On November 15, 2015...

- New Document Layout for Requisitions, Purchase Orders and Invoices
- Enhancements to Checkout
  - New Layout
  - Budget Check Process
  - Grant Validation Check
- Dashboard View for Commonly Used Features
- Mobile App for Approvers
- New PunchOut Suppliers
Requisition, Purchase Order and Invoice Layout

✓ New Layout
✓ Link Navigation

☐ Navigational tabs on PRs, POs and Invoices will become left aligned links

☐ Drop down menus for actions like “Withdraw Requisition”, “Add Comment”, “Create Receipt” will be accessible through a new Document Actions link

☐ History tab will become a link opening a new window
PR, PO and Invoice Layout Tabs

Current Layout

✓ Tab Navigation

New Layout

✓ Link Navigation
PR, PO and Invoice Layout Drop Downs

Current Layout

✓ Drop Down Menus

New Layout

✓ Link Navigation
PR, PO and Invoice Layout Drop Downs

Current Layout
✓ History Tab

New Layout
✓ History Link
Checkout Enhancements

Multiple Enhancements to the Checkout Process, Including:

✓ New Layout
  ✓ Link Navigation
    ❑ Tabs & Process Flowchart Navigational Tools become left aligned links

✓ Budget Check Process
  ✓ Budget Check prior to placing order vs. requisition rejection
    ❑ Validate Account Codes
    ❑ Validate Project Status

✓ Grant Validation Check
  ✓ Certify purchases for projects within 60 days of end date
Checkout: New Layout

Current Layout

✓ Tabs & Flowchart Navigation Through Checkout Process

New Layout

✓ Link Navigation Through Checkout Process
Checkout Enhancements

✔ Budget Check Process
  ✔ Budget Checking currently occurs only after placing your order
  ✔ Requisitions that fail budget check reject and have to be replaced. Sometimes this means starting over from scratch
  ✔ November 15th release allows for Budget Check *before* the order is placed. If the order fails, you may edit your cart and recheck the budget, eliminating immediate system rejections.

✔ As a reminder, Budget Check:
  - Validates Account Codes
  - Validates Project Status
Checkout: Budget Check

Current Budget Check

✔ After Order is Placed
☐ Failed = PR Reject

New Budget Check

✔ Before Order is Placed
☐ Failed =
View Message>Update Cart>Check Budget Again

Update Cart>Check Budget Again
Checkout Enhancements

✓ Grant Purchase Validation

✓ Today, Emory Express only ensures the project is open and does not validate important Grant Order requirements

✓ With the upgrade, users will certify orders for projects within 60 days of end date

✓ The Certification is completed through the Grants Purchase Validation step on the Checkout General Link
Checkout Enhancements

✓ Grant Purchase Validation

✓ Checking the Grant Validation box certifies that:

✓ The purchase is essential to the project being charged and the charges are being allocated based upon anticipated usage

✓ You are not aware of any existing item(s) that would be available to this project within Emory and be appropriate to meet the needs of the charged project

✓ You understand that if unused supply purchases at the end of the award exceed $5000 in value, the federal sponsor must be reimbursed for the amount of the remaining supplies
Current

✓ System only verifies Project is open

New

✓ Grant Purchase Validation required on Checkout General Link for projects ending 0-60 days of order
Dashboard View

✓ Accessed from Your Name in Emory Express Banner

✓ Access most commonly used Emory Express features from one page

✓ Graphical view of Requisition status

✓ Messages relative to your Emory Express role
Dashboard View

Dashboard View features:
- **Select your Name to access Dashboard View**
- **Order Here!**
- **Find PRs, POs and Invoices**
- **Link to your bookmarks and helpful documents.**
- **Access Draft Carts**
- **Graphical view of requisition status**
- **Messages geared to your Emory Express role**
Mobile App for Approvers

✓ Mobile App named SciQuest available for approvers
✓ IOS (Apple Products) and Android Devices
✓ Via Apple Store or Google Play
✓ IOS scaled for iPhone and may be difficult to read on iPad devices
New PunchOut Suppliers

✓ 2 suppliers will have PunchOut ordering available (currently only accessible through Shop)
Resources

Available for Preview Now:

- Overview and Full User’s and Approver’s Manual available at
  www.finance.emory.edu/home/Procure and Pay
  Select Training For our Campus > Emory Express

On Release Date:

- 13 Quick Guides on Common Emory Express Processes

Finance Systems Client Support

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