HOW TO MANAGE COLLABORATIONS

Overview

The following instructions explain how to create and manage express shipping collaborations within the eShip@Penn system. The function supports limited "Guest" access for inbound shipments for Research and non- Research materials, both Domestic and International. It provides a manageable and compliant alternative to Penn created "return labels." Collaborations create a limited self-service option for immediate, recurring, or regulated shipments packaged outside the University; no longer solely dependent on Penn personnel to coordinate.

For additional information and FAQs regarding eShip@Penn, review the eShip@Penn website hosted by Penn Mail Services.

Key Points

eShip@Penn provides the ability to set up non-Penn recipients as Collaborators. Collaboration allows for more details to be associated with a recipient than is available in the Address Book and allows shipments to Penn to be generated on demand, and at no cost by an external collaborator.

- Multiple "Ship To" addresses from the Address book allow sender to select one or many **domestic locations only**, at time of shipping. Supports pre-paid 2nd to 3rd party shipments. **(multi "ship to" addresses are not available for international shipments)**
- Shipping labels/Airway Bills can now be generated by non-Penn colleagues through eShip@Penn collaboration.
- Using the eShip application ensures the proper purchasing protocol is followed by using the default budget code of the Requester on every transaction. Each transaction can be tied back to Penn G/L and financial records through the tracking number, budget code, and Requester.
- Setting up a Collaboration can be done quickly, and in advance for immediate shipments, and shipping privileges easily modified, terminated, or extended as business needs dictate.
- Collaborations can be managed easily from any web-enabled device including laptops and smartphones.
- Collaboration for return shipping supports compliance requirements for restricted party screening, and simplifies billing, payment, and cost reallocation.

When to Add a Collaborator

- For frequent *inbound* shipping to Penn, either research or business materials, both domestic and international.
- Research samples need to be shipped to and/or returned to a Penn recipient, with little advance notice, or outside normal business hours.
- Whenever regulated materials, including biologics and dry ice, will be prepared and packaged by shippers outside the university.
- For any on-going or recurring external or vendor relationships, where the shipping costs are paid by Penn and not otherwise addressed by a Purchase Order.
- As a more secure option than providing a departmental or University express carrier account number.

Important Notes

- Research Materials being shipped to Penn locations require the shipper to have the appropriate training (at the time of the creation of the shipment) to send the shipment.

- International shippers must comply with all applicable export regulations at their country of origin as well as import regulations for the US.
- Certain categories of Research Shipping Collaborations are disallowed to the University at this time: inbound Chemicals, Category A Biologicals, and Radioactive Materials.   Please contact Penn EHRS for further instructions.
- With few exceptions, all inbound research material should be shipped through collaboration rather than providing a FedEx account number.
- Non-Penn Collaborators have a limited version of eShip@Penn and will not see confidential information, rates, shipment pricing or budget code details.
- When reviewing shipping history under "My Shipments", shipments to Penn from outside collaborators are marked with Shipment Status = *Inbound*. Sponsors may choose to filter Inbound shipments by individual collaborator name, or view All Collaborators.

    Note: As with outbound shipments, your Domestic, International, and Research Material shipping histories are each unique reporting options under MY SHIPMENTS

How to Manage Collaborations: Adding a Collaborator

1. At the top of your eShip@Penn window, click on *Manage Collaborations* under **Acct Management** menu.

2. Complete all Guest Shipper information on the Collaborator Invitation and click on **Send Invitation**.
   - Required Fields include:
     - **Shipment Origin** (Country)
     - **First** and **Last Name** of the Collaborator preparing the inbound shipment
     - **Email** address which should receive the activation invitation
     - **Number of Shipments** permitted (this can later be modified)
     - **Allowed Workflows** (select one or both)
       - Non-Research Material Shipping (Business documents or non-regulated products)
       - Research Material Shipping (biological, dry ice)

3. The system will display your confirmation under Collaborator List with a Status of **Pending**, until accepted

Collaborator List

	Collaborator Name and Email	Collaboration Status	Shipment Limit	Non Research Material Shipping	Research Material Shipping	Associated Billing Reference	Collaboration created on
Details	Valerie Morgan TEST (vcdebater92@comcast.net)	Pending Re-send Invitation/Activation Email Delete Collaboration	10	Y	Y	No default payment method detected	12/15/2020
Details	Kanisha Scott (kanisha@upenn.edu)	Pending Re-send Invitation/Activation Email Delete Collaboration	10	Y	Y	No default payment method detected	12/1/2020

- You cannot proceed with the inbound shipment until the Collaborator registers. If Pending, the Penn staff member can either **Re-send** the invitation or **Delete** the collaboration.
- If the request was sent to an incorrect email, the original invitation cannot be edited and re-sent. Delete the collaboration in error and create a *new* invitation to the correct email address.
- Number of Shipments and Allowed Workflows may be edited after registration, anytime during the course of the collaboration.

4. eShip@Penn sends out an email notification to the guest Collaborator – an Invitation to Collaborate noting the Penn staff member's name and email, with instructions on how to register. The activation email will be addressed from **no-reply@eshipglobal.com**.

eShipGlobal - Invitation to collaborate

N no-reply@eshipglobal.com <no-reply@eshipglobal.com>
12/2/2020 10:07 AM

To: vcdebater92@comcast.net

Dear Valerie Morgan,

KANISHA SCOTT (kanisha@upenn.edu) would like to collaborate with you for Inbound shipping. Please activate the invitation by clicking on the following link.

https://upenn.eshipglobal.com/Registration/

We encourage you to email us at Support@eShipGlobal.com or call us at (800) 816-1615 (International callers please call 001-972-518-1775) with any questions that you might have.

Thank you.

Sincerely,
The eShipGlobal Team.

5. The Collaborator must accept their invitation by clicking on the email link to activate. They need to set a password, confirm their default Ship From Address and **Register**:

6. Successful registration will immediately be confirmed for the Collaborator.

7. Once the Collaborator registers successfully, eShip@Penn will send an email to the Penn user informing that the Collaborator registered, and the guest user can go ahead and create an inbound shipment.

From: <no-reply@eshipglobal.com>
Date: Wed, Dec 16, 2020, 11:29 PM
Subject: eShipGlobal - Collaboration Confirmation
To: <_____edinlove09@gmai_____>

Dear VALERIE J MORGAN,

Your collaboration has been activated successfully. Please find additional information on the collaboration below:

To access your account, please click on the following link:
https://upenn.eshipglobal.com/login/systemlogin.asp.

For shipping assistance, follow the step-by-step instructions on how to create a shipment here: https://upenn.eshipglobal.com/inbound_directions.pdf.

Thank you.

Sincerely,
The eShipGlobal Team.

8. When the Penn sponsor returns to the eShip **ACCT MANAGEMENT/Manage Collaborations** menu , the status of the new collaboration should now display as *Active* on the Collaborator list.

Collaborator List

	Collaborator Name and Email	Collaboration Status	Shipment Limit	Non Research Material Shipping	Research Material Shipping	Associated Billing Reference	Collaboration created on
Details	Test User (blessedinlove09@gmail.com)	Active	15	Y	Y	No default payment method detected	12/16/2020

9. *The only **SHIP TO** address initially available to a Collaborator will be the sponsor's eShip@Penn default system address.* It is highly recommended all sponsors review their current system generated inbound shipping address for correctness by selecting **Details** on any newly active Collaboration.

	Contact Name	Company Name	Address Line 1	Address Line 2	City	State	Zipcode	Country
Default Address	Business Services Division	UPENN/Valerie J. Morgan	3401 Walnut Street	Ste 440A	Philadelphia	PA	19104	US

How to Manage Collaborations: Edit or Update

1. To edit or update your collaboration, click on the **Details** link.

2. Edit your collaboration:
   - Modify the status (Active or Expired)
   - Increase or decrease the number of shipments you would like your collaborator to be able to ship
   - Update the allowed workflows (RMS – Research Material Shipments, or Non-RMS)

NOTE: You can terminate any collaboration by changing the status to "Expired"

3. From the **Details** screen, you may also add any **Approved Address** listed from your current eShip Sender's Address Book. To make new Ship To addresses available, or to edit existing addresses, you first need to add or edit them under your main eShip **ADDRESS BOOK/Sender Addresses**.

Guidance for Collaborators using eShip for regulated shipments

1. To ship a package as the collaborator, select the inviter.

2. Answer whether the shipment contains any hazards or regulated material.

3. The shipper must have current shipping training to send any hazardous or regulated materials. The shipper must agree to this statement to continue.

4. Select the appropriate classification for your biological shipment.

5. The shipper will complete the material description, quantity, and value.

6. The shipper will complete the shipping information, including address, package information, and special instructions, including the use of Dry Ice.

7. Finally, the shipper must acknowledge that they will follow all regulations required to ship this package, as listed in the pop-up window. This will be customized to the shipment and material details.