO Manager’ at the front of this User Guide for detailed information regarding the PO statuses

- In order to perform any of the above tasks, select a requisition and click on the appropriate button

Reminder: The status of a requisition for a PO Manager will only be Approved, Incomplete, or Pre-Approved i.e. it will never be 'In Process’.

- Click on either the Requisition # link or the Description link to arrive at the screen below
Requisitions Tab (continued)

From the requisition, there is additional information available for viewing:

1. **Approved** – view the ‘Approval History for Requisition’

2. **View** – view the attachment (if applicable) associated with the requisition

   -: Note the attachment here is the Header attachment, not the Line attachment

Note: The Purchase (Order) # is only listed when the PO finally approved by a PO Manager.

Continued on the next page
Requisitions Tab (continued)

3. **Details** – view all info regarding the requisition/PO
   - Shipment
   - Receipt
   - Invoice
   - Payment

4. **(Purchase) Order** – view all the purchase order information here

   ![Click here for more info, i.e. the Charge Account](image)

   ![Purchase Order #](image)
Notifications Tab

Notifications a.k.a. ‘Worklist’ is where you can see the following:

- **Open Notifications** – The following types of ‘notifications’ can be viewed here:
  - PO has been approved
  - PO has been rejected
  - PO will require a receipt
  - Requisition or PO which require your approval

- **All Notifications** – includes both ‘Open’ and ‘Closed’ notifications
  - To ‘close’ a notification click on the link under Subject and click [OK] after opening the link

- **FYI Notifications** – The following types of ‘notifications’ can be viewed here:
  - PO has been approved
  - PO has been rejected
  - PO will require a receipt

- **Notifications From Me** – is not used at Penn

- **To Do Notifications** - Requisition or PO which require your approval

- See upcoming sections for more details regarding the following:
  - Approving a Requisition
  - Rejecting a Requisition

The most recent ‘Notifications’ can also be accessed from the Requisitions Homepage
Approvals Tab

In addition to being able to access ‘Requisitions which require your approval’ from the Notifications tab, these requisitions also appear under the ‘Approvals’ tab.

- From the View drop down box, select ‘Requisitions to Approve’ and click on [Go]
- All the requisitions which require your approval appear here
- For each requisition there are options

1. [Cancel Requisition] – select the requisition and cancel
2. [Respond] – select a requisition and click on [Respond] to see the following screen

Update requisition
Approvals Tab (continued)

The PO Manager is the only one authorized to ‘approve’ a requisition. Their own requisitions are automatically approved as they, PO Managers, have unlimited dollar authority for a requisition. For requisitions sent to PO Managers from an individual with Requisition Only responsibility, these requisitions are not required to have a ‘Charge Account’, a.k.a. a Penn Accounting Flexfield, therefore the PO Manager must enter the charge account.

1. To access the requisition, click on Update requisition (screen shot on previous page)

2. Click on [Close Approver Cart] to return to the previous screen

3. Click on [Approver Checkout] to make any adjustments to the requisition including adding the Charge Account

   The screens that appear in the ‘Approver Checkout’ are the same screens as the [Checkout] process

4. After updating and/or reviewing the requisition the following options are available:
   1. [Approve] - approve the requisition so it will continue on it’s way to the Supplier
   2. [Approve and Forward] – not used at Penn
   3. [Forward] – not used at Penn
   4. [Reject] – use this option to return the requisition back to the creator.

   Be sure to add a ‘Note’ to explain why the requisition is being rejected

From the View drop down box on the Approvals tab, select ‘Requisitions I Have Approved’ and click on [Go] to see all the requisitions you have approved
Receiving Tab

University policy requires all purchase orders over $10,000 be receipted.

**Important!** Do not process a system receipt until the goods and services have been delivered and are in good condition.

Be sure to only enter the exact quantity/amount received.

Do not receive the entire amount if the entire amount has not been received.

There are two basic scenarios when 'Receiving a Requisition':

**To receive the full Quantity/Amount**
- Click on the icon under Express Receive
- Click on [Submit]

**To receive a portion of the Requisition**
- Click on the Requisition Number
- Click on [Receive]
- Select the line(s) to be receipted
- Adjust the Receipt Quantity (Note: It could be an amount here)

Note: This requisition was originally for $10,000 however, the invoice was for $12,000 due to the fact that more people came to the event. The amount/quantity received should always equal the amount/quantity invoiced!
Receiving Tab (continued)

- Type comment if desired. This is an FYI only.
- Click on [Next]
- Click on [Submit]
- A confirmation with the receipt number will appear at the top of the screen
- Click on [Return to Receiving]
- The Requisition or a portion of the Requisition receipted will now move to ‘My Receipts at a Glance’
Supplier List

From the Home Page, click on **Supplier List**

- Enter a search criteria
  - Supplier Name
  - Supplier Number
  - Supplier Type

- Click on [Go] to execute the query

- The list of suppliers matching your search criteria will be returned.

For more information on the Supplier Portal and how a Supplier can update their information, go to:

https://cms.business-services.upenn.edu/purchasing/supplier-resources/become-a-penn-supplier/supplier-portal.html
PO Action History

From the Requisition Home Page, click on **PO Action History**

- Enter a search criteria
  - PO Number
  - Ship To
  - Supplier
  - Buyer
- Click on [Go] to execute the query

![Simple Search](image)

Note that the search is case insensitive

- Click on the PO Number link, to see the following:

  1. **Action History**
  2. **PO Lines**
  3. **PO Search** – returns you to the original search page shown above

Note you can save your search
Shipment Information

- From Home Page, click on **Shipment Information**
  - Enter a search criteria
    - PO Number
    - Order Date
    - Supplier Name
    - Ship-To Location Code
  - Click on [Go] to execute the query

- Click on University Contact link to view Phone and Email Address

- Click on Ship-To Location Code to Address, City, State and Zip
Appendix A: Sample Requisitions

Property Management (a.k.a. Asset Requisitions)

Let’s say you want to order a freezer. We’d start by searching for the freezer in the Penn Marketplace.

- Click on [Place Order]
- Click on [Checkout]
- Click on [Edit Lines] ; Click on Account tab
- Enter the Charge Account

When entering the account number for an asset, the default object code must be change to one of the following:

- **1870** Furniture and Fixtures
  - e.g. a custom table
- **1871** Computer Equipment
  - e.g. a server
- **1872** Other Capitalized Equipment
  - e.g. research equipment
- **1877** Equipment in Process

Click on the Attachment tab
- Select ‘Purchasing’ and add a note to the Purchasing Services regarding bid info
  - The note to Purchasing Services is required for all requisitions over $10,000
- Click on [Submit]

For Non-Marketplace Requisitions

The ‘Description’ must be a full English language description, including the Manufacturer name and the Model number, if applicable
- Do not type only a Quote # in the description – use the “Additional Information” field to add this information.
Property Management (a.k.a. Asset Requisitions) (continued)

The Property Management Information screen appears. The fields must be completed as outlined below:

<table>
<thead>
<tr>
<th>Line Description</th>
<th>BLDG-FLR-RM</th>
<th>Category Code</th>
<th>Responsible Organization</th>
<th>Govt. Retain Title</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EA-ISTMP UNDERCNTRL FLR</strong></td>
<td>0022-10-1034A</td>
<td>[MOVEABLE-REFRIGERATI]</td>
<td>0103-BIOLOGY</td>
<td></td>
</tr>
</tbody>
</table>

**This page has a horizontal layout. Scroll to the right to enter the required information.**

1. **Description** – defaults from the Penn Marketplace

2. **BLDG-FLR-RM** – this is where the asset is being placed for use. Select the Bldg/Floor/Room from the drop down box.

   The Building, Floor and Room information here should match the information found in Space@Penn and/or Facilities. For additional information on University Buildings go to: [http://www.facilities.upenn.edu/mapsBldgs/](http://www.facilities.upenn.edu/mapsBldgs/)

3. **Category Code** – type in the first few letters of the word 'MOVEABLE'. From the search results select the most accurate category for the asset being purchased.

   The category field drives the appropriate depreciation method, i.e. the number of years the item will be depreciated. If the wrong category is selected the wrong depreciation amount will be expensed.

4. **Responsible Organization** – type or select the appropriate responsible organization for the asset.

5. **Govt. Retain Title?** – for Sponsored Programs, the government may retain title. If yes, check the box, if not, leave blank.

6. **Custodian of Item** – select the individual that is responsible for the property item. This is frequently, but not necessarily, the person that is using the item.

   Custodians must be employees of Penn.

7. **Custodian Telephone** – enter the phone number for the Custodian

8. **Tagging Contact** – select the name of the person who is to receive the asset tag(s) from their Senior BA/Asset Administrator

   Tagging Contacts must be employees of Penn

9. **Tagging Telephone** - enter the phone number for the Tagging Contact

10. **Component of Existing Asset?** – check this box if the purchase is component of an already existing asset. Otherwise leave blank.

11. **Primary Asset Number** – when the box to 'Component of Existing Asset? is checked the Buyer must enter the Asset Number of which the item being purchased is a component in this field. The Primary Asset Number will be validated against existing assets in BEN Assets.

   Contact the Property Management Group to obtain a Primary Asset Number
   [dofproperty@pobox.upenn.edu](mailto:dofproperty@pobox.upenn.edu)

- Click on [Apply] to complete the Requisition process
Requisition for Radioactive Material

BEN Buys must be used for the purchase of all radioactive materials. To ensure compliance with appropriate agency regulations pertaining to the procurement of radioactive materials, University Financial Policy #2313 must be followed. The policy states

“Approval to acquire radioactive materials must be received from the University’s Environmental Health and Radiation Safety Office (EHRS www.ehrs.upenn.edu) prior to the creation of a purchase order.”

- ERHS will provide Requisitioners with a Radioactive Material (RAM) Number in the following format:
  - XXXX-YYYYY-ZZ

  Each radioactive item requires a unique RAM number

Radioactive Items Penn Marketplace

From the Requisitions Home Page create a catalog request by selecting Shop at Penn Marketplace

- Search the Marketplace using the various search criteria; Click [Search]

  ![Image of Penn Marketplace with search icon highlighted](image)

  Note the icon for radioactive materials.

- Once the requisition has been completed, the following pop-up screen will appear after clicking on [Submit]

  For Non-Marketplace items the pop-up screen appears by entering object code 5235 in the Charge Account

- Enter the RAM # provided by EHRS and click on [Apply]

  ![Image of Requisitions screen with RAM input highlighted](image)

  This screen appears by selecting the radioactive icon in the Marketplace or by typing object code 5235 in the Charge Account.
Catering Requisition Requiring a Deposit

For a requisition requiring a deposit, create a Non-Marketplace requisition with at least two lines – a deposit line and a balance due line.

- Line one of the requisition should represent the deposit amount due the Supplier

**Lines of the PO** are ordered **alphabetically** based on the ‘Item Description’ field of the requisition. To ensure the order of the PO lines is the same as the requisition lines, alphabetize the description by placing an ‘A.’ at the beginning of the description for **Line 1** and ‘B.’ for **Line 2**, etc.

**Receipts** will be required for both lines of this PO

**Line 1 – Deposit** – receipt asap, i.e. as soon as the PO is approved by Purchasing

**Tip:** Hand carry invoice to Accounts Payable for payment of deposit

**Line 2 – Balance** – will be receipted after the service has been performed

Since this PO is a ‘Non-Contract’ Supplier, three bids must be sent to the Purchasing Dept.
Receipt when Invoice and Original PO Quantity/Amount Differ

In order for Accounts Payable to pay an invoice appropriately, the receipted quantity of an item should reflect the actual quantity/amount received. For example:

- The original PO quantity/amount for this PO is **$950**
- The 'balance due' invoice from the Supplier is for **$1,200** as there were more people attending the party
- **Amount to be receipted is the invoice amount of $1,200**
  
  If the invoice amount were less than the PO amount, again, the amount to be received in the system is the true amount of the goods or services received i.e. the invoice amount NOT THE AMOUNT OF THE ORIGINAL PO.

The 'received' amount should always reflect the amount of the payment due to the Supplier!

![Image of receipt process](image)

**Note:** This requisition was marked 'Receipt Required' for as desired by the creator of the requisition.

Receipt of Periodic Services/Maintenance

Receipts should be created periodically for services and/or maintenance to reflect the appropriate amount to be paid.

For example: If a PO is created for $12,000 and the Supplier will sent invoice on a monthly basis for $1,000, enter the receipt amount as $1,000 each month. Do not click on the Express Received icon.

- **Original Amount:** $12,000
- **Receipt Quantity:** Only $1,000 each month until the 12th invoice is received from Supplier
Requisition for Temporary Employment

AppleOne, a University preferred contract Supplier for temporary staffing solutions, is in the Penn Marketplace as a Punchout.

- From BEN Requisitions Home Page select **Shop at Penn Marketplace**
- Click on the ‘AppleOne’ Punchout

- From the AppleOne Punchout, click on the UPENN Manager Reference Guide

  Note: In order to access this Reference Guide, you must be logged into the Penn Marketplace.

This document will serve as a tool to guide you through the most common tasks in the process of engaging and managing a Temporary Worker during their assignment at UPENN utilizing AccelerationVMS.

Upon reviewing this guide, you should have a better understanding of the AccelerationVMS technology, and how to utilize its many functions in support of the contingent labor program.

**Highlights at a Glance**

- Opening a new requisition
- Reviewing candidates
- Interviewing and selection process
- Purchase Orders
- Timecard and Expense approval
- Managing Assignments
## Appendix B: Use of Notes and Attachments

<table>
<thead>
<tr>
<th>NOTES</th>
<th>Header Level</th>
<th>Line Level</th>
<th>When Adding an Approver</th>
</tr>
</thead>
</table>
| Note to Approver       | Used by Requisitioner Only to relay information to Requisition Approver (i.e. PO Manager) regarding the entire Requisition. | Not Applicable | Used by Requisitioner to relay information to an additional internal approver regarding the entire Requisition.  
If a requisition was forwarded to you, and you're forwarding to an additional Approver, clear the original Note to Approver and add a new note here. |
|                        |              |            |                                                                                        |
|                        | Note: Information on account or grant usage should be included here. |            |                                                                                        |

<table>
<thead>
<tr>
<th>ATTACHMENTS</th>
<th>Header Level</th>
<th>Line Level</th>
<th>When Adding an Approver</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal to Requisition</td>
<td>Not Used</td>
<td>Not Used</td>
<td>Not Used</td>
</tr>
</tbody>
</table>
| To Purchasing         | Not Used     | Required to document Competitive Bids or justification of Bid Waiver for over $10,000 PO. **Possible note to Purchasing Services:**  
- Contract Supplier – No Bids Required or  
- Bids to Follow* or  
- Sole Source Supplier  
Purchasing Services will review when PO over $10,000 is automatically routed to them.  
*Can e-mail bids to Purchasing – sourcing@upenn.edu | Not Used |
| To Approver           | Not Used     | Used by Requisitioner to relay information to the Approver regarding a specific line item on the Requisition/PO. | Not Used |
| To Buyer              | Not Used     | Not Used   | Not Used                |
| To Receiver           | Not Used     | Not Used   | Not Used                |
| To Supplier           | Not Used     | Used to sending specific information to Supplier such as delivery instructions. For EDI Suppliers, you must add a Non-Marketplace line to the P.O Important! **Start the Item Description field with ‘ZZZ’:** the rest of the Item Description field is then available for any order instructions you wish to send. **Leave the Supplier Item field blank.** | Not Used |
# Revision History

<table>
<thead>
<tr>
<th>Date</th>
<th>Page Number(s)</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>November 26, 2012 (BAM)</td>
<td>Various</td>
<td>R12 BEN Financials Upgrade</td>
</tr>
<tr>
<td>September 9, 2013</td>
<td>Page 21 - 24</td>
<td>Penn Marketplace New Look</td>
</tr>
<tr>
<td>March 25, 2014</td>
<td>Page 14, 76</td>
<td>Added e-mail address for sending bids, requests for waivers, etc. to Purchasing Services</td>
</tr>
<tr>
<td>April 20, 2015</td>
<td>Page 11</td>
<td>Added ‘Default Approver’ vacation information</td>
</tr>
<tr>
<td>December 18, 2015 (PW)</td>
<td>Pages 5, 8, 11, 45</td>
<td>Purchasing Services website updates</td>
</tr>
<tr>
<td>June 30, 2016 (BDL)</td>
<td>Pages 4, 15</td>
<td>Removed 'BEN Reports’ reference; no longer exists</td>
</tr>
<tr>
<td>September 2, 2016 (BDL)</td>
<td>Page 53</td>
<td>AppleOne Temporary Staffing Service added</td>
</tr>
<tr>
<td>December 21, 2016 (BDL)</td>
<td>Page 53</td>
<td>AppleOne Temporary Staffing Punchout in Marketplace</td>
</tr>
<tr>
<td>May 9, 2018 (BDL)</td>
<td>Various</td>
<td>Penn Marketplace Enhancements</td>
</tr>
<tr>
<td>May 31, 2018 (BDL)</td>
<td>Various</td>
<td>Reviewed and updated various web links</td>
</tr>
<tr>
<td>September 5, 2018 (BDL)</td>
<td>Page 48, 49 &amp; 54</td>
<td>Removed ‘exchange’ from email addresses; removed Object Code 1874 – Collectibles</td>
</tr>
<tr>
<td>January 14, 2019 (BDL)</td>
<td>Various</td>
<td>New ‘Competitive Bid’ and ‘Receipt Required’ Limit from $5,000 to $10,000</td>
</tr>
</tbody>
</table>