

eShip@Penn Express Shipping powered by eShipGlobal

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.

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- 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

eShip
Global™
Penn
UNIVERSITY of PENNSYLVANIA
DROP-OFFS SUPPLIES CONTACT

HOME RATE QUOTE SHIP TRACK QUICKSHIP MY SHIPMENTS ADDRESS BOOK ACCT MANAGEMENT HELP LOGOUT

Domestic Shipment History

From Date:

To Date:

Tracking/Order #:

Shipment Status:

	Order #	Item #	Origin	Destination	Service	Tracking	Total
Cancelled (Inbound)	108918463	1	University of Outside Collaborator Test User 730 N. Swarthmore Ave Ste TBD Swarthmore PA 19081 United States	UPENN/Valerie J. Morgan Business Services Division 3401 Walnut Street Ste 440A Philadelphia PA 19104 United States	UPS 2nd Day Air On 12/17/2020	1Z8076EA0293706074 No information at this time.	USD 9.66
Cancelled (Inbound)	108867865	1	esg Mark Roberts 18111 Preston Rd Dallas TX 75252 United States	UPENN Regular User 3620 Hamilton Walk test Philadelphia PA 19104 United States	FedEx Standard Overnight On 12/1/2020	399697384769 No information at this time.	USD 13.53

Revised: 12/17/2020 For help contact Penn Mail Services at 215-898-MAIL (6245) 2

or eShip@upenn.edu

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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)

A screenshot of the 'Collaborator Invitation' form. The form is titled 'Collaborator Invitation' and contains the following fields: '*Shipment Origin: Select Country' (dropdown menu), '*First Name:' (text input), '*Last Name:' (text input), '*Email:' (text input), and '*Number of Shipments:' (text input). Below these fields is the '*Control Code: 12937652'. Under the heading 'Allowed Workflows', there are two checkboxes: 'Non Research Material Shipping' and 'Research Material Shipping'. A red rectangular box highlights the 'Send Invitation' button at the bottom right of the form.

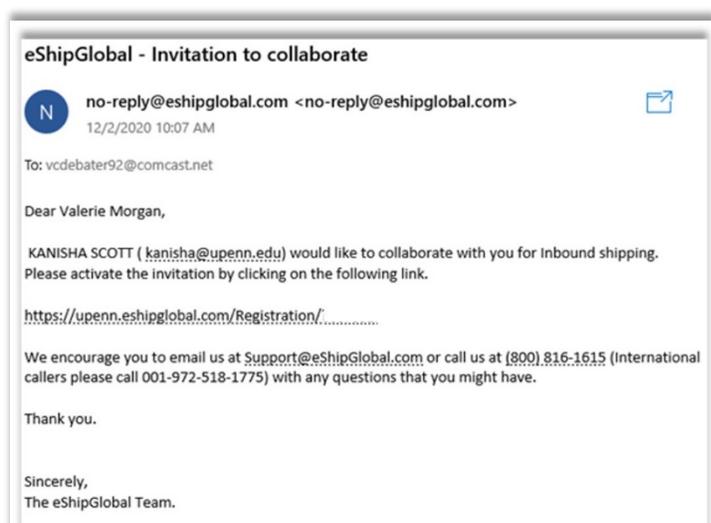
3. The system will display your confirmation under Collaborator List with a Status of **Pending**, until accepted

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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**.



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**:

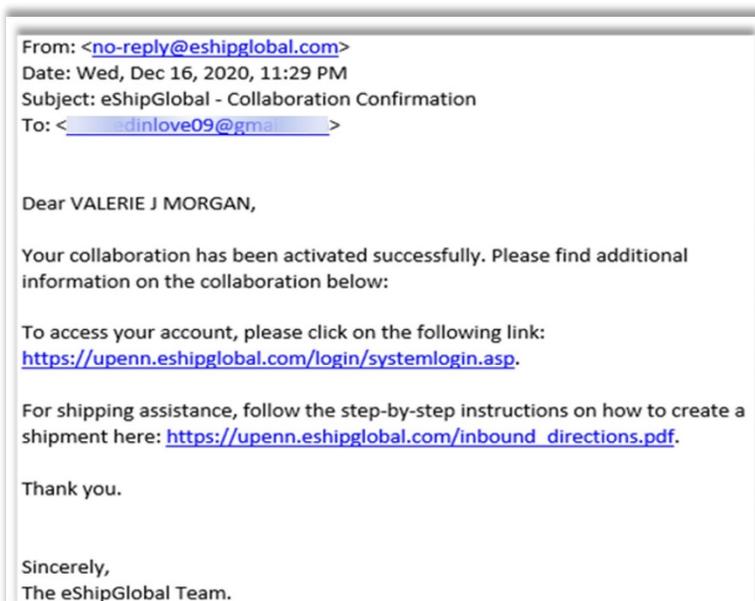
The screenshot shows the 'Collaborator Registration' page. At the top, there are logos for 'eShip Global' and 'Penn University of Pennsylvania'. Below the logos, the page title is 'Collaborator Registration'. A message reads: 'Please complete the form below to create a collaborator profile. On successful registration you will receive an email with further instructions.' The form contains the following fields: 'Email', '*Password', '*Re-type Password', '*First Name', '*Last Name', '*Company Name', '*Address Line 1', 'Address Line 2', '*City', '*State' (a dropdown menu with 'Select State' as the current selection), '*Zip/Postal Code', 'Country' (a dropdown menu with 'United States' as the current selection), and '*Phone'. A 'Register' button is located at the bottom of the form. A note at the bottom left of the form area states '* Required Fields'.

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.

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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

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How to Manage Collaborations: Edit or Update

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

Collaborator List

	Collaborator Name and Email	Collaboration Status	Shipment Limit	Non Research Material Shipping	Research Material Shipping	Associated Billing Reference	Collaboration created on
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

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)

Collaborator Details

Contact name:	Test User
Email Address:	<input type="text" value="JVE09@GMAIL.COM"/>
Status:	<input type="text" value="Active"/>
Shipment Limits:	<input type="text" value="15"/>
Cost Object:	12937652
Allowed Workflows:	<input checked="" type="checkbox"/> Rms <input checked="" type="checkbox"/> Non-Rms
<input type="button" value="Save Changes"/>	

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**.

Approved Addresses

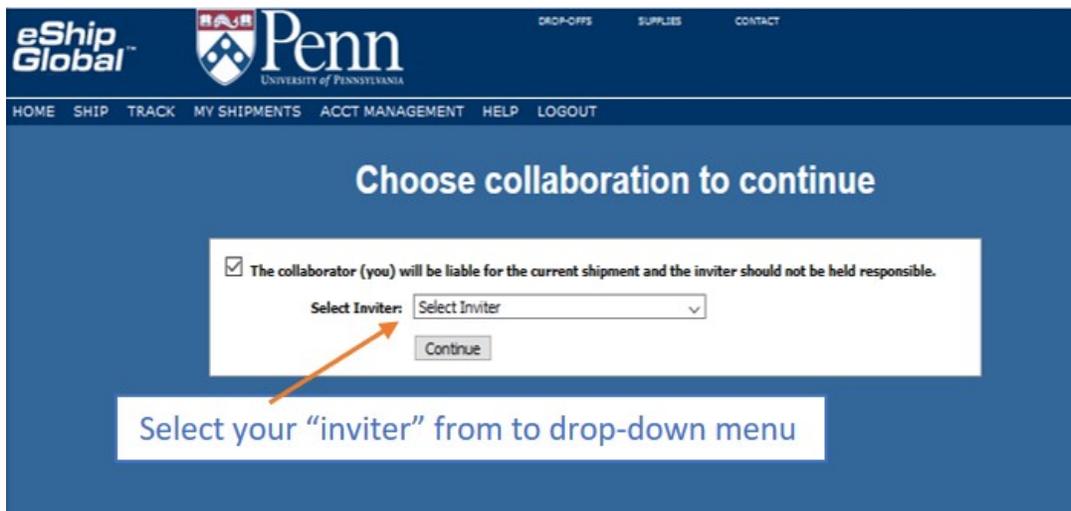
- Inviter (you): The addresses added below will be available for this collaborator to send shipments to. These addresses are from your "Sender" Address book. To add additional addresses, please go to your address book and click on "Sender Address".
- Collaborator: the default and added addresses will be migrated to the collaborator as Recipient (Ship To) Addresses.

	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
<input type="button" value="Add"/>	This is a test	Joe Smith/Lab name	1250 Porter St		Franklin	TN	37064	US

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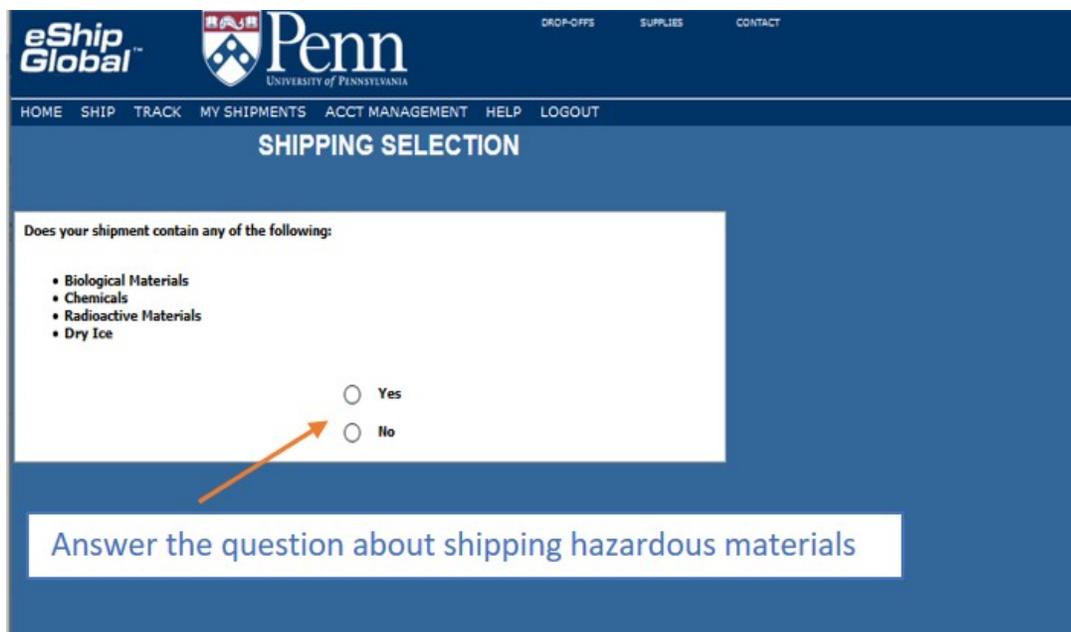
Guidance for Collaborators using eShip for regulated shipments

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



The screenshot shows the eShip@Penn web interface. At the top, there are logos for eShip Global and Penn University of Pennsylvania, along with navigation links for DROP-OFFS, SUPPLIES, and CONTACT. Below that, there are more navigation links: HOME, SHIP, TRACK, MY SHIPMENTS, ACCT MANAGEMENT, HELP, and LOGOUT. The main heading is "Choose collaboration to continue". Below this, there is a checkbox that is checked, with the text "The collaborator (you) will be liable for the current shipment and the inviter should not be held responsible." Below the checkbox, there is a label "Select Inviter:" followed by a dropdown menu that currently shows "Select Inviter". An orange arrow points to the dropdown menu. Below the dropdown menu is a "Continue" button. At the bottom of the screenshot, there is a white box with blue text that says "Select your 'inviter' from to drop-down menu".

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



The screenshot shows the eShip@Penn web interface. At the top, there are logos for eShip Global and Penn University of Pennsylvania, along with navigation links for DROP-OFFS, SUPPLIES, and CONTACT. Below that, there are more navigation links: HOME, SHIP, TRACK, MY SHIPMENTS, ACCT MANAGEMENT, HELP, and LOGOUT. The main heading is "SHIPPING SELECTION". Below this, there is a question: "Does your shipment contain any of the following:". Below the question, there is a list of items: Biological Materials, Chemicals, Radioactive Materials, and Dry Ice. Below the list, there are two radio buttons: "Yes" and "No". An orange arrow points to the "Yes" radio button. At the bottom of the screenshot, there is a white box with blue text that says "Answer the question about shipping hazardous materials".

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

- Select the appropriate classification for your biological shipment.

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

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HOME SHIP TRACK MY SHIPMENTS ACCT MANAGEMENT HELP LOGOUT

RESEARCH MATERIAL SHIPPING

Stage 2 : Material Selection

MATERIAL DATABASE

Please provide details about the material you are shipping in the form below including:

- Material Name (Provide description that includes the origin of the material and solution it is packed in, for example protein derived from rat serum, noninfectious in ethanol)
- Quantity in each inner receptacle (For shipments with multiple inner containers)
- Total Quantity in Package (Total weight or volume of package contents)
- Net Value in USD (Total value of package contents)
- NOTE: For Dry Ice shipments, enter quantity of dry ice (in lbs) in the "Special Instructions" section on the next screen.

*** Material Name: Provide a description of the material, for example "Murine Cell line-not infectious-has not been exposed to animal pathogens-not regulated" because this will become the wording for the "Description of Goods" in the Commercial Invoice.**

Material Entry

Material Classification: Exempt Human Specimen

*Material Name:

*Total Quantity in Package: ml (Max. Total Qnty: NA)

*Net Value in USD (Min. 1):

Does the material contain any chemical preservative?

Add another material Continue Start Over

Complete the material description, quantity, and value details for your shipment.

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

The screenshot shows the 'RESEARCH MATERIAL SHIPPING' web application interface. The page title is 'RESEARCH MATERIAL SHIPPING' and the current stage is 'Stage 3 : Shipment Creation and Documentation'. The interface is divided into several sections:

- Ship Domestic:** Includes 'Ship From' (Name, Address, Edit button) and 'Shipping Date' (12/17/2020).
- Ship To:** A dropdown menu for 'Select Address'.
- Research Materials:** A table with columns: Material Name, Material Classification, UN or ID No., Harmonized Code, *Net Weight, Net Value(USD), and Q ratio. The current entry is 'Tissue', 'EXEMPT HUMAN SPECIMEN', '1ml', and '1'.
- Package Info:** Includes 'No. of pkgs. for each address above: 1', radio buttons for 'Identical' (selected) and 'Non-Identical', 'Type' (Select a package), 'Service' (Select a service), 'Total Pkg Weight' (lbs), 'Dimensions' (inches), and 'Shipment Ref'.
- Special Instructions:** Includes checkboxes for 'Saturday Delivery', 'Signature Required', 'Signature Release', 'Dangerous Goods', 'Dry Ice (Express shipments only)', and 'Overpack'. It also has a 'Dangerous Goods Type' dropdown, 'Person Responsible' text field, and 'Dry Ice Weight' (lbs). 'Decl. Value' is set to 0 (US\$).
- Email Notifications:** Includes checkboxes for 'Notify Shipper', 'Notify Recipient', 'Notify Shipper on Delivery', 'Notify Others on Delivery', and 'Notify Shipper on Exceptions'.

At the bottom, there are buttons for 'Show Quote', 'Ship', and 'Start Over'. A blue callout box with orange arrows points to the 'Special Instructions' section, containing the text: 'Complete the shipping information for your shipment.'

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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.

The air waybill contains the following information:

1. The UN Number "1845", preceded by the prefix "UN"
2. The words "Carbon dioxide, solid" or "Dry ice"
3. The Class number "9"
4. The number of packages of dry ice
5. The net quantity of dry ice in kilograms

Quantity

6. The quantity of dry ice per package is 200 kg or less

Package Condition

7. Packages are free from damage and in a proper condition for carriage
8. The packaging is vented to permit the release of gas and is of sufficient strength for the amount of material being shipped

Markings

9. The words "Carbon dioxide, solid" or "Dry ice"
10. The UN number "1845" preceded by prefix "UN"
11. Full name and address of the shipper and consignee
12. The net quantity of dry ice within each package

Labels

13. Class 9 label affixed
14. No irrelevant marks or labels

By checking this box you agree to follow the steps indicated above when preparing the package for this shipment

Continue

Material Name	Material Classification	
Adeno virus	UN 3373 Biological Substance, Affecting Humans	Proper shipping name: Biological substance, Category B UN NO: UN3373 Net Weight/Volume: 1 ml Net Value: 1 USD

Complete Shipment Cancel Shipment Shipment History

Acknowledge you will comply with required shipping regulations for your shipment to gain access to needed documentation