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For additional information and FAQs for eShipGlobal, go to the eShipGlobal information on “It’s Your Yale”

NOTE: The Screen shots in this guide provide COA charging instructions / cost allocations. They are solely intended for instructional purposes and should not be used in your shipments. For questions related to what COA you should use, please contact your supervisor or your business office.
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HOW TO ACCESS/LOG IN

Overview

- To access your eShipGlobal application, simply login with your Yale NetID.
- For additional information and FAQs for eShipGlobal, go to the eShipGlobal information on “It’s Your Yale”.

NOTE: If you don’t have access to the system or the application denies your login, contact your business office.

Key Points

- Access your eShipGlobal application through the eShipGlobal page.
- Click the link to be automatically logged into your eShipGlobal application.
- After 30 minutes of inactivity, you will automatically be logged out of the eShipGlobal system.
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MAINTAINING USER PREFERENCES

Overview

The Account Management functionality will help you easily maintain shipping preferences in the eShipGlobal system.

For additional information and FAQs for eShipGlobal, go to the eShipGlobal information on “It’s Your Yale”.

Key Points

- Default settings for email notifications and package pick-up or drop-off preferences can easily be changed.
- Although these selected options will automatically appear by default for each shipment that you create, preferences can be changed for each individual shipment/order.
- After 30 minutes of inactivity, you will automatically be logged out of the eShipGlobal system.

Maintain User Preferences

1. Click on Account Management from the navigation menu located at the top of the eShipGlobal window. Then select User Preferences.

2. Click to select Email Notifications you would like to send or receive.

3. Click one of the radio buttons to select your Package Pickup/Drop-off Preferences.
4. Click on **Save Preferences**. Your selection will be saved and you will receive a confirmation message.

---

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<table>
<thead>
<tr>
<th><strong>Email Notifications</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Check the appropriate checkboxes for default email notifications</td>
</tr>
<tr>
<td>□ Notify Shipper on Order</td>
</tr>
<tr>
<td>□ Notify Recipient on Order</td>
</tr>
<tr>
<td>□ Notify Shipper On Delivery</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>External Scales Configuration</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Use external scales connected to PC on port: COM1 ▼</td>
</tr>
<tr>
<td>[Setup Weighing Scales]</td>
</tr>
<tr>
<td>Read this before attempting to connect and configure your scales</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Label Printer Type</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Please indicate the printer type for printing airbills. A thermal printer setup user guide is available <a href="#">here</a>.</td>
</tr>
<tr>
<td>□ Laser Printer</td>
</tr>
<tr>
<td>□ Thermal Printer (EPL2, ZPL formats)</td>
</tr>
<tr>
<td>Thermal printer type: Eltron (EPL2) ▼</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Thermal Printer Configuration</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter the name of the thermal printer that's connected to your workstation</td>
</tr>
<tr>
<td><strong>Thermal Printer Name:</strong></td>
</tr>
<tr>
<td>(eg. \Machinename\printername)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Package Pickup/Drop-off preference</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Please choose Drop-Off or Pick-Up for the default shipping option</td>
</tr>
<tr>
<td>□ No Preference</td>
</tr>
<tr>
<td>□ Drop-Off</td>
</tr>
<tr>
<td>□ Pick-Up</td>
</tr>
</tbody>
</table>

[Save Preferences]
MANAGING ADDRESS BOOK ENTRIES

Overview

The Address Book stores Recipient and Sender information for easier shipping to commonly used addresses.

For additional information and FAQs for eShipGlobal, go to the eShipGlobal information on “It’s Your Yale”.

Objective

Learn how to add, edit, and delete addresses in your eShipGlobal Address Book so the information is accurate and easily available for shipping packages.

Key Points

- A list of shipping addresses for Recipients and Senders can be maintained in the eShipGlobal Address Book.
  - When shipping a package using the eShipGlobal system, add the frequently used Recipient to the Address Book.
  - Enter Recipient addresses into the Address Book in advance of using them.
    - The recipient address can be added directly from the shipping form while the address is typed, once the “Add to Address Book” check box.
  - You can also maintain multiple Sender addresses. An example is that if you have multiple office locations, you can create a Sender address for each location. You can then select the appropriate Sender address from the Address Books when preparing a Shipment.
  - For inbound shipping labels that do not involve research materials, you will establish your address as a Recipient address.
    - For multiple shipments from the same sender, the recommendation is to utilize the “Collaboration” module.
  - When an address changes or you realize that you have entered and saved the information incorrectly, editing entries is easy.
  - When an entry is no longer required in the Address Book, it can be deleted.
  - The system also allows the bulk import of addresses. The guide and template file is available for download in the system.
- When entering Recipient information to create a shipping label, fields can be filled in on the main form or selected from the Address Book by clicking on the Load from Address Book button.
- After 30 minutes of inactivity, you will automatically be logged out of the eShipGlobal system.
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Manage Address Book Entries

1. Click on **Address Book** from the navigational menu and choose **Recipient Addresses** from the drop-down list.

   ![Address Book Screenshot]

   - The Address Book will display in a new window.

Add new address book entry

1. Click on **New** to add a new Recipient to the Address Book.

   ![Address Book Entry Screenshot]

   - The **Edit**, **Download**, **Import File**, and **Delete** buttons at the bottom of your Recipient list are also available to help you manage your Address Book.
   - Enter information about the new Recipient in the appropriate fields.
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2. Enter the name of the Company or primary Contact in the **Company/Contact Name** box.
   - This is a required field. If the delivery is for a Residential delivery, enter the primary contact name into this field.

3. Enter the Contact Name of the Recipient in the **Alternate Contact Name** box.

4. Enter in the Recipient address information using the **Address 1** and **Address 2** fields.
   - Each box can contain up to 35 characters.
   - The **Address 2** field is generally used for department, floor, suite, building information, etc.
5. Enter the City.

6. Click on the drop-down arrow next to State to select the appropriate State.
   - State is a required field for all deliveries to the United States, Canada, and Mexico.
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7. Enter the appropriate **Zip** code.
   - NOTE: Zip codes are required for all destinations within the United States.

8. Click on the drop-down arrow next to **Country** to select the appropriate Country.
9. Enter the Recipient **Phone** number.
   - Phone number is a required field.

10. Click **Click here to verify this address**.
    - This is available for domestic/US addresses only.
    - If address verification fails, you can still attempt to ship to this address.

11. Enter the Recipient’s **Email**, if available.
12. Click **Save**, OR click **Cancel/Go Back**.

- You will be brought back to the main Address Book.
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Edit or Delete an Address Book Entry

1. To Edit or Delete a saved Recipient:
   a) locate the address from within your Address Book or
      • Within the Address Book, saved Recipient addresses are listed alphabetically by Company Name. Locate the address by clicking on the letter that begins the Company Name of the address that you are looking for.

   b) Enter your Search criteria in the Search box, and click Find.

   • From the Address Book window, you can use the Search feature to locate the shipping Recipient. For example, you can enter Search criteria into the Search box and find associated results in the Company name, any part of the address, a particular city, First Name, Last Name, State, Zip Code, etc.

2. Click in the box located next to the Recipient address that you would like to Edit or Delete to select it.
   a) To edit, you can also simply click on the name displayed in the “Company/Contact” column.

3. If you want to update the information, click on Edit.
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4. Update the necessary information.
5. Click **Save Changes** to keep the new information that you entered or click **Cancel/Go Back** to discard your changes.

![Add Address Form]

6. Click **Click here to verify this address.**
   a) This is available for domestic/US addresses only.
   b) If address verification fails, you can still attempt to ship to this address.

**Delete an Address from the Address Book**

1. To permanently Delete the selected Recipient address from the Address Book, click **Delete**.

2. Click **Yes, Delete**.
   - To cancel the Delete request click **No, Do Not Delete**.
   - You will be brought back to the main Address Book window.

![Delete Address Confirmation]

*NOTE: There may be several entries for one company. Only the record that you selected will be deleted.*
ACCOUNT MANAGEMENT: HOW TO CREATE CHARGING INSTRUCTION (COA) PROFILES

Overview

Use this chapter to learn how to add and manage your Charging Instruction Profiles.

For additional information and FAQs for eShipGlobal, go to the eShipGlobal information on “It’s Your Yale”.

Key Points

- eShipGlobal provides one easy-to-use interface to create shipping labels for FedEx, UPS, and USPS (flat rate shipping). This third-party service allows you to review shipping costs at Yale contracted rates and choose the most cost-effective shipping solution.
- Using the eShipGlobal application ensures the proper purchasing protocol is followed by using online validation of the Yale charging and Requester on every transaction. Each transaction is tied back to Yale Financial Statements through the tracking number and charging and Requester.
- After 30 minutes of inactivity, you will automatically be logged out of the eShipGlobal system.

Shipping Carriers

Contracted domestic rates are available with FedEx, UPS, and USPS.

- Yale now has contracted rates for USPS Priority Mail Flat Rate Shipping in medium-sized boxes (11" x 8-1/2" x 5-1/2" or 13 5/8 x 11 7/8 x 3 3/8) and carrier envelopes (12-1/2" x 9-1/2").
- Federal Express and UPS will commonly appear within your shipping carrier option list while USPS will only appear when Carrier Letter or Carrier Box is selected from the packaging Type selection in the Package Information section.

Packaging

When selecting Custom Packaging as the packaging Type, provide approximate weights and container sizes.

- All packages are weighed and measured by the shipping vendor selected; prices will be adjusted according by the carrier if necessary.

Special Arrangements and Services

- Please note that with some shipping Carriers, additional charges may be incurred if you make special arrangements to have packages picked up.
- Adding Special Services, like Saturday delivery, Residential Delivery, Signature Required, etc. may result in additional charges with the shipping Carrier you select.
- Special Services and may not be available from all Carriers.
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Creating a Charging Instructions (COA) Profile

1. At the top of your eShipGlobal window, under Account Management, click on **Charging Instructions Profile**.

   ![Charging Instructions Profile](image)

2. To add a new profile, select **Add Charging Combination**.

   ![Add Charging Combination](image)

3. Enter or select the COA charging instructions that indicate to where the shipping costs should be charged.

   ![Charging Instructions Profile](image)

   **NOTE:** Enter Grant information or Gift information or Yale Designated.
4. When you have completed entering your Charging Instructions, click **Add**.

![Charging Instructions Profile]

**NOTE:** Requester will not be saved in a COA profile. For every shipment, you will need to indicate who requested the shipment.

5. Once your profile has been added, you will be able to see the new profile in your Billing References table.

<table>
<thead>
<tr>
<th>Billing References Profile Name</th>
<th>Default Charging Instructions</th>
<th>Charging Instructions Classification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finance Business Systems - COA</td>
<td>Make Default</td>
<td>INBOUND</td>
</tr>
<tr>
<td>Procurement Department Charging Ins</td>
<td>Make Default</td>
<td>Make Default</td>
</tr>
</tbody>
</table>
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**Edit or Update Charging Instructions**

1. To Edit or Update your Charging Instructions, click on the appropriate profile to edit.

<table>
<thead>
<tr>
<th>Billing References</th>
<th>Default Charging Instructions</th>
<th>Charging Instructions Classification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finance Business Systems - COA</td>
<td>Make Default</td>
<td>INBOUND</td>
</tr>
<tr>
<td>Procurement Department Charging Ins</td>
<td>Make Default</td>
<td>Make Default</td>
</tr>
</tbody>
</table>

   ![Add Charging Combination Button]

2. Edit your Charging Instructions, as needed, and click **Save Changes**.
   - Charging Instructions Profile Name
   - Company
   - Grant
   - Gift
   - Yale Designated
   - Cost Center
   - Program
   - Project
   - Assignee
   - Requester

   ![Charging Instructions Profile Name: Procurement Department Charging Ins]
   - *Company:* CO01
   - Grant:
   - Gift:
   - Yale Designated: YD000002
   - *Cost Center:* CC0075
   - *Program:* PG00400
   - *Project:* PJ000001
   - Assignee:
   - Spend Category: SC204
   - *Requester:* 10930427

   ![Save Changes Button]
Add a COA Profile From a Shipping Form

1. From the Shipping Form, select Save Profile.
2. Enter a Profile Name and fill out the Charging Instructions. Your new profile will be added to your Charging Instructions drop down once a shipment is created.

NOTE: Enter Grant information or Gift information or Yale Designated

NOTE: Requester will not be saved in a COA profile. For every shipment, you will need to indicate who requested the shipment.
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How to Manage Collaborations

Overview

Use this chapter to learn how to manage collaborations. These are for inbound shipments for Research and non-Research materials, both Domestic and International.

For additional information and FAQs for eShipGlobal, go to the eShipGlobal information on “It’s Your Yale”.

Key Points

EShipGlobal provides the ability to set up non-Yale 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 Yale to be generated by the non-Yale collaborator.

- Save a COA profile to the the collaboration. Note: you can only save one COA profile to a collaboration, but you can change it, as needed.
- Save multiple “Ship To” addresses from the address book to allow sending to select one or many, at time of shipping.
- Shipping labels/Airway Bills can now be generated by non-Yale colleagues through eShipGlobal collaboration.
- Using the eShipGlobal application ensures the proper purchasing protocol is followed by using online validation of the Yale Charging Instructions (COA values) and Requester on every transaction. Each transaction is tied back to Yale Financial Statements through the tracking number, charging instructions, and Requester.
- After 30 minutes of inactivity, you will automatically be logged out of the eShipGlobal system.

When to Add a Collaborator

- Research materials need to be shipped to and/or returned to a Yale recipient.
- For frequent inbound shipping to Yale, research or non-research, domestic and international
- For On-going Shipping relationships

Important Notes

- You must have COA Profile created and saved before initiating a collaboration.
- Research Materials being shipped to Yale locations require a recipient to have the appropriate training (at the time of the creation of the shipment) to receive the shipment.
- Collaboration for return shipping assists with compliance requirements.
- Where possible, inbound research material should be shipped through collaboration.
- Non-Yale Collaborators have a limited version of eShipGlobal, and will not see confidential information nor COA details.
- If you review reports under “My Shipments”, shipments to Yale from collaborators are marked as inbound.
How to Manage Collaborations: Adding a Collaborator

1. At the top of your eShipGlobal window, under Account Management, click on Manage Collaborations.

2. Add the information for the collaboration that you would like to create.

   IMPORTANT: you must enter “Number of Shipments”, even if it is an estimate. Collaborations will not expire by date or time in the system. They expire based on the number of inbound shipments to Yale.

3. Select the payment method (COA Profile) that you would like to use for this collaboration.

   NOTE: You must have COA Profile saved before initiating a collaboration.

4. Select the Allowed Workflows for this collaboration. This will give rights, through eShipGlobal, to your collaborator. You can give your collaborator access to more than one workflow.
   - Non-Research Material Shipping includes Domestic and International documents, packages etc.
   - Research Material Shipping includes Domestic and International Biological, Chemical, Radioactive etc. shipments.

   NOTE: You must have completed the appropriate training to receive inbound shipments for research materials.
5. Once you have filled out your Collaboration Invitation, click **Send Invitation**.

![Collaborator Invitation Form]

6. When your invitation is sent, your collaborator will receive an email outlining next steps. Once they log in, they will be able to access the eShipGlobal shipping system to ship to Yale, and their shipments will be charged-back to the Payment Method COA.

![Invitation sent successfully]

**NOTE:** All collaborations require valid billing codes for cost allocation. Please [click here](#) to add at least one billing code profile before proceeding with the collaborator invitation.

![Collaborator Invitation Form]

**NOTE:** Collaborators have a limited version of eShipGlobal, and will not see confidential information or COA details.
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How to Manage Collaborations: Edit or Update

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

<table>
<thead>
<tr>
<th>Collaborator Name and Email</th>
<th>Collaboration Status</th>
<th>Shipment Limit</th>
<th>Non Research Material Shipping</th>
<th>Research Material Shipping</th>
<th>Associated Billing Reference</th>
<th>Collaboration created on</th>
</tr>
</thead>
<tbody>
<tr>
<td>Garrett Ames (<a href="mailto:garrett.ames@yale.edu">garrett.ames@yale.edu</a>)</td>
<td>Active</td>
<td>10</td>
<td>Y</td>
<td>Y</td>
<td>Procurement Department Charging Ins</td>
<td>2/11/2019</td>
</tr>
</tbody>
</table>

2. Edit your collaboration:
   - Updating the status (active or expired)
   - Increasing or decreasing the amount of shipments you would like your collaborator to be able to ship
   - Update the payment method
   - Update the allowed workflows

Note: Collaborator can only be assigned one COA Profile at a time.

3. To add or remove addresses to the list of approved “Ship To” addresses for this collaborator, click on Add or Remove.

NOTE: Your default address is added automatically and can only be edited through the address book.

For help contact the Finance Support Center at 432-5394 or sharedservices@yale.edu
CREATING A DOMESTIC SHIPPING LABEL

Overview

- Use this chapter to easily create a shipping label for a domestic package.
- Certain shipments may require training and/or may be routed for approvals. The system will notify you if your shipment requires you to take additional training, or if it needs to be approved.
- If you are trying to create a shipping label for an international package, please refer to the Creating an International Shipping Label chapter.
- If you are shipping research materials, see the chapters on Creating a Domestic Shipping Label for Research Materials and Creating an International Shipping Label for a Research Shipment.
- For additional information and FAQs for eShipGlobal, go to the eShipGlobal information on “It’s Your Yale”.

Key Points

- eShipGlobal provides one easy-to-use interface to create shipping labels for FedEx, UPS, and USPS (flat rate shipping). This third-party service allows you to review shipping costs at Yale contracted rates and choose the most cost-effective shipping solution.
- Using the eShipGlobal application ensures the proper purchasing protocol is followed by using online validation of the Yale Charging Instructions (COA values) and Requester on every transaction. Each transaction is tied back to Yale Financial Statements through the tracking number, charging instructions, and Requester.
- After 30 minutes of inactivity, you will automatically be logged out of the eShipGlobal system.

Shipping Carriers

Contracted domestic rates are available with FedEx, UPS, and USPS.

- Yale now has contracted rates for USPS Priority Mail Flat Rate Shipping in medium-sized boxes (11" x 8-1/2" x 5-1/2" or 13 5/8 x 11 7/8 x 3 3/8) and carrier envelopes (12-1/2" x 9-1/2").
- Federal Express and UPS will commonly appear within your shipping carrier option list while USPS will only appear when Carrier Letter or Carrier Box is selected from the packaging Type selection in the Package Information section.

Packaging

When selecting Custom Packaging as the packaging Type, provide approximate weights and container sizes.

- All packages are weighed and measured by the shipping vendor selected; prices will be adjusted according by the carrier if necessary.
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Special Arrangements and Services

- Please note that with some shipping Carriers, additional charges may be incurred if you make special arrangements to have packages picked up.
- Adding Special Services, like Saturday delivery, Residential Delivery, Signature Required, etc. may result in additional charges with the shipping Carrier you select.
- Special Services and may not be available from all Carriers.

Create a Domestic Shipping Label

1. Click **Ship To** located in the navigation menu at the top of your eShipGlobal window.

2. Indicate if you are shipping materials classified as biological, chemical, or radioactive. If no research materials are included, choose **No**, then choose **Domestic**.
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3. Click on the drop-down arrow in the **Ship From** field to select a Sender from your profile.

   **NOTE:** If you are the only Shipper in your profile, the Ship From field will automatically default to your name and physical location. However, if you are creating a shipping label for someone other than yourself, identify the Sender.

   ![Sender Information](image1)

   **NOTE:** To edit information for one of the Senders or recipients associated with your shipping profile, refer to [Manage Address Book Entries](#).

4. Accept today’s date (by default) or enter a future date in the **Shipping Date** field.
   - To change the Shipping Date, click in the **Shipping Date** box and enter a new Shipping Date.
   - You can also click on the calendar icon located on the right-hand side of the **Shipping Date** field to select the date from the calendar.
   - Labels can be printed in advance.
   - The shipping date selected cannot exceed 9 days from today’s date.

   ![Sender Information](image2)

5. Click on **Load from Address Book** to select a Recipient from the saved Address Book
   - To enter a new Recipient, [go to step 9](#).
6. Type Search criteria in the field provided. Then click **Find**.

![Search screenshot](image)

**NOTE:** Address book entries will appear alphabetically by Company Name. Residential addresses will have Home listed as the Company Name. You can navigate the Address Book using the letters listed at the top of the window or using the Search feature. Please refer to **Manage Address Book Entries**.

7. Click to select the address that you would like to use as the Recipient.

![Address selection screenshot](image)

8. Click **Ship To** and **go to step 11**.
   - Recipient information will automatically be entered in the appropriate fields.

![Recipient information screenshot](image)

9. Complete the online form by entering the **Recipient information** for the delivery in the Ship To fields provided.
   - If there is a Company Name, enter it in the **Company/Contact Name** box and then address the package to an individual by entering the Recipient contact name in the **Alternate Contact Name** box.
   - If the package is intended for residential delivery, enter the Recipient contact name in the **Company/Contact Name** box.
   - To add the address being entered to the saved Address Book, check the box next to Add to Address Book. Leave blank if the address will not be needed for future deliveries.

![Address information screenshot](image)

*Fields marked with asterisks (*) are required.*
Express Shipping powered by eShipGlobal

10. Click **Validate Address** to confirm the validity of the entry. After confirming the address, click **Close**.
   - This is available for domestic/US addresses only.
   - If address verification fails, you can still attempt to ship to this address.

11. Enter the number of packages for the intended Recipient. If only one package is being prepared for the Recipient, **go to step 15**.
   - **Package Types**
     - Carrier Letter: Envelope provided by the shipping carrier that appears with the carriers logo printed on it. This is not a prepaid envelope.
     - Carrier PAK: Large plastic or Tyvek envelope provided by the shipping carrier that appears with the carrier's logo printed on it.
     - Carrier Box: Small boxes provided by the shipping carrier that appears with the carrier logo printed on it. There is usually a delineated area reserved for affixing the printed label or air bill.
     - Carrier Tube: Sturdy cardboard tube provided by the shipping carrier that appears with the carrier’s logo printed on it. There is usually a delineated area reserved for affixing the printed label or air bill.
     - Customer Packaging: Packaging not provided by the shipping carrier.
12. Indicate whether the packages are **Identical** or **Non-Identical**.
   - For Non-Identical packages, go to next step.
   - For Identical packages go to step 15.

**NOTE:** You can use a single request to ship multiple Identical Packages to different recipients OR you can ship multiple Non-Identical packages to a single recipient. You cannot ship multiple not-identical packages to multiple recipients with a single request.

**NOTE:** Every package will be assigned a unique tracking number and you have the opportunity to specify a different shipping Service for each Package.

13. From the dropdown list of options provided, specify the Type of packaging, Weight / Dimensions if applicable, shipping Service, and Declared Value if applicable for each Package.

14. Click **OK**.
15. Select the type of package from the Type drop down-list. Then provide the Shipment Reference and Content Description if applicable.

16. Enter the approximate weight of the package.

17. Enter the approximate Dimensions of the package.
18. Enter or select the COA charging instructions for this shipment.

NOTE: You can elect to have a third party, or the Recipient of the package pay for delivery. Choose Third Party or Recipient from the Bill To drop-down list and enter the Account Number and Zip Code associated with the Recipient/Third Party Account Number in the boxes provided. COA Charging Instructions are required as back-up.

19. Type in the first name, last name, cost center name, or cost center number of the Requester to search. Then select the appropriate person from the list of options provided.

NOTE: The Requester is the individual who requested that the package be shipped. This information is captured to facilitate reporting data and improve the ability to provide financial reviewers with complete “initiator/Preparer” information on all University transactions.

NOTE: The Screen shots in this guide provide COA charging instructions / cost allocations. They are solely intended for instructional purposes and should not be used in your shipments. For questions related to what COA you should use, please contact your supervisor or your business office.
20. Select the *Special Instructions* or enter the *Declared Value* (for insurance purposes, if applicable) required for this package.

![Special Instructions](image)

*NOTE: Additional charges may apply for some special services and are not available from all shipping carriers.*

21. Select the *Email Notifications* requested.
   - You may be prompted to enter email addresses for recipient.

![Email Notifications](image)

22. Click *Show Quote*.

![Email Notifications](image)

23. Select a shipping Carrier, Service, and Rate from the list of options provided.
   - Shipping Carrier options will be displayed from the least expensive to the most expensive option.

*NOTE: There may be a substantial increase or difference in price for an 8:00 AM delivery as opposed to a 10:30 AM delivery from the same carrier. A breakdown of estimated charges will be displayed on the right side of the window or when you hover the Contracted Rate. The Transaction Charge will not be billed to the charging provided.*

24. Click *Ship*. 
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Print Label

1. Click Print Airwaybill.

![](image1)

2. Click Print Airwaybill.

- Paper labels will print on locally installed printers, network printers, or multi-function devices.

![](image2)

NOTE: When the Shipping Label is printed, fold the paper in half and insert it into the plastic sleeve of your envelope. The Airway bill information should be facing through the window so that it can be easily scanned by the Carrier.
Express Shipping powered by eShipGlobal

3. Select the Printer where you would like to print the shipping label. Then click **Print**.

![Print dialog box]

4. Close out the Print Label Screen to return to the My Shipments window.
Express Shipping powered by eShipGlobal

Email Label

1. Click **Email Label** to send the shipping label electronically to another individual.

   ![Email Label Form](image)

   - **Sender Name:** John Smith
   - **Sender Email:** jsmith@eshipglobal.com
   - **Receiver Name:**
   - **Receiver Email:**
   - **Subject:** URL to print label
   - **Message:** Please click on the link provided below to print the airwaybill for the package.

   ![Preview and Send Buttons](image)

2. Enter the **Receiver Name** and **Receiver Email** in the boxes provided.
   - Customize the **Subject** and **Message** content if you choose.

   ![Customized Email Form](image)

   - **Sender Name:** John Smith
   - **Sender Email:** jsmith@eshipglobal.com
   - **Receiver Name:** Tom Jones
   - **Receiver Email:** jones@yale.edu
   - **Subject:** URL to print label
   - **Message:** Hi Tom, please find the label for you to print and send.

   ![Preview and Send Buttons](image)
3. Click **Preview Email**.

   ![Preview Email](image)

4. Review the message and click **Send Email**.
   - To edit the message before sending, return to step 2.
   - After the Email is sent to the Receiver Email specified, an Email sent successfully message will appear.

5. Click the **Back to Summary** button, located in the upper-right corner of the screen, to return to the My Shipments window.

   ![Back to Summary](image)
CREATE AND MAINTAIN QUICKSHIP PROFILES FOR DOMESTIC SHIPPING

Overview

- Use this chapter to easily create a QuickShip profile for recurring domestic shipments. This feature is most helpful when you ship the same package repeatedly to the same Recipient.
- The Recipient address information and all of the shipping selections entered can be saved to the QuickShip profile.
- QuickShip functionality is restricted to Domestic shipments that do not involve research materials.
- For additional information and FAQs for eShipGlobal, go to the eShipGlobal information on “It’s Your Yale”.

NOTE: Quickship does not allow shipments to multiple recipients within one transaction.
NOTE: The Screen shots in this guide provide COA charging instructions / cost allocations. They are solely intended for instructional purposes and should not be used in your shipments. For questions related to what COA you should use, please contact your supervisor or your business office.

Key Points

- This chapter assumes that you have successfully logged into eShipGlobal and have experience creating, printing, and emailing domestic shipping labels in the eShipGlobal system.
- Please refer to the Create a Domestic Shipping Label chapter for more detailed information about the sections and information necessary to complete a domestic shipping label.
- The number of packages, package type, service, charging instructions, special instructions, and email notifications can be modified after creating a QuickShip profile.
- Edit a Saved QuickShip profile when you are ready to ship a new package to the addresses associated with the profile.
- After 30 minutes of inactivity, you will automatically be logged out of the eShipGlobal system.

Example:

- In this example, we are sending a single Carrier Letter to a new Recipient using FedEx Express Saver service and will print the shipping label for the package.
Express Shipping powered by eShipGlobal

Create a QuickShip Profile

1. Click Ship To located in the navigation menu at the top of your eShipGlobal window.

2. QuickShip functionality is restricted to Domestic shipments that do not involve research materials.
   - Click No for first prompt
   - Click Domestic for second prompt.

3. At the top of the domestic shipping form, click Save /Update the shipment preferences for QuickShip and enter a name for the profile you would like to create.

4. Select the Sender.
5. Complete the online form by entering the Recipient delivery information in the Ship To fields provided.
   
   - If there is a Company Name, enter it in the **Company / Contact Name** box and then address the package to an individual by entering the Recipient contact name in the **Alternate Contact Name** box.
   
   - If the package is intended for residential delivery, enter the Recipient contact name in the **Company / Contact Name** box.

   NOTE: Required Fields are marked with an asterisk (*)

6. Click **Validate Address**.
   
   - This is available for domestic/US addresses only.
   
   - If address verification fails, you can still attempt to ship to this address.

7. Select the Type of package from the **Type** drop down-list. Then provide the **Shipment Reference** and **Content Description** if applicable.

   NOTE: System defaults to “Carrier Letter”
8. Choose a Service from the drop-down list of options provided.

![Service Selection](image)

9. Enter or select the COA charging instructions that indicate to where the shipping costs should be charged.

![Cost Allocation](image)

*NOTE: Cost Allocation info / COA Charging Instructions are not saved as part of the QuickShip profiles.*

10. Type in the first name, last name, cost center name, or cost center number of the Requester to search. Then select the appropriate person from the list of options provided.

![Requester Selection](image)
Express Shipping powered by eShipGlobal

11. Select the **Special Instructions** or **Declared Value** required for this package.

![Special Instructions](image)

12. Select the **Email Notifications** requested.

![Email Notifications](image)

13. Click **Ship Now**.

![Ship Now](image)

14. Click **Print Airwaybill** or **Email Label**.

![Order Information](image)

15. Use instructions provided in the [Create a Domestic Shipping Label](#) chapter for more information about printing or emailing labels.
**Express Shipping powered by eShipGlobal**

**Edit a QuickShip Profile**

*NOTE: Edit a Saved QuickShip profile when you are ready to ship a new package to the addresses associated with the profile.*

1. To use the saved QuickShip profile to prepare a new shipment, click QuickShip located in the navigation menu at the top of your eShipGlobal window.

2. Click on the profile name link (the profile will load).

3. If your changes require an update to the saved Recipient address associated with the QuickShip profile, click on the Company/Contact Name link within the Ship To section.

4. Update the Recipient Address as necessary, then click Save Changes.

5. Continue with the label creation then print or email your label

6. Your changes will automatically be saved to the selected QuickShip profile after you create the shipping label.
Delete a QuickShip Profile

1. Click QuickShip located in the navigation menu at the top of your eShipGlobal window.
2. Click to select the Profile that you would like to Delete.

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Created Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yale University</td>
<td>12/3/2018 2:47:29 PM</td>
</tr>
</tbody>
</table>

3. Click **Delete**.
4. Click **OK** to confirm profile deletion.

Shipping From a QuickShip Profile

1. Select a saved profile
2. After clicking **Ship** from the navigation menu and making the appropriate selections regarding Research Materials and Domestic or International shipping, select a saved QuickShip profile from the list of options provided in the dropdown list.
3. Click **Ship Now**.

4. Click **Print Airwaybill** or **Email Label**.

5. Use instructions provided in the *Create a Domestic Shipping Label* chapter for more information about printing or emailing labels.
CREATING AN INTERNATIONAL SHIPPING LABEL

Overview

- Use this chapter to easily create a shipping label for an international package.
- Certain shipments may require training and/or may be routed for approvals. The system will notify you if your shipment requires you to take additional training, or if it needs to be approved.
- If you are trying to create a shipping label for a domestic package, please refer to the Creating a Domestic Shipping Label chapter.
- If you are shipping research materials, see the chapters on Creating a Domestic Shipping Label for Research Materials and Creating an International Shipping Label for a Research Shipment.
- For additional information and FAQs for eShipGlobal, go to the eShipGlobal information on “It’s Your Yale”.

Key Points

- eShipGlobal provides one easy-to-use interface to create shipping labels for FedEx, UPS, DHL, and USPS (flat rate shipping). This third-party service allows you to review shipping costs at Yale contracted rates and choose the most cost-effective shipping solution.
- Using the eShipGlobal application ensures the proper purchasing protocol is followed by using online validation of the Yale charging and Requester on every transaction. Each transaction is tied back to Yale Financial Statements through the tracking number and charging and Requester.
- After 30 minutes of inactivity, you will automatically be logged out of the eShipGlobal system.

Shipping Carriers

- Contracted domestic rates are available with FedEx, UPS, DHL, and USPS.
  - Yale now has contracted rates for USPS Priority Mail Flat Rate Shipping in medium sized boxes (11" x 8-1/2" x 5-1/2" or 13 5/8 x 11 7/8 x 3 3/8) and carrier envelopes (12-1/2" x 9-1/2"). Right now, only non-dutiable shipments are supported for USPS.
  - Federal Express, UPS, and DHL will commonly appear within your shipping carrier option list while USPS will only appear when Carrier Letter or Carrier Box is selected from the packaging Type selection in the Package Information section.

Packaging

- When selecting Custom Packaging as the packaging Type, provide approximate weights and container sizes.
  - All packages are weighed and measured by the shipping vendor selected; prices will be adjusted according by the carrier if necessary.

Special Arrangements and Services

- Please note that with some shipping Carriers, additional charges may be incurred if you make special arrangements to have packages picked up.
- Adding Special Services, like Saturday delivery, Residential Delivery, Signature Required, etc. may result in additional charges with the shipping Carrier you select. Special Services may not be available from all Carriers.
Express Shipping powered by eShipGlobal

1. Click Ship located in the navigation menu at the top of your eShipGlobal window.

2. Screen shot of step Indicate if you are shipping materials classified as biological, chemical, or radioactive (research materials). If so, please see Creating an International Shipping Label for a Research Shipment. Chose No for non-research materials, then choose International.

3. Select the type of item you want to ship internationally and click “Continue”. If you don’t know which item to select, hover over the links to see descriptions. For purpose of this scenario we will select “Documents”.
4. Complete online form by entering the Item Name, Gross Weight, Quantity and Net Value.

![Ship International Form](image)

5. On the item selection form for Technical Data/Software, and Tangible Item/Products, there are two additional optional fields called “Schedule B Number” and the “ECCN#”.

![Material Entry](image)

**NOTE:** Visit [https://www.export.gov/welcome](https://www.export.gov/welcome) for more information about exporting from the United States.
6. Click on the drop-down arrow in the **Ship From** field to select a **Sender** from your profile.

   **NOTE:** If you are the only Shipper in your profile, the Ship From field will automatically default to your name and physical location. However, if you are creating a shipping label for someone other than yourself, identify the Sender.

   **NOTE:** To Edit information for one of the Senders or recipients associated with your shipping profile, refer to Manage Address Book Entries.

7. Accept today’s date (by default) or enter a new date in the Shipping Date field.
   - To change the Shipping Date, click in the **Shipping Date** box and enter a new Shipping Date.
   - You can also click on the calendar icon located on the right-hand side of the **Shipping Date** field to select the date from the calendar.
   - Labels can be printed in advance.
   - The shipping date selected cannot exceed 9 days from today’s date.

8. Click on Load from Address Book to select a Recipient from the saved Address Book, and go to next step.
   - To enter a new Recipient, **go to step 13**.
Express Shipping powered by eShipGlobal

9. Type Search criteria in the field provided, then click Find.

NOTE: Address book entries will appear alphabetically by Company Name. Residential addresses will have Home listed as the Company Name. You can navigate the Address Book using the letters listed at the top of the window or using the Search feature. Please refer to Managing Your Address Book for more detail.

10. Click to select the address that you would like to use as the Recipient.

Recipient information will automatically be entered in the appropriate fields.

11. Click Ship To and go to step 17.

12. Enter Recipient address information
   • If there is a Company Name, enter it in the Company / Contact Name box and then address the package to an individual by entering the Recipient contact name in the Alternate Contact Name box.
   • If the package is intended for residential delivery, enter the Recipient contact name in the Company / Contact Name box.

To add the address being entered to the saved Address Book, click in the box next to Add to Address Book or leave blank if the address will not be needed for future deliveries.
14. Select the Recipient Country from the drop-down list of options provided.

15. Complete the online form by entering the Recipient information for the delivery in the Ship To fields provided.
   - Canada and Mexico require a State/Province selection.

*Note: Fields marked with asterisks (*) are required.*
Express Shipping powered by eShipGlobal

16. Select the Type of package from the Type drop down-list. Then provide the Shipment Reference and Content Description if applicable.

![Package Information]

Package Types
- Carrier Letter: Envelope provided by the shipping carrier that appears with the carrier’s logo printed on it. This is not a prepaid envelope.
- Carrier PAK: Large plastic or Tyvek envelope provided by the shipping carrier that appears with the carrier’s logo printed on it.
- Carrier Box: Small boxes provided by the shipping carrier that appears with the carrier logo printed on it. There is usually a delineated area reserved for affixing the printed label or airbill.
- Carrier Tube: Sturdy cardboard tube provided by the shipping carrier that appears with the carrier’s logo printed on it. There is usually a delineated area reserved for affixing the printed label or airbill.
- Customer Packaging: Packaging not provided by the shipping carrier.

17. Enter the approximate Weight and Dimensions of the package.

![Package Information]

18. Provide a Shipment Reference (optional).
19. Enter or select the COA charging instruction for this shipment.

**NOTE:** You can elect to have a Third Party, or the Recipient of the package pay for delivery and/or the Duties and Taxes associated with it. Choose Third Party or Recipient from the Bill To drop-down list. Enter the Recipient / Third Party Account Number, Country, and the Zip Code associated with the Recipient / Third Party Account Number in the boxes provided. Charging is required as back-up.

20. Type in the last name of the Requester who requested the package label. Then select the appropriate person from the list of options provided.

**NOTE:** The Requester is the individual who requested that the package be shipped. This information captured in a structured way to facilitate reporting on data and improves the ability to provide financial reviewers with complete “initiator/Preparer” information on all University transactions.
21. Select the Special Instructions requested.

![Special Instructions]

NOTE: Additional charges may apply for some special services and are not available from all shipping carriers. When scheduling a pickup, please allow at least 2 hours between the Shipment Ready time and Business close time.

22. Enter Customs Information including Customs Value and Declared Value (for insurance purposes if applicable) required for this package.

![Customs Information]
23. Select the Email Notifications requested.

NOTE: If you choose to Notify Shipper, Notify Recipient, Notify Shipper on Delivery, or Notify Others on Delivery, you will need to enter an email address, email addresses need to be entered for each of the requested Email Notifications.

24. Click Show Quote.

25. Select a shipping Carrier, Service, and Rate from the list of options provided.
   - Shipping Carrier options will be displayed from the least expensive to the most expensive option.

NOTE: Prices vary from Carrier to Carrier and between Services provided by the same Carrier. A breakdown of estimated charges will be displayed on the right side of the window. The Transaction Charge will not be billed to the charging provided.

26. Click Ship.

27. Click Print Airwaybill.
28. Click Print Airwaybill.

- Paper labels will print on locally installed printers, network printers, or multi-function devices.

**NOTE:** When the Shipping Label is printed, fold the paper in half and insert it into the plastic sleeve of your envelope. The Airway bill information should be facing through the window so that it can be easily scanned by the Carrier. Print 3 copies of the Airway Bill for international air shipments and 5 copies for international FedEx Ground shipments.
29. Select the Printer where you would like to print the shipping label. Then click Print.

30. Close out the Print Label Screen to return to the My Shipments window.
Express Shipping powered by eShipGlobal

31. Click Print Documents to print necessary Customs documents.

32. Click Print Documents.
   - Select the printer, then click Print.
   - Close out the Print Documents to return to the My Shipments window.

NOTE: Print 3 copies of the Commercial Invoice and other customs related forms for international air shipments and 5 copies for international FedEx Ground shipments to Canada or Mexico. Include the copies with the Shipping Label.
CREATING A DOMESTIC SHIPPING LABEL FOR A RESEARCH SHIPMENT

Overview

- Use this chapter to create a shipping label for a domestic package that contains a biological material.
- This chapter will provide an example of how to ship an exempt biological material packaged with dry ice.
- Certain shipments may require training and/or may be routed for approvals. The system will notify you if your shipment requires you to take additional training, or if it needs to be approved.
- For additional information and FAQs for eShipGlobal, go to the eShipGlobal information on “It’s Your Yale”.

Key Points

- eShipGlobal provides one easy-to-use interface to create shipping labels for FedEx, UPS, and USPS (flat rate shipping). This third-party service allows you to review shipping costs at Yale contracted rates and choose the most cost-effective shipping solution.
- Using the eShipGlobal application ensures the proper purchasing protocol is followed by using online validation of the Yale COA Charging Instructions and Requester on every transaction. Each transaction is tied back to Yale Financial Statements through the tracking number and charging and Requester.
- To improve compliance, eShipGlobal is integrated with Yale’s TMS system. When you log in with your Yale NetID and password, the system provides automatic training verification.
  - Training courses for biological substances and dry ice packages are available online. In most cases, if you require training, you will be able to complete the training requirement and ship your package in the same day. Also, the system will present you message with exact course / courses that you will need to take to get the desired training level, to be able to create that shipment.
- After 30 minutes of inactivity, you will automatically be logged out of the eShipGlobal system.

Shipping Carriers

Contracted domestic rates for shipping research materials are available with FedEx.

Packaging

- When selecting Custom Packaging as the packaging Type, provide approximate weights and container sizes.
  - All packages are weighed and measured by the shipping carrier selected; prices will be adjusted according by the carrier if necessary.
- The Medical School Stockroom (Sterling Hall of Medicine, 333 Cedar Street, SHM I-E7) and Kline Biology Tower (219 Prospect Street, KBT C-11) have boxes available for most shipments containing biological materials.
- Supplies are also are available on Workday with Access to SciQuest Catalog Content. Click on Favorites and then locate the Research Materials Shipping Supplies link from the left-hand navigation.
Express Shipping powered by eShipGlobal

Example: Shipping Exempt Biological Material Packaged with Dry Ice

1. Click **Ship To** located in the navigation menu at the top of your eShipGlobal window.
   - Research materials are generally defined as materials that are used in laboratory settings such as animals, biological (cultures or stocks of human or animal pathogens, select agents or toxins, human or animal materials, genetically modified microorganisms, vectors, plasmids, etc.), chemical or radioactive, and dry-ice.
   - Some research materials may not necessarily be hazardous but become regulated materials once they are transported.

![Yale eShipGlobal interface](image)

2. Indicate that you are shipping research materials by clicking **Yes**.

![Yes/No options](image)

3. Choose **Domestic**.

![Options for Domestic, International, Intra-Campus, Self-Transport](image)
4. After user selects the shipment type the certification pop-up message is presented, the user needs to read it, check the box – “I agree to the above requirements” and click either Confirm Shipment or Cancel Shipment.

5. Classify the material in your shipment.
- Check all that are applicable.

6. Click Continue.

7. Select the appropriate material name for the biological material.
- If you have completed the necessary training for this exempt biological material, you will see a confirmation of your training.
- If you have not completed the necessary training, the system will pop up a message with exact course(s) that you will need to take to complete the required training level for your shipment. Training courses for biological substances and dry ice packages are available online. In most cases, if you require training, you will be able to complete the training requirement and ship your package in the same day.

8. Select the appropriate Microorganism or Prion for the biological material.
9. Answer the questions related to the biological material.

- Does the material contain a wild type bacterium, fungus, parasite, prion, protozoa or virus?
- Does this material contain a genetically modified microorganism?
- Does the material contain a genetically modified organism or is the material genetically modified?
- Have nucleic acids of any type from a microorganism or prion been introduced into the genetically modified organism?
- Does the material contain a plasmid or vector?
- Is there a high probability that the material contains a microorganism or prion?
- Does this shipment include dry ice?

10. Click **Continue**.
Express Shipping powered by eShipGlobal

11. Enter the **Material Name**, Net Weight or Volume, and **Net Value** of the substance that you plan to ship.

```
Material Entry

```

```
Material Classification: Exempt Human Specimen
*Material Name: Human Urine
Maximum Quantity Per Inner Receptacle: 1 ml (Max. Inner Qty: NA)
*Total Quantity in Package: 1 ml (Max. Total Qty: NA)
1Net Value in USD(Min. 1): $1

Does the material contain any chemical preservative?

Enter the total value of items shipped in each classification.
```

**NOTE:** For this example, **Total Quantity in Package** needs to include weight of the dry ice.

12. Click **Continue**.

13. Confirm or edit Sender’s location.

- Only the Senders physical location can be modified. The Company and Contact information cannot be changed because it is tied to the person who logged into the system. This staff member has had their training levels validated and the person who is expected to be making the shipping request. The Shipper is also expected to be the most knowledgeable about the material being shipped.

```
Required fields are indicated by an asterisk. All other fields are optional. Please complete the form and click on "Save Changes".
```

```
Company/Contact Name: Yale
Alternate Contact Name: John Smith
*Address 1: 25 Science Park
Address 2: 5th Floor
State/Province: Connecticut
City: New Haven
Zip: 06511-1968
Phone: 123-456-7890
Email: jsmith@eshipglobal.com
```

14. Click **Save Changes**.
Express Shipping powered by eShipGlobal

15. Accept today’s date (by default) or enter a future date in the Shipping Date field.
   - To change the Shipping Date, click in the Shipping Date box and enter a new Shipping Date.
   - You can also click on the calendar icon located on the right-hand side of the Shipping Date field to select the date from the calendar.
   - Labels can be printed in advance.
   - The shipping date selected cannot exceed 9 days from today’s date.

16. Click on Load from Address Book to select a Recipient from the saved Address Book and go to next step.
   - Go to step 20 to enter a new Recipient.

17. Type Search criteria in the field provided. Then click Find.

   NOTE: You can navigate the Address Book using the letters listed at the top of the window or using the Search feature. Please refer to the Managing Your Address Book quick chapter for more detail.

18. Click to select the address that you would like to use as the Recipient.
Express Shipping powered by eShipGlobal

19. Click Ship To and **go to step 23**.
   - Recipient information will automatically be entered in the appropriate fields.

<table>
<thead>
<tr>
<th>Company/Contact</th>
<th>Company/Contact Name</th>
<th>Address</th>
<th>City/State</th>
<th>Zip</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yale University</td>
<td>150 Munson Street</td>
<td>New Haven CT</td>
<td>06520</td>
<td>United States</td>
<td></td>
</tr>
</tbody>
</table>

   ![Recipient Information]

   For help contact the Finance Support Center at 432-5394 or sharedservices@yale.edu

20. Enter the Recipient information for the delivery in the fields provided.
   - If there is a Company Name, enter it in the **Company / Contact Name** box and then address the package to an individual by entering the Recipient contact name in the **Alternate Contact Name box**.
   - If the package is intended for residential delivery, enter the Recipient contact name in the **Company / Contact Name** box.

   ![Recipient Information]

   Note: Fields marked with asterisks (*) are required.

21. To add the address being entered to the saved Address Book, click in the box next to **Add to Address Book** or leave blank if the address will not be needed for future deliveries.
Express Shipping powered by eShipGlobal

22. Click **Validate Address** to confirm the validity of the entry. After confirming the address, click **Close**.
   - This is available for domestic/US addresses only.
   - If address verification fails, you can still attempt to ship to this address.

![Recipient Information](image)

*NOTE: Enter the Recipients email address in the Ship To: section if you would like to notify the Recipient of delivery.*

23. Select the type of package from the **Type** drop down-list. Then provide a **Shipment Reference** if applicable.
   - **Package Types**
     - Fiberboard box: Brand new, unused, UN certified package (different sizes available).
     - Plastic case: UN certified package (different sizes available).
     - Customer packaging: Packaging not provided by the shipping carrier.
24. Enter the approximate **Weight** and **Dimensions** of the package.

![Package Information](image)

25. Enter or select the COA instructions for this shipment.

![Cost Allocation](image)

**NOTE:** You can elect to have a Third Party, or the Recipient of the package pay for delivery. Enter the charging as a backup funding source. Then choose Third Party or Recipient from the Bill To drop-down list. Enter the Recipient / Third Party Account Number and Zip Code associated with the Recipient / Third Party Account Number in the boxes provided.
26. Type in the last name of the **Requester** who requested the package delivery. Then select the appropriate person from the list of options provided.
   - You can also check Save Profile and Create a Charging Instructions Profile Name from this screen.

```
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requester Name</td>
<td>Minor, Thomas</td>
</tr>
<tr>
<td>Requester Last Name</td>
<td>Minor, Thomas</td>
</tr>
<tr>
<td>Requester First Name</td>
<td>Minor, Thomas</td>
</tr>
</tbody>
</table>
```

**NOTE:** The Requester is the individual who requested that the package be shipped. This information captured in a structured way to facilitate reporting on data and improves the ability to provide financial reviewers with complete “initiator/Preparer” information on all University transactions.

27. Select any optional **Special Instructions** or enter a **Declared Value** (for insurance purposes if applicable) required for this package.
   - Additional charges may apply for some special services.
28. If dry ice is included in your package, click Dry Ice and indicate how many pounds will be included. TIP: The weight of dry ice should not exceed the total package weight you entered previously.

29. Select optional Email Notifications requested.
   - If you choose to Notify Shipper, Notify Recipient, Notify Shipper on Delivery, or Notify Others on Delivery, you will need to enter an email address, email addresses need to be entered for each of the requested Email Notifications.

30. Click Show Quote.

NOTE: There may be a substantial increase or difference in price for an 8:00 AM delivery as opposed to a 10:30 AM delivery from the same carrier. A breakdown of estimated charges will be displayed on the right side of the window or when you hover the Contracted Rate. The Transaction Charge will not be billed to the charging provided.

31. Review the package information.
   - If changes are required, click Edit Shipment and return to the main form to make corrections.
   - If the information is correct, continue to next step.
32. Select a shipping Carrier, Service, and Rate from the list of options provided.

- Shipping Carrier options will be displayed from the least expensive to the most expensive option.

   NOTE: After 3 PM, FedEx Overnight 8 AM may not show as an available option for the next business day.

33. Click **Ship**.

34. Click **Complete Shipment**.

35. Read the Requirements for Exempt Human or Animal Specimen Packages.

36. Read the Requirements for Dry Ice Shipments.

37. Click in the box next to the statement that you will follow the steps indicated in the checklist when preparing the package for this shipment.

38. Click **Continue**.
39. Complete Shipment
   a) Click on the Complete Shipment button.
   b) Review the checklists.
   c) Check the box at the bottom agreeing to terms.
   d) Click the Continue button.
      • The page will close and all of the buttons for printing the labels and documents will be available to facilitate the completion of the shipment.

40. Print Airwaybill
   • Click on the Print Airwaybill button and go to step 43.
41. Schedule Pickup

- Click on Schedule Pickup and go to step 43

- Please retain the Pickup Confirmation Number for your records. Your package will be picked up only if you have a Pickup Confirmation Number.

42. Cancel Shipment

- Check the checkbox next to the tracking number that you want to cancel.
- Click Cancel Shipment.
- After your label has been cancelled, you will see a “x” in the left-hand column of the shipment history and on the label summary.
43. Click Print Airwaybill.

- Paper labels will print on locally installed printers, network printers, or multi-function devices.

NOTE: When the Shipping Label is printed, fold the paper in half and insert it into the plastic sleeve of your envelope. The Airway bill information should be facing through the window so that it can be easily scanned by the Carrier.

44. Select the Printer where you would like to print the shipping label. Then click Print.
45. Close out the Print Label Screen to return to the My Shipments window.

46. Click Packaging Instructions & Labels.

47. Print the packaging instructions and labels that appear.
   - Checklists and labels were created based on your earlier responses to categorize the material you are shipping.

48. Cut around the outside border of the label and affix it to a vertical side of the box (not the top or bottom) then cover the label with clear plastic packaging tape.

49. Cut around the outside border of the label, fill in the information in the Dry Ice label, affix it to a vertical side of the box (not the top or bottom) and then cover the label with clear plastic packaging tape.

*NOTE: Missing information on this label can result in a returned shipment.*
50. Click **Schedule Pickup**.

51. Choose a pickup date (if other than today) and then select the Shipment Ready Time and Business Close time from the drop-down list of options provided.

   - Please allow at least 2 hours between the shipment ready time and business close time.
52. Edit the address information if necessary. Please include building, floor, or suite numbers where the package is located.

<table>
<thead>
<tr>
<th>Pickup Location</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Contact Name:</strong> John Smith</td>
</tr>
<tr>
<td><strong>Company:</strong> Yale</td>
</tr>
<tr>
<td><strong>Address:</strong> 25 Science Park 5th Floor</td>
</tr>
<tr>
<td><strong>City:</strong> New Haven</td>
</tr>
<tr>
<td><strong>State:</strong> CT</td>
</tr>
<tr>
<td><strong>Zip:</strong> 06511-1968</td>
</tr>
<tr>
<td><strong>Country:</strong> US</td>
</tr>
<tr>
<td><strong>Phone:</strong> 123-456-7890</td>
</tr>
<tr>
<td><strong>Special Instructions:</strong> Dangerous Goods</td>
</tr>
</tbody>
</table>

**IMPORTANT:** Please make sure Address field has the complete physical address where the package needs to be picked up from (including building, floor or suite numbers).

53. Edit the Number of Packages to be picked up from the specified location.

<table>
<thead>
<tr>
<th>Shipment Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Service Type:</strong> FedEx Standard Overnight</td>
</tr>
<tr>
<td><strong>Number of Packages:</strong> 1</td>
</tr>
<tr>
<td><strong>Total Weight:</strong> 5 lbs</td>
</tr>
</tbody>
</table>

54. Click Submit Pickup.

- Then wait for the Pickup Confirmation Number.
- Your package will only be picked up if you received a Pickup Confirmation Number.

55. Click Back to Summary.
CREATING AN INTERNATIONAL SHIPPING LABEL FOR A RESEARCH SHIPMENT

Overview

- Use this chapter to create a shipping label for an international package that contains a research material.
- This chapter will provide an example of how to ship an exempt biological material packaged with dry ice internationally.
- Certain shipments may require training and/or may be routed for approvals. The system will notify you if your shipment requires you to take additional training, or if it needs to be approved.
- For additional information and FAQs for eShipGlobal, go to the eShipGlobal information on “It’s Your Yale”.

Key Points

- eShipGlobal provides one easy-to-use interface to create shipping labels for FedEx, UPS, and USPS (flat rate shipping). This third-party service allows you to review shipping costs at Yale contracted rates and choose the most cost-effective shipping solution.
- Using the eShipGlobal application ensures the proper purchasing protocol is followed by using online validation of the Yale charging and Requester on every transaction. Each transaction is tied back to Yale Financial Statements through the tracking number and charging and Requester.
- To improve compliance, eShipGlobal is integrated with Yale’s TMS system. When you log in with your Yale NetID and password, the system provides automatic training verification.
  - Training courses for biological substances and dry ice packages are available online. In most cases, if you require training, you will be able to complete the training requirement and ship your package in the same day.
- After 30 minutes of inactivity, you will automatically be logged out of the eShipGlobal system.

Shipping Carriers

Contracted domestic rates for shipping research materials are available with FedEx.

Packaging

- When selecting Custom Packaging as the packaging Type, provide approximate weights and container sizes.
  - All packages are weighed and measured by the shipping vendor selected; prices will be adjusted according by the carrier if necessary.
- The Medical School Stockroom (Sterling Hall of Medicine, 333 Cedar Street, SHM I-E7) and Kline Biology Tower (219 Prospect Street, KBT C-11) have boxes available for most shipments containing biological materials. Supplies are also are available on Workday with Access to SciQuest Catalog Content. Click on Favorites and then locate the Research Materials Shipping Supplies link from the left-hand navigation.
Express Shipping powered by eShipGlobal

1. Click **Ship To** located in the navigation menu at the top of your eShipGlobal window.
   - Research materials are generally defined as materials that are used in laboratory settings such as animals, biological (cultures or stocks of human or animal pathogens, select agents or toxins, human or animal materials, genetically modified microorganisms, vectors, plasmids, etc.), chemical or radioactive, and dry-ice.
   - Some research materials may not necessarily be hazardous but become regulated materials once they are transported.

2. Indicate that you are shipping research materials. Click **Yes**.

   **Does your shipment contain any of the following:**

   - Biological Materials
   - Chemicals
   - Radioactive Materials
   - Dry Ice

   - Yes
   - No
3. Choose **International**.

![Image of International Selection](image)

4. After user selects the shipment type the certification pop-up message is presented. The user needs to read it, check the box – “I agree to the above requirements”, and click either **Confirm Shipment** or **Cancel Shipment**.

5. Classify the material in your shipment.
   - Check all that are applicable.

![Image of Research Material Shipping](image)

6. Click **Continue**.
7. Select the appropriate material name for the biological material.
   - If you have completed the necessary training for this exempt biological material, you will see a confirmation of your training.
   - If you have not completed the necessary training, you will receive a prompt indicating which training you need and a link to complete that training.

8. Select the appropriate Microorganism or Prion for the biological material.
9. Answer the questions related to the biological material.

10. Click Continue.

11. Enter the Material Name, Quantity, Net Value, and any additional fields for the substance that you plan to ship.

12. Click Continue.
Express Shipping powered by eShipGlobal

13. Confirm or edit Sender's location.
   - Only the Sender's physical location can be modified. The Company and Contact information cannot be changed because it is tied to the person who logged into the system. This staff member has had their training levels validated and is the person who is expected to be making the shipping request. The Shipper is also expected to be the most knowledgeable about the material being shipped.

14. If the shipping location is accurate, go to step 17.

15. Click Edit.

16. Update the physical address information and click Save Changes.

17. Accept today's date (by default) or enter a future date in the Shipping Date field.
   - To change the Shipping Date, click in the Shipping Date box and enter a new Shipping Date.
   - You can also click on the calendar icon located on the right-hand side of the Shipping Date field to select the date from the calendar.
   - Labels can be printed in advance.
   - The shipping date selected cannot exceed 9 days from today's date.
18. Click on **Load from Address Book** to select a Recipient from the saved Address Book,
   - **Go to step 22** to enter a new Recipient.

19. Type **Search** criteria in the field provided. Then click **Find**.
   
   NOTE: You can navigate the Address Book using the letters listed at the top of the window or using the Search feature. Please refer to the **Managing Your Address Book** chapter for more detail.

20. Click to select the address that you would like to use as the Recipient.

21. Click **Ship To** and **go to step 24**.
   - Recipient information will automatically be entered in the appropriate fields.
Express Shipping powered by eShipGlobal

22. To enter an address, complete the online form by entering the Recipient information for the delivery in the fields provided.
   - If there is a Company Name, enter it in the **Company / Contact Name** box and then address the package to an individual by entering the Recipient contact name in the **Alternate Contact Name** box.
   - If the package is intended for residential delivery, enter the Recipient contact name in the **Company / Contact Name** box.

   ![Recipient Information Form]

   *Fields marked with asterisks (*) are required.*

23. To add the address being entered to the saved Address Book, click in the box next to **Add to Address Book** or leave blank if the address will not be needed for future deliveries.

24. Select the type of package from the **Type** drop down-list. Then provide the **Shipment Reference** and Content Description if applicable.
   - **Package Types**
     - Fiberboard box: Brand new, unused, UN certified package (different sizes available).
     - Plastic case: UN certified package (different sizes available).
     - Customer packaging: Packaging not provided by the shipping carrier.
Express Shipping powered by eShipGlobal

25. Enter the approximate **Weight** and **Dimensions** of the package.

26. Enter the COA or select a saved set of charging instructions identifying where the shipping costs should be charged.

   **NOTE:** You can elect to have a Third Party, or the Recipient of the package pay for delivery. Enter the charging as a backup funding source. Then choose Third Party or Recipient from the Bill To drop-down list. Enter the Recipient / Third Party Account Number and Zip Code associated with the Recipient / Third Party Account Number in the boxes provided.

27. Type in the last name of the **Requester** who requested the package delivery. Then select the appropriate person from the list of options provided.

   **NOTE:** The Requester is the individual who requested that the package be shipped. This information captured in a structured way to facilitate reporting on data and improves the ability to provide financial reviewers with complete “initiator/Preparer” information on all University transactions.
28. Select any optional **Special Instructions** or enter a **Declared Value** (for insurance purposes if applicable) required for this package.
   - Additional charges may apply for some special services.

29. If dry ice is included in your package, click Dry Ice and indicate how many pounds will be included.
   - **TIP:** The weight of dry ice should not exceed the total package weight you previously entered.

30. Select optional Email Notifications requested.

**NOTE:** If you choose to Notify Shipper, Notify Recipient, Notify Shipper on Delivery, or Notify Others on Delivery, you will need to enter an email address, email addresses need to be entered for each of the requested Email Notifications.
Express Shipping powered by eShipGlobal

31. Click Show Quote.

32. In the event the compliance check flags this shipment, click Submit for Approval.
   - Your shipment will be routed for approval to a designated officer.

33. Review the package information.
   - If changes are required, click Edit Shipment and return to step the main form to make corrections.
   - If the information is correct, continue to next step.

34. Select a shipping Carrier, Service, and Rate from the list of options provided.
   - Shipping Carrier options will be displayed from the least expensive to the most expensive option.

   NOTE: After 3 PM, FedEx Overnight 8 AM may not show as an available option for the next business day.
   NOTE: There may be a substantial increase or difference in price for an 8:00 AM delivery as opposed to a 10:30 AM delivery from the same carrier. A breakdown of estimated charges will be displayed on the right side of the window or when you hover the Contracted Rate. The Transaction Charge will not be billed to the charging provided.
35. Click **Ship**.

36. This shipment has been routed to the designated officer to approve this shipment due to a compliance check. Once approved, you will get an email prompting you to login and complete the shipment.

37. When you receive approval notification and are back in the system, click **Complete Shipment**.

38. Read the Requirements for Exempt Human or Animal Specimen Packages.

39. Click in the box next to the statement that you will follow the steps indicated in the checklist when preparing the package for this shipment.

40. Then click **Continue**.

*NOTE: Many actions can be performed from the shipment summary window.*
41. Complete Shipment by printing all required documents.

![Shipment Information Table]

42. Click Print Airwaybill.

- Paper labels will print on locally installed printers, network printers, or multi-function devices.

![Shipment Information Table]

NOTE: When the Shipping Label is printed, fold the paper in half and insert it into the plastic sleeve of your envelope. The Airway bill information should be facing through the window so that it can be easily scanned by the Carrier.
43. Schedule Pickup
   - Click on Schedule Pickup.
   Please retain the Pickup Confirmation Number for your records. Your package will be picked up only if you have a Pickup Confirmation Number.

44. Select the Printer where you would like to print the shipping label. Then click Print.

45. Close out the Print Label Screen to return to the My Shipments window.
46. Click Print Documents to print necessary Customs documents.

47. Click Print Documents.
   - Select the printer, then click Print.
   - Close out the Print Documents to return to the My Shipments window.

IMPORTANT: Print 3 copies of the Commercial Invoice and other customs related forms for international air shipments and 5 copies for international FedEx Ground shipments to Canada or Mexico. Include the copies with the Shipping Label.
48. Print the packaging instructions and labels that appear. Checklists and labels were created based on your earlier responses to categorize the material you are shipping.

49. Cut around the outside border of the label and affix it to a vertical side of the box (not the top or bottom) then cover the label with clear plastic packaging tape.

50. Cut around the outside border of the label, fill in the information in the Dry Ice label, affix it to a vertical side of the box (not the top or bottom) and then cover the label with clear plastic packaging tape.

*NOTE: Missing information on this label can result in a returned shipment.*

51. Click Schedule Pickup.
52. Choose a pickup date (if other than today) and then select the Shipment Ready Time and Business Close time from the drop-down list of options provided.
   - Please allow at least 2 hours between the shipment ready time and business close time.

53. Edit the address information if necessary. Please include building, floor, or suite numbers where the package is located.

54. Edit the Number of Packages to be picked up from the specified location.
55. Click on **Submit Pickup**.

Please retain the Pickup Confirmation Number for your records. Your package will be picked up only if you have a Pickup Confirmation Number.

56. Click Back to Summary.
FREQUENTLY ASKED QUESTIONS: INTERNATIONAL SHIPMENTS

- How do I send a “Documents Only” shipment?
  - A document is generally defined as a written, typed or printed communication of no commercial value. International documents shipped in an envelope or in any other packaging do not require an invoice. Call us at 1-800-816-1615 for information about documents. Enter customs value of at least $1.00 for documents only.

- How do I send a Non-Documents shipment?
  - International shipments containing items other than documents require additional forms. When using non-document shipments, you need to fill in product profile and other information for export purpose. Multiple copies of commercial invoices and other forms are needed. The system will produce a label and other necessary documents for each package.

- What documents are required for international shipments?
  - If you’re shipping internationally, eShipGlobal produces the following documents based on the information you provide:
    - Commercial Invoice
    - Shipper’s Export Declaration (SED)
    - Certificate of Origin
    - NAFTA Certificate of Origin
    - Caribbean Common Market Commercial Invoice (CARICOM)

- What is a Commercial Invoice?
  - This is a document provided by the seller/exporter that describes the parties involved in the shipping transaction and the goods being transported. It is the primary document used by Customs and for imports should be prepared using the official language of the country to which the goods are being exported, if possible. The Commercial Invoice should include a detailed breakdown of all items included in the shipment: including any generic or scientific name, grade and quantity, composition and/or construction, the country of manufacture, the price or cost, currency used, the Harmonized System number for each commodity and the terms of delivery. The document shown is an example of one format. Some countries require that an original invoice be executed on the shipper’s letterhead. The invoice should always be signed and dated by the exporter certifying that the details provided are true and correct representations of the contents covered by the Commercial Invoice.

- How many copies should I send with the shipment?
  - The system will provide a prompt indicating the quantity of commercial invoice copies and other forms needed for the shipment that are required.
  - Forms cannot be filed electronically.

- What is NAFTA Certificate of Origin?
  - The CF434 NAFTA Certificate of Origin is a US form that is used to validate claims for preferential duty treatment (reduced or duty-free entry) under the North American Free Trade Agreement (NAFTA) between the US, Canada and Mexico. Alternative versions of the form which have been approved by Canada or Mexico customs authorities may also be used. This form can be prepared to cover either a single shipment or for a ‘blanket’ period up to one (1) year. It may be prepared in Spanish, French or English. However, customs authorities may require that a written translation into the importer’s
language be provided. To request preferential treatment, the NAFTA Certificate must be prepared and signed by the exporter. However, the exporter may ask the actual producer of the goods to prepare and sign one (as the manufacturer) as a supporting document. For more information, please contact US Customs.

- What is Caribbean Common Market Commercial Invoice?
  - The CARICOM is an invoice much like the Commercial Invoice, that is used for export shipments consigned to the Caribbean Common Market member nations. The CARICOM can be used interchangeably with the Commercial Invoice provided the details required by the import customs requirements of the destination are met on the document that is prepared. It is recommended that the shipper verify with the importer what form of invoice is acceptable or required if there is any question. The CARICOM should not be used for exports other than to the CARICOM member nations. (Antigua, Barbuda, Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Haiti, Jamaica, Montserrat, St. Kitts and Nevis, St. Lucia, St. Vincent and Grenadines, Suriname and Trinidad and Tobago).

- What is a Shippers Export Declaration (SED)?
  - The Shipper's Export Declaration (SED) is required by the US Department of Census in order to obtain statistical data and by the Bureau of Export Administration (BXA) to assist in enforcing export controls. Many shipments qualify for an exemption on the basis of the destination and/or the value. (Shipments to most destination are exempt if the value per Schedule B is $2500 USD or less.) The form is to be prepared and signed by a US shipper (exporter) or their agent, indicating the description (including the Schedule B or HTS number), value, weight, destination, and other basic information about an export shipment. SED information may be submitted electronically through the Automated Export System (AES). For information on SED requirements and exemptions, please review the U.S. Code of Federal Regulations.