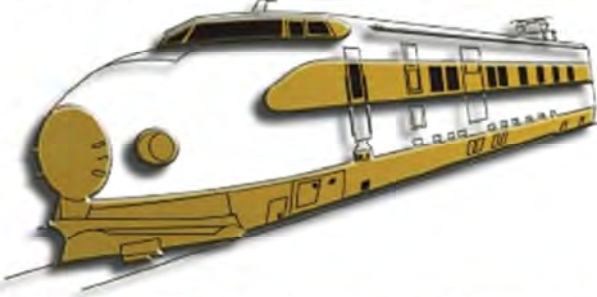




EMORY



EXPRESS

- *Transforming the Future of Buying at Emory*

Training Manual

Questions: e-market@emory.edu

Website: <https://www.finance.emory.edu>

Customer Care: 727-5400



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The Emory Marketplace

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

The MarketPlace also contains purchasing tools, commodity specific information, and other resources.

To enter the Emory MarketPlace

1. www.finance.emory.edu
2. Select the PROCURE & PAY tab
3. Select the *Buying in the Marketplace* link

EMORY UNIVERSITY | Finance Division

SCHOOLS LIBRARIES RESOURCES SEARCH

PAYROLL **PROCURE & PAY** TRAVEL GRANTS ACCOUNTING REPORTING CASH & DEBT TRAINING

Procure & Pay

Buying in the Marketplace

Buying Green Practices
Environmental Practices
Scientific Procurement Advisory Council

How to 

Credit Cards at Emory

Contract Administration

Training for our Campus

Supplier Diversity

CCR Requirements

Procure & Pay Policies

Procure & Pay FAQ's

Archived Memos/Shows

Glossary of Terms

About Us

For Our Suppliers

Forms

Welcome to the Emory Marketplace

The Emory Marketplace is designed to inform faculty and staff university resources for purchasing goods services for Emory. Each commodity listed below provides Emory's preferred supplier, how to make your purchase and the preferred payment method. If you cannot locate the service or goods you need in the Marketplace list below, call Customer Care at 404.727.5400.

EMORY EXPRESS

Dependent upon the type of needs you have, you may be required to place a requisition in our procurement tool, Emory Express. Individuals who purchase goods and services on behalf of the university are required to be familiar with the University Policy of Procurement of Goods and Services and attend an Emory Express Training session.

Audio-Visual Services	Laundering Services (Lab Coats)
Books and Periodicals	Linen Rental Services
BioSafety Cabinets Laminar Flow Hoods/Certification Process	Mail Services and Shipping (Emory/FedEx/Customs Brokers)
Catering - Box Lunches /Pizzas - delivery or pick-up Catering Services - full service & staff on site	Maintenance and Repair Operations Supplies for electrical, network, general bldg., industrial)
Cell Phones, Pagers & more	Office Supplies
Chartered Bus Services and Shuttle Services for special events	Picture Frames, Awards, etc.
Coffee and Tea Service and other beverages	Printing Services (Emory Document Services & Others)
Computers, Printers & Software	Promotional Items

Procure & Pay Quick Links

Procure & Pay Contacts & Customer Care
M-F, 8:30 a.m. - 5:00 p.m.
404.727.5400
e-market@emory.edu

Organization Chart

Emory Express

Supplier Announcements and Promotions

Diversity Supplier Listing

View Survey Results

Compass Expense Reports and Payment Requests


Employee Discounts

- ✓ A single place to get information and purchase goods and services
- ✓ Streamlined processes - - - saving time and money
- ✓ Provides data on what we buy, who we buy from, and what it costs
- ✓ Maximizes our buying power and significantly reduces risk



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 and its powerful search engine provides information on thousands of products.

EMORY EXPRESS also provides direct access to suppliers' websites (punch-out suppliers), forms to request non-cataloged items, and built-in internal controls.

- ✓ **Purchasing Guidelines**
All eligible purchases should go through Emory Express.
- ✓ **Online Access**
Via the internet with your Emory username and password.
- ✓ **Online Approvals**
Approvals, if required, will be completed online.
- ✓ **Contract Suppliers (denoted with a *)**
Contract suppliers have University negotiated pricing. Purchase orders for contract suppliers are sent directly to the supplier via Express and do not need to go through Procurement Services unless they are \$10,000 and greater.
- ✓ **Punch-out Suppliers**
Suppliers who provide links to their websites within Express. Includes Staples, Fisher Scientific, Dell, Apple, Home Depot, etc.
- ✓ **Non-contract Suppliers**
Requisitions to non-contract suppliers via the Product Search tool will go through Procurement if they are \$2000 or greater before being electronically submitted to the supplier.
- ✓ **Non-Catalog Items**
Available to request items that are not available through the hosted catalogs or punch-out suppliers. Requisitions go through Procurement if they are \$1499 or greater.



✓ **Radiopharmaceuticals and Controlled Substances**

All requisitions for Radioactive materials will continue to go to Radiation Safety and then to the vendor. All Radioactive deliveries must be made to the Radiation Safety Office (727-8784 or 727-5922).

All requisitions for Controlled Substances will go to the Buyer in Procurement Services and then to the vendor. (Procurement must track all licenses.)

✓ **Multiple Suppliers/1 requisition**

Several suppliers can be on the same requisition. The Purchase Order (P.O.) number will be assigned for each vendor. See purchasing tips for combining multiple suppliers on one requisition.

✓ **P-cards**

Should be used for field purchases, conference registrations, cell phone bills, catering, grocery store purchases, etc. (See Appendix C)

✓ Department/Division determines purchasing limits and approval queues.

✓ Buyers will continue to be an integral part of the procurement process and are available for assistance



Emory Express Purchasing Tips

The following tips will optimize the **EMORY EXPRESS** purchasing process.

Multiple Suppliers on One Requisition

An unlimited number of suppliers can be placed on a single requisition; however please keep the following in mind:

- ✓ Requisitions are approved in their entirety. Keep approval workflow in mind when building carts:
 - POs for Contract suppliers (*) are sent directly to the supplier and do not go through the Procurement Dept unless they are *\$10,000 or greater*.
 - POs for Non-Contract suppliers are sent directly to the supplier and do not go through the Procurement Dept unless they are *\$2,000 or greater*.
 - Non-Catalog Items are sent directly to the supplier and do not go through the Procurement Dept unless they are *\$1,500 or greater*.
- ✓ New Suppliers should be in a separate cart.
- ✓ Radiopharmaceuticals should be in separate cart.

Catalog Searches

- ✓ If an item cannot be located based on a part number, try locating it using the product search by product description (keywords). Suppliers frequently change their part numbers.
- ✓ If an item cannot be located by a part number or product description, use the supplier's punch-out (if available).
- ✓ Please contact e-market@emory.edu for any products that are not available through a contract suppliers' punch-out or hosted catalog.

Punch-out Suppliers

- ✓ Punch-out suppliers are ideal for DNA sequencing orders.
- ✓ Once a punch-out item is placed in the Express shopping cart, the quantity cannot be changed. Confirm the quantity before placing a punch-out item into the Express shopping cart. (See 'Punch-outs' for help on changing the quantity once a punch-out item has been placed in the Express shopping cart.)



Express Log-in

EMORY EXPRESS is easily accessible via the Internet and the Financial Operations website.

Faculty and staff who have been activated in Express can access the system with their Emory Username and Password.

To Login:

1. Go to: www.finance.emory.edu

2. Click on the tab
“PROCURE & PAY”



3. Click on the link
“Buying in the Marketplace”



4. Click on the logo
EMORY EXPRESS and sign in with your Emory ID
And password




Note: Please log out of Express **and** close your internet browser to end the purchasing session.




Help

There are several help features available in **EMORY EXPRESS**



Click on the  to get additional details about the contents of the window.



Point the mouse to a feature or function. If the mouse becomes a , click once to view additional information.



Place the mouse on a symbol or icon and a tool tip/description will display

Telephone Assistance

(404) 727- 5400
Procurement Customer Care

E-mail comments to

e-market@emory.edu



Screen Layout

The Emory Express screen is easy to navigate. There are 4 main sections

- 1) Header
- 2) Menu
- 3) Desktop: Bulletin Board
- 4) Desktop: Shopping Area

Header

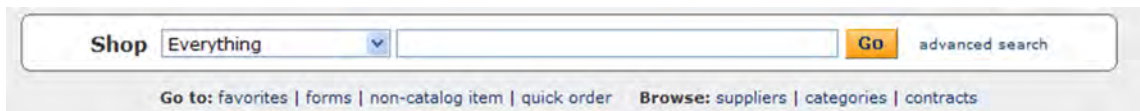


Menu



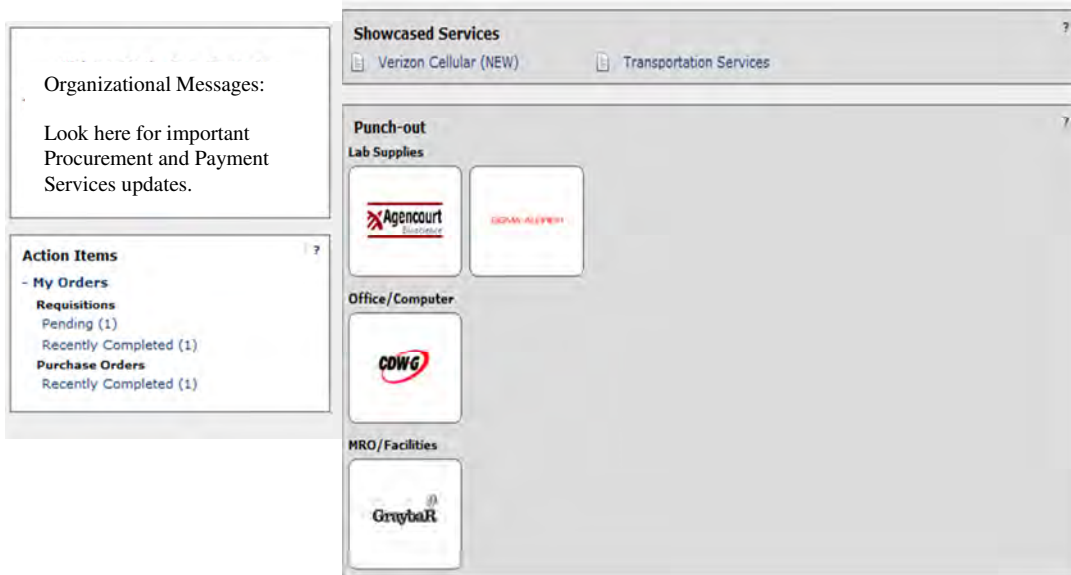
Desktop: Shopping Area

Favorites, Search functions,
Punch-outs, and Forms



Desktop: Bulletin Board

Organization Messages and User Review Info





Screen Layout

cont'd

Header



EMORY EXPRESS	Click the logo to return to the Home page
User Name	The user name identified with the account (from Profile)
Profile	User ID, E-mail Preferences, Smart Keys and accounts, Addresses, Personal Settings, etc.
Logout	Ends Express and returns the user to the Finance Division website.
Location (e.g Home-Quick Order)	Current location in Emory Express
Cart	Active cart: number of items and total dollar amount
Search for	Searches for Part, PO, and Receipt numbers, etc.

Menu



Home/Shop	Return to the Home Page
My Favorites	Create/Edit Favorite folders. Edit Favorite contents.
Forms	Access Organizational Forms
Carts	View active and draft carts, create or remove a cart
History	Information on submitted requisitions
Settlement	Settlement of receipts and invoices.
Profile	User ID, E-mail Preferences, Smart Keys and accounts, Addresses, Personal Settings, etc.
More>>	Other menu choices.



Screen Layout

cont'd

Desktop: Bulletin Board

Organizational Messages:

Look here for important Procurement and Payment Services updates.

Action Items

- **My Orders**
- Requisitions**
- Pending (1)
- Recently Completed (1)
- Purchase Orders**
- Recently Completed (1)

Organization Message	A bulletin board to display information for the end user community
-----------------------------	--

Action Items	Quick view at the status of your requisitions.
---------------------	--

My Resources

[Product Release Library](#)
[Terms and Conditions](#)
[email: e-market@emory.edu](mailto:e-market@emory.edu)
[phone: +1 \(404\) 727-5400](tel:+14047275400)

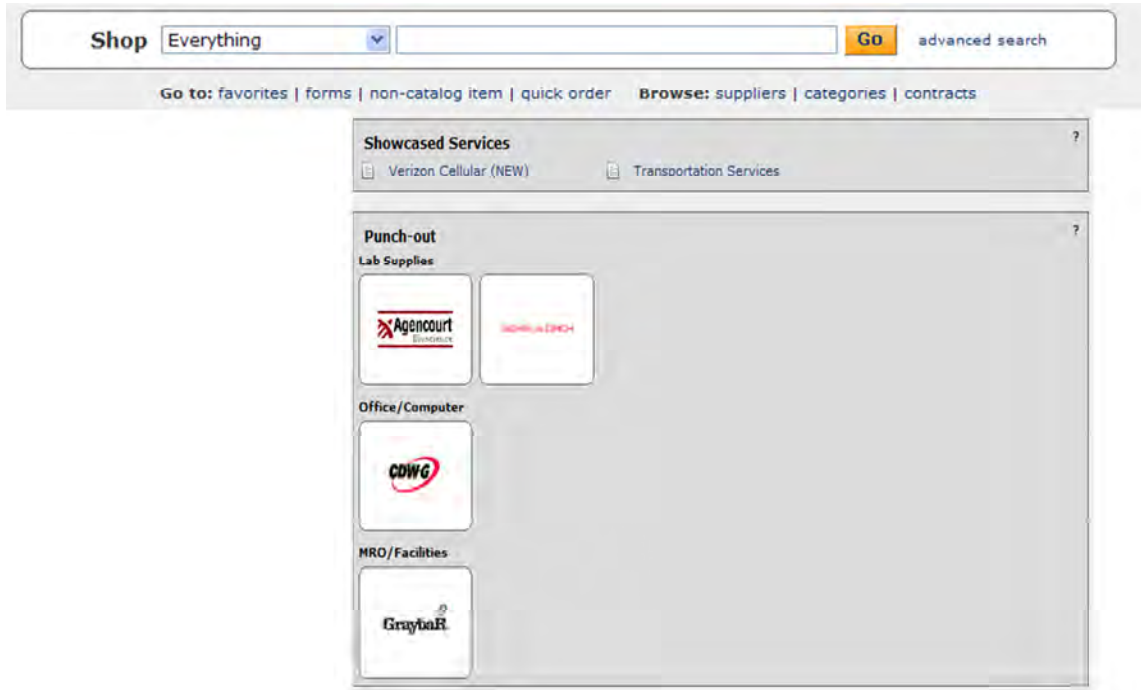
My Resources	Recent Enhancements	Includes release notes and details about new features
	E-mail	System support administrator e-mail
	Phone	System support phone



Screen Layout

cont'd

Desktop: Shopping Area



Shop	Drop down arrow used to narrow the search. Use Everything for the broadest search.
Favorites	Items that have been saved as a favorite . (Create Favorite folders or edit favorites using My Favorites on the menu.)
Forms	Emory forms for special items and services.
Non-Catalog Item	For products not available through “shop” or the Punch-outs. Also used for special promotions and quotes not available in the Punch-outs.
Quick Order	Search for products in Express using the part number/SKU
Other Searches	By Supplier, By Category, By Contract.
Punch-out	Direct access to suppliers’ online catalogs



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 profile areas.

User Settings: User ID, Personal Settings, and E-mail notification preferences

Purchasing: Custom codes - Smart Keys and Accounts
Addresses - Ship To and Bill To addresses

Access the profile

Choose **profile** in the Header



Profile

User Settings	User Identification, Personal Settings, E-mail Preferences.
Purchasing	Smart Keys, accounts, shipping addresses.
Permissions	Options determined by the department or Procurement.
History	An audit trail of additions/modifications made to the user's profile.



Profile cont'd

1st time users should review or edit the following profile settings.


User Settings Tab

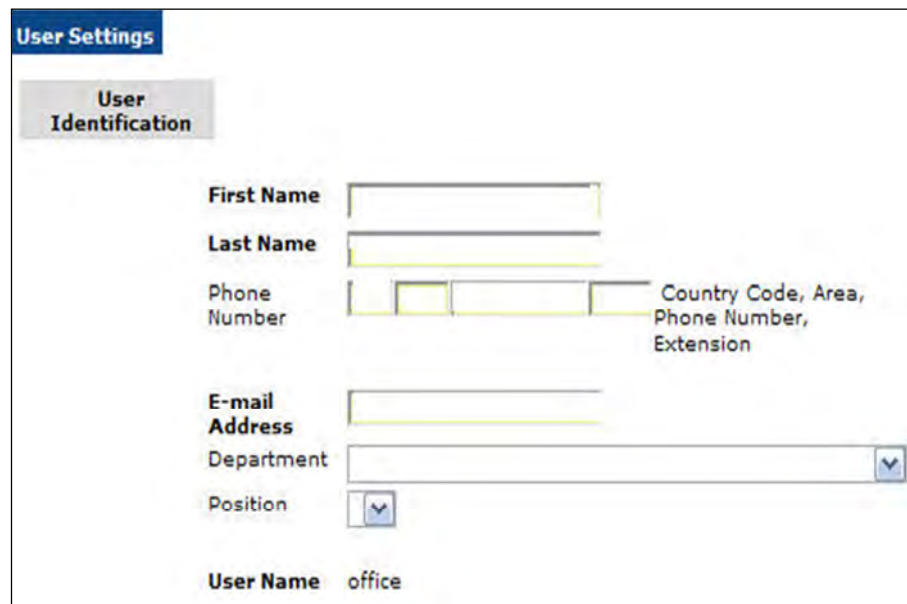
- ✓ User Identification (Position is not used)
- ✓ E-mail Preferences

Purchasing Tab

- ✓ Custom Codes – Smart Keys and Accounts
- ✓ Shipping Address(es)
- ✓ Billing Address

Profile: User Identification

1. Select Profile
2. Select **User Settings**
3. Select **User Identification**
4. Edit info, if applicable.
4. 



User Settings

User Identification

First Name

Last Name

Phone Number Country Code, Area, Phone Number, Extension

E-mail Address

Department

Position

User Name office





Profile cont'd

Personal Settings

Express provides the ability to identify your country, time zone and change the color theme on your screen.

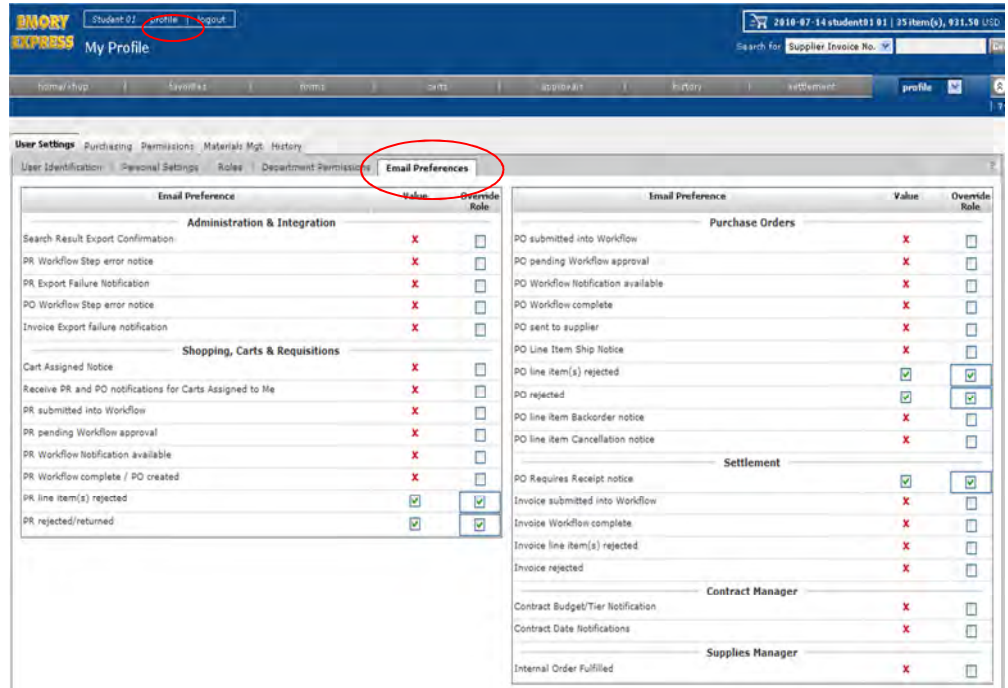
The screenshot shows a web interface for 'Personal Settings'. At the top, there are navigation tabs: 'User Settings', 'Purchasing', 'Permissions', and 'History'. Below these, a sub-navigation bar includes 'User Identification', 'Personal Settings', 'Roles', 'Department Permissions', 'Email Preferences', and 'Navigation Setup'. The main form area contains three fields: 'Country' with a dropdown menu showing 'United States', 'Time Zone' with a dropdown menu showing 'EDT/EST - Eastern Standard Time', and 'Color Theme' with a dropdown menu showing a list of themes including 'Amgen', 'Banana Republic', 'Blue and Gold', 'Blue and Gold 2', 'Blue and Gold Macs', 'ChemLife', 'Dark light blue', 'Fax', 'Grey and Red', and 'Java Bean'. A 'Save' button is positioned at the bottom center of the form area.



Profile cont'd

Profile: E-mail Preferences

1. Select **Profile**
2. Select **User Settings**
3. Select **Email Preferences**
4. Click the to select or deselect a notification.
5. Note: It is recommended to select notifications:
PR line item rejected
PR rejected
PO line item rejected
PO rejected
PO Requires Receipt Notification



6. **Save**

Profile: Smart Keys

1. Select **Profile** from the header

2. Select **Purchasing**

3. Select **Custom Fields**

4. **Smart Keys:**

Select **Edit** to add, view, or change info.

Custom Field Name	Default Value	Description	Edit Value
GL Business Unit	EMUW		Edit
Smart Key	No Default Value		Edit
Department ID	No Default Value		Edit
Project	No Default Value		Edit
Activity	No Default Value		Edit
Account Code	No Default Value		Edit

5. Select

Create New Value

6. **New Value:** Enter a Smart Key on the Value line

7. Choose **Default** , as applicable

8. [Save](#)

Edit Values [Close](#)

[Create New Value](#)

Value	Description

New Value ?

Value:

Description:

Default:

Status: active

[Save](#)

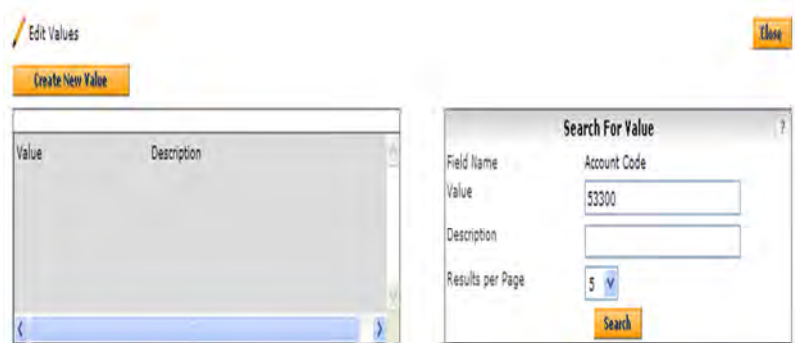
Repeat as needed

Profile: Account Codes

1. Select **Profile** from the header
2. Select **Purchasing**
3. Select **Custom Fields**
4. **Account codes:**
Select **Edit** to add, view, or change info.



5. Select **Create New Value**



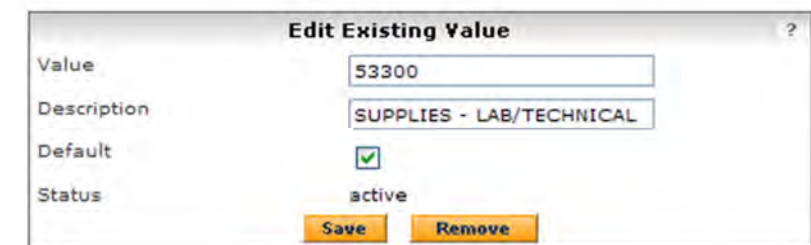
6. **New Value:** Enter an Account Code on the Value line
7. **Search**

8. Select the Value
9. **Add Values**



Repeat as needed

- To default your Account Code, select the link on the right and click default on the left. **Save**




Profile: Accounting Code Favorites (for frequently used accounting code combinations)

1. Select **Profile** from the header

2. Select **Purchasing**

3. Select **Custom Fields**

4. Select **Code Favorites:**

Select  to add, new combinations.

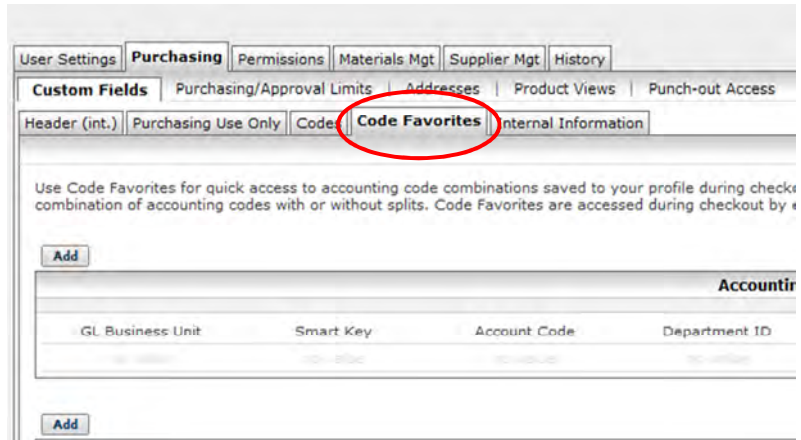
5. Enter **Nickname** (The nickname will appear as your checkout choice; detailed names are suggested.)

6. Enter a **Smart Key** and **Account Code** combination.

7. Choose **Default**, as applicable

8. 

Repeat as needed

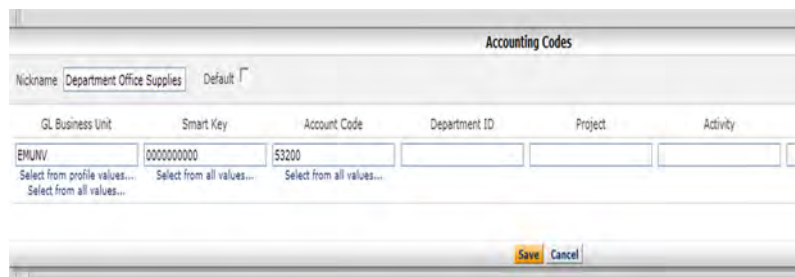


Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. Code Favorites are accessed during checkout by a combination of accounting codes with or without splits. Code Favorites are accessed during checkout by a combination of accounting codes with or without splits.

Add

GL Business Unit	Smart Key	Account Code	Department ID

Add



Accounting Codes

Nickname: Department Office Supplies Default

GL Business Unit	Smart Key	Account Code	Department ID	Project	Activity
EMUNV	000000000	53200			

Select from profile values... Select from all values... Select from all values...
Select from all values...

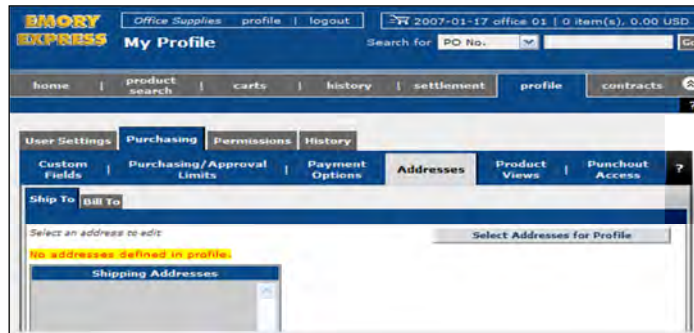
Save **Cancel**



Profile cont'd

Profile: Addresses - Ship To

1. Select **Profile**
2. **Purchasing** tab
3. **Addresses** tab
4. **Ship To** tab
5. **Select Addresses for Profile**



6. Enter the numeric or text portion of the address, e. g. 700 or Jesse. Choose **Search**

7. Click on the circle in front of the address

Name	Address
<input type="radio"/> 1700 CLIFTON	Attn: User Name Department: ACADEMIC & ADMINISTRATIVE IT Building/Room: 1700 CLIFTON RD ATLANTA, GA 30329 United States
<input type="radio"/> 1700 N DECATUR	Attn: User Name Department: ACADEMIC & ADMINISTRATIVE IT Building/Room: 1700 N DECATUR RD ATLANTA, GA 30322 United States

8. Change the nickname and/or indicate default (optional)
9. Add or edit the Attn:, Building, Dept/Room (mandatory)
10. **Save**

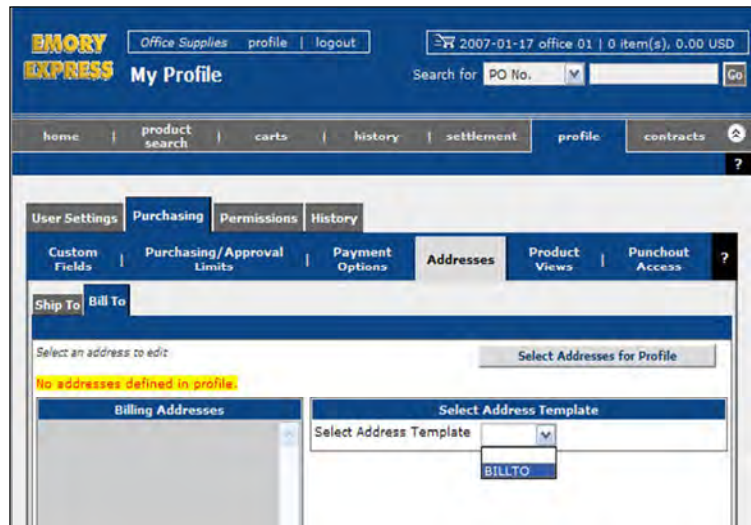


Profile cont'd

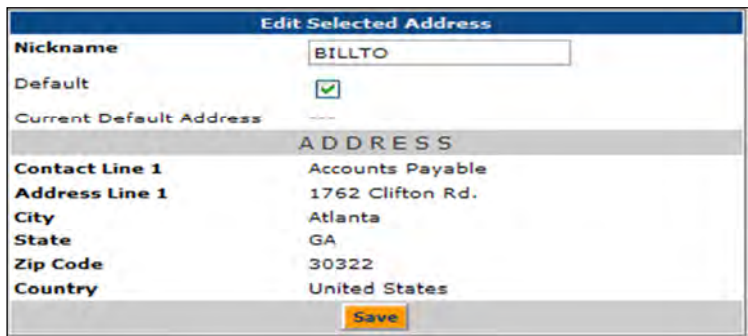
Profile: Addresses - Bill To

Invoices will be sent to Emory's Payment Services (A/P).

1. Select **Profile**
2. **Purchasing** tab
3. **Addresses** tab
4. **Bill To** tab
5. Click on **Select Addresses for Profile**
6. From Pull Down Menu, Select Address Template **BILL TO**



7. **Save**





Favorites

The **Favorites** link allows for quick access to Personal Favorites

Enter the quantity of items you want to order and select the Add to Cart button.

My favorites

Results per page: 20 Total Products: 2 Page 1 of 1

[Add non-catalog item...](#) [edit](#) | [move/copy](#) | [delete](#) | [add to cart](#)

2-Fluoro-6-Methylpyridine, 98% from VWR International	22.45 USD	<input type="checkbox"/>
Part Number LCX01561G0001 (EA)	1g, 1/EA	
Manufacturer Info 1561 - (Lancaster Synthesis Inc)	<input type="text" value="1"/> Add to Cart	
CAS Number 407-22-7	edit move/copy delete	
()		
2-Fluoro-6-Methylpyridine, 98% from VWR International	70.41 USD	<input type="checkbox"/>
Part Number LCX01561G0005 (EA)	5g, 1/EA	
Manufacturer Info 1561 - (Lancaster Synthesis Inc)	<input type="text" value="1"/> Add to Cart	
CAS Number 407-22-7	edit move/copy delete	
()		



Choosing Products

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

1. To search within a product category, click the drop down arrow and select the category.
2. Enter the Product Description, Part (SKU) number, or supplier name.
3. For additional search criteria, choose **advanced search**.
4. Use **Include Similar** terms if the exact spelling is not known

Shop Everything [advanced search](#)

Advanced Search Everything

Find Results That Have:

All of These Words Supplier Name

Part Number (SKU) Manufacturer Name

Other Options

Include similar terms Exclude Words

Exact Phrase Any of These Words

Custom Attributes

Core List

Energy Star

Energy Star

[change preferences](#)



Choosing Products

Cont'd

Multiple Search criteria may be used.

Favorites Quick Order Product Search Forms	
advanced search simple search	Display or hide multiple search lines (one for each of the search functions described below.)
Find Results That Have:	
All of these words	Displays products that have <i>all</i> of these words.
Supplier Name	Results will display all products for the requested supplier.
Part No. (SKU)	Results will be products that match the part/SKU number. Separate multiple numbers with spaces.
Manufacturer Name	Results will display all products for the requested manufacturer.
Other Options	
Include similar terms	Use if the exact spelling/ part number is unknown.
exact phrase	Displays products containing the entire search string, including spaces and punctuation.
exclude words	Another Product Description must be used with this function. The results will be the products matching the other criteria that don't include these words.
any of the words	Displays products that contain <i>any</i> of the words. Products with more than one match will display first.
Products per page	20 to 200 per page. The number here is remembered between searches. Only results on the same page can be compared to one another.



Search Results

- 1** **Most preferred supplier:** indicates top choice suppliers for Emory
- *** **Contract supplier:** Emory negotiated discount pricing with these suppliers

Results for: Everything : graduated beakers Showing 1 - 20 of 61 results Compare Selected: 0

Refine and Filter Search ?

Add Keywords

By Supplier

- A DAIGGER & SCIENTIFIC COMPANY INC (17)
- BIOWORLD (9)
- Fisher Scientific (25)
- VWR International (10)

By Category

- Beakers (61)

By Packaging UOM

- 12/CS (3)
- 24/CS (1)
- 25/CS (1)
- 100/CS (13)
- EA (9) [more...](#)

Products per page 20 Sort by: Best Match Page 1 of 4

Flask, Erlenmeyer, Disposable Polycarbonate, Corning Brand. Wide Mouth. Cap Type: With Vented Cap, Graduated. Individually wrapped; sterile. Capacity: 1L	486.41 USD
from Fisher Scientific	25/CS
Part Number 07200672	<input type="text" value="1"/> <input type="button" value="Add to Cart"/> <input type="button" value="▼"/>
Manufacturer Info 431147 - (Corning Life Sciences Plastic)	check availability
	add favorite compare
Beaker, glass 10mL, PYREX brand, Griffin, Low Form, Double Scale, Graduated, 12/PK	52.12 USD
from Fisher Scientific	12/PK
Part Number 02540C	<input type="text" value="1"/> <input type="button" value="Add to Cart"/> <input type="button" value="▼"/>
Manufacturer Info 1000 10 - (Corning Glass Works)	check availability
	add favorite compare
Beaker, glass 20mL, PYREX brand, Griffin, Low Form, Double Scale, Graduated, 12/PK	44.75 USD
from Fisher Scientific	12/PK
Part Number 02540E	<input type="text" value="1"/> <input type="button" value="Add to Cart"/> <input type="button" value="▼"/>
Manufacturer Info 1000 20 - (Corning Glass Works)	check availability
	add favorite compare

- ✓ Refine and filter your search by Supplier, Category, or Packaging using the links to the left
- ✓ Enter the number of items and select the Add to Cart button to begin your order
- ✓ Select the add to favorite link to save this to your personal favorites list
- ✓ Select the compare link for multiple items to compare selected
- ✓ Use sort by feature to list results based on best match, part number, unit of measure and price.



Quick Order

Quick Order is a convenient way to add items to a cart when the part number or SKU is known. **Quick Order** searches supplier and manufacturer catalogs.

1. Select the **Category** (*Everything* provides the broadest search.)
2. Enter the part number(s)
3. Select **Add to Active Cart**.

The screenshot shows a web form titled "Quick Order" with a "back to shop..." link in the top right. The form contains a "Category" dropdown menu set to "Everything", followed by five "Part Number (SKU)" input fields. At the bottom, there is an "Include similar terms" checkbox and a yellow "Add to Active Cart" button.

- ✓ If only one item is a match, it is added to the active cart.
- ✓ If multiple matches are found, an index displays the results by Supplier and by Category
- ✓ If no matches are found, a **Non-catalog Item link** will display



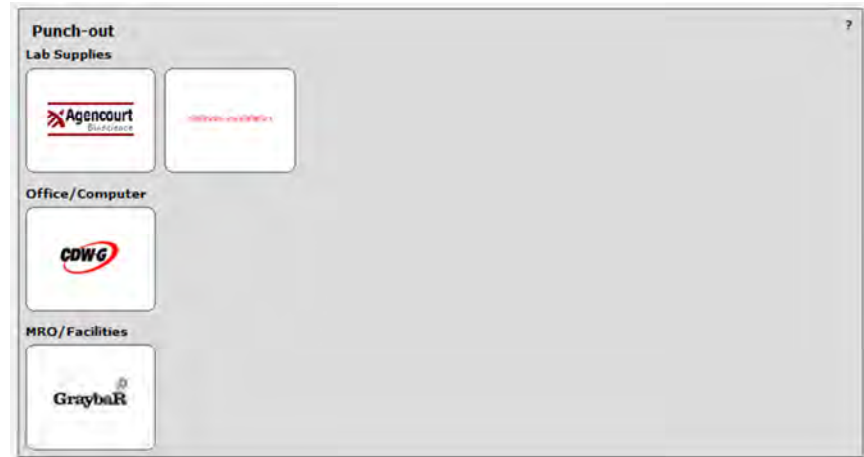
Punch-outs

Punch-outs are direct access to suppliers' websites. Users can search for products and add them to the Express shopping cart.

Punch-outs are in categories, e.g. Lab supplies, Office/Computer.

1. Click the supplier's icon.
2. Search for products, add them to the cart, and complete your order.

You will be returned to the Emory Express cart.



To return to Express without any products, choose [Cancel Punch-out](#)



- ✓ A punch-out with a yellow triangle in a circle is currently running slowly.
- ✓ A punch-out with a red x in a circle is currently not available.



Non-Catalog Item

The Non-Catalog item is used to request items that are not available through Express or have other special requirements such as quoted pricing.

1. Select **Non-Catalog Item**.

The screenshot shows the top navigation bar of the Emory Express system. The 'Shop' dropdown menu is set to 'Everything'. Below the navigation bar, there are links for 'Go to: favorites | forms | non-catalog item | quick order | Browse: s'. The 'non-catalog item' link is highlighted with a red rectangular box. Below the navigation bar, the main content area is titled 'Non-Catalog Item' and displays a message: '{No Supplier Selected} choose supplier...'. Below this message, there is a form with a 'Product Description' field and a 'Catalog No.' field. The 'Product Description' field has a character count of '255 characters remaining' and 'expand | clear' options. There is also a '- Hide product details' link and a 'Manufacturer Part No.' field.

2. Click on **Choose Supplier** to input Supplier Name. Enter a partial name of the supplier for maximum results. If your supplier is not found, enter **New Supplier**.

The screenshot shows the 'Non-Catalog Item' form with the 'Choose Supplier' button highlighted in a red rectangular box. The form includes a 'Product Description' field, a 'Catalog No.' field, and a 'Packaging' dropdown menu set to 'EA'. Below the 'Product Description' field, there is a character count of '255 characters remaining' and 'expand | clear' options. There is also a '- Hide product details' link and a 'Manufacturer Part No.' field. Below the 'Manufacturer Part No.' field, there is a 'UNSPSC' field. On the right side of the form, there is a list of checkboxes for various hazard types: 'Controlled substance', 'Green', 'Hazardous material', 'Radioactive', 'Rad Minor', 'Select Agent', and 'Toxin'. At the bottom of the form, there are three buttons: 'Save and Close', 'Save and Add Another', and 'Close'.



Non-Catalog Item cont.

3. **Select** the correct supplier.
2. Provide the **product name** and a detailed **description**, and New supplier information.
3. Enter the **Part Number**.
4. Enter the **quantity**.
5. Enter the **confirmed price**.
6. Enter the Manf Name and Part No (optional)

The screenshot shows the 'Supplier Search' interface. At the top, there is a search bar with 'vwr' entered. Below it, 'Results per page' is set to 20. There are 'Search' and 'Cancel' buttons. The results section shows 'Suppliers found: 1' and 'Page 1 of 1'. A table lists the supplier 'VWR International' with a 'Select' button next to it. Below the table, the fulfillment address is listed: 'Goshen Corporate Park West 1310 Goshen Parkway West Chester, PA 19380-0906 US', with a 'Select' button highlighted by a red box.

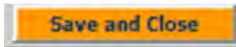
The screenshot shows the 'Non-Catalog Item' form. At the top, it says 'VWR International' with a 'change...' link. Below that, there is a '+ Show distribution methods' link. The form has a table with columns: 'Product Description', 'Catalog No.', 'Quantity', 'Price Estimate', and 'Packaging'. The 'Product Description' field is empty, with a '255 characters remaining' indicator and 'expand | clear' links. Below the table, there are fields for 'Manufacturer Part No.' and 'UNSPSC'. On the right side, there is a list of checkboxes for various categories: 'Controlled substance', 'Green', 'Hazardous material', 'Radioactive', 'Rad Minor', 'Select Agent', and 'Toxin'. At the bottom, there are three buttons: 'Save and Close', 'Save and Add Another', and 'Close'.



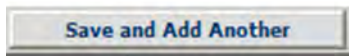
Non-Catalog Item Cont'd

7. Available Actions:

a. One Item:



b. Multiple items:



Repeat 4-8.

8. See page 32 for attaching quotes.

The screenshot shows the 'Non-Catalog Item' form in the VWR International system. The form includes a header with the company name and a 'change...' link. Below the header, there is a '+ Show distribution methods' link. The main form area is divided into several sections: 'Product Description' with a text input field and a character count of '255 characters remaining'; 'Catalog No.', 'Quantity', and 'Price Estimate' fields; and a 'Packaging' dropdown menu set to 'EA'. There is also an 'expand | clear' link. Below these fields, there is a '- Hide product details' section with input fields for 'Manufacturer Part No' and 'UNSPSC'. On the right side, there is a list of hazard categories with checkboxes: 'Controlled substance', 'Green', 'Hazardous material', 'Radioactive', 'Rad Minor', 'Select Agent', and 'Toxin'. At the bottom of the form, there are three buttons: 'Save and Close', 'Save and Add Another', and 'Close'.



Shopping Cart

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

1. Change the quantity of a hosted catalog item: type in the new quantity.



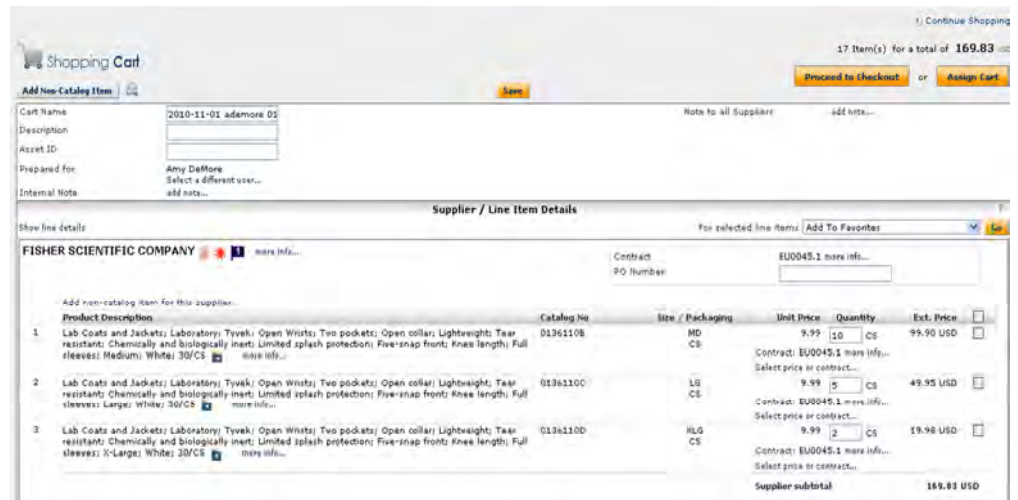
3. Change the quantity of punch-out item(s):

- a. Select all of the punch-out's items.

- b. Choose **Remove Selected Items** from the pull-down menu

- c. Select

- d. Return to the punch-out's website to shop again





Proceed to Checkout

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

- ✓ The Summary information and Line Item detail(s)
- ✓ Shipping and delivery options -including deliveries to different locations
- ✓ Accounting codes -including distributions to multiple accounts
- ✓ Internal or external notes and attachments, per cart or per line item

The Proceed to Checkout function displays the **Requisition Summary**:

- ✓ Information **above** the Supplier/Line Item Details is header information and will be applied to every item in the requisition
- ✓ Information **below** the Supplier/Line Item Details can be added or changed for each individual line item

Requisition Summary - Draft Requisition

2016-11-01 ademore 01 | 2 Item(s), 263.39 USD

Message: All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition Summary:

- General:** Cart Name: 2010-11-01 ademore 01; Description: 2010-11-01 ademore 01; Prepared by: Amy DeHore; Requisitioner Name: N/A; Requisitioner Phone Number: N/A; Requisitioner FX: N/A.
- Shipping:** Ship To: Amy DeHore, Department: ACCOUNTING, Building/Room: 4-13, 129 CLIFTON RD, ATLANTA, GA 30322, United States; Delivery Options: Best Carrier-Best Way.
- Billing:** Bill To: Payment Services, 1 Spa Clifton Rd, 3rd Floor, Atlanta, Ga 30322, United States; Credit Card Info: Payment will be handled using Corporate Payment Services vPayment; Billing Options: Accounting Date.
- Accounting Codes:** GL Business Unit: Smart Key; Account Code: 5390; Department ID: 143128; Project: 143128; Dept # 1: 143128; Dept # 2: 143128.

Supplier / Line Item Details:

Line(s)	Description	Manufacturer Name	Manufacturer Part Number	Supplier Part Auxiliary ID	Category	Price / Packaging	Unit Price	Quantity	Ext. Price
1	HP LaserJet P3015e	HP	CE42A#ABA	438	Capital Expense	1599.00	256.00	1 EA	256.00 USD
2	Logitech R100 Optical USB Mouse	Logitech	910-001439	3031	Capital Expense	0.00	0.00	1 EA	0.00 USD

Summary: Supplier subtotal: 263.39; Shipping: 0.00; Handling: 0.00; Supplier total: 263.39 USD. Subtotal: 263.39; Shipping: 0.00; Handling: 0.00; Total: 263.39 USD.



Requisition Summary

The Requisition Summary tab applies changes to all items in a requisition. Note: you must edit fields **above** the Supplier / Line Item Details line to apply to all items.

1. **Ship To** - To change delivery address for the requisition, click [edit](#) in the Shipping section.

- a. Select Alternate address from Profile Values pull down menu.

- b. 

The screenshot shows the 'Requisition Summary' tab with the 'Shipping' section highlighted by a red box. The 'Ship To' field is selected, showing the address: 'Attn: Amy DeHore, Department: ACCOUNTING, Building/Room: 4.15, 1599 CLIFTON RD, ATLANTA, GA 30322, United States'. Other sections visible include 'General', 'Billing', 'Accounting Codes', and 'Internal Notes and Attachments'.

2. **Delivery Options** - To change delivery options for the requisition, click [edit](#) in the Delivery Options section.

- a. Select Alternate option from Ship Via pull down menu.

- b. 

The screenshot shows the 'Requisition Summary' tab with the 'Delivery Options' section highlighted by a red box. The 'Ship Via' field is selected, showing the option 'Best Carrier-Best Way'. Other sections visible include 'General', 'Billing', 'Accounting Codes', and 'Internal Notes and Attachments'.



Requisition Summary Cont'd

3. **Accounting Codes** - To change Smart Keys or accounts for a req, click [edit](#) in the Accounting Codes section.

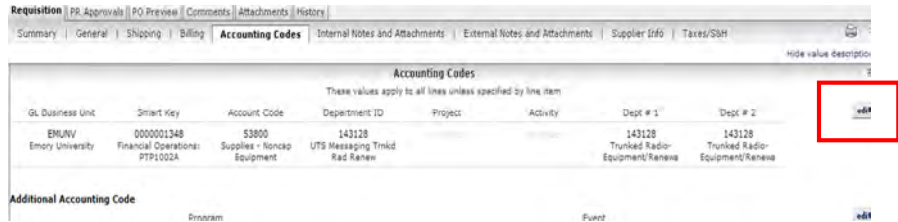
a. Type in a new **Smart Key** and/or **Account Code** only.

i. To select codes from the profile, click on **Select From Profile Values . . .** and choose from the pull down menu.

ii. To select codes from your code favorites, click on the **Select From Your Code Favorites pull down menu** and choose your combination.

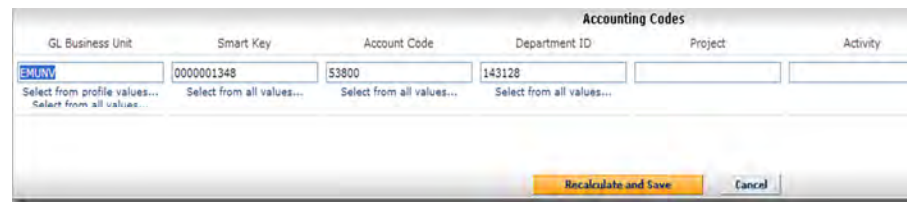
b. Click the recalculate/validate values... link

c. 



GL Business Unit	Smart Key	Account Code	Department ID	Project	Activity	Dept # 1	Dept # 2	edit
EMUNV Emory University	000001348 Financial Operations: PTP1002A	53800 Supplies - Noncap Equipment	143128 UTS Messaging Trnkid Rad Renew			143128 Trunked Radio- Equipment/Renew	143128 Trunked Radio- Equipment/Renew	

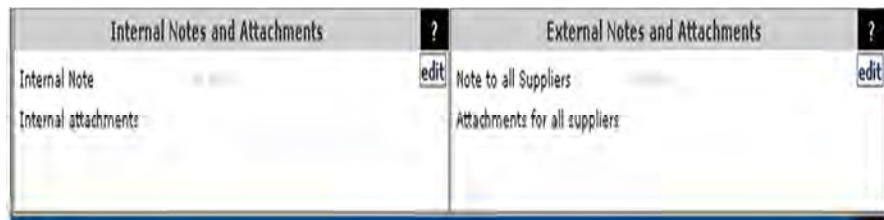
The second line is only for programs and events (special activities like commencement). If a Program or Event is not applicable for the order or invoice you submit, you may leave it blank.



GL Business Unit	Smart Key	Account Code	Department ID	Project	Activity
<input type="text" value="EMUNV"/>	<input type="text" value="000001348"/>	<input type="text" value="53800"/>	<input type="text" value="143128"/>	<input type="text"/>	<input type="text"/>
<small>Select from profile values... Select from all values...</small>	<small>Select from all values...</small>	<small>Select from all values...</small>	<small>Select from all values...</small>		

4. **Internal Notes** (viewable by Emory personnel only). Notes for Emory including any **New Supplier** information
Click [edit](#) and type the note.

5. **External Notes** (viewable by the supplier and Emory personnel). Click [edit](#) and type the note.



Internal Notes and Attachments	External Notes and Attachments
<p>edit</p> <p>Internal Note</p> <p>Internal attachments</p>	<p>edit</p> <p>Note to all Suppliers</p> <p>Attachments for all suppliers</p>



Requisition Summary Cont'd

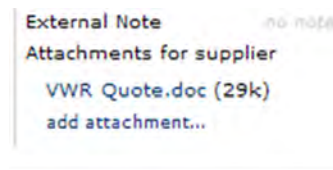
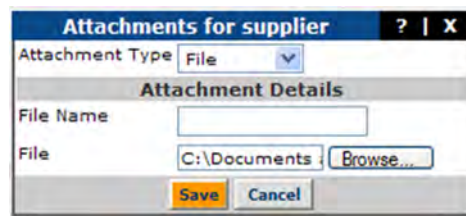
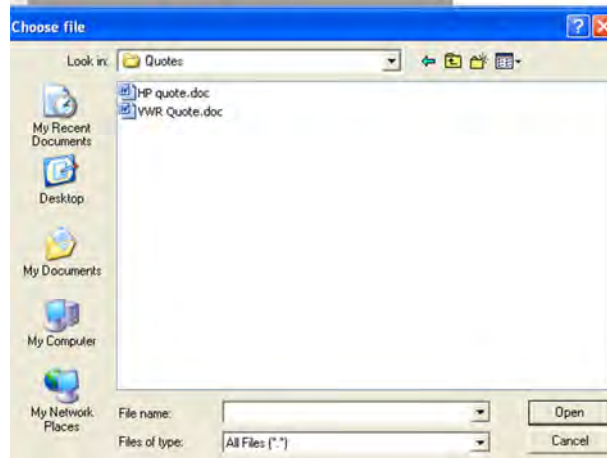
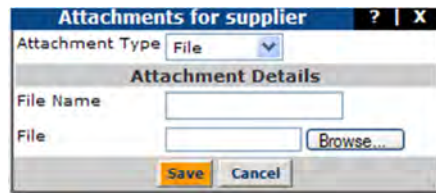
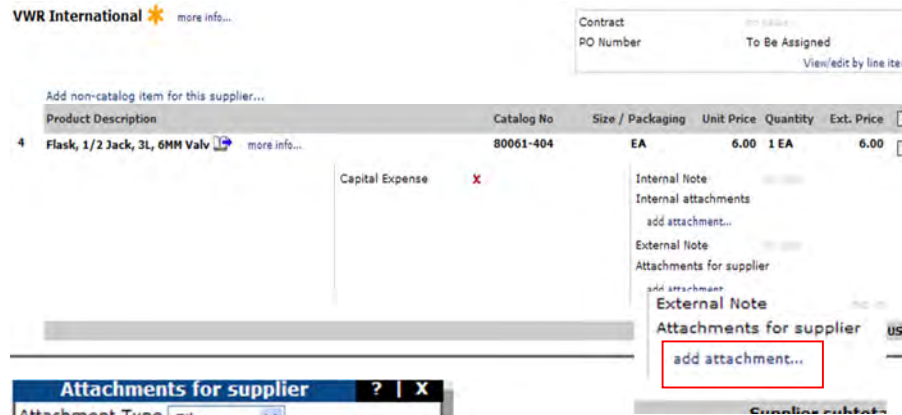
- 6. Documentation, quotes, and web URLs should be added at the line item level
 - a. Click **add attachment** under External notes

- b. Click **Browse**

- c. Locate the file, Click on the **filename** and select **Open**.

- d. Click **Save**.

- e. The filename will display





Shipping

The Shipping tab applies address and delivery option changes to individual items in a requisition. Note: you must edit fields **below** the Supplier / Line Item Details line to edit individual line items.

1. **Line item - Shipping** To change the delivery address or delivery options for **per line item**, click on the **Shipping tab**.

To change the delivery address for a specific item, click [edit](#) to the right of Ship To in the product description.

a. Select Alternate address from Profile Values pull down menu.

b. 

To change the delivery options for a specific item, click [edit](#) to the right of Delivery Options.

a. Select Alternate option from Ship Via pull down menu.

b. 

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 HP LaserJet P2035n	1598105	EA	256.00	1 EA	256.00 USD
2 Logitech B100 Optical USB Mouse	2086051	EA	7.39	1 EA	7.39 USD

Supplier subtotal	263.39
Shipping	0.00
Handling	0.00
Supplier total	263.39 USD



Accounting Codes

The Accounting Codes tab applies Smart Key and Account Code changes to individual items in a requisition. Note: you must edit fields **below** the Supplier / Line Item Details line to apply to all items.

1. **Line item - Accounting** To change Smart Key or accounts **per line item**, click on the **Accounting Codes** tab.


2. To change a Smart Key or account for an item, click **edit** to the right of Accounting Codes in the product description.

a. Type in a new **Smart Key** and/or **Account Code** only.

i. To select codes from the profile, click on **Select From Profile Values . . .** and choose from the pull down menu.

ii. To select codes from your code favorites, click on the **Select From Your Code Favorites** pull down menu and choose your combination.

b. Click the recalculate/validate values... link

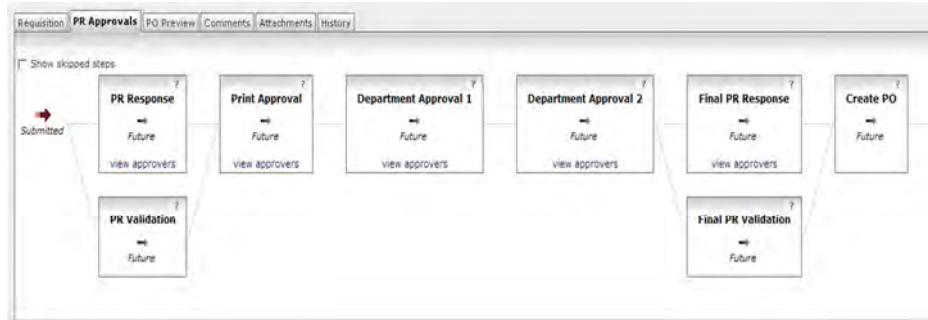
c. 



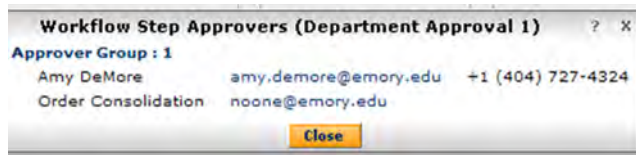
Place an Order

After reviewing the cart and making any adjustments, you may review your approvers and place your order.

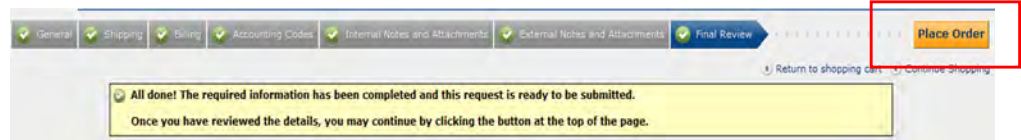
1. Click the **PR Approvals** tab
2. Click **view approvers**



3. A list of approvers for the step will display



- 4.



5. A Requisition Information box will appear with the Req number, cart name, total, etc.





Checking Status

You can check the status of your requisition from the History, My Requisitions tabs in the menu bar.

Emory Express provides a listing of requisitions in date sequence.

You may review any pending requisitions by selecting the requisition number and clicking on the PR Approvals Tab.

You may review the reason for rejected requisition by selecting the requisition number and clicking on the History Tab.

My Requisitions						Legend ?
Status	All	No. of Requisitions: 10			Page 1 of 1	
Status	Requisition No.	Requisition Name	Requisition Date/Time	Requisition Total	Remove Notification	
	4592738	2007-07-10	7/10/2007 10:41 AM	16,349.58 USD		Remove
	4577841	2007-07-06 student01 01	7/6/2007 3:20 PM	3,043.00 USD		Remove
	4554362	2007-07-03 student01 01	7/3/2007 10:24 AM	10,814.04 USD		Remove
	4549641	2007-07-02 student01 01	7/2/2007 3:16 PM	10,166.38 USD		Remove
	4531918	2007-06-28 student01 01	6/28/2007 3:18 PM	108,334.74 USD		Remove
	4526970	2007-06-28 student01 01	6/28/2007 10:31 AM	0.00 USD		Remove
	4522142	2007-06-27 student01 01	6/27/2007 3:34 PM	527.25 USD		Remove
	4441981	2007-06-15 student01 01	6/15/2007 3:37 PM	420.68 USD		Remove
	4421482	2007-06-13 student01 01	6/13/2007 3:31 PM	2,436.92 USD		Remove
	4379863	2007-06-07 student01 01	6/7/2007 3:42 PM	4,868.84 USD		Remove

LEGEND	
	Requisition Approved
	Requisition Pending Approval
	Requisition Rejected
	Requisition Withdrawn
	Pending, but line item(s) Rejected
	Approved, but line item(s) Rejected





Receive/Complete an Order

All purchase orders over \$1499 must be received in Emory Express

1. **History**
2. **My Purchase Orders**
3. Check the **Selection Box** to the right of the Purchase Order you need to acknowledge receiving
4. In 'Available actions' choose **Create Quantity Receipt**

Workflow Status	PO No	Supplier	Creation Date/Time	PO Total	Requisition No.	Requisitioner	Supplier Status	Settlement Status	Select
<input checked="" type="checkbox"/>	S000070	A DAIGGER & SCIENTIFIC COMPANY INC	7/25/2009 4:10 PM	5,000.00 USD	320256	01. Student	Sent	Receipt-Required No Matches	<input type="checkbox"/>
<input checked="" type="checkbox"/>	S000069	A DAIGGER & SCIENTIFIC COMPANY INC	7/21/2009 3:43 PM	294.00 USD	318415	01. Student	Sent	No Matches	<input type="checkbox"/>

5. Click 
6. Enter the quantity received for each item. If a line item was not received, 
7. **Save updates.**
8. **Complete.**

Header Information

Receipt Name: 2009-07-25 student01 01 Receipt Create Date: 7/25/2009 4:19:29 PM

Receipt No: To Be Assigned Receipt Date: 7/25/2009 Packing Slip No.: Supplier Name: A DAIGGER & SCIENTIFIC COMPANY INC Received by: Student 01


RECEIPT ADDRESS


Location: Carrier: DELIVERY: Tracking No.: Flexible Text Field 2: Attachments: Notes: (1,000 Chars. Max)

Receipt Summary

PO No.	PO Line No.	Product Name	Catalog No.	Dty/UDM ordered	Previous Receipts	Quantity	Add to Inventory	Action	Select
S000070	1	test	test	1 1/EA		1		Received Receive & Return	<input type="checkbox"/>

9. A receipt confirmation will appear. Click on the printer icon to open a printer friendly window.

Receipt No . 16876  has been created for the following PO No(s):

- PO/Reference No. S000070 



Receive/Complete an Order

Cont'd

A receipt was completed in error can be corrected or deleted if the PO status is **not matched**.



1. History
2. My Purchase Orders
3. Click the **PO No.** that needs a revised receipt
4. Click the **Receipts** tab

5. 

6. Enter the reason in the Comments Box for recordkeeping.

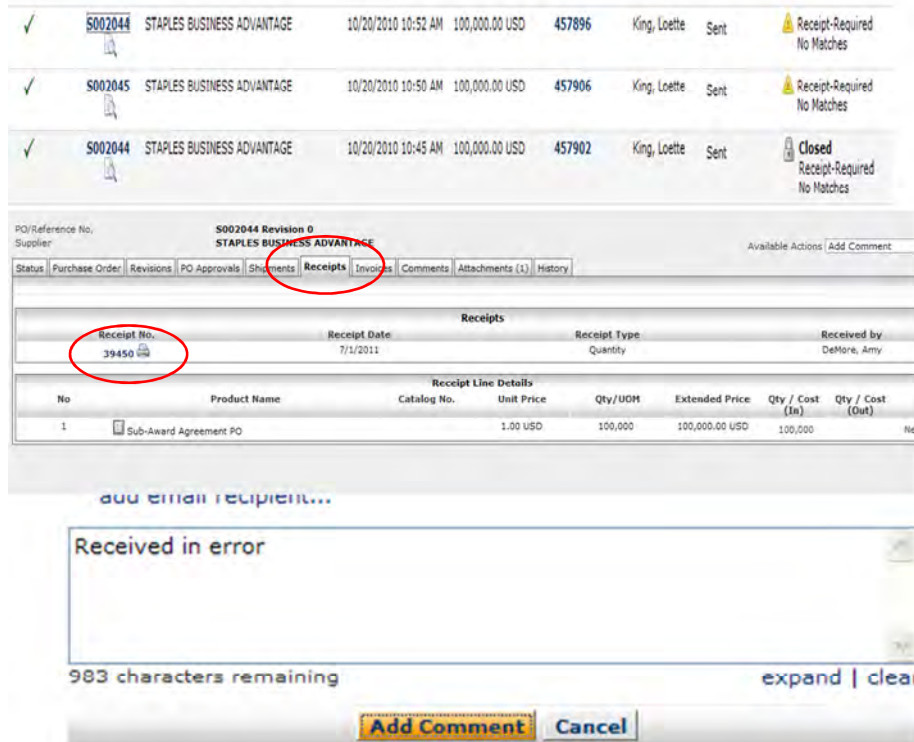
7. 

8. To **update the quantity** enter the correct amount.




9. To **delete** the entire receipt





The screenshot displays the Emory Express system interface. At the top, there is a list of purchase orders for 'STAPLES BUSINESS ADVANTAGE'. The 'Receipts' tab is selected and circled in red. Below this, a table shows receipt details for receipt number 39450, dated 7/1/2011. A 'Receipt Line Details' table shows one line item for 'Sub-Award Agreement PO' with a quantity of 100,000. Below the tables, there is a text input field for comments with the text 'Received in error'. At the bottom, there are buttons for 'Add Comment', 'Cancel', 'Save Updates', and 'Complete'.

Appendix



- A. Ordering Radioactive Materials
- B. Ordering from Specialty Gases Southeast, Inc.
- C. Acquisition and Payment of Goods/Services (P-card purchases, Business Travel, and Online Payment Requests)



Appendix A Ordering Radioactive Items

Below are the 5 requirements when ordering radioactive items:

1. **All radioactive materials** must be shipped to our central receiving location, the Radiation Safety Office.

This address should be saved in the user's profile and must be used as the shipping address for radiopharmaceuticals.

Radiation Safety Office

Attn: Radiation Safety/<PI's Full Name>

Department: EHSO, Room G44

Building/Room: Whitehead Building

615 Michael Street

Atlanta GA 30322

2. Radioactive materials must be charged to **account 54580**.
The account 54580 should be saved in the user's profile and must be used as the subcode for radioactive requisitions.
3. The **PI's authorization number**, usually R - ###, the **amount of radioactive material on hand**, and the **lab location for RSO delivery** must be included in the **internal notes** of the requisition or form.
4. Any radiopharmaceutical that is not available from the hosted catalogs in Express must be requested on a **Request for Radioactive Material** form. See 'Forms'
5. Radioactive items must be requested in a separate cart.

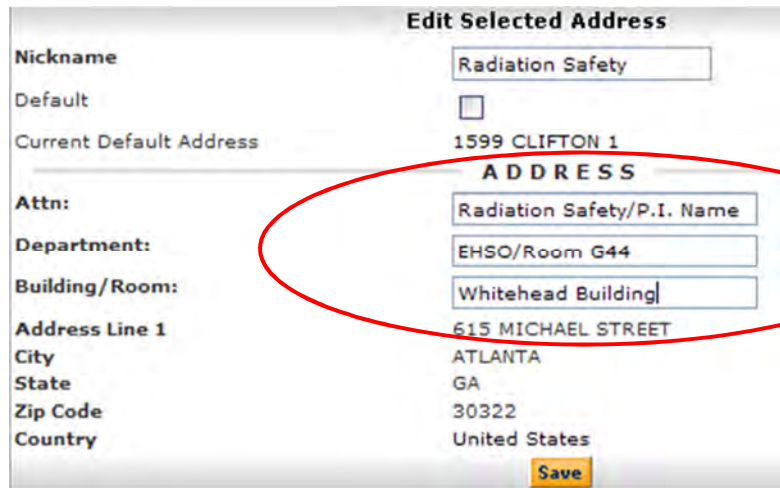
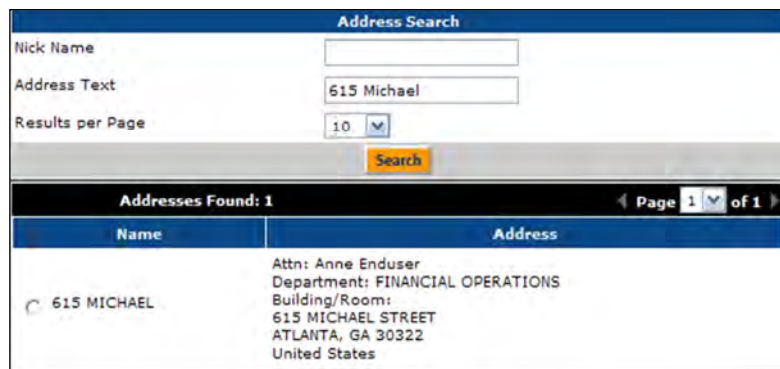
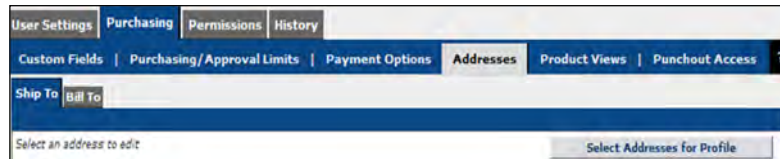


Ordering Radioactive Items

Add Radiation Safety to 'Ship to' Addresses

All radiopharmaceuticals must be shipped to the Radiation Safety Office. The address should be added to the user's profile and selected when needed.

1. Click **Profile**
2. Click **Purchasing**
3. Click **Addresses**
4. Click **Ship To**
5. Click **Select Addresses for Profile**
6. Enter **"615"** and Search
7. Click on the circle to the left of the address, **615 MICHAEL**
8. Enter this information
Nickname: Radiation Safety
Attn, Department, and Building/Room - *Must be entered in the format shown*
Attn: Radiation Safety/PI's Name
Dept: EHSO/ Room G44
Bldg/Room: Whitehead Building







Ordering Radioactives

Radioactive materials can be ordered from hosted catalogs in Express.

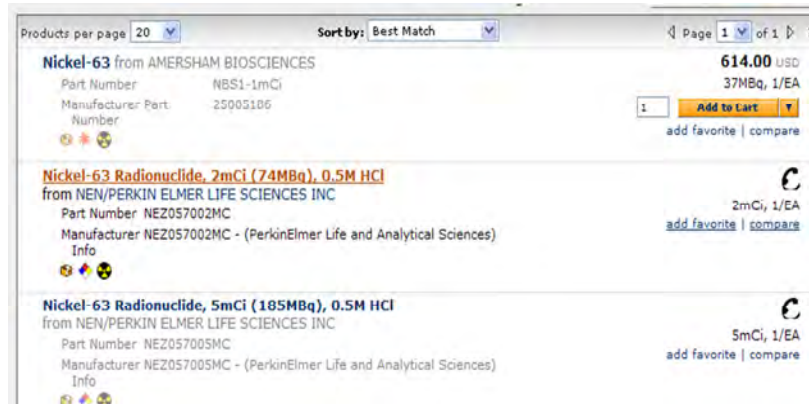
However, to request a radiopharmaceutical that is not available from a hosted catalog in Express, use the **Request for Radioactive Material form**.

Request a radioactive item from a hosted catalog supplier


1. Search for the item or choose it from Favorites.

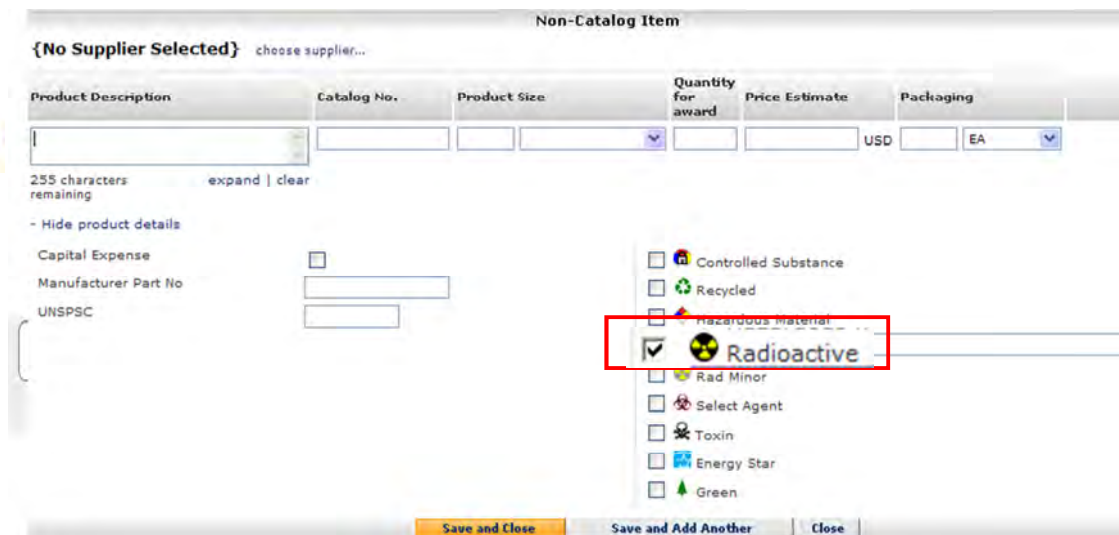
-  indicates a radioactive item
-  indicates a hazardous item

2. Add to Cart



Request a radioactive item that is not in a catalog

1. Click the **non-catalog item** link
2. Complete the non-catalog item as instructed on pp 24-26 **and** select the Radioactive box 






Review cart

Review the cart and enter the shipping address, 54580 subcode, and internal notes.


Shipping, subcode, and internal notes

1. 


2.  the shipping details and

3. From the profile select the **Radiation Safety address** or use the org address search to find 615 Michael Street.

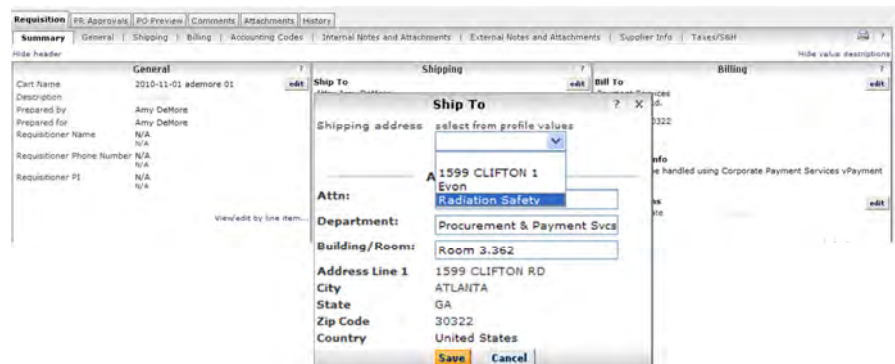
4. 

5.  the Accounting Codes and enter the Smart Key and account 54580.

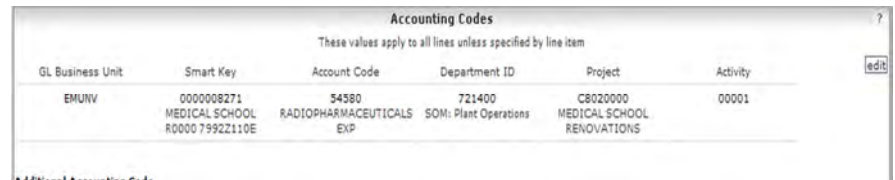


6.  the Internal Notes. Enter the **lab location**, **PI's authorization # (R-###)**, and the **amount of radioactive material on hand**.

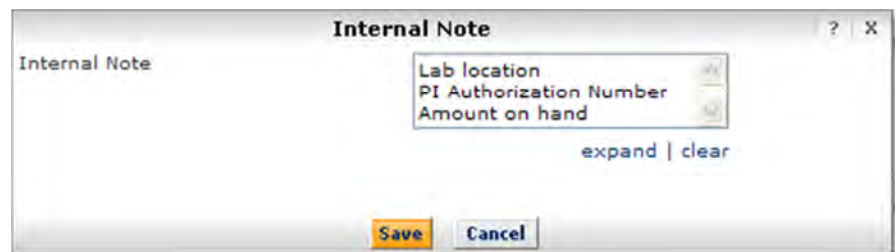




The screenshot shows the 'Shipping' tab of a requisition form. A 'Ship To' dialog box is open, displaying a dropdown menu with 'Radiation Safety' selected. Other fields include 'Department: Procurement & Payment Svcs', 'Building/Room: Room 3.362', and 'Address Line 1: 1599 CLIFTON RD, ATLANTA, GA, 30322, United States'. 'Save' and 'Cancel' buttons are at the bottom.



GL Business Unit	Smart Key	Account Code	Department ID	Project	Activity
EMUNV	000008271 MEDICAL SCHOOL R0000 7992Z110E	54580 RADIOPHARMACEUTICALS EXP	721400 SOM: Plant Operations	CB020000 MEDICAL SCHOOL RENOVATIONS	00001



The screenshot shows the 'Internal Note' dialog box with a text area containing:
Lab location
PI Authorization Number
Amount on hand
Buttons for 'expand' and 'clear' are below the text area. 'Save' and 'Cancel' buttons are at the bottom.



Confirm and Place Order

6. Confirm info including Shipping to **Radiation Safety, Room G 44, 615 Michael**

Account **54580**

Internal notes has the **PI authorization number**, the Amount of radiation on hand, and lab location.

Requisition						
Summary						
Hide header						
General		Shipping		Bill To		Billing
Cart Name	2009-01-08 ademore 01	Ship To	Attn: Radiation Safety/P.I. Name Department: EHSO/Room G44 Building/Room: Whitehead Building 615 MICHAEL STREET ATLANTA, GA 30322 United States	Bill To	Payment Services 1599 Clifton Rd. 3rd Floor Atlanta, GA 30322 United States	
Description		Delivery Options	Ship Via	Best Carrier-Best Way	Billing Options	Accounting Date
Prepared by	Amy DeMore					
Prepared for	Amy DeMore					
Requisitioner Name	N/A					
Requisitioner Phone Number	N/A					
Requisitioner PI	N/A					
View/edit by line item...						
Accounting Codes						
These values apply to all lines unless specified by line item						
GL Business Unit	Smart Key	Account Code	Department ID	Project	Activity	
EMUW	0000009271 MEDICAL SCHOOL R0000 79922110E	54580 RADIOPHARMACEUTICALS EXP	721400 SOM: Plant Operations	CB020000 MEDICAL SCHOOL RENOVATIONS	00001	
Additional Accounting Code						
Internal Notes and Attachments			External Notes and Attachments			
Internal Note	Lab location PI Authorization Number Amount on hand		Note to all Suppliers	Attachments for all suppliers		
Internal attachments			add attachment...			
Supplier / Line Item Details						
Hide line details						
For selected line items: Add To Favorites						
NEN/PERKIN ELMER LIFE SCIENCES INC						
Contract: EU0139 more info...						
PO Number: To be assigned - edit to specify						
Add non-catalog item for this supplier...						
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 [a- ³² P]-Deoxycytidine 5'-triphosphate, 250µCi (9.25MBq), Specific Activity: 30000Ci (1111TBq)/mmole, 10mmol Tris base (pH 7.0), Lowal Frac. Resubstanc...	BLU013H250UC	250µCi (9.25MBq) 1/EA	92.00	1 EA	92.00 USD	
Manufacturer Name	PerkinElmer Life and Analytical Sciences	May Procurement Services source this item from another supplier?	Internal Note	Internal attachments		
Manufacturer Part Number	BLU013H250UC		add attachment...			
CAS Number	102783-51-7		External Note	Attachments for supplier		
Molecular Formula	C ₁₀ H ₁₆ N ₅ O ₁₃ P ₃		add attachment...			
					Supplier subtotal	92.00
					Shipping	30.00
					Handling	0.00
					Supplier total	122.00 USD
Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.					Subtotal	92.00
					Shipping	30.00
					Handling	0.00
					Total	122.00 USD

7.



The requisition will be electronically placed into the approval workflow.



Appendix B Ordering from Nexair

Nexair requires:

- the user's account number - E#### that is assigned by Nexair
- the Smart Key that the tank rental fee should be charged to.

Enter the information in the external notes field for Nexair.

The screenshot shows the 'Edit Line' interface for a Nexair order. The main table lists the following item:

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 CARBON DIOXIDE DRY 50lbs more info...	CO2 DRY 50	50LBS CYL	10.25	1 CYL	10.25 USD

Additional details for the item include:

- UNSPSC: 12-14-19-00 [more info...](#)
- May Procurement Services source this item from another supplier?
- Internal Note:
- External Note: (highlighted with a red box)

At the bottom of the interface, there are 'Save' and 'Cancel' buttons.