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Introduction

This user guide will help users learn how to use the eShipGlobal transportation management software. This document will act as a reference guide for users who want to understand the difference between user roles, what value does eShipGlobal provide, what workflow to use for shipping research materials and ensuring exportation compliance. This guide includes step-by-step instructions on both domestic and international shipment of biological hazardous materials, hazardous chemicals, radioactive materials, dry ice & non-regulated materials.

Pre-Requisites

To follow this guide, you need to have access to your instance of the eShipGlobal workspace. You may also need to receive training in order to ship certain materials.

Getting Started

eShipGlobal is a completely web based tool. Simply log in from your preferred web browser (Firefox, Chrome, Internet Explorer, and Safari are all supported browsers). If you do not know the URL to access eShipGlobal, contact your Administrator.

Each user has a specific role in eShipGlobal, and when he or she logs in, he or she will see the home page with information particular to his or her role. The Home Page ensures that each and every user sees the information and menu options that they need to get their job done.

![Home Page]

**Figure 1: Home Page**
Roles

eShipGlobal provides pre-defined roles, such as, the ECO Admin, the EHS Admin, and RMS Users. There is also an additional Administrator Role for Managing the software implementation. All roles are described in section below.

Regular User
The Regular User role is the most basic user type. This user requires no training validation, but is only able to create non-regulated domestic and international shipments.

Reports: Has access to Shipment history, International Shipment history, tracking report (can be restricted to self), and Shipment search report, Manifest report and UPS high Value report (shipments with value above $5000).

RMS User
The RMS User role is for users who will need to ship regulated research materials. This user can create regulated and non-regulated domestic and international Shipments. The system validates level of training with the material selection before allowing user to prepare the shipment.

Reports: Has access to Shipment history, International Shipment history, Research Material Shipment history, inbound shipment history, Tracking report, Shipment search report, Manifest report and UPS high Value report (shipments with value above $5000), eShipLab OP-950/ Certification report

Administrator
The Administrator role can create regulated and non-regulated domestic and international shipments. The administrator has access to additional information and reports related to billing and invoicing. This user can also manage other user accounts and access rights.

Reports: Has access to Shipment history, International Shipment history, Research Material Shipment history, inbound shipment history, Tracking report, Shipment search report, Manifest report and UPS high Value report (shipments with value above $5000), eShipLab OP-950/ Certification report

ECO Admin
The ECO Admin role is responsible for addressing any issues flagged as part of the export compliance logic on shipments created by other users. This role can also create non-regulated domestic and international shipments.

Reports: Has access to Shipment history, International Shipment history, Tracking report, Shipment search report, Manifest report and UPS high Value report (shipments with value above $5000).
**EHS Admin**

The *EHS Admin* role is responsible for addressing any issues flagged by hazardous materials and dangerous goods regulations. This user can also create regulated and non-regulated domestic and international shipments.


- Shipment History - No Export
- International Shipment History – No Export
- Research Material Shipment History – No Export
- Inbound Shipment History – No Export
- Tracking Report – Can Export
- Shipment Search Report – Can Export
- Manifest Report – No Export
- UPS High Value Report (shipments with value above $5000) – No Export
- eShipLab OP-950/ Certification Report – No Export
eShipGlobal Process

There are two major workflows that are part of the overall eShipGlobal process. They are the research materials workflow and the export compliance workflow. The diagram below shows a high-level workflow of the steps a user takes to ship research materials both domestically and internationally.

![High-Level Workflow Diagram](image)

Figure 2: High-Level Workflow

**Export Compliance: User Workflow**

The diagram below shows the export compliance process flow, walking through the shipping process for the user.

![Export Compliance User Workflow Diagram](image)

Figure 3: Export Compliance: User Workflow
Export Compliance: ECO Admin Workflow

The diagram below shows the workflow for the ECO Admin, in order to support Export Compliance.

Figure 4: Export Compliance: ECO Admin Workflow
User Scenarios

The following sections walk the user through the most common scenarios of the eShipGlobal application. Each section includes a short description of the scenario and then a step-by-step walkthrough of the scenario with screenshots from the application.

1.0 Non-RMS Domestic Shipping

The purpose of this scenario is to show the user how to ship domestic packages without any regulated materials. The user will create a new domestic shipment. This scenario walks through address selection, package and billing information, special instructions, rate shopping and email notifications.

Let’s look at that in eShipGlobal:

1. Select **Ship > Ship To** from top navigation menu. Select “No” where it asks to determine if this shipment contains research materials.

2. Identify if this as a domestic or international shipment. For purpose of this scenario we will select Domestic.

![Figure 5: Shipping Selection: Domestic](image)

3. You can use a “Quick Ship” saved profile or enter the shipping information. The first section is the “Ship From” section. This will default to the logged in user’s profile information. You can add a new sender, by clicking on the “Add Sender” button and entering in that sender’s information. The Shipping Date defaults to today’s date and can only be edited to a future date.
4. In the “Ship To” section, the user can load an address from the address book, by clicking the “Load from Address Book” button and selecting the contact from the address book. If the address does not exist, the user can enter in the contact information in the “Ship To” section. Check the “Add to Address Book” checkbox to save this information in the address book for reuse at a later time.

5. In the “Package Information” section, enter information about the package including number of packages, package type, weight, dimensions, and service. You can leave the “Service” field blank and use the “Show Quote” button to select the best service based on timing and price. If in the Billing section you are going to use a Third-Party account or bill the Recipient, you must select a Service in this section, because the Show Quote tool will not be available. If there is more than one package, the user must mark the packages as identical or Non-Identical. If “Non-Identical” the user will need to enter package information for all packages.
6. In the “Billing References” section, enter account information and select how to bill the shipment. Select “Prepaid” if you’re going to use your organizations account information. The user can select “Recipient” or “Third Party” to enter in someone else’s account to be billed. If you do not use “Prepaid” option, then you will need to select a “Service” in the Package Information section. *Note: Show Quote feature will not be available for Third Party or Recipients accounts so you will only have an option to “Ship”. If you select “Prepaid” you will be required to enter the cost object code and assign the cost allocation.

7. In the “Special Instructions” section, select any special services or instructions for the package, such as, “Saturday Delivery”, “Signature Required”, or “Hold at Station”. Some special services have additional charges. *Note: FedEx does not hold packages for Saturday Delivery, as they deliver as soon as they can. So, if the shipping date is a Monday-Thursday, FedEx will not show up on the quote page, only UPS when you choose Saturday Delivery. If you want FedEx options, you would need to be shipping it out closer to Saturday. You can change shipping date to see if it would be cheaper to ship FedEx and wait to ship it a few days so it can be delivered on Saturday.
8. Select any email notifications desired for this shipment.

![Email Notifications Section](image)

Figure 4: Email Notifications Section

9. Click “Show Quote” button to review multiple carrier options. Choose the carrier and service desired for this shipment, and click on the “Ship” button.

![Show Quote](image)

Figure 5: Show Quote
10. The “My Shipment” screen is displayed automatically once the “Ship” button is selected. From this screen, the user can print the airway bill, schedule a pickup, upload supporting documentation and create a return order.

![Image of Domestic Shipment History]

**Figure 6: My Shipment**
2.0 Non-RMS International Shipping

The purpose of this scenario is to show the user how to ship international packages without any regulated materials with Export Compliance. The user will create a new international shipment. This scenario walks through item classification, item selection, ECCN, address selection, package and billing information, customs information, special instructions, rate shopping, email notifications and the compliance checker.

Let’s look at that in eShipGlobal:

1. Select **Ship>Ship To** from top navigation menu. Determine if this shipment contains research materials. For this scenario, we will select “No”.

2. Identify if this as a domestic or international shipment. For purpose of this scenario we will select International.

![Shipping Selection: International](image)

**Figure 7: Shipping Selection: 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”.
Figure 15: Item Classification: International Shipping

4. Answer the license check questions.

Figure 86: Export Questionnaire: Documents

5. On the “Item Selection” form, fill in all required fields for “Documents”. The “Item Name” field is where you type the name of the item, as you type a drop-down menu will appear of all previous shipments. Enter the weight, quantity and select metrics for both. Finally enter the net value of the item. If you select “Yes” or “I Don’t know” to the above question, then this shipment will be routed to the ECO admin for approval once the shipping form is completed. For “Documents”, the system will default the ECCN to “EAR99”. The user may click on “Add another item” to add another item to the shipment. Click “Continue” to go to the “International Shipping” form.
6. On the item selection form for Technical Data (software), and tangible item products, there is one additional optional field called “Schedule B Number” and the ECCN does not have a default value.
7. For “Products” on the items classification page, begin by typing the name of the item in the “Item Name” field. If the item already exists in the item database, you can select it and all needed information will be filled out for you. You will only need to enter the “Gross Weight”, “Quantity”, and “Net Value in USD”. If the item is not in the database please leave the Schedule B Number and ECCN# fields blank and they will be filled out by your ECO Admin if necessary.

Figure 19: Item Database Lookup on Entry
8. The first section is the “Ship From” section. This will default to the logged in user’s profile information. You can add a new sender, by clicking on the “Add Sender” button and entering in that sender’s information. The Shipping Date defaults to today’s date and can only be edited to a future date.

9. In the “Ship To” section, the user can load an address from the address book, by clicking the “Load from Address Book” button and selecting the contact from the address book. If the address does not exist, the user can enter in the contact information in the “Ship To” section. Check the “Add to Address Book” checkbox to save this information in the address book for reuse at a later time.
10. In the “Package Information” section, enter information about the package including number of packages, package type, weight, dimensions and service. If the user chooses “Customer Packaging”, then the dimensions are required. If the user chooses a Carrier package type such as “Carrier Box”, “Carrier Tube”, “Carrier PAK”, the dimensions are defaulted and not editable. If the package type is “Carrier Letter”, the weight and dimensions are defaulted and not editable. You can leave the “Service” field blank and use the “Show Quote” button to select the best service based on timing and price. This option is not available if you use a “Third Party” or “Recipient” account for billing. If either of those are used, you will need to select a “Service”.

11. In the “Billing References” section, enter account information and select how to bill the shipment and duties/taxes. Select “Prepaid” if you’re going to use your organization’s account information. The user can select “Recipient” or “Third Party” to enter in someone else’s account to be billed. In the Billing Information section, select the accounts to be charged.
12. Select special instructions for the shipment. In some cases, additional charges may apply. Complete the “Customs Information” section for the shipment. All shipments carry a default value of $100. The value entered in the “Item Selection” will be populated here. If this is wrong, you'll need to edit the item by clicking on the item name in the “Item Name” section. For shipments valued at $100 or less, leave the default value as $0. It is always rounded up to the next $100. If SED method is “Included”, a valid ITN is required. If SED method is “Exempted”, then a FTSR Number is required. Select any email notifications desired for the shipment.

13. When you click on “Show Quote” for international shipments, the compliance checker will validate address against the RPS database and ECCN for Export Compliance. If the shipment fails either of these checks, the shipper can submit the shipment for approval by the ECO Admin. Details of failure can be viewed by using scroll bar.
Figure 26: Failed Export Compliance

Figure 27 Continued: Rate Shopping
14. If shipment is submitted for approval, you will see the International Shipment History Page, giving you an overview of the shipment information. The ECO admin will have either approve or edit your shipment for you to continue.

![International Shipment History](image)

**Figure 28: Shipment History: Submitted for ECO Approval**

15. If shipment passes the RPS check and Export Compliance, the “My Shipments” page will display the shipment information. Click on “Complete Shipment” to review the final checklist and complete the shipment.

![Shipment Details](image)

**Figure 29: Shipment Details**
16. Review the checklist. Once you have finished reviewing the checklist, click “Continue” to complete shipment.

![Checklist Review Image]

Figure 30: Checklist Review

17. The “My Shipment” screen will then be updated. From this screen, the user can print the “Print Airwaybill”, “Print Documents”, view “Export Checklist” or “Schedule Pickup”.

![Shipment Details Image]

Figure 12: Shipment Details
18. If the user selects the “Print Docs” button, the system will print the Commercial Invoice with all the information pre-populated from the shipment form.

![Image of Commercial Invoice]

**Figure 13: Commercial Invoice**

19. Once the Commercial Invoice has been printed and signed, you can upload it to the Supporting Documents for future reference.

![Image of Supporting Documents]

**Figure 33: Upload Supporting Documents**
3.0 Shipment History

The purpose of this scenario is to show the user how to view his or her past shipments. Let’s look at that in eShipGlobal:

1. Select **My Shipments > Shipment History** from the top navigation menu.
2. Filter by date range and choose status of “All”, “Inbound”, “Approved”, “Pending” or “Cancelled”. Click on the shipment you wish to review.

![Figure 34: Shipment History: Domestic](image)

3. Users can also view Shipment History for International Shipments, Research Material Shipments and many more reports.
4.0 Tracking
The purpose of this scenario is to show the user how to track a package.

Let’s look at that in eShipGlobal:

1. Select **Track** from the top navigation menu.
2. Enter the Tracking or Order # associated with the shipment you would like to track.

![Figure 35: Tracking](image)

![Figure 36: Tracking](image)
Appendix B - Glossary

**Export**
An item sent from the United States to a foreign destination such as biological, chemical and radioactive materials. These items are generally sent using a carrier such as FedEx, USPS, UPS, DHL or World Courier.

**Export Compliance**
Export Compliance is a specialized multidisciplinary framework, which provides support to Organizations in Compliance Risk Management, i.e. the risk of legal or administrative sanctions, financial losses or reputation deterioration for failing to comply with laws, regulations and legislation, codes of conduct and good practice.

**Export Administration Regulations (EAR)**
United States export control law that affect the manufacturing, sales and distribution of technology. The legislation seeks to control access to specific types of technology and the associated data. Its goal is to prevent the disclosure or transfer of sensitive information to a foreign national. EAR contains a Commerce Control List (CCL) of regulated commercial items, including those items that have both commercial and military applications. Regulates items designed for commercial purpose which could have military applications such as computers or software. Covers both the goods and the technology. Licensing addresses competing interests and foreign availability. Combines commercial and research objectives with national security.

**International Traffic in Arms Regulations (ITAR)**
United States export control law that affect the manufacturing, sales and distribution of technology. The legislation seeks to control access to specific types of technology and the associated data. Its goal is to prevent the disclosure or transfer of sensitive information to a foreign national. ITAR contains a United States Munitions List (USML) of restricted articles and services. Covers military items or defense articles. Regulates goods and technology designed to kill or defend against death in a military setting. Includes space related technology because of application to missile technology. Includes technical data related to defense articles and services. Strict regulatory licensing - does not address commercial or research objectives.

**Restricted Party Screening (RPS)**
The Departments of State, Commerce and Treasury each issue lists of individuals, companies, or other organizations whose US export privileges have been restricted or revoked. The lists include both US and foreign individuals and organizations. Screening foreign sponsors, subcontracts, vendors and other foreign parties is a critical component of an organization’s efforts to prevent violations of US export control laws.

**Foreign Trade Statistics Regulations (FTSR)**
Is an official issuance of the Bureau of the Census and U.S. Department of Commerce. It is a compilation of regulations governing the reporting of statistical information on U.S. trade with foreign countries, Puerto Rico, and U.S. Possessions.

**Shipper’s Export Declaration (SED)**
The Shipper’s Export Declaration (SED), Commerce Form 7525-V, is used for compiling the official U.S. export statistics for the United States and for export control purposes. The regulatory provisions for preparing, signing and filing the SED are contained in the Foreign Trade Statistics Regulations (FTSR), Title 15 Code of Federal Regulations (CFR) Part 30.
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