

Penn Global

Purchasing One-Page Guide

**Buyer/Requestor Responsibilities**

In order to best facilitate timely and accurate procurement, please adhere to the steps below:

1. Determine if the vendor is a UPenn Supplier
2. Determine the method of purchase
3. If purchasing via PO or Non-PO, share invoice/quote with PGBO
4. Provide complete business justification

**Purchasing Process**

\*If vendor is already a UPenn supplier, advance to next step. If not, be aware of the following:

* New suppliers need to be on-boarded to the Penn Marketplace first.
* You must provide the company name + the **full name** & **email address** of the individual who will be completing the registration.
* [Resource guides](https://cms.business-services.upenn.edu/purchasing/supplier-resources/supplier-resources/reference-guides.html) for new suppliers.

\*If vendor is an individual, stop & contact PGBO. The onboarding & engagement process for individuals is different and must be completed prior to work being performed. [Service Provider Classification forms](https://www.hr.upenn.edu/policies-and-procedures/processes-and-procedures/service-provider-classification)

If purchasing method is a Purchase Order (PO):

* Once vendor is in the Marketplace, you may shop Penn Marketplace and assign the cart to an individual in PGBO.
  + User guide [here](https://benhelps.upenn.edu/support/solutions/articles/15000043422-shopper-role-shopper-guide)
* Alternatively, you may request PO creation to PGBO. Link [here](https://app.smartsheet.com/b/form/6fd4e321a74043b6ba1340db96bb4746).
* Be prepared to send the quote, provide a business justification, and budget source

If purchasing method is a Non-PO payment:

* You can shop in the Marketplace & assign a cart directly to PGBO staff.
* Once vendor is in the Marketplace, you may request a Non-PO payment via the e-form to PGBO. Link [here](https://app.smartsheet.com/b/form/6fd4e321a74043b6ba1340db96bb4746)
* You will need to provide the quote from the vendor, an appropriate business justification, and any relevant budget info.

If purchasing method is a Purchasing Card:

* Ensure the vendor is not in the Marketplace
* Complete all ProCard holder responsibilities associated with purchase.
  + ProCard holder responsibilities [here](https://cms.business-services.upenn.edu/purchasing/making-purchases/purchasing-basics/card-programs/purchasing-card/280-roles-and-responsibilities.html)
* Amazon Business accounts are available to all ProCard holders.

**More Questions?** Ask the Penn Global Business Office!



Purchasing at PENN

Purchasing and related payment transactions are initiated by Penn Global’s Business Office, then processed centrally by Penn.

Everyone who authorizes the expenditure of University funds must confirm each purchase is:

* Reasonable and necessary
* For the purpose of University activity
* Clearly explained via business justification
* Compliant with University & Penn Global policies
* Consistent w/sponsor or donor restriction

What makes a good business justification?

Every purchasing request should be accompanied by an appropriate business justification. This helps PGBO to streamline the process, fulfill our compliance obligations, and make sure they get charged to the appropriate budget/source.

It should….

* provide sufficient detail
* mention if it should be charged to a specific program, project, gift/endowment fund
* provide the answer to…
  + What are you buying?
  + Why are you buying it?
  + Who is it intended for?

Resources

Looking for a vendor: [UPenn Supplier List](https://cms.business-services.upenn.edu/purchasing/making-purchases/find-a-supplier/supplier-search.html)

Not sure which procurement method to use (PO, Credit Card, etc.): [UPenn Commodity Matrix](https://benhelps.freshservice.com/support/solutions/articles/15000046132)

\*Still unsure, ask PGBO!

Log-in to the [Penn Marketplace](https://cms.business-services.upenn.edu/purchasing/making-purchases/penn-marketplace.html). You can:

* look up vendor status
* look up payment status or history
* assign a shopping cart to Finance for purchasing
* Some Quick Reference Guides [here](https://cms.business-services.upenn.edu/purchasing/making-purchases/penn-marketplace/training/reference-guides.html) may be helpful