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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
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 (Punch Outs) 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.
  o 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.
  o Keep new suppliers in a separate cart as they require additional processing time in Procurement.
  o Keep radiopharmaceuticals in a separate cart. All radiopharmaceuticals require additional approval through Emory’s Radiation Safety Office.

• **When searching through the Shop hosted catalogs:**
  o Search by part number. If the part number returns no results, try searching by manufacturer number.
  o If an item cannot be found by part number or manufacturer number, try the supplier’s PunchOut if available.
  o Search by product description and use the filters to narrow results.
  o 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:**
  o May be used for custom designed orders or special quotes. Suppliers will advise when your quote or custom product is available in their PunchOut.
  o 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**.

   ![Emory Express login page](image)

   3. Select the **Emory Express** quick link

   ![Emory Express quick link](image)
4. Enter your Emory Network ID and password. **Login.**

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

### 3.2 Support

There are several help features available in Emory Express:

- ![help icon] icons indicate helpful information is available for a screen or section in Emory Express.
- ![info icon] Place your mouse on a symbol, icon, or form name and additional information will display.
- **Email your questions:**
  - Order inquiries: e-market@emory.edu
  - Payment Inquiries: actspay@emory.edu
- Useful links are available on the Emory Express Message Board

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**Useful Links**

- Buying in the Emory Marketplace
- Emory Commodity Matrix (Buying and Payment Methods at Emory)
- Emory Express User Manual
- Lookup Payment Information
- Account Code Quick Reference List
- Supplier Promotions
- Procurement & Payment Services Forms
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 (Speed Charts 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.
5.2.1 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.

5.2.2 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.

5.3.1 Custom Fields and Accounting Code Defaults

Select the **Codes** tab to store your Speed Chart(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 Speed Chart:
   a. Select the Speed Chart Edit Button
   
   b. Create New Value and enter the Speed Chart in the Value box. Do not enter a description. If this is your only Speed Chart, you may select Default to automatically attach it to all Emory Express carts. Save. Repeat this step to add additional Speed Charts.

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.
5.3.2 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.**

   ![Image of Select Addresses for Profile](image1.png)

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

   ![Image of Enter Street Number and Search](image2.png)

   d. **Select your Address.**

   ![Image of Selecting your Address](image3.png)
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 52 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. 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

6.1 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.

6.1.1 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.
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.

6.1.2 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.
6.1.3 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.

6.2 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.

### 6.3 Non-Catalog Form

The Non-Catalog Form 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 Form** link under Popular Forms.

2. **Enter Supplier and select** your supplier.

   a. If the supplier is not found, **Enter New Supplier** and **select your supplier**. Then complete the **New Supplier Info** section.

3. **Complete the General Info bolded fields**. The information should match your quote or the supplier’s website.
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. Complete the Additional Information.
   a. You must answer the Is Emory University entering into a contractual agreement with this purchase question. Answer yes if you are attaching a contract so Emory Express will route it to an authorized signature authority.
   b. All quotes should be attached when entering your last item. Attaching a quote for each item submitted could increase the file size when transmitting the order to the supplier, thereby delaying your order.
6. **Add the items to your cart.**

   a. **To order one item, click Go.**

   b. **To order multiple items from that supplier, change the Available Actions to Add to Cart. Click Go. Enter the General Info. Repeat this step until the last item is in the cart. If applicable, attach the quote under External attachments on the last item only.**
7. **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*.

![Shopping Cart Image]

### 7.1 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.*
7.2 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.
8. Proceed to Checkout

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

1. Shipping and delivery options
2. Accounting Codes
3. 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 errors. Use the workflow banner to access any page you need to edit.

## 8.1 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 multiple addresses; each order must deliver to a single address.

### 8.1.1 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.**

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

   d. **Enter the Building/Room number** and **Save**.
8.1.2 **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 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.*
8.2 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 58-61.
8.3 Accounting Codes

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

8.3.1 Speed Chart/Account Code Changes for all Items

1. To change the 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.

3. If the code is not in your profile, enter it directly in the corresponding text box. Save.

8.3.2 Speed Chart/Account Code Changes for Individual Items

1. To change the Speed Chart or Account Code for individual items, edit the Accounting Codes next to the applicable item.
2. Emory Express will notate 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.

8.4 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.

8.4.1 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 attachment...** link.
   
   ![Internal Notes and Attachments](image1)

   b. **Select Files.**

   ![Add Attachments](image2)

   c. **Locate your file and double click the name.**

   ![File Upload](image3)

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

   ![Add Attachments](image4)
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**.

8.4.2 **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**.

---

![External Notes and Attachments](image-url)
2. To add an External Attachment from the Final Review Page:
   a. Select the External Attachments **add attachment**... link next to the first item you are ordering from the intended supplier recipient.

   ![Add Attachments](image1)

   b. **Select Files**.

   ![Add Attachments](image2)

   c. **Locate your file and double click the name**.

   ![File Upload](image3)

   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**.

8.5 **Final Review and Place Order**

In addition to adding Notes and Attachments, the Final Review page is 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 **Place Order** button.
9. 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.

2. Select the requisition number.

3. Select the PR Approvals tab.

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.
10. 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 38-40).

10.1 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.
10.2 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 tab**. **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**.
11. 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 page 32-35.

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

Once you have located your document:

1. Click Go in the Available Actions menu.
2. All users who have acted on the document will appear. *Select a recipient if applicable.* (If your recipient is not listed, see step 3.) Enter your comment. Attach documentation if needed. **Add Comment.**

![Add Comment](image)

3. If your recipient is not listed:
   a. Select **add email recipient…**

![Add Comment](image)
b. Search for the recipient and select.

c. Enter your comment. Attach documentation if needed. Add Comment.
12. Cancelling an Order

Due to speed of fulfillment, please contact the supplier first to cancel your order. Request written confirmation of the cancellation.

If they are able to successfully cancel your order, please follow the steps on the *How do I Close a Purchase Order?* job aid to cancel the order in Emory Express.
13. 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.

13.1 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.

13.2 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 (Speed Chart, 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.
13.3 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

13.4 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

13.5 Quick View Next & Previous

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

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

13.6 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.

13.7 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 Speed Charts and Account Codes charged.

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

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

4. Select the file name. Save or Open the file. OK.
13.8 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.

13.9 Customizing your Export Results

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

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

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

3. To customize imported fields, select **Let me choose**. If you are exporting accounting codes, select **Yes** next to “Do you want Custom Fields as columns in your data file”.

Choose Custom Fields – Line Level to capture line level changes. Select additional Export Files if applicable. Select the Next button.

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

6. You can now choose your Document Search **Export Template** when you export search results.
14. 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.

14.1 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.

14.2 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.
14.3 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. Place Order.
15. 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** Classification.

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

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

5. 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**

   [Check box]

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

<table>
<thead>
<tr>
<th>Supplier Inv #</th>
<th>Invoice Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>123456</td>
<td>10/29/2014</td>
</tr>
</tbody>
</table>

7. 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.

8. Request special disposition such as hold for pick up or mail enclosures in the Internal Notes box.

9. Select **Add Attachments** to attach your supporting documentation. Retain supporting documentation in your department; Payment Services will process your request using the electronic attachments.
10. 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.

11. Follow the steps to Proceed to checkout on pages 25-37.

12. 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.
16. Invoice Review

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

Suppliers may submit invoices electronically to Emory Express, by mail to our imaging service or directly to you if a Purchase Order does not exist (Check Requests). Steps to access invoices depend on the invoice delivery method.

16.1 Electronic Invoices

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

To access electronic invoices:

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

2. Select the Invoices tab.

3. Select the Voucher No.

![Invoice Display]

PO/Reference No. T182050 Revision 1 (Closed)
Supplier STAPLES BUSINESS ADVANTAGE

Status Purchase Order Revisions PO Approvals Shipments Receipts Invoices Comments Attachments History

General Information
PO/Reference No. T182050
Revision No. 1
Supplier Name STAPLES BUSINESS ADVANTAGE
Purchase Order Date 4/16/2014
Total 402.96

Invoicing Summary
Voucher No. 0570596
Supplier Invoice Number 3228750802
Invoice Date 4/17/2014
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.

16.2 Paper Invoices

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

To access images of paper invoices:

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

2. Select the Invoices tab.

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

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

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

To access Check Request invoices using Emory Express:

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

2. Select the Attachments tab.

3. Select the Attachment name.

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