eShip@Penn™ Management System

Welcome!
Visualizing the eShip@Penn Shipping Hierarchy

**eShip@Penn Shipping Hierarchy**

**Mail Services**
- “Owns” express shipping
- Authorizes Sr. BAs
- Makes changes at all levels if needed

**Sr. Business Administrators**
- Responsible for express shipping at their School or Center
- Authorize Dept. Admins

**Department Administrators**
- Authorize Allocators

**Allocators**
- Authorize Shippers
- Reallocate shipping expenses

**Shippers**
- When authorized, log-in to online eShip@Penn application via Penn Mail Services to create shipments and airway bills
Objectives

- Instructions based on your role in the authorization process
- Senior Business Administrator, Department Administrator or Allocator
Select Your Role

Senior Business Administrator
Slides 5 - 12

Department Administrator
Slides 13 - 21

Allocator
Slides 22 - 30
Welcome Senior Business Administrators!

In this section you will find:

• Brief review of your role and responsibility in the eShip@Penn Management System

• Detailed instructions for using the application
Role of Senior Business Administrator

- Assign Department Administrators to your hierarchy
- Re-assign personnel and default budget codes at all levels
- You may not reallocate your own or other shipper’s charges
Click on the eShip@Penn tab at Penn Mail Services website ([www.upenn.edu/mail](http://www.upenn.edu/mail))
From the eShip@Penn page, click on the Allocators, Administrators menu item on the left. Click on the eShip@Penn icon. Authenticate with your PennKey and password.
From the eShip Management System landing page, select “Manage Hierarchy” in the left vertical menu bar.
To Assign Department Administrator:

- Identify the person by entering their PennID or PennKey as shown here (must have a valid ID to be in the system)
- Click "Search"
Make Changes to your Hierarchy

Search below by PennId or Penn Key to select and manage the "Allocator" role:

- Penn Id
- or-
- Penn Key

Search
Clear

Results for search

Name (first and last): John Doe
PennId: 0000000
PennKey: jdoe
Email Address: jdoe@upenn.edu

Return to hierarchy view

John Doe is an allocator reporting to Jane Doe
Change department admin

Current backup: Jane Doe
Change

Reporting to John Doe
Re-assign shippers

Shippers | Default Budget Code
---------|---------------------
Julie Doe | 000-000-0000000-00000-00000

As an Example:

- Click on an Allocator's name on Manage Hierarchy page to review profile (shown here), including assigned Shippers
Senior Business Administrator Recap

- General responsibility for express shipping and assigning Department Administrators
- From the eShip@Penn web page, select Shippers, Allocators, Administrators menu item on the left.
- Click on the eShip@Penn icon and authenticate using your PennKey.
- On the system’s landing page, select “Manage Hierarchy” from left vertical menu bar
- Enter person’s PennKey or PennID and “Search”
- Confirm by clicking “Assign Administrator,” repeat for each
- Administrator and their Allocator(s) and Shipper(s) are displayed on the Manage Hierarchy page
- Click on Administrator’s, Allocator’s, or Shipper’s name to make edits, move personnel or assign new Allocators or Shippers
Welcome Department Administrators!

In this section you will find:

• Brief review of your role and responsibility in the eShip@Penn Management System

• Detailed instructions for using the application
Role of Department Administrators

- Assign Allocators and review invoice charges
- Re-assign personnel at both Allocator and Shipper level, and reallocate charges
- You may not reallocate your own charges
- If you want to be a Shipper, you must be assigned to an Allocator’s hierarchy
Click on the eShip@Penn tab at the Penn Mail Services website (www.upenn.edu/mail)
From the eShip@Penn page, select Shippers, Allocators, Administrators menu item on the left. Click on the eShip@Penn icon. Authenticate with your PennKey and password.
Select “Manage Hierarchy” or “Review my Allocator’s Charges” in the left vertical menu bar.
Assign Allocators

To assign an Allocator:

- Select "Manage Hierarchy" on the main page
Make Changes to your Hierarchy

As an Example:
- Click on an Allocator's name on Manage Hierarchy page to review their profile (shown here), including assigned Shippers
To review your Allocator's charges:

- Select "Review my Allocator's Charges" from the main page
- Charges will be displayed for each Allocator in your hierarchy (above)
From the eShip@Penn web page, select Shippers, Allocators, Administrators menu item on the left.

Click on the eShip@Penn icon and authenticate using your PennKey.

Select “Manage Hierarchy” or “Review My Allocator’s Charges”

To assign an Allocator:

- Enter person’s Penn ID or PennKey and “Search”
- Confirm and click “Assign Allocator” for each person
- Change “Backup Allocator” by selecting “Change”
- Allocators and Shippers are displayed on Manage Hierarchy main page
- Click on Allocator or Shipper’s name to make edits, move or assign personnel

To review invoice charges:
- Select “Review my Allocator’s Charges” to view or reallocate charges
Welcome Allocators!

In this section you will find:

• Brief review of your role and responsibility in the eShip@Penn Management System

• Detailed instructions for using the application
Role of Allocator

- Assign Shippers
- Reallocate invoice charges (must have Chart of Accounts training and authorization to complete transactions in the general ledger)
- You may not reallocate your own charges
- If you want to be an Authorized Shipper, you must be assigned to another Allocator’s hierarchy
Allocator Log-In

Click on “eShip@Penn” tab at the Penn Mail Services website (www.upenn.edu/mail)
From the eShip@Penn page, select the Allocators and Administrators menu item on the left. Click on the eShip@Penn icon. Authenticate with your PennKey and password.
Select “Manage Shippers” or “Review my Invoice Charges” in the left vertical menu bar.
Assign Shippers

To assign a Shipper:
- Select "Manage Shippers" on the main page
To reallocate your Allocator's charges:
- Select "Review my Invoice Charges" from the main page
- Charges will be displayed for each Shipper in your hierarchy (above)
On the eShip@Penn web page, select Shippers, Allocators, Administrators menu item on the left.

Click on the eShip@Penn icon and authenticate using your PennKey and password.

Select “Manage Shippers” or “Review My Invoice Charges” from the left vertical menu bar

To assign an Authorized Shipper:
- Enter person’s PennID or PennKey and “Search”
- Assign default budget code under “Specify Shipper Account Details”
- Double check and click “Assign Shipper”
- Click on shipper’s name to activate edit options

To reallocate charges:
- Select “Review My Invoice Charges” on main page
- Make changes and click “Apply Changes”

Email reminder Monday, online re-allocations by 5:00 p.m. Friday
For More Information

- Visit the eShip@Penn website:  www.upenn.edu/mail/eship
- Training modules and support information such as FAQs
- Locate campus drop boxes
- Order supplies
- Hazardous Materials instructions
- Export Compliance information
- Find out what’s new about eShip@Penn

- Contact Penn Mail Services - eShip@exchange.upenn.edu