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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 or via the email notification. 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 tab Procure & Pay.

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:

- ![Help Icon](https://via.placeholder.com/150) icons indicate helpful information is available for a screen or section in Emory Express.
- ![Info Icon](https://via.placeholder.com/150) Place your mouse on a symbol, icon, or form name and additional information will display.

- **Email your questions:**
  - Order inquiries: e-market@emory.edu
  - Payment Inquiries: actspay@emory.edu

- Useful links are available on the Emory Express Message Board

<table>
<thead>
<tr>
<th>Useful Links</th>
</tr>
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<tbody>
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<td>Buying in the Emory Marketplace</td>
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<td>Emory Commodity Matrix (Buying and Payment Methods at Emory)</td>
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<td>Account Code Quick Reference List</td>
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<tr>
<td>Supplier Promotions</td>
</tr>
<tr>
<td>Procurement &amp; Payment Services Forms</td>
</tr>
</tbody>
</table>
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.
5. **Reviewing Requisitions**

Requisitions pending your approval are accessible through the *Action Items* link. Select *Unassigned Requisitions Needing Approval*.

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 the Shipping Address or the Accounting Codes. If you see a symbol, be sure to select the corresponding tab 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:

![Example 1 Image]

Example 2:

![Example 2 Image]
6. Taking Action in Emory Express

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

6.1 Approving a Requisition

Change the Available Action to Approve/complete step & show next. Click Go.

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.

6.2 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.

6.2.1 Rejecting All Items on a Requisition

1. Change the Available Action to Assign to myself. Click Go.

2. Change the Available Action to Reject Requisition. Click Go.
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.

6.2.2 **Partially Rejecting A Requisition**

1. **Change the Available Action** to Assign to myself. Click Go.

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. Locate the *For Selected Line Items* Action Box. The box is above the first item in the order. The action should default to *Reject Selected Items*. **Click Go.**

![For selected line items action box](image)

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.

![Add Note window](image)
6.3 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.

*Change the Available Action to Forward to… Click Go.*

> Requisition Number(s) 55967356

Available Actions: Forward to...

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

| Last Name | Jones |
| First Name | Amy |
| User Name | |
| Email | |
| Department | |
| Results Per Page | 10 |

*Select the approver.*

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>Jones, Amy</td>
<td>ademore</td>
<td><a href="mailto:amy.demore@emory.edu">amy.demore@emory.edu</a></td>
<td>+1 (404) 727-4324</td>
<td>[select]</td>
</tr>
</tbody>
</table>

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

For the name Amy Jones: 

Please review this for grant appropriateness. If you approve, please complete the approval process for this workflow step.

877 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.
6.4 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, you must 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, change the Available Action to Assign to myself. Click Go.

6.5 Returning a Requisition to the Approval Inbox

If you would like to return a requisition to you approval colleagues, you may return it to the shared folder. This will unassign 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 requisition to the department approval inbox, change the Available Action to Return to Shared Folder. Click Go.
7. 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 14-17).

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.
7.1 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**.

7.2 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.

### 7.3 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**.
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


Once you have located your document:

1. Click Go in the Available Actions menu.

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]

   Search for the recipient and **select**.

   ![User Search Image]

   Results Per Page 10

   Users meeting the search criteria: 1

   Hulsey, Jennifer
   jhulsey
   jennifer.hulsey@emory.edu
   +1 (404) 727-8096

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

   ![Add Comment Image]

   Please advise if you have received these products.

   950 characters remaining

   ![Add Comment Image]

   Attach file to this document (optional):

   Attachment Type: File
   File Name
   File: Browse...

   ![Add Comment Image]

   Add Comment  Cancel

   c. **Enter your comment. Attach documentation if needed. Add Comment.**
10. 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.

10.1 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.
10.2 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.
10.3 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

10.4 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

10.5 Quick View Next & Previous

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

The Quick View contains a Next & Previous to help scroll through your results without have to navigate back to the Document Search screen and selecting the next document in line.
10.6 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.

10.7 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.
10.8 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.

10.9 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**.

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

Suppliers submit Purchase Order invoices directly to Payment Services. Invoices are matched to the Purchase Order and available for you and your approvers to view. No action is needed from you unless it is over $4999. If it is over $4999, see page 36-37 for steps on acknowledging receipt of your order.

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.

11.1 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 your Purchase Order number and select it using the Document Search Steps on pages 42-45.

2. Select the Invoices tab.

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.

11.2 Paper Invoices

Paper invoices are submitted to Emory’s imaging service who 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 42-45.

2. Select the **Invoices** tab.
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.**
11.3 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 42-45.

2. Select the Attachments tab.

3. Select the Attachment name.

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