Emory Express Approver Manual

http://www.finance.emory.edu/home/Procure and Pay

e-market@emory.edu

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# Table of Contents

1. EMORY EXPRESS
   1.1 Emory Express Approvals

2. USING EMORY EXPRESS
   2.1 Login
   2.2 Support

3. EMORY EXPRESS HOME PAGE

4. PROFILE
   4.1 Access the Profile
   4.2 User Profile and Preferences
   4.3 Setting up the Mobile App

5. EMORY EXPRESS WEBSITE
   5.1 Reviewing Requisitions in Emory Express
   5.2 Taking Action in Emory Express
   5.3 Approving a Requisition
   5.4 Rejecting a Requisition
      5.4.1 Rejecting All Items on a Requisition
      5.4.2 Partially Rejecting A Requisition
   5.5 Forwarding a Requisition
   5.6 Placing a Requisition on Hold (Assigning Without Immediate Action)
   5.7 Returning a Requisition to the Approval Inbox

6. TAKING ACTION VIA THE EMAIL NOTIFICATION
   6.1 Approving a Requisition via the Email Notification
   6.2 Rejecting a Requisition via the Email Notification
   6.3 Placing a Requisition on Hold via the Email Notification (Assigning Without Immediate Action)

7. TAKING ACTION VIA THE MOBILE APP
   7.1 Reviewing Requisitions in the Mobile App
   7.2 Taking Action Requisitions in the Mobile App

8. ASSIGNING A SUBSTITUTE APPROVER
   8.1 Assigning a Substitute for All Requisition Folders
   8.2 Assigning a Substitute for Specific Department Numbers

9. ADDING COMMENTS

10. EMORY EXPRESS DASHBOARD
10.1 Access the Dashboard .......................................................... 31
10.2 Dashboard Features .......................................................... 31

11. DOCUMENT SEARCH ........................................................... 32
11.1 Simple Search .................................................................. 32
11.2 Advanced Search ............................................................. 33
11.3 Date Range ...................................................................... 35
11.4 Post Filter Options ............................................................ 35
11.5 Quick View Next & Previous ................................................. 35
11.6 Saving Searches ............................................................... 36
11.7 Exporting Searches ........................................................... 37
11.8 Editing and Starting a New Search ....................................... 39
11.9 Customizing your Export Results ......................................... 39

12. INVOICE REVIEW ................................................................. 42
12.1 Electronic Invoices ............................................................. 42
12.2 Paper Invoices ................................................................. 43
12.3 Check Request Invoices ..................................................... 45
1. **Emory Express**

Emory Express is the online purchasing tool for goods and services procured on behalf of the university. It is also used to pay companies when purchase orders and credit cards are not applicable in accordance with the Emory Commodity Matrix. The matrix is available at [http://www.finance.emory.edu/home/Procure and Pay](http://www.finance.emory.edu/home/Procure and Pay) under the **Buying in the Marketplace** tab.

1.1 **Emory Express Approvals**

Emory Express approval limits are designated by the department or division/school and route based on the department number(s) a requisition is charging. Department approvals are required before the requisition is sent to the supplier or Procurement.

Emory Express generates an email notification to approvers when a requisition is pending their approval. Upon receipt of the notification, approvers may take action on the requisition in Emory Express, via the email notification, or through the Emory Express (SciQuest) Mobile App. Please note taking action through the email notification does require establishing a pin in your Emory Express profile.
2. Using Emory Express

Emory Express is easily accessible through the internet on the Procure & Pay website. Faculty and staff who are activated in Emory Express can access the system with their Emory Network ID and password.

2.1 Login

To login to Emory Express:


2. Click on the Procure & Pay tab.

3. Select the Emory Express quick link
4. Enter your Emory Network ID and Password. Login.

Please log out of Emory Express and close your internet browser to end the purchasing section.

2.2 Support

There are several help features available in Emory Express:

- ![❓] icons indicate helpful information is available for a screen or section in Emory Express.
- ![🔍] Place your mouse on a symbol, icon, or form name and additional information will display.
- Email: e-market@emory.edu
- Phone: 404-727-5400
- Useful links are available on the Emory Express Message Board
3. **Emory Express Home Page**

The Emory Express screen is comprised of four main sections:

1. **Banner** - profile, recent transactions, bookmarks, action items, notifications, cart review & checkout
2. **Menu** - home, shopping cart, document search
3. **Dashboard: Message Board and News** - Procurement and Emory Express announcements, quick links, support information
4. **Dashboard: Shopping and Forms** - ordering and check requests (Emory Express training required.)
4. **Profile**

The profile contains user information and preferences. Some settings are determined by the department/division administration or Procurement Services.

Approvers should access their profile to establish contact information and email approval pin.

1. **User Profile and Preferences:**
   a. User Name, Phone Number, and E-Mail address
   b. Language, Time Zone, and Display Settings

2. **Default User Settings:**
   a. Custom Fields and Accounting Code Defaults (SmartKeys and Accounts)
   b. Default Addresses (Ship To and Bill To)

4.1 **Access the Profile**

To access the profile, select the down arrow next to your name and choose **View My Profile**.

4.2 **User Profile and Preferences**

*View My Profile* will launch you to the User Profiles and Preferences: User’s Name, Phone Number, Email, etc. setup page. On this page, you may store your contact information and establish email approval pin.
Enter or edit your Name, Phone Number, Department and E-mail Address. Do not enter a Badge ID as the field is not used at Emory University. Enter your Email Approval Code. Codes require a minimum of four characters. Save your edits.

### 4.3 Setting up the Mobile App

Emory Express offers a mobile app named SciQuest, the host company for Emory Express. Before you use the mobile app, you must add a device to your Emory Express Profile. The app is available for iOS (Apple products) and Android devices through the Apple Store and Google Play Store. Although the app will function on the Apple iPad, it is scaled for the smaller iPhone screen. The display on the iPad may be more difficult to read.

To add a mobile device, select **App Activation Codes**, Add Device.

Enter the Device Name. Select **Yes** to receive your Activation code via email. **Add Device.** Your activation code expires 72 hours after your request so be sure to register your device within 72 hours.
You will receive an email with a registration code and link to download the Mobile App. The App name is SciQuest, the host company of Emory Express. In the activation email, select the applicable button to download the Mobile App.

Mobile Device Authentication
October 2, 2015 at 2:16 PM

Dear Amy Jones,

Congratulations! You're one step closer to activating the SciQuest mobile app on your device. If you haven't done so already, please download the SciQuest app using one of the app store links below and return to this email once the app is installed. If you are not using an Android or Apple device, please proceed to the Register Device button to complete activation.

[Google Play] [Apple Store]

After you download the SciQuest mobile app, return to the activation email to register your device.

Dear Amy Jones,

Congratulations! You're one step closer to activating the SciQuest mobile app on your device. If you haven't done so already, please download the SciQuest app using one of the app store links below and return to this email once the app is installed. If you are not using an Android or Apple device, please proceed to the Register Device button to complete activation.

[Google Play] [Apple Store]

Android and Apple users:
Once you have installed the SciQuest mobile app, please select Register Device.

Register Device

Activation Code will display here.
Select the **Android/Apple: Begin Here!** button.

Your Activation Code will automatically populate if accessing via your activation email. You may also enter it manually. **Enter your Emory Network Password. Register Device.**

Your Mobile App Icon should appear on your device. Please note you are required to enter your Emory Network password when accessing the mobile app.
5. Emory Express Website

The Emory Express web version allows maximum functionality for approvers. In addition to approving, holding, and rejecting requests, the web version allows you to partially reject, forward, and return requisitions to approval folders.

5.1 Reviewing Requisitions in Emory Express

Requisitions pending your approval are accessible through the Action Items link. Select Requisitions.

You may group pending requisitions in your approval inbox by List or Folder.

The List view displays all requisitions pending your approval regardless of the department number charged. It is beneficial when you wish to review by submission date.

The Folders view groups requisitions by the department number charged. You may expand each folder to view the requisitions.
You may use filters on the left to narrow the pending requisitions list and quickly access requisitions by Supplier Name, creating Department Name, Requestor Name, or charged department number (Folders).

Select the Requisition Number to review a requisition.
The requisition summary page appears. Approvers should review requisitions for correct accounting assignment, appropriate business purpose, and overall funding availability. It is important to review requisitions for symbols. symbols indicate a line level change and may be visible under Shipping or the Accounting Codes links. If you see a , be sure to select the corresponding link and scroll to the item descriptions to review the individual line items. Items with shipping addresses or accounting codes that differ from the header will post their special address or code under the item description.

Example 1:

```
VWR INTERNATIONAL INC

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Catalog No</th>
<th>Size / Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 LATEX GLOVE EVOLUTION XS PK100 MICROFLEX Evolution One Gloves Unique 32916-530</td>
<td>32916-530</td>
<td>UNIT PK</td>
<td>7.41</td>
<td>1 PK</td>
<td>7.41 USD</td>
</tr>
<tr>
<td>2 SAFESKIN LXT LATEX GLOVES XLXMTCH Pure G5 LXT Laxx Gloves 82005-728</td>
<td>82005-728</td>
<td>CS</td>
<td>83.60</td>
<td>1 CS</td>
<td>83.60 USD</td>
</tr>
</tbody>
</table>
```

Ship To (same as header)

Delivery Options (same as header)
5.2 Taking Action in Emory Express

Approvers may approve, reject, forward or put requisitions in their queue on hold. After reviewing the requisition, use the Document Actions link to take action.

5.3 Approving a Requisition

Document Actions, Approve/complete step & show next.
If all department workflows are approved, the requisition will route to the next approval group. If the requisition is charging multiple departments and you are not authorized to approve all pending queues, the requisition will only route to the next approval group when all pending groups have approved it.

5.4 Rejecting a Requisition

You may reject an entire requisition or specific items. The requestor will receive an email notification when you reject a requisition which will include your rejection reason. Requisitions are not editable; if they are rejected, the requestor will need to initiate a new requisition in Emory Express.

5.4.1 Rejecting All Items on a Requisition

1. Document Actions, Assign to myself.


3. Enter the reason you are rejecting the requisition. Be specific when possible. For example, if they are using the wrong account code, enter “use account code xxxxx.”

Reject Requisition. The requisition status is now rejected and an email notification will generate to the requester.
Reject Requisition

WARNING: You are about to reject ALL lines on this requisition. Once a PR is rejected, it cannot be reinstated. Click Reject Requisition or Cancel to leave the PR unchanged.

PR Reject Reason

Please change the office supply items to account code 53200.

Symbols indicate they are part of a group order. You must reject all items with the symbol from that supplier.

540 characters remaining

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

5.4.2 Partially Rejecting A Requisition

1. Document Actions, Assign to myself.

2. Locate and check the item(s) you wish to reject. Items with a symbol indicate they are part of a group order. You must reject all items with the symbol from that supplier.

3. Selected Line Item Actions (link is above the first item in the order), Reject Selected Items.
4. *Enter the reason* you are rejecting the requisition. Be specific when possible. For example, if they are using the wrong account code, enter “use account code xxxxx.” **Reject Line Item.** The requisition status is now rejected and an email notification will generate to the requester.

![Reject Line Item](image)

5.5 **Forwarding a Requisition**

You may also forward a requisition to another approver for review. Emory Express will allow you to document the reason you are forwarding a requisition. This is often used when an approver would like supervisory or grant administrator approval on a request. Please note the receiving party must have an approval role in Emory Express.

1. **Document Actions, Assign to myself.**

![Document Actions, Assign to myself](image)

2. **Document Actions, Forward to…**

![Document Actions, Forward to…](image)

3. *Enter the name of the approver* to whom you are forwarding the requisition. **Search.**
4. **Select** the approver.

5. **Enter notes** documenting why you are forwarding the requisition. **Forward.**

5.6 **Placing a Requisition on Hold (Assigning Without Immediate Action)**

When you would like to research a requisition before taking action, you may hold the requisition in your approval queue by assigning it to yourself. This will prevent any others in the approval workflow from taking action while indicating to your approval colleagues and the requester that you are working on the request. Please note that if a requisition is assigned to you, only you may take action. It is important to return any requisitions to the shared workflow folder if you are unable to process prior to a leave of absence.

To assign a requisition to yourself, **Document Actions, Assign to myself.**
5.7 Returning a Requisition to the Approval Inbox

If you would like to return a requisition to your approval colleagues, you may return it to the shared folder. This will un-assign the requisition from your personal inbox and allows your approval colleagues to take action. Please remember to return all requisitions prior to an extended leave of absence.

To return a requisition to the department approval inbox, Document Actions, Return to Shared Folder.
6. Taking Action via the Email Notification

You may also take action on a requisition directly from your email. Email actions include Approve, Assign, and Reject. You must login to Emory Express to Forward, Return, or partially Reject requisitions (see pages 14-18).

Once your approval code is established, email notifications of requisitions pending approval will contain action buttons. Please see page 9 to learn how to establish an email approval code.

Email notifications will include: requester information, items ordered, shipping and accounting.

---

Department ID: 113010 (Financial Operations: PTP): (All Values) Approval Request for Requisition# 56040530

Dear [Approver Name],

The requisition listed below has been submitted for your approval.

**Summary**

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Catalog Number</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Ext Price</th>
<th>Discount</th>
<th>No. of Packing</th>
<th>Capital Expense</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item 1</td>
<td>Glasses, Safety, Jackson Safety, Meets ANSI Z87.1 Standard. Black frames. Case lens with diploes (+1.5)</td>
<td>90029</td>
<td>1</td>
<td>31.74 USD</td>
<td>31.74 USD</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Item 2</td>
<td>Glasses, Safety, Jackson Safety, Meets ANSI Z87.1 Standard. Black frames. Case lens with diploes (+1.5)</td>
<td>90029</td>
<td>1</td>
<td>31.74 USD</td>
<td>31.74 USD</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Item 3</td>
<td>Glasses, Safety, Jackson Safety, Meets ANSI Z87.1 Standard. Black frames. Case lens with diploes (+1.5)</td>
<td>90029</td>
<td>1</td>
<td>31.74 USD</td>
<td>31.74 USD</td>
<td>No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL:** 952 USD

---

**Accounting Codes**

GL Business Unit: DUNV - Emory University
Dean Key: 000000118 - Financial Operations PTP
Account Code: 5320 - Supplies - Lab/Technical
Department ID: 113010 - Financial Operations: PTP
Project Activity:

Additional Accounting Code
Program
Unit

Ready to approve, reject or assign this document to yourself? **Take Action**
6.1 Approving a Requisition via the Email Notification

To approve a requisition from your email notification, select the **Take Action** button.

Select **Approve**, enter a comment if needed, **enter your approval code**, and **Submit**.

6.2 Rejecting a Requisition via the Email Notification

To reject a requisition from your email notification, select the **Take Action** button.
Select **Reject**, enter a comment indicating the reason you are rejecting, enter your approval code, and **Submit**. An email will generate to the requester indicating the rejection reason.

### 6.3 Placing a Requisition on Hold via the Email Notification (Assigning Without Immediate Action)

To place a requisition on hold while you research the request, select the **Take Action** button. Please remember that once you assign a requisition to yourself, your approval colleagues are not able to act on it. You must access Emory Express to return it to the shared approval folder if you wish to release it back to your approval colleagues. See page 17 for steps on returning a requisition to the shared approval folder.

Select **Assign**, enter a comment if needed, **enter your approval code**, and **Submit**.
7. **Taking Action via the Mobile App**

The Emory Express (SciQuest) mobile app is available for IOS (Apple product) and Android devices. The app is available from the Apple Store and from Google Play Store. The app is downloaded to the device. **Note: Although the app will function on the Apple iPad, it is scaled for the smaller iPhone screen. The display on the iPad may be more difficult to read.**

See pages 9-11 for details on establishing mobile app access.

Access the SciQuest (Emory Express) mobile app from your registered device. Login with your Emory Network Password.

7.1 **Reviewing Requisitions in the Mobile App**

Select **Requisitions** to review requisitions pending your approval.

Select **My PR Approvals** to review requisitions assigned to you. Select **Department ID**... to review all requisitions pending approval.
Select the Requisition you wish to review. If a requisition is assigned to you, a people icon and the message Assigned to Me will appear under the requisition details.

Select the + symbols to expand and review the requisition details. Please note: Only header level details appear in the application. If messages appear that accounting /shipping lines vary by line, please review the requisition on the Emory Express website.
7.2 Taking Action Requisitions in the Mobile App

Select the applicable action on the requisition. If you are Rejecting the Requisition, you must enter a comment before selecting the Reject button.

The Mobile App will confirm the selected action and allow you to Return to the Department Folder.
8. Assigning a Substitute Approver

You may schedule a substitute approver for any scheduled absences. The assignee must have approval rights in Emory Express to assume the substitute role. Assignees will receive email notifications when requisitions are pending approval.

To assign a substitute approver, select **Orders & Documents, Approvals, Assign Substitute Approvers.**

8.1 Assigning a Substitute for All Requisition Folders

To assign a substitute for all of your workflow folders, select the **Assign Substitute to All Requisition Folders** button.

*Select the Include Date Range for Substitution* box if you have a scheduled return to work date. *Enter the Substitute Name. Enter the Start and End dates. Assign.*

If you did not set a scheduled End Date, navigate to the **Assign Substitute Approvers page** and select the **End Substitution for All Requisition Folders** upon your return.
8.2 Assigning a Substitute for Specific Department Numbers

To assign for specific Department Numbers, select the corresponding Assign button.

Select the Include Date Range for Substitution box if you have a scheduled return to work date. Enter the Substitute Name. Enter the Start and End dates. Assign.

If you did not set a scheduled End Date, navigate to the Assign Substitute Approvers page and select the corresponding Remove button upon your return.
9. Adding Comments

Emory Express offers an Add Comment action to assist with order communication. It is the primary communication tool used in Procurement and Payment Services regarding orders and invoices. We encourage end users to use this tool when communicating within your department.

To add a comment to a document in Emory Express, locate the document (requisition, purchase order, or invoice number) in Emory Express.

If you have the document reference number, you may locate it using the Quick Search tool on the Emory Express banner

Locate older orders using the Document Search steps on pages 26-29.

Once you have located your document:

1. Select Document Actions, Add Comment.

2. All users who have acted on the document will appear. Select a recipient if applicable. (If your recipient is not listed, see step 3.) Enter your comment. Attach documentation if needed. Add Comment.
3. If your recipient is not listed:
   a. Select **add email recipient**…

   ![Add Comment](Image)

   This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

   Email notification(s):
   - Amy Jones (Prepared by) <ademore@emory.edu>
   - add email recipient...

   ![User Search](Image)

   b. **Search for the recipient and select.**

   ![New Search](Image)

   Users meeting the search criteria: 1

<table>
<thead>
<tr>
<th>Name</th>
<th>User Name</th>
<th>Email</th>
<th>Phone</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hulsey, Jennifer</td>
<td>jhulsey</td>
<td><a href="mailto:jennifer.hulsey@emory.edu">jennifer.hulsey@emory.edu</a></td>
<td>+1 (404) 727-8096</td>
<td>[select]</td>
</tr>
</tbody>
</table>

   ![Add Comment](Image)

   c. **Enter your comment. Attach documentation if needed. Add Comment.**

   ![Add Comment](Image)

   Please advise if you have received these products.

   ![Attach file](Image)

   Attach file to this document (optional):
   - Attachment Type: File
   - File Name
   - File: Browse... No file selected.

   ![Add Comment](Image)

   Add Comment  Cancel
10. Emory Express Dashboard

The Emory Express Dashboard is available through your Emory Express banner.

It offers the following benefits:

1. Access to most commonly used Emory Express features from a single page
2. Graphical view of requisition status
3. Messages relative to your Emory Express role (requestor, approver, etc)

10.1 Access the Dashboard

To access the profile, select the down arrow next to your name and choose **Dashboards**

10.2 Dashboard Features

[Image of Emory Express Dashboard features]

**Access your Approval Inbox**

**Find PRs, POs and Invoices**

**Messages geared to your Emory Express role**
11. **Document Search**

Document Search provides the ability to search across Requisitions, Purchase Orders, and Invoices at the same time. It allows for simple and advanced searches. You may export your results into excel for easy reporting.

11.1 **Simple Search**

The following fields are searchable in the Simple Search box:

- Requisition Number
- Purchase Order Number
- Invoice Number (Emory's Voucher ID generated in Compass Financials)
- Supplier Invoice Number
- Catalog Number
- Requisition Name
- Supplier Name

You may enter a single criterion or enter a combination. If you enter a combination, Emory Express will treat it as an AND search.

To access Document Search, select the **Orders & Documents** icon from the vertical menu. Then select **Search Documents**.

*Enter your search criteria* and **Go**.

Results will appear on the next page.
11.2 Advanced Search

Advanced search allows you to target additional criteria for more specific reporting needs. The following fields may be targeted using Advanced Search:

- Purchase Order Number
- Purchase Order Information (Participants, Dates, Amounts, Supplier, Department originated in)
- Item/Product Information
- Contract Information
- Requisition Information
- Receipt Information
- Invoice Information
- Workflow Step
- Supplier Status
- Receipt, Invoice, or Matching Status
- Custom Fields (SmartKey, Account Codes, Department IDs, Projects)

You may enter a single criterion or enter a combination.

To access Advanced Search, select the Orders & Documents icon from the vertical menu. Then select Search Documents.

Select the advanced search link.
Select a document type to open more filter options.

Enter your search criteria and Go.

Results will appear on the next page.
11.3 Date Range

You may narrow your search results to a specific date range through the Date Range down arrow. Options include:

- Custom Date Range
- By predefined days
- Calendar Month or Year to Date
- Prior Month or Year
- Current Fiscal Year to Date
- Prior Fiscal Year

11.4 Post Filter Options

There are a series of post filter options available from search results. Examples of post filter options include:

- Workflow Status
- Supplier
- Prepared By
- Receipt Status
- Invoice Status

11.5 Quick View Next & Previous

Document Search provides a Quick View link for documents you wish to view without leaving your search results. Select the Quick View link to access Quick View.

The Quick View contains a Next & Previous to help scroll through your results without having to navigate back to the Document Search screen and selecting the next document in line.
11.6 Saving Searches

You can save common search parameters in your Document Search Dashboard. When a search is saved, it retains all search criteria.

1. After running a commonly used search, select Save Search.

2. Name the report. Select a Personal folder. Save.

3. Access Saved Searches through the Orders & Documents icon from the vertical menu. Then select View Saved Searches.
4. Select the applicable Personal folder.
   a. You may Export if no search parameter changes are needed.
   
   b. Select the search name if you need to edit the criteria.
   
   c. Select Add Shortcut to add it to your Orders and Documents Simple Search Screen.

11.7 Exporting Searches
You may export Emory Express order data from a screen view level or at a transaction detail level. The transaction level includes items ordered, delivery addresses and the SmartKeys and Account Codes charged.

1. After running a commonly used search, select Export Search.
2. Enter the file name. Enter a description if needed. Select the Request Export Template down arrow and choose your preferred template. Submit.

3. If you are ready to extract your report, select the Go to Page: Download Export Files button. If you would like to extract your files later, you may access them through the Orders & Documents icon. Select Document Search, then Download Export Files.

4. Select the file name. Save or Open the file. OK.
11.8 Editing and Starting a New Search

Links are available at the top of the Search Results screen that allow you to edit the search or start a new one. Selecting **Edit Search** will take you back to the search screen and retain your criteria. Selecting **Start New Search** will take you back to the search screen and remove your criteria.

![Edit Search and Start New Search](image)

11.9 Customizing your Export Results

You can preset exported fields through custom templates. This allows you to only export the data you wish to see and create cleaner reports.

1. Select the **Orders & Documents** icon. Then select **Document Search, Create and Manage Export Templates**.

![Orders & Documents](image)

2. Select **Create Template for** and choose the **Document Search transaction type**.

![Create Template](image)
3. To customize imported fields, select **Let me choose**. If you are exporting accounting codes, select **Yes** next to “Do you want Custom Fields as columns in your data file”. Choose **Custom Fields – Line Level** to capture line level changes. Select additional Export Files if applicable. Select the **Next** button.

4. Choose the **Custom Fields** you would like to export. If you know the field names, you may search for them. Select the **Next** button.
5. Create a **Template Name**. Then click the **Save** button.

6. You can now choose your Document Search **Export Template** when you export search results.
12. Invoice Review

Suppliers submit Purchase Order invoices directly to Payment Services. Invoices are matched to the Purchase Order and available for submitters and approvers to view. Suppliers may submit invoices electronically to Emory Express, by mail to our imaging service or directly to you if a Purchase Order does not exist (Check Requests). Steps to access invoices depend on the invoice delivery method.

12.1 Electronic Invoices

Electronic invoices are submitted directly to Emory Express. There is no paper image of the invoice; however, the Emory Express Invoice page is Emory’s official system of record.

To access electronic invoices:

1. Locate the Purchase Order number and select it using the Document Search Steps on pages 26-29.

2. Select the Invoices link.

3. Select the Voucher No.
4. Invoice Information displays. Select the Printer Icon for an easy to read format. Note you may review payment information in the Invoice Header level.

12.2 Paper Invoices

Paper invoices are submitted to Emory’s imaging service which uploads the invoice image on your Purchase Order.

To access images of paper invoices:

1. **Locate your Purchase Order number and select it** using the Document Search Steps on pages 26-29.

2. Select the **Invoices link**.

3. Select the **Voucher No.**
4. The invoice image link is located at the top of your screen. Note you may review payment information in the Invoice Header level. Select the Image Attachment.

5. Select the file name. Save or Open the file. OK.
12.3 Check Request Invoices

Check Request Invoices are attached by the Emory Express requester. While invoices are maintained in the department, Emory Express is the official University system of record for Check Request payments.

To access Check Request invoices using Emory Express:

1. Locate your Purchase Order number and select it using the Document Search Steps on pages 26-29.

2. Select the Attachment Overview link.

3. Select the Attachment name.

4. Select the file name. Save or Open the file. OK.