Emory Express User Manual

http://www.finance.emory.edu/home/Procure and Pay
e-market@emory.edu

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1. **The Emory Marketplace**

The Emory Marketplace provides 1-stop shopping with direct links to Emory Express as well as internal and external suppliers.

The Emory Marketplace also contains commodity specific information including: contract suppliers associated with the products, instructions on how to make your purchase, and the preferred method of procurement (i.e. Emory Express, P-Card or Corporate Card).

To access the Emory Marketplace:

1) Visit [www.finance.emory.edu](http://www.finance.emory.edu)
2) Select the “Procure & Pay” tab
3) Select the “Buying in the Marketplace” link
2. **Emory Express**

Emory Express is an easy to use application for the creation, submission, and approval of requisitions. The application is accessed via a secure website using your Emory Network ID and password. Its search engines allow for the requisitioning of thousands of products via hosted catalog searches and supplier websites (PunchOuts) while ensuring internal controls through its electronic approval process.

2.1 **Overview**

- **All eligible purchases should go through Emory Express.** Eligible purchases are documented on the Emory Commodity Matrix (accessed from the Emory Marketplace webpage).
- **Accessible via the Internet** with your Emory Network ID and password
- **Approvals** are completed online.
- **Contract Suppliers** are denoted with 🌟. Purchase Orders for contract suppliers are sent directly to the supplier via Emory Express and only go through Procurement if they are $10,000 or greater or submitted through a form.
- **PunchOut Suppliers** provide links to their websites within Emory Express. Orders are returned to the Emory Express shopping cart for address and accounting assignment.
- **Requisitions to non-contract suppliers** via the Shop tool route through Procurement if they are $2000 or greater before submission to the supplier.
- **Non-catalog item** is available for products or quotes not available through the hosted catalogs or PunchOuts.
- **Radioactive material** orders route to Radiation Safety for approval. In addition, they are delivered to Radiation Safety prior to department distribution.
- **Requisitions for Controlled Substances** route to Procurement and then to the supplier to monitor licensing. A copy of the DEA license is required for every order. The shipping address must match the DEA license address.
- **Multiple suppliers** may be included on the same requisition. The Purchase Order (PO) number is assigned for each vendor. See *Purchasing Tips* on page 6 for guidance on combining multiple suppliers on a requisition.
- **Purchasing limits and approval queues** are determined at the Department or the School/Division level. Approvals route according to the Department charged and not the end user. This allows for cross charging on joint department projects.
• Procurement Strategic Sourcing Specialists are available to assist with sourcing and special order processing.

2.2 Purchasing Tips

The following tips will optimize the Emory Express purchasing process:

• Multiple suppliers may be placed on one requisition; however, requisitions are approved in their entirety. Keep approval workflow in mind when processing orders.
  ○ Do not combine standard supply orders with large equipment orders. Large dollar orders require additional School/Division approvals. Also, capital equipment is recorded through the Emory Assets team before it is approved; supplies do not need to route through these approval steps.
  ○ Keep new suppliers in a separate cart as they require additional processing time in Procurement.
  ○ Keep radiopharmaceuticals in a separate cart. All radiopharmaceuticals require additional approval through Emory’s Radiation Safety Office.

• When searching through the Shop hosted catalogs:
  ○ Search by part number. If the part number returns no results, try searching by manufacturer number.
  ○ If an item cannot be found by part number or manufacturer number, try the supplier’s PunchOut if available.
  ○ Search by product description and use the filters to narrow results.
  ○ Contact a Procurement Strategic Sourcing Specialist for assistance in sourcing your product. Strategic Sourcing Specialists are listed on the Procure & Pay About Us website under Contacts – Procure & Contract Administration.

• PunchOut Suppliers:
  ○ May be used for custom designed orders or special quotes. Suppliers will advise when your quote or custom product is available in their PunchOut.
  ○ Are not editable once you leave their website. Confirm your order prior to submitting to your Emory Express Shopping Cart.
3. **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.

3.1 **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.**

![Emory University Login Page]

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

3.2 **Support**

There are several help features available in Emory Express:

- ![Question Mark] icons indicate helpful information is available for a screen or section in Emory Express.

- ![Hand Hold] 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

<table>
<thead>
<tr>
<th>Useful Links</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buying in the Emory Marketplace</td>
</tr>
<tr>
<td>Emory Commodity Matrix (Buying and Payment Methods at Emory)</td>
</tr>
<tr>
<td>Emory Express User Manual</td>
</tr>
<tr>
<td>Lookup Payment Information</td>
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<tr>
<td>Account Code Quick Reference List</td>
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<tr>
<td>Supplier Promotions</td>
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<tr>
<td>Procurement &amp; Payment Services Forms</td>
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</tbody>
</table>
4. **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
5. **Profile**

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

Users can customize the following areas:

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)

5.1 **Access the Profile**

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

5.2 **User Profile and Preferences**

User Profiles and Preferences allows you to store your contact information and establish language and time zone preferences. Select the User Profile and Preferences link to access these options.
User’s Name, Phone Number, Email, etc.

*Enter or edit your Name, Phone Number, Department and E-mail Address.* The department should reflect the department you will charge to ensure the appropriate signature authorities are able to review your transactions. Do not enter a Badge ID as the field is not used at Emory University. **Save** your changes.

Language, Time Zone and Display Settings

Emory Express has established defaults for Language (English), Time Zone (Eastern Standard Time) and Display (color theme, help options, etc). You may change them from this screen when applicable. If you make changes, be sure to **Save**.
5.3 Default User Settings

Default User Settings stores user accounting codes and addresses. Select the Default User Settings link to access these options.

Custom Fields and Accounting Code Defaults

Select the Codes tab to store your SmartKey(s) and commonly used Account Codes. There is no limit to the amount of fields stored; however, it is recommended to only store commonly used codes in order to easily locate them at the time of checkout.
1. To add your SmartKey:
   a. Select the SmartKey **Edit** Button

   b. **Create New Value** and enter the **SmartKey** in the Value box. Do not enter a description. If this is your only SmartKey, you may select **Default** to automatically attach it to all Emory Express carts. **Save**. Repeat to add additional SmartKeys.

2. To add your Account Code:
   a. Select the Account Code **Edit** Button
b. Create New Value and enter the Account Code in the Value box. Do not enter a description. If this is your only Account Code, you may select Default to automatically attach it to all Emory Express carts. Search.

c. Select your Account Code. Add Values. Repeat steps b and c to add additional Account Codes.
Default Addresses

You may also store shipping addresses in your profile. If you ship to multiple addresses, you may assign a primary, or default, address and any supplemental addresses you may need. Addresses not in the system will require approval within your department/school before Emory Express Administrators can establish them in the system.

1. To add your Shipping Address:
   a. Select Addresses for Profile.

   ![Select Addresses for Profile](Image)

   b. Enter the Street Number in the Nickname/Address Text box. 
   Search.

   ![Enter the Street Number](Image)

   d. Select your Address.

   ![Select your Address](Image)
e. Enter the Building/Room. Abbreviate the building name when possible to reduce the risk of shipping label character limitations. Save. Repeat steps a-e for additional addresses. If you are ordering radioactive materials, please review page 56 for the mandatory shipping address.

2. Invoices remit to Payment Services. To add the Payment Services Bill To address:

   a. Select the Bill To tab.
b. **Select Addresses for Profile.** Click the **Down Arrow** and choose the **Bill To** template.

c. **Save.**

d. When successfully added, the Bill To address will display in your Billing Addresses list.
6. **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. Messages relative to your Emory Express role (requestor, approver, etc)

6.1 **Access the Dashboard**

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

- **Order Here!**
  - Find PRs, POs, and Invoices

- **My Bookmarks**
  - Link to your bookmarks and helpful documents.

- **My Requisitions**
  - Graphical view of requisition status

- **My Draft Carts**
  - Access Draft Carts

- **Messages geared to your Emory Express role**
7. **Choosing Products**

Emory Express offers several shopping methods in order to meet the diverse needs of the university.

Emory Express shopping options include
1. Shop
2. PunchOuts
3. Non-Catalog Item

7.1 **Shop**

Shop provides the tools to search the catalogs within Emory Express. You can view and compare products within a product category, add items to your shopping cart, or add items to your Favorites list.

**Searching Catalogs**

To search within a product category, click the drop down arrow and select the category. Then enter the **product description, part (SKU) number, or supplier name**. Click Go.

For additional search criteria, choose **advanced search**.
Preferred Primary Contract : indicates top choice suppliers for Emory
Emory Contract ✭ : indicates Emory negotiated discount pricing

You can filter your search results using links to the left of your search results. You may also Sort by using the drop down at the top of your results.

Enter the number of items you wish to order in the text box and select Add to Cart to begin your order.

7.1.2 Favorites

You may add frequently ordered items to a Favorites folder. To save an item as a favorite, select the add favorite link. The Favorites folder is accessible under your Shop bar.
7.1.3 Compare

To compare multiple items, select the compare link next to the items you wish to relate. Then, select the Compare Selected button at the top of your search results.

7.2 PunchOuts

PunchOuts are direct access to Emory contract pricing on a supplier’s website. You can search for products and add them to your Emory Express shopping cart. Some PunchOuts will open in a new window. Please ensure your pop-up windows are enabled prior to accessing the supplier’s PunchOut.

To access a PunchOut, click on the supplier’s icon.
Search for products, add them to your cart, and submit your order to your Emory Express shopping cart.

To return to Emory Express without any products, choose the Cancel PunchOut button.

### 7.3 Non-Catalog Item

The non-catalog item is used to request items that are not available through Emory Express. It is also used for quotes not accessible via the PunchOut.

1. Select the non-catalog item link under Shop.

2. Enter Supplier and select your supplier. If the supplier is not found, enter New Supplier. The supplier’s name, address and email should be included in the Internal Notes when you checkout (see page 32).

3. Complete the remaining bolded fields. The information should match your quote or the supplier’s website. All quotes should be attached during checkout on the Final Review page. Be sure to only attach your quote at the line level to protect contractual agreements (see page 33).
4. **Select the applicable item classification.** Please note that the Radioactive symbol must be selected for relevant items; failure to classify Radioactive materials accordingly will result in Radiation Safety rejecting your request.

5. **To order additional items from that supplier, select Save and Add Another.** After inputting all items, **Save and Close.**
8. Shopping Cart

The Shopping Cart allows the user to change the quantities for catalog products and delete PunchOut supplier orders.

*Select the dollar amount in your banner to access your Shopping Cart. Then select View my Cart.*

8.1 Changing Quantities

You may change the quantity to increase or reduce your order amount. Select the applicable Update button to save any changes. *The Total should reflect the Unit Price multiplied by the Quantity.*
8.2 Removing Items

1. To remove Shop and non-catalog items, select the corresponding **Remove** button.

2. To remove PunchOut items, **select all items** using the checkboxes to the right of the extended amount. Then select the **Perform an action on...** link at the top of your shopping cart items. **Remove Selected Items**. Return to the PunchOut to shop again.
9. Proceed to Checkout

The Proceed to Checkout command provides functionality to view, add or change the following criteria:

1. Grant Purchase Validation (required for projects ending 0-60 days of order)
2. Shipping and Delivery Options
3. Accounting Codes
4. Internal and External Notes and Attachments

Select the Proceed to Checkout button to begin the checkout process.

You will land on the first page with that needs action. Use the navigation links to access pages you need to edit.

9.1 Grant Purchase Validation

Grant purchase validation is required for any projects within 60 days of their end date. Grant purchase validation certifies that:

a) The purchase is essential to the project being charged and the charges are being allocated based upon anticipated usage.
b) 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.

c) You understand that if unused supply purchases at the end of the award exceed $5,000 in value, the federal sponsor must be reimbursed for the amount of remaining supplies.

To certify projects ending within 60 days:

1. Access the General link.

2. Edit the Grant Purchase Validation line.

3. Check the Grant Purchase Validation box. Save.

9.2 Shipping

The Shipping page allows you to edit shipping addresses and delivery options for your items. You may update the address and/or delivery options for all items in your cart or for individual items. Please note PunchOut orders may not deliver to multiples addresses; each order must deliver to a single address.
9.2.1 Addresses/Delivery Changes for all Items

1. To change addresses or delivery options for all items, edit the Shipping Address or Delivery Options at the top of your page. The Delivery Option defaults to Best Carrier-Best Way. You may edit the option to expedite delivery.

2. If the address is in your profile, you may select from the down arrow. Choose the applicable address and Save.

3. If the address is not in your profile:
   a. Select the click here link.
b. **Select from org addresses.**

![Ship To section of the Emory Express user interface with a dropdown menu labeled 'select from your addresses' and an option to 'select from org addresses'.]

The fields below will be used to enter your shipping address for this order. If you need to make a change, select a different address from the available options.

Shipping address

- [ ] select from your addresses
- [ ] select from org addresses

---

**c.** Enter your street number in the Nickname/Address Text box and **Search.** Select the correct address.

![Address Search results with details for 1599 Clifton Avenue.](image)

**d.** Enter the Building/Room number and **Save.**

![Ship To section with fields for Address Details including: Name (Amy Jones), Department (FINANCIAL OPERATIONS), Building/Room: blank, Address Line 1 (1590 Clifton Rd NE), City (ATLANTA), State (GA), Zip Code (30322), Country (United States).]

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**9.2.2 Addresses/Delivery Changes for Individual Items**

To change addresses or delivery options for individual items, **edit the Shipping Address or Delivery Options next to the applicable item.** Please note: PunchOut items must deliver to the same location; you may choose to ship all PunchOut items to an alternate location, however you may not split the order among multiple shipping addresses.
Emory Express will notate the line item when the address or delivery option differs from the header. It is important to note any symbols on your Checkout screen. symbols indicate a line level change. Always review the applicable page when the symbol appears to verify that the line level change is accurate.

To copy this change to another item/items, select the **copy to other lines** link. **Select the additional lines and Copy.**
9.3 **Billing**

All invoices route to Payment Services for review and processing. Invoices are electronically sent through Emory Express or uploaded into Emory Express through an imaging tool. This allows users to view invoice information at any time without handling physical paper. For information on how to view your invoices in Emory Express, please see pages 62-65.

![Billing Table]

<table>
<thead>
<tr>
<th>Bill To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Billing address: Payment Services</td>
</tr>
<tr>
<td>Po Box 740046</td>
</tr>
<tr>
<td>Atlanta, GA 30348</td>
</tr>
<tr>
<td>United States</td>
</tr>
</tbody>
</table>

9.4 **Accounting Codes**

The Account Codes page allows you to edit SmartKey and Account Codes for your items. You may update the SmartKey and/or Account Codes for all items in your cart or for individual items.

9.4.1 **SmartKey/Account Code Changes for all Items**

1. To change the SmartKey or Account Code for all items, edit the Accounting Codes at the top of your page.

2. If the code is in your profile, you may Select from profile values. Select the down arrow and choose the applicable code. Save.

![Accounting Codes Table]
3. If the code is not in your profile, enter it directly in the corresponding text box.

Save.

9.4.2 SmartKey/Account Code Changes for Individual Items

1. To change the SmartKey or Account Code for individual items, edit the Accounting Codes next to the applicable item.

2. Emory Express will note the line item when the accounting codes differ from the header. It is important to note any ☢ symbols on your Checkout screen. ☢ symbols indicate a line level change. Always review the applicable page when the ☢ symbol appears to verify the line level change is accurate.
9.5 Final Review Notes and Attachments

The Final Review page allows you to edit Notes and Attachments for your items. You may attach notes and attachments at an internal or external level.

9.5.1 Internal Notes and Attachments

Internal Notes and Attachments are used to provide additional information to your order approvers, including any special Emory approvers and Procurement. Information posted in Internal Notes and Attachments do not transmit to the supplier.

1. To add an Internal Note from the Final Review Page, select the Internal Notes and Attachments edit button. Enter the note and Save.

2. To add an Internal Attachment from the Final Review Page:
   a. Select the Internal Attachments Add Attachments button.
   b. Select Files.
c. Locate your file and double click the name.

![File Upload](image)

![Add Attachments](image)

3. To remove an Internal Attachment, select the corresponding **Remove** link. To move it to External Attachments, select the corresponding **Remove down arrow** and **Move to External Attachments**.

![Remove](image)

9.5.2 External Notes and Attachments

External Notes and Attachments are used to provide additional information to Suppliers. They often consist of quotes, promotion codes, and customer account numbers. Because the majority of attachments consist of confidential quoted pricing, you will attach them only at the line level.
1. To add an External Note from the Final Review Page, select the **Edit** button next to the first item you are ordering from the intended supplier recipient. *Enter the note* in the External Notes field and **Save**.

2. To add an External Attachment from the Final Review Page:
   a. Select the External Attachments **Add Attachment** button next to the first item you are ordering from the intended supplier recipient.

   b. **Select Files**.
c. Locate your file and double click the name.

d. Save Changes. For multiple files, Select Files and repeat steps c and d.

3. To remove an External Attachment, select the corresponding Remove link. To move it to Internal Attachments, select the corresponding Remove down arrow and Move to Internal Attachments.

9.6 Final Review, Check Budget, and Place Order

The Final Review page is also the final step prior to placing your order. Verify all fields are correct prior to placing your order. Once the order is placed, you may not edit it. Please remember to note any ☝ symbols on your Checkout screen. ☝ symbols indicate a line level change. Always review the applicable page when the ☝ symbol appears to verify the line level change is accurate.

When your order is correct and you are ready to submit it for approval, click the Check Budget button.
9.6.1 If your order passes the Budget Check step, **Place Order**.

9.6.2 If your order *does not* pass the Budget Check step, select **history** to determine why.

9.6.2.1 **Account is not valid:** *Change the corresponding account number to a valid value* (line indicated in details message), **Save**, and **Check Budget**. Note: if you do not know the appropriate account code, contact your business office or Compass Support (404-727-7000) for assistance.

9.6.2.2 **Project End Date not valid:** *Change the SmartKey to one associated with your new Project number*. **Save**, and **Check Budget**. Note: if you do not know the appropriate SmartKey code, contact your Grants Administrator for support.
10. Checking Status

Emory Express provides real time information on the status of your requisitions. It also delivers the requisition workflow routing and a list of approvers for each approval step. Actions throughout the life of the requisition are available through the history tab.

To check status of your requisition:

1. Select your name from the banner. Then select My Pending Requisitions.

![My Pending Requisitions]

2. Select the requisition number.

![Requisition Details]

3. Select the PR Approvals link.
4. Your requisition is pending in the Active workflow step. Select **view approvers** to see who should approve this requisition. Please note only one person per group is required to approve.
11. Receive/Complete an Order

Procurement policy dictates that departments must acknowledge receipt of all orders over $4999. This is done through the Emory Express receiving process. The receiving process is an authorization to pay for goods and services received. If the goods and/or services are still in transit or arrived damaged, do not complete this process. You may document any extenuating circumstances through the Purchase Order’s comments tab (see pages 42-44).

11.1 Completing a Receipt

1. Select your name from the banner. Then select My Recently Completed Purchase Orders.

2. Select the Purchase Order number you need to receive. Click Go.

3. Update the quantity to reflect the amount received, Save Updates, and Complete.
11.2 Correcting/Deleting a Receipt

You can correct or delete a receipt if it is not matched to an invoice.

1. Select your name from the banner. Then select My Recently Completed Purchase Orders.

2. Select the Purchase Order number for the receipt you need to correct/delete.

3. Select the Receipts Link. Select the Receipt No. you need to correct.

4. Reopen Receipt. The system will prompt you to document the reason. Enter the reason and confirm Reopen Receipt.
5. To make corrections, Save Updates, and Complete. To delete a receipt, select Delete.
12. 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.

Recent requisitions and orders are accessible by selecting your name in the Emory Express banner:

Locate older orders using the Document Search steps on pages 46-49.

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. 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…
b. Search for the recipient and select.

![User 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

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>
- Jennifer Hulsey <jennifer.hulsey@emory.edu>

Please advise if you have received these products.

950 characters remaining

Attach file to this document (optional):
- Attachment Type: File
- File Name: 
- File: Browse...

Add Comment | Cancel
13. Cancelling an Order

Due to speed of fulfillment, please contact the supplier first to cancel your order. If they are able to successfully cancel your order, please add a comment to the Purchase Order using the steps on pages 42-44. Please use Emory Express as the recipient name to ensure the message delivers to Procurement Operations. Your comments should indicate your request to cancel and include a copy of the supplier cancellation confirmation.

If you are unable to cancel with the supplier, you may not request to cancel in Emory Express. The supplier will discuss return options and supply a credit memo to Payment Services to credit your SmartKey upon returned receipt of goods or completion of the agreed upon return terms.
14. 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.

14.1 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.
14.2 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.
14.3 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

14.4 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

14.5 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 option 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.
14.6 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.

14.7 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, Download Export Files.**

4. **Select the file name. Save or Open the file. OK.**
14.8 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.

![Image of search results screen]

14.9 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**.

![Image of custom template options]
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.
15. Ordering Radioactive Materials

There are special requirements for ordering radioactive materials. Failure to complete the requirements will result in rejection of your requisition and may result in loss of ordering privileges for the study. The requirements include:

1. Shipment directly to Radiation Safety using the pre-approved Radiation Safety shipping address. The approved address is:

   Radiation Safety Office
   Attn: Radiation Safety/<PI’s Full Name>/<Authorized Permit Number
   EHSO, Room G44
   Whitehead Building
   615 Michael Street
   Atlanta, GA 30322

2. Charged to account code 54580

3. Radioactive flag selected on non-catalog items.

4. Request radioactive materials in a separate cart.

15.1 Storing the Radioactive Shipping Address

To ensure you use the approved Radiation Safety address, you should add it to your profile. You may then select it when needed.

To add the Radiation Safety Shipping Address:

   1. Select the down arrow next to the user Name and choose View My Profile.

   2. Select Default User Settings: Default Addresses
3. **Select Addresses for Profile** and enter **615** in the Nickname/Address Text box. **Search.**

4. **Select 615 Michael** and enter the following information.
   a. **Nickname:** **Radiation Safety**
   b. **Attn:** **Radiation Safety/PI's Full Name/<Authorized Permit Number>**
   c. **Department:** **EHSO Room G44**
   d. **Building/Room:** **Whitehead Building**

5. **Save.**

**15.2 Ordering from Shop or a PunchOut**

Radioactive materials are flagged in Emory Express with the universal radioactive symbol. You may add them to your cart from the Shop catalogs or a PunchOut.
Proceed to checkout. Change the shipping address to **Radiation Safety**. Change the Account Code to **54580**. **Place Order.**

### 15.3 Ordering from a Non-Catalog Item

If the item is not available through Shop or a PunchOut, you may request on a non-catalog item. Complete the non-catalog item as instructed on pages 21-22 and **select the Radioactive symbol**.

Proceed to checkout. Change the shipping address to **Radiation Safety**. Change the Account Code to **54580**. **Budget Check. Place Order.**
16. Check Requests

The Check Request form is used to request payments to companies for goods or services when an Emory Purchase Order was not originally issued. Common Check Request commodities include memberships and registrations when Visa is not accepted, utility payments, and payments to municipalities. The form contains instructions on submitting documents for payment and is available on the Emory Express homepage under Showcased Services. Only one invoice is allowed per form.

To submit a Check Request:

1. Enter the **Supplier Name.** If the supplier is not in the system, enter *New Supplier* and include a copy of the supplier’s W9 or W8-BEN and ACH form (if applicable). Forms are available through a hyperlink on the Check Request. Also include a new supplier’s email address or fax number in internal notes. *Please note: do not select New Supplier because of the address. You may update addresses in the remit to sections on the form.*

2. Enter the **Product Description.** This may also be the business purpose of the payment.
3. In the **Quantity** field, enter **1**. In the **Price** field, enter the **amount of the payment**.

<table>
<thead>
<tr>
<th>Quantity</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price</td>
<td>750.00</td>
</tr>
</tbody>
</table>

4. If there is a written contract in place with this supplier, check the corresponding box and attach the contract through Internal Attachments (step 7).

| Written Contract in place with Supplier | ☐ |

5. Enter the **Supplier Invoice #**. If there is no invoice number, enter a unique identifier such as your membership identification number. Enter the **Invoice Date**.

| Supplier Inv # | 123456 |
| Invoice Date   | 10/29/2014 |

6. Select the Remit To Address. If it is not listed, check Add New Remit to Address and enter it in the New Remit To Address box.

7. Request special disposition such as hold for pick up or mail enclosures in the Internal Notes box.
8. Select **Add Attachments** to attach your supporting documentation. Retain supporting documentation in your department; Payment Services will process your request using the electronic attachments.

![Add Attachments](image)

9. **For one invoice**, click the **Go** button. **For multiple invoices**, select **Add to Cart** and click the **Go** button. Edit to match the next invoice. **When your final invoice is entered**, change the action back to **Add and Go to Cart** and click the **Go** button.

![Available Actions](image)

10. Follow the steps to Proceed to Checkout on pages 25-36.

11. After the Department Approves and New Suppliers are established, the Check Request becomes a Purchase Order. Payment Services will process within 5 business days of receipt. The invoice will pay on the later date of the next business day or due date.
17. 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 39-41 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.

17.1 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 46-49.

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.

17.2 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 46-49.

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.**
17.3 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 46-49.

2. Select the Attachment Overview link.

3. Select the Attachment name.

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