CLEVELAND METROPOLITAN SCHOOL DISTRICT

SUPPLIER SELF SERVICE GUIDE

CMSD PROCUREMENT/PURCHASING DEPARTMENT

JULY 2018

The Supplier Self-Service portal creates a higher level of connectivity for an integrated flow of information between CMSD and our Suppliers.

Cleveland Metropolitan School District (CMSD)

CMSD Supplier Self Service Portal

Supplier Partners

Contact us: 216.838.0410   SupplierSelfService@clevelandmetroschools.org

Supplier Self Service Portal Overview

The CMSD Supplier Self Service Portal is a free internet accessible Workday enabled self-service tool that allows suppliers to directly access their information during the "procure-to-pay" lifecycle. The portal is available to all CMSD approved suppliers who are registered to use the service.

The Supplier Self Service portal offers the ability to:

- Self-register through an external website
- Receive newly issued purchase orders
- View purchase orders
- Access payment and remittance advice information
- Maintain master data such as contact information, addresses, and bank accounts.
- Create invoices (coming soon)
- Upload catalogs (coming soon)

In addition to the benefits above, the portal is available 24/7 and provides real-time access to invoice and purchase order information.

Effective, August 2018, CMSD will require all approved Suppliers to register and use the Supplier Self Service portal to conduct business with CMSD.

If you are approved and registered, you should have received your login credentials. If you are registered and have not received your login credentials, please contact us at SupplierSelfService@clevelandmetroschools.org.

To get answers to our most frequently asked questions (FAQs) and review our Supplier Self Service Fact Sheet, visit our Supplier Self Service web page at http://clevelandmetroschools.org/Domain/120. Select Supplier Self Service from the menu on the left.

Contents

Supplier Self Service Web Site

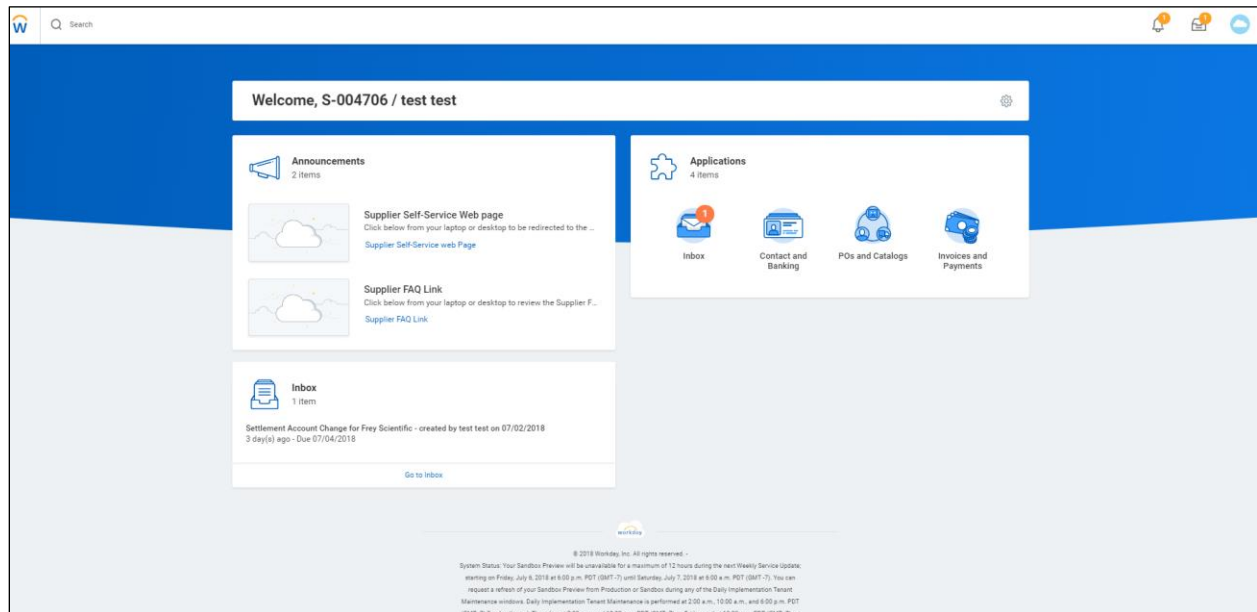*Website address: http://clevelandmetroschools.org/Page/13414*

Supplier Self Service Portal Login Page

You may access the Self Service Portal using the link in the email from CMSD.
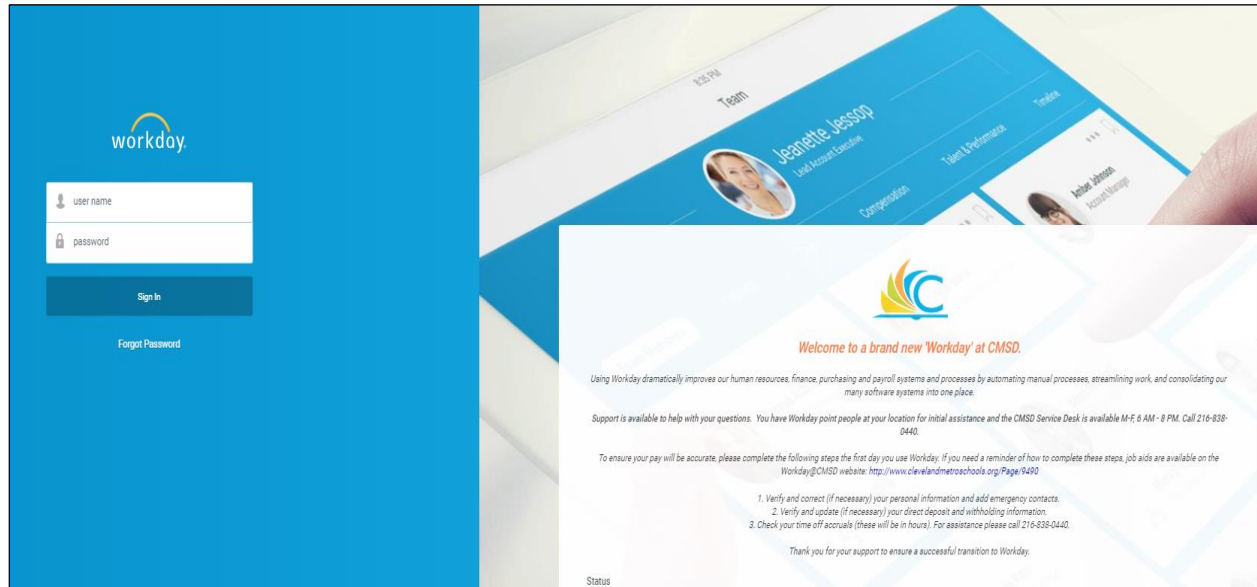
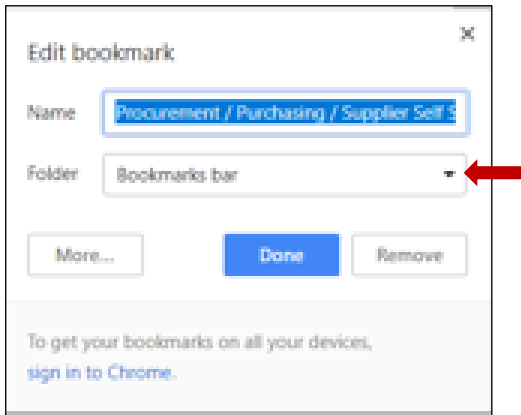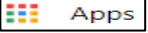# Supplier Self Service Portal Home Page

Bookmark a Webpage

Follow the steps below to bookmark the Supplier Self Service webpage and the CMSD Supplier Portal login page.

INSTRUCTIONS

NOTE: To bookmark a webpage, make sure you are on the open webpage
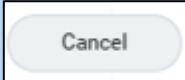
- Click ⋮ in the upper right corner of the screen. Scroll down and click **Bookmarks.**

- Click **Bookmark this page** to display the **Edit Bookmark** box (see below)

> Edit bookmark   ✕
>
> Name   [Procurement / Purchasing / Supplier Self S]
>
> Folder   [Bookmarks bar   ▼] ⬅
>
> [More...]   [Done]   [Remove]
>
> To get your bookmarks on all your devices,
> sign in to Chrome.

- Type **the name of the webpage you want to bookmark** next to name

- Click the ▼ on the right of **Folder** and click Bookmark Bar or select a folder you've created

- If you chose Bookmark Bar, the bookmarked page will appear on the same row as ⦙⦙⦙ Apps or in your designated folder.

- If you have many items on your Bookmark Bar, you may need to scroll right using the » in the top right of the screen.

Self Service Portal Tools

Q Search	Perform document search
(bell icon with 6)	Notifications to take action
(gear icon)	Configure the page you're viewing or refresh information
(filter icon)	Filter information on the report
(columns icon)	Select Column preference for report
(chart icon)	Create/expand/collapse chart
(orange ••• icon)	Displays additional actions/details
(horizontal scroll bar)	Scroll left or right
(vertical scroll bar)	Scroll up or down
(inbox icons)	Inbox

		Return to the homepage
		Preference menu/sign out option
		Return toggle to normal view
		Toggle to full screen view
		Print document
		Export to Excel
		Configure/view chart
		Search menu options
Submit / OK		Accept the transaction or entry and proceed to the next step
Save for Later		Save the current entries to allow updates later
Cancel		Cancel the transaction or entry

Inbox Application

Purpose: The purpose of this Application is to enable suppliers to receive Workday messages, actions items and view archived transactions that have been completed within the Inbox.

How to Access: The inbox can be accessed from the Workday homepage.

Audience: CMSD Approved Suppliers

Helpful Hints: You will need to be registered as a CMSD Supplier and have access credentials in order to log in to the Supplier Portal.

Procedure: Complete the following steps to understand the use of the Inbox application and the different Dashboards.

The homepage offers three ways to access the inbox.

1. On the bottom of the left side of the screen. Messages can be accessed by clicking Go to Inbox .

2. On the right side of the screen under Applications Inbox .

3. On the top right side of the screen .

These options are shown on the next page.
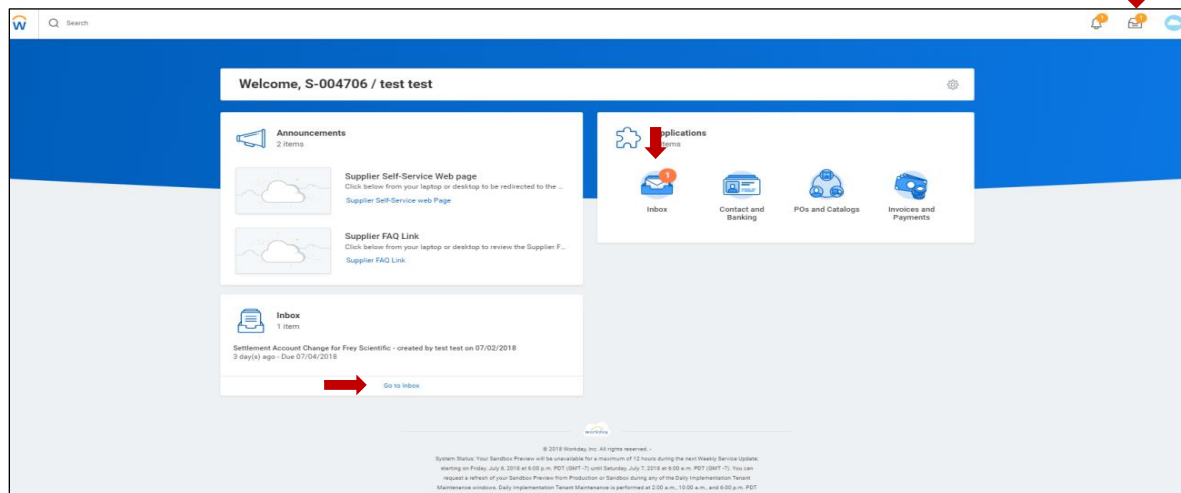
The inbox on the left side of the screen will show the 3 most current messages. These messages are designed to alert you that action is needed on pending transactions. See below.
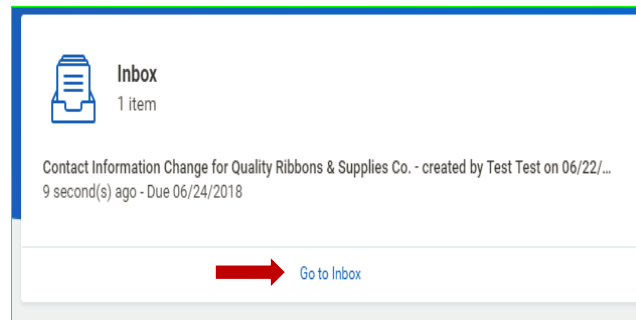
Click [Go to Inbox] to review pending items. As shown in the next illustration, Action and Archive items will be displayed. To view the details, click the Action or Archive tab.
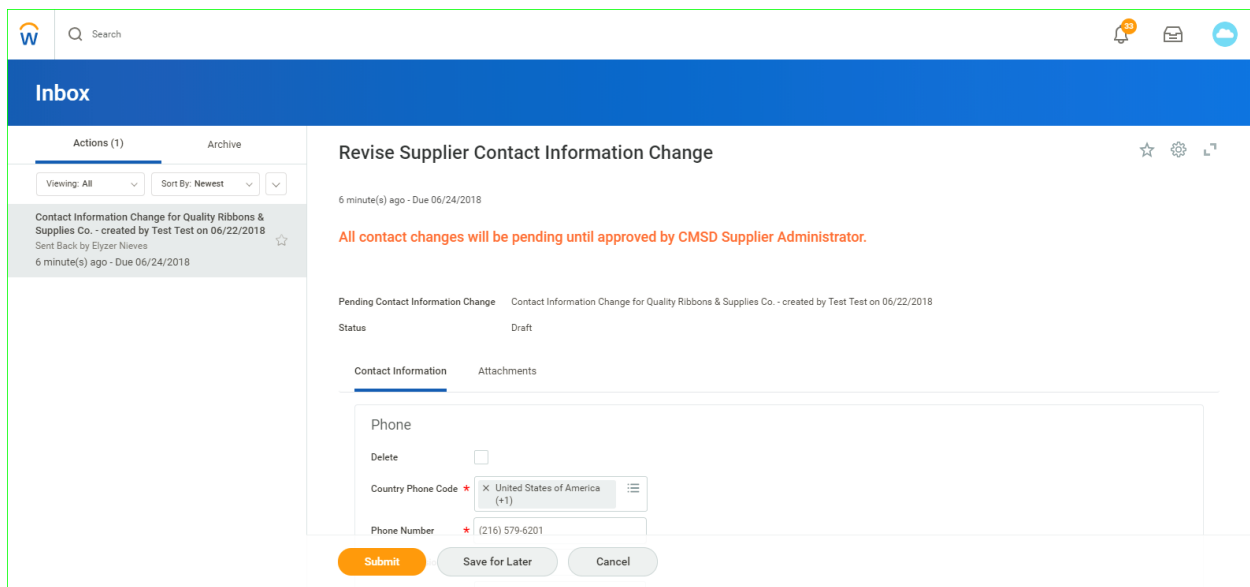
Helpful Hint: You can also use the [icon] or [Inbox] icons to open the Inbox page below.

Once the Inbox page is open you will see 2 tabs:
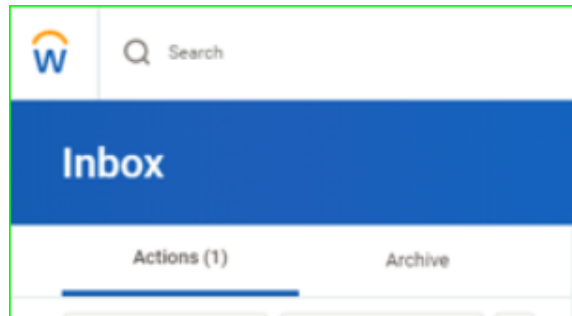
Tab	Description
Actions	Displays incomplete business process tasks, approvals, and To Dos in chronological order.
Archive	Displays business process tasks and actions completed. The system default displays tasks and actions for the last 30 days. To see additional items, follow the steps listed under Archive Tab on page 13.

Actions Tab

Once there is pending action you are now ready to review what action is required. In the next example we see that a previous change request has been sent back in the red box.
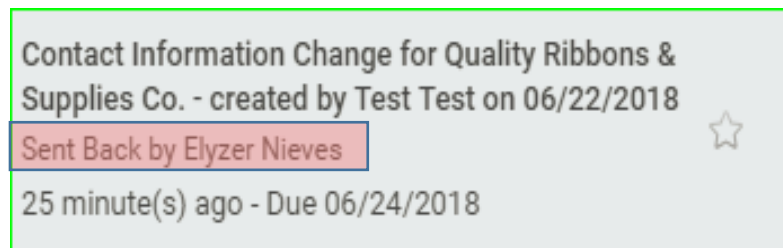
On the right side scroll down the page to review the comments from the Approver. These comments will identify actions you will need to take.
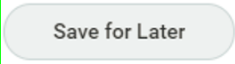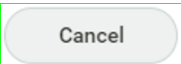
Task Actions

Task Actions	Description
Save for Later	**If the icon Save for Later is selected, it will save the changes and they can be picked up at a later time to complete all the pending edits and submit for approval at a later time.**
Cancel	**If the icon Cancel is selected, you will go back to the menu screen without saving any data.**
Submit	**If the icon Submit is selected, it will trigger the actual changes for the Supplier Administrator to review, update, approve or cancel the corresponding change request.**
Done	**Once a process has been submitted you can press Done to go back to the Inbox.**

Click [Done] to return to the inbox.
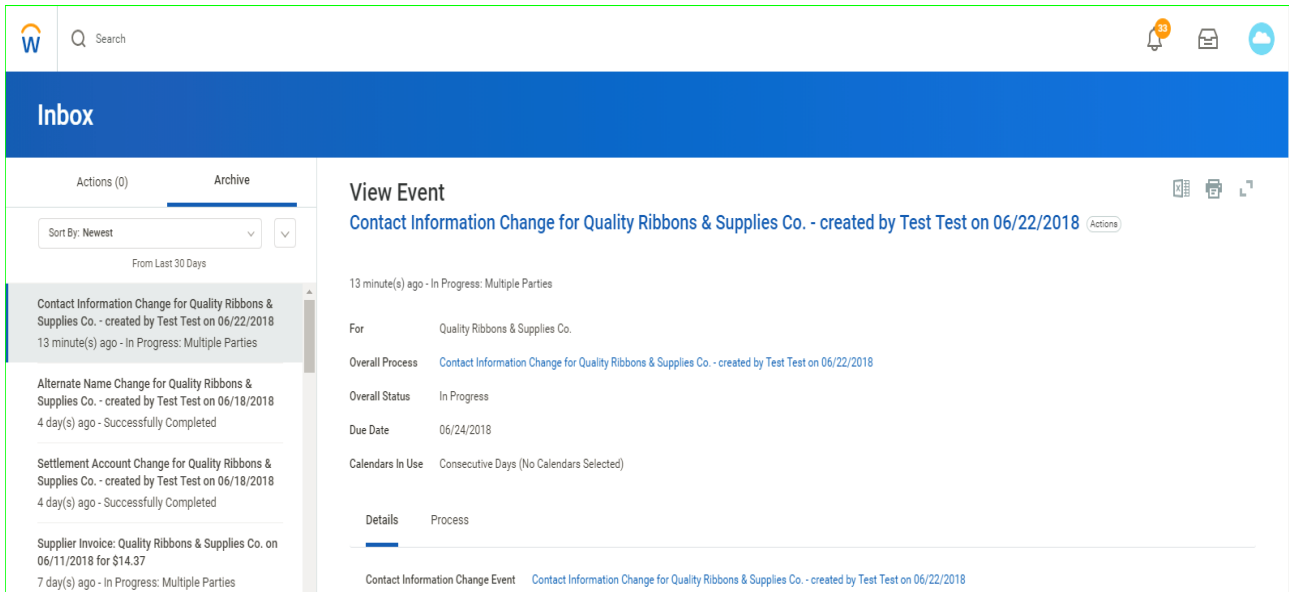
Once you have taken action on any messages, your Inbox Application will clear out showing that you don't have any pending actions. You have the option to see all transactions on the Archive Tab (details below).

Helpful Hint: Submitting a transaction will come back with the final status from the approver that could be: Denied, Sent Back for update or Approved.

Archive Tab
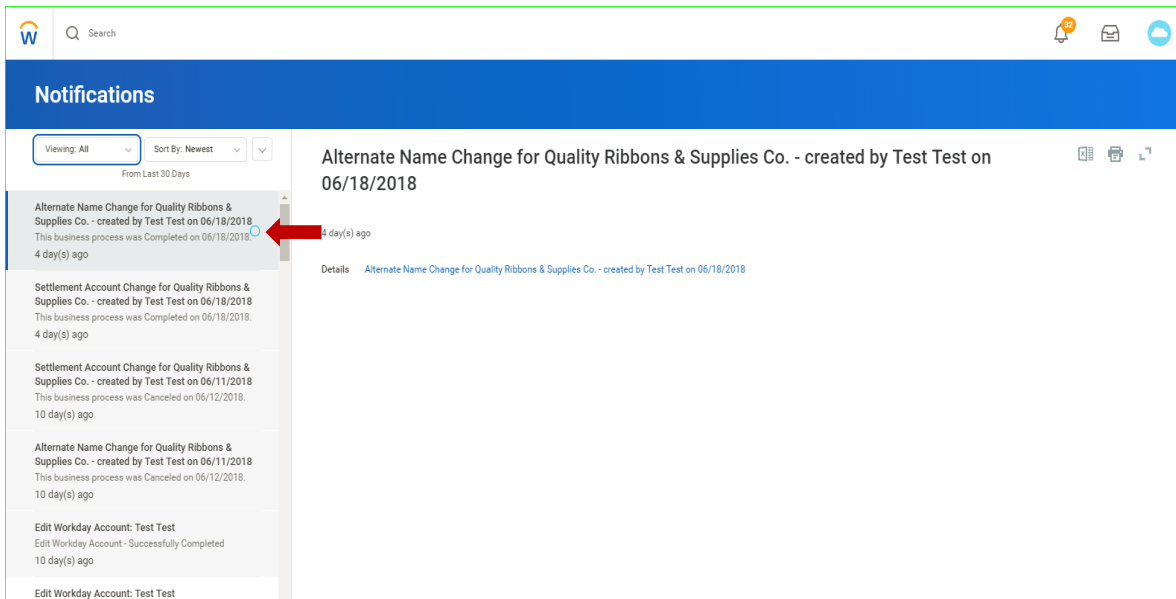
On the Archive Tab below you will see the review history of all the actions that have been taken within your Inbox.

The Archive tab displays completed action items for 30 days from the initiated request date. To view archived items older than 30 days, perform the following steps: Click the down arrow and select "View More Processes". When the "View More Processes" screen is displayed, enter the "Start Date" and "End Date", and then click OK.

Notifications

Notifications are used to keep you informed of activity related to your account. These are typically items that you need to know about but don't require action. In the example below, the

Notifications icon was selected. Unread notifications will have a circle next to them. The circle will disappear once the notification is selected.

Contact and Banking Application

Purpose: The purpose of this Application is to enable suppliers to maintain or view their supplier data, such as addresses and settlement banking information, and to submit their own updates.

How to Access: Go to the CMSD supplier portal home page, select the **Contact and Banking** icon under the **Applications** section.

Audience: CMSD Approved Suppliers

Helpful Hints: You will need to be registered as a supplier contact and need to have access credentials in order to log in to the Supplier Portal.

Procedure: Complete the following steps to understand the use of the Application and the different Dashboards.

Once you log in to the supplier portal you will see the next home page where you will be able to apply different actions by selecting specific Applications like: Inbox, Contact and Banking, Invoices and Payments, and PO's and Catalogs.
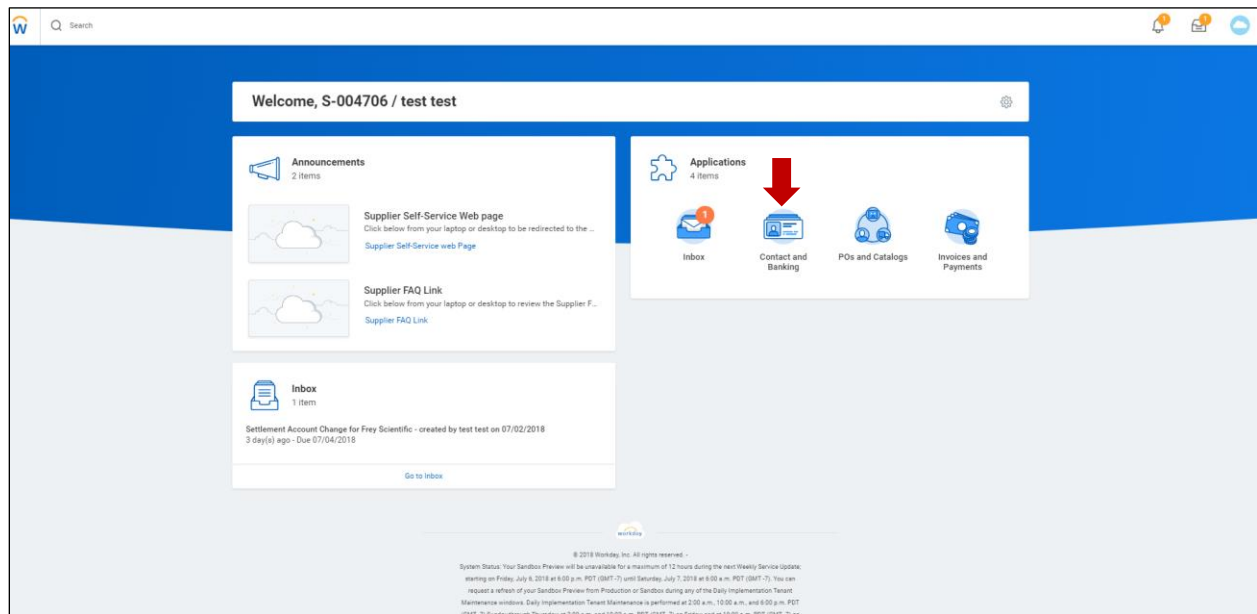
Contact and Banking Application
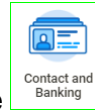
To access the Contact and Banking application click the [icon image] icon. Once selected a new dashboard page will open.
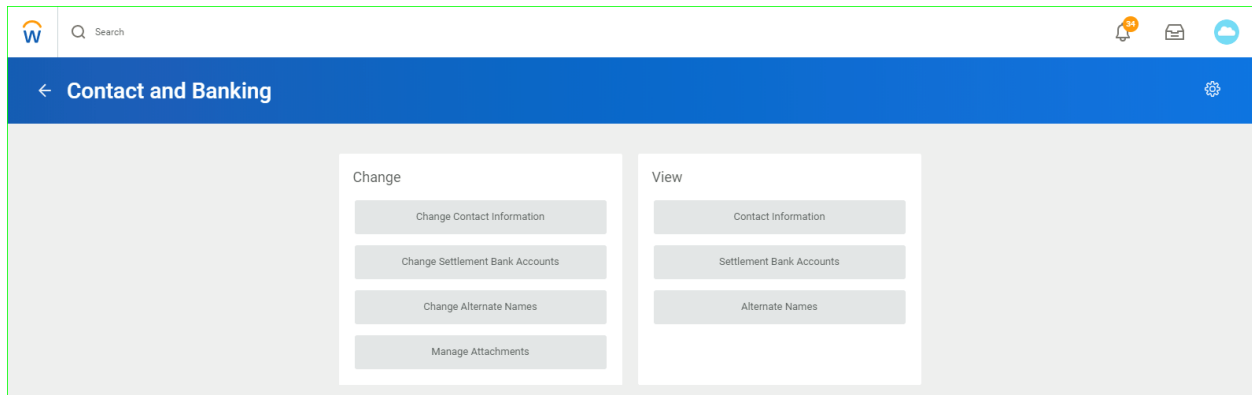
The dashboard is divided into two sections:

Change will allow you to maintain and update your company information. An internal approval process will be triggered if you initiate and submit a change of information.

Task	Description
Change Supplier Contact Information	Submit new and updated supplier contact information for review and approval.
Change Supplier Settlement Bank Account	Submit new, and updated supplier settlement bank accounts for review and approval.
Change Supplier Alternate Name	Submit new and updated supplier alternate names for review and approval.
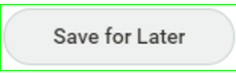
Manage Attachments	Upload multiple type of files related to the information provided.
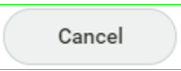
The second option **View** will just allow the supplier contact user to see the existing data on "view mode".

Change
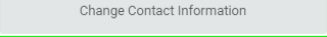
Task Actions for Change Request:

Below you will find the list of task actions possible and a brief description on what each action will trigger within a change request.

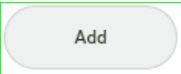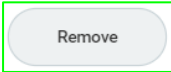| Task Actions	Description
OK	**Before any change can be made a confirmation message will pop up and will need to be confirmed to start the draft Change by selecting the OK icon.**
Delete ☐	**If the Delete box is checked, the existing record type where selected will be deleted once the transaction is fully approved once submitted.**
Add	**If the Icon Add is selected, it will open up a new section based on the selection type to include a new record to the supplier data.**
Remove	**If the Icon Remove is selected, it will remove the record you just inserted by selecting the Add action above.**
Save for Later	**If the Icon Save for Later is selected, it will save the changes and they can be picked up at a later time to complete all the pending edits and submit for approval at a later time.**

Cancel	**If the Icon Cancel is selected, it will just take you back to the menu screen without saving any data.**
Submit	**If the Icon Submit is selected, it will trigger the actual changes for the Supplier Administrator to review, update, approve or cancel the corresponding change request.**

Change Contact Information

Select the icon below you will find what information can be updated with this task.

1. Phone

Field	Required/Optional
Country Phone Code	**Required**
Phone Number	**Required**
Phone Extension	**Optional**

Phone Device	**Required**
Type	**Business (Default)**
Primary	**At least one must be Primary**
Use For	**Billing**
	Remit To (See helpful hint below)
	Shipping
Visibility	**Required**
Comments	**Optional**

Helpful Hint: If the remit to address is to be used as the primary business/contact address, you only need to complete the remit-to address section it will serve as the address for all instances

Address

Helpful Hint: Please DO NOT remove old addresses. CMSD has opted to retain all account history. If your address has changed, please **Add** the new address with a new effective date.

Field	Required/Optional
Effective Date	**Required**
Country	**Required**
Address Line 1	**Required**
Address Line 2	**Optional**
City	**Required**
State	**Required**
Postal Code	**Required**
County	**Optional**
Type	**Business (Default)**
Primary	**At least one must be Primary we suggest selecting the most effective dated one.**
Use For	**Select one or all that apply**
Visibility	**Required**
Comments	**Optional**

Email

Field	Required/Optional
Email Address	**Required**
Type	**Business (Default)**
Primary	**At least one must be Primary**
Use For	**Select one or all that apply**
Visibility	**Required**
Comments	**Optional**

Instant Messenger

Field	Required/Optional
User Name	**Required**

Provider	**Required**
Type	**Business (Default)**
Primary	**At least one must be Primary**
Use For	**(empty)**
Visibility	**Required**
Comments	**Optional**

Web Address
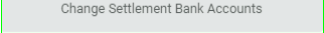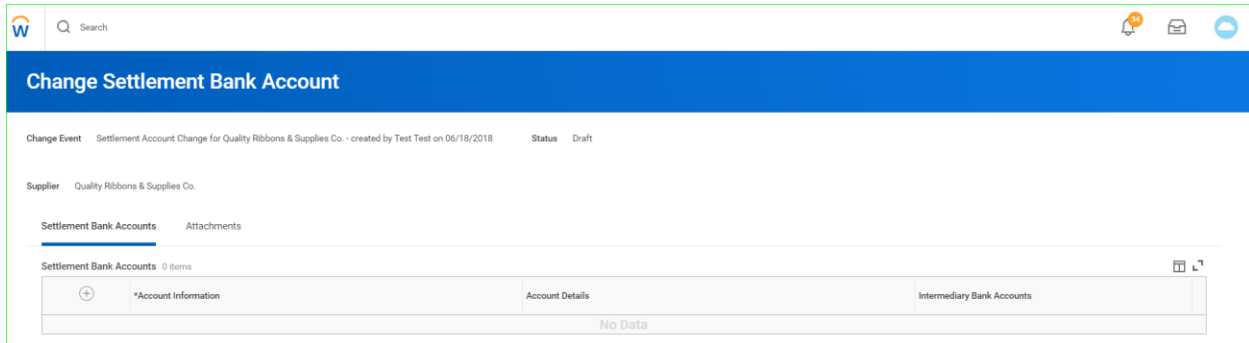
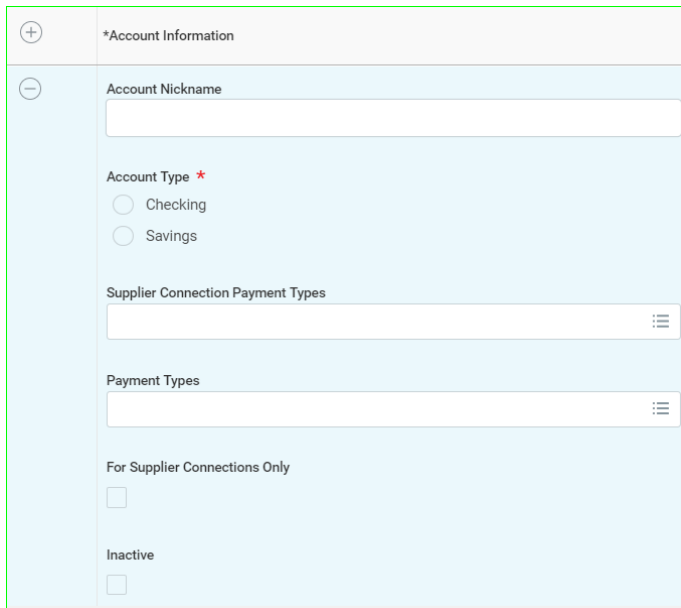| Field	Required/Optional
URL Address	**Required**
Type	**Business (Default)**
Primary	**At least one must be Primary**
Use For	**Select one or all that apply**
Visibility	**Required**
Comments	**Optional**

Change Settlement Bank Accounts

Select the icon [Change Settlement Bank Accounts] below you will find what information can be added or updated with this task.

We are going to select the [⊕] icon in order to insert a Settlement Bank Account.

Settlement Account Information

Field	Required/Optional
Account Nickname	**Required**

Account Type	**One required**
Supplier Connection Payment Types	**Do Not Use**
Payment Types	**Select one or all that apply**
For Supplier Connections Only Box	**Do Not Use**

Settlement Account Details

Account Details

Country *

Bank Name

Branch Code

Branch Name
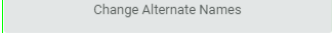
Bank Code

Account Number

Check Digit

Name On Account

Roll Number

IBAN

Bank Identification Code

Bank Instructions

Field	Required/Optional
Country	**Required**
Bank Name	**Required**
Branch Code	**Optional**
Branch Name	**Optional**
Bank Code	**Required**
Account Number	**Required**
Check Digit	**Optional**
Name on Account	**Optional**
Roll Number	**Optional**
IBAN	**Optional**
Bank Identification Code	**Optional**
Bank Instructions	**Optional**

Change Alternate Names

Select the icon [Change Alternate Names] below you will find what information can be updated with this task.
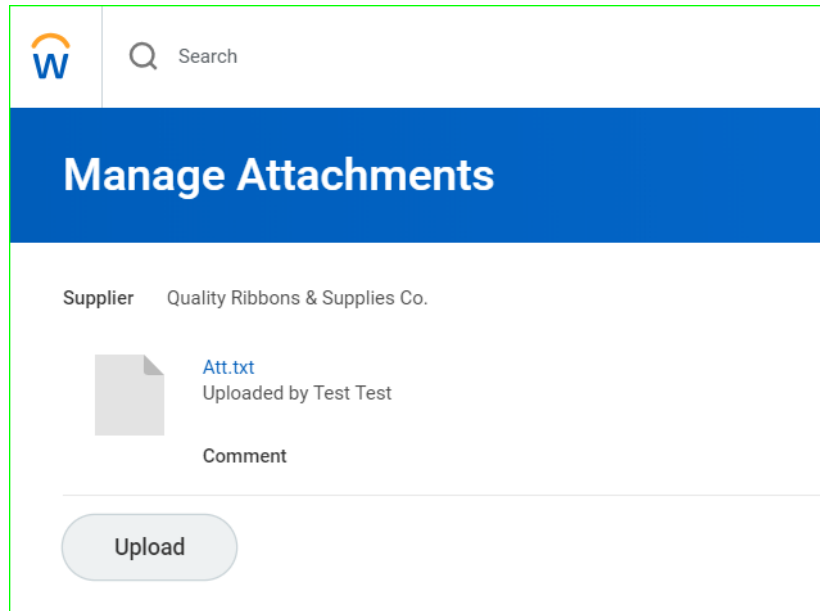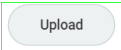
Select the ⊕ icon in order to insert a new Alternate Name.

Name *

| Field	Required/Optional
Name	**Required**
Usage	**Select 1099 MISC Recipient and any other that may apply**

Manage Attachments

Select the icon [Manage Attachments] below you will find what information can be updated with this task.

Manage Attachments

Supplier   Quality Ribbons & Supplies Co.

Att.txt
Uploaded by Test Test

Comment

Upload

You will only have the ability to use the upload task to include additional attachments by selecting the

 icon which will open your local file location to allow you to select the files you want to upload.
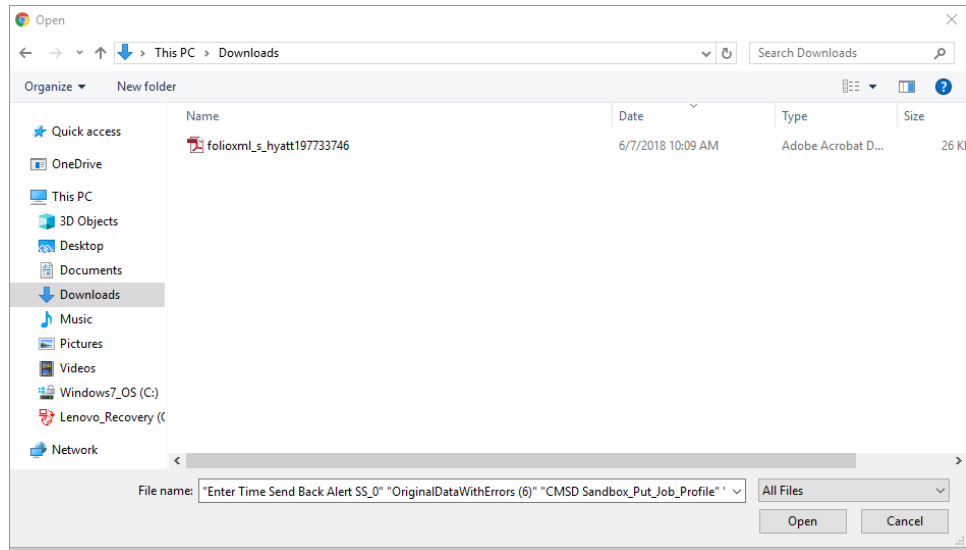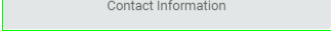

Once selected, click **Open** and the file will show on the Manage Attachments page along with a brief description of the file...
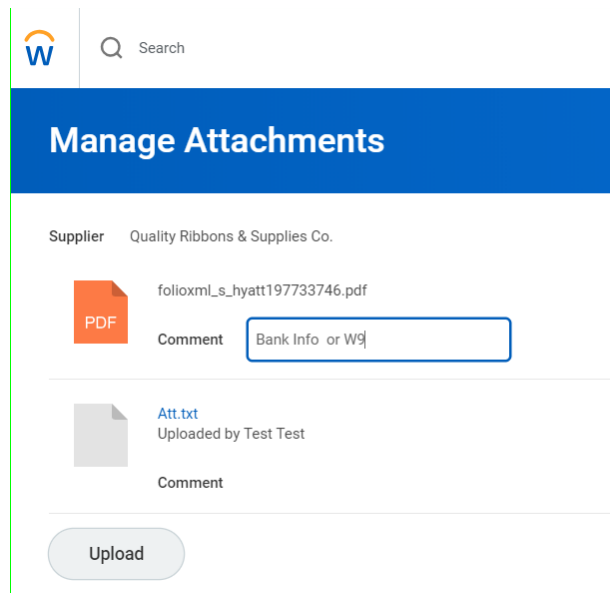
If necessary, you may add more files by repeating the Manage Attachment steps.

View

Contact Information

Select the icon [Contact Information] below you will find what information can be viewed with this task.

Settlement Bank Accounts

Select the icon [Settlement Bank Accounts] below you will find what information can be viewed with this task.

Alternate Names

Select the icon [Alternate Names] below you will find what information can be viewed with this task.

Invoices and Payments Application

Purpose: To provide instructions for viewing and searching most recent invoices and payments.

How to Access: Log into the Supplier Self Service Portal and click **Invoices & Payments** on your under the Applications section of the home page.

Audience: CMSD Approved Suppliers

Helpful Hints: Clicking on the blue text on any screen will return additional information.

Procedure: Follow the steps below to view and search invoices and payments.

Invoices and Payments

Invoices and Payments can be accessed from your Supplier Self Service Portal home page. This application allows you to view the details for **most recent payments** and **most recent invoices**.
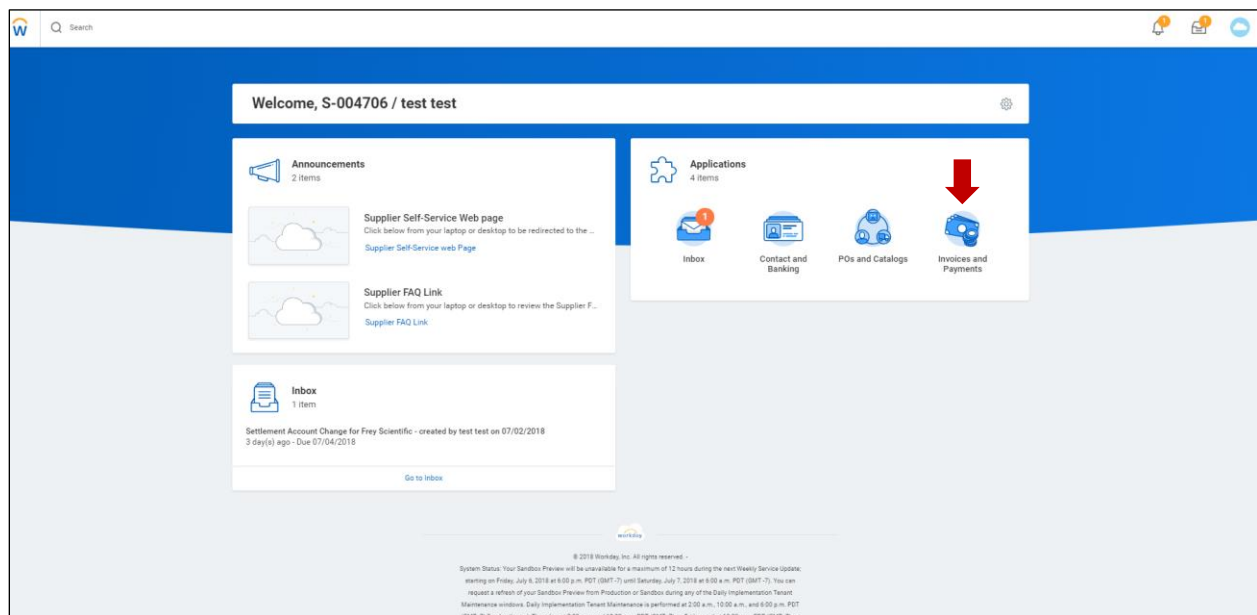
Most Recent Payments

Most Recent Payments details include payment amount, payment date, transaction reference, and the number of invoices included in the payment while

View More Details...

Clicking **View More Details** (in blue above) in the bottom left corner of Most Recent Payments will allow you to perform detailed searches using the selection fields below. This option allows customized searches to fit your needs.

Find Payments for Supplier Contact

Payment Date On or After	MM / DD / YYYY 📅
Payment Date On or Before	MM / DD / YYYY 📅
Payment Types	☰
Payment Status	☰
Payment Currency	☰
Payment Amount Equal To	0
Payment Amount Greater Than	0
Payment Amount Less Than	0
Supplier Reference Number	
Transaction Reference	

Indicates availability of a search menu. See search options in the table below.

☰ Search menu options:

Selection Options	Options
Payment Types	Cash, Check, Credit Card, Debit Card, Direct Debit, Direct Deposit, EFT, Manual, Wire
Payment Status	Approved, Awaiting Payment Acknowledgement, Awaiting Settlement, Canceled, Complete, Draft, Escheated, In Progress, Payment Received, Rejected, Returned, Stopped, Unapplied
Payment Currency	Generally USD but other currency selections are available

Clicking **View** in the second column of the Most Recent Payments table returns payment details for each invoice included in the payment. The example below is the results of clicking **View** for the payment in the amount of $356.76 which includes five invoices.

View Payment for Supplier Contact

Supplier Payment   Supplier Payment: Staples Contract & Commercial Customer Id: 1065558DET: 02/08/2018   Status   Complete   Reconciliation Status   Unreconciled
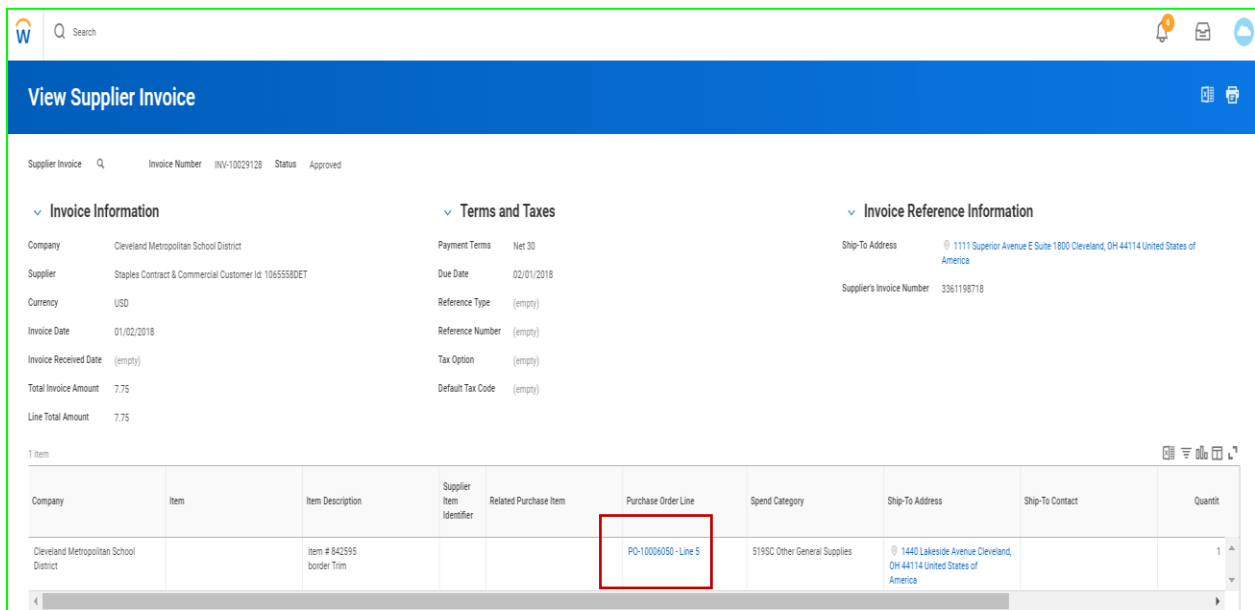
∨ Payment Information

Company	Cleveland Metropolitan School District			
Payee	Staples Contract & Commercial Customer Id: 1065558DET			
Payment Date	02/08/2018			
Payment Amount	356.76			
Currency	USD			
Memo	(empty)			

∨ Payment Detail

Bank Account	Key Bank - Accounts Payable Checking 3688
Payment Type	Check
Transaction Reference	1009967

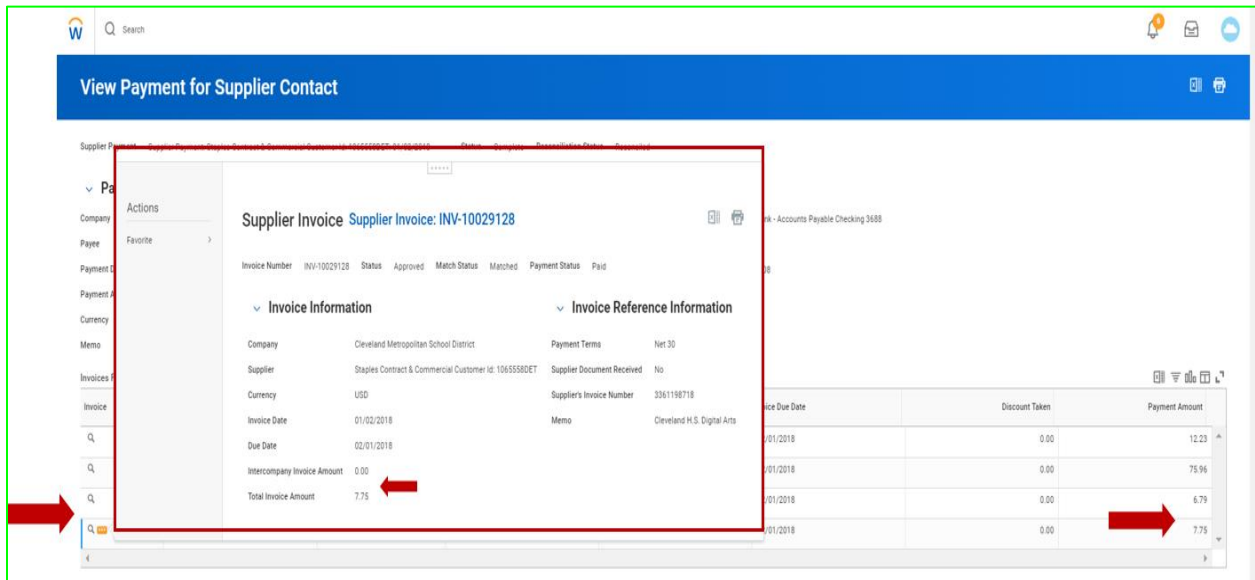Invoices Paid 5 items

Invoice	Invoice Date	Supplier's Invoice Number	Invoice Amount	Discount Due Date	Invoice Due Date	Discount Taken	Payment Amount
🔍	02/08/2018	3368261428	19.19		03/10/2018	0.00	19.19
🔍	02/08/2018	3368261429	602.15		03/10/2018	0.00	602.15
⋯	02/08/2018	3367231078	(319.00)		03/10/2018	0.00	(319.00)
🔍	02/07/2018	3368197015	22.43		03/09/2018	0.00	22.43
🔍	02/07/2018	3368197014	31.99		03/09/2018	0.00	31.99

 Report features found in the top right of the report table allows you to export to Excel, filter data, create graphs, view/edit grid preferences, and toggle to full

As shown below, additional invoice details can be obtained by placing the cursor to the right of the magnifying glass and clicking on the yellow Twinkie ( ). A pop-up window will display additional details.

Clicking directly on the magnifying glass will return the results shown below.

Line item detail can be displayed by clicking directly on the **blue text** under Purchase Order Line (see above). The results are shown below.

View Goods Order Line

Goods Order Line	🔍
Line	5
Purchase Order	PO-10006050
Supplier	Staples Contract & Commercial Customer Id: 1065558DET
Item	(empty)
Spend Category	519SC Other General Supplies
Tax Applicability	(empty)
Tax Code	(empty)

Tax Recoverability

Quantity	1
Unit of Measure	Bundle
Unit Cost	14.99
Extended Amount	14.99
Currency	USD
Prepaid	
Ship-To Address	⊙ 1440 Lakeside Avenue Cleveland, OH 44114 United States of America
Ship-To Contact	(empty)
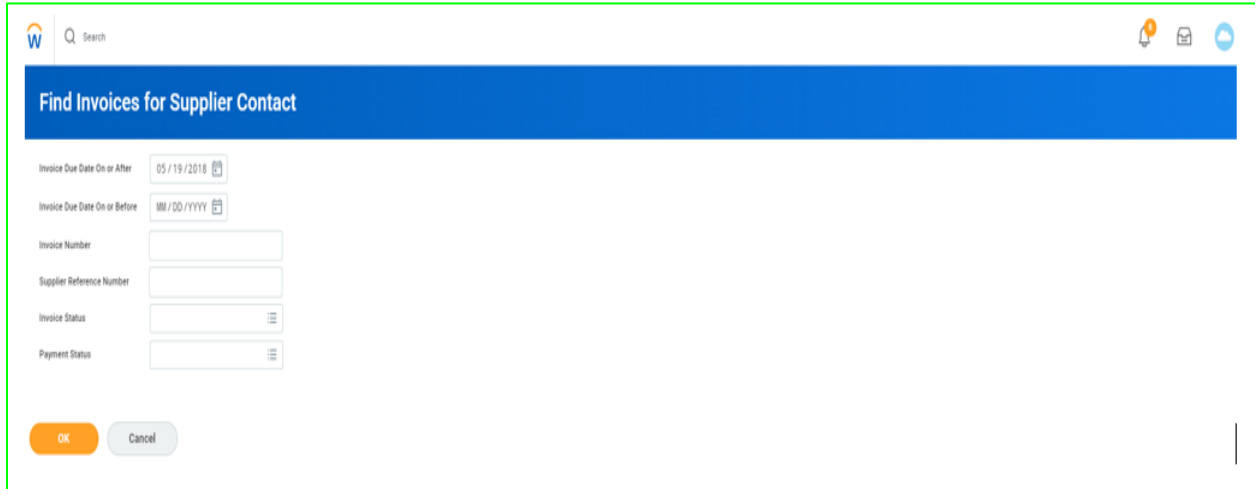
Receipts   Invoices

Receipts 1 item

Receipt	Quantity Received	Received UOM		Quantity	Ordered UOM
REC-0020296 for PO-10006050	1	Bundle		1	Bundle
			Total:	1	

Most Recent Invoices

This report provides the list of your most recent invoices. Details for most recent invoices include invoice: number, amount, due date, status and payment status.

Most Recent Invoices   ⚙

Invoice	Supplier Reference Number	Total Invoice Amount	Currency	Due Date	Invoice Status	Payment Status
INV-10035972	TEST001	267.91	USD	07/11/2018	In Progress	Unpaid
INV-10035877		0.00	USD	03/11/2018	Canceled	
INV-10035878	3369334953	17.82	USD	03/11/2018	Approved	Paid
INV-10035586	3369261429	602.15	USD	03/10/2018	Approved	Paid
INV-10035588	3369261428	19.19	USD	03/10/2018	Approved	Paid
INV-10035611	3367231078	(319.00)	USD	03/10/2018	Approved	Paid
INV-10035364	3369197014	31.99	USD	03/09/2018	Approved	Paid
INV-10035365	3369197015	22.43	USD	03/09/2018	Approved	Paid
INV-10035366	3369197016	73.98	USD	03/09/2018	Approved	Unpaid
INV-10034226	3366276847	110.79	USD	03/02/2018	Approved	Paid

View More Details...

To see the details related to a given invoice, click on the invoice number (in blue text) in the column titled Invoice. A sample of the results is shown below.

To review the line item details, click the blue text under Purchase Order Line. See example below.

If you don't see the invoice you want, click **View More Details** on the bottom left of the report to open the **Find Invoices for Supplier Contract** box. This feature allows you to search for

invoices based on due dates, invoice number, supplier reference number, and invoice or payment status.

Enter your search criteria and click [OK] to continue the search or [Cancel] to discontinue the search. Not all fields are required to complete a search. You can customize the search based on your needs.
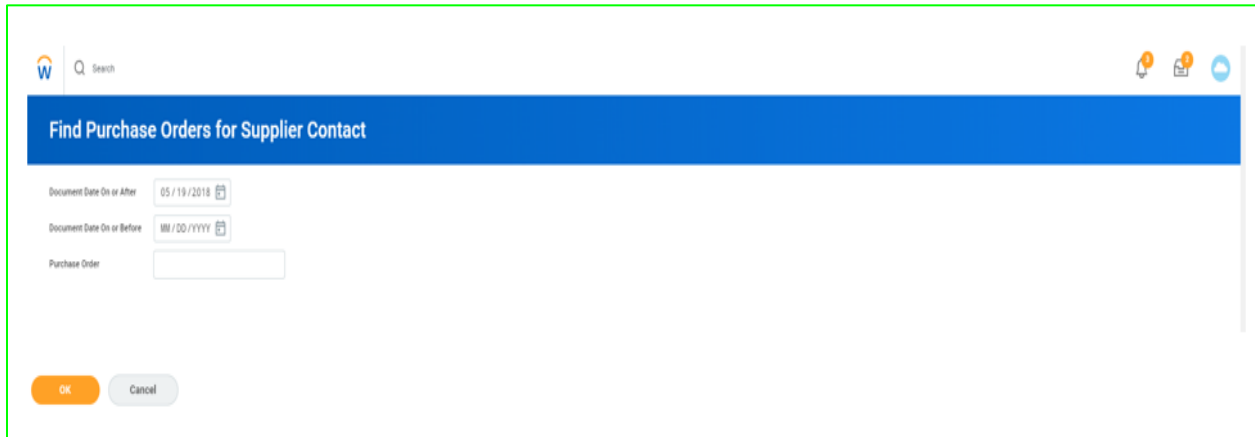
[≡] Search menu options:

Selection Criteria	Options
Invoice Status	Approved, Canceled, Denied, Draft, Incomplete, In Progress
Payment Status	Paid, Partially Paid, Unpaid

Find Purchase Orders

This feature allows you to search for a purchase order based on date or purchase order number. To perform a search enter the date range or purchase order number and click [OK] to continue or [Cancel] to stop the search.
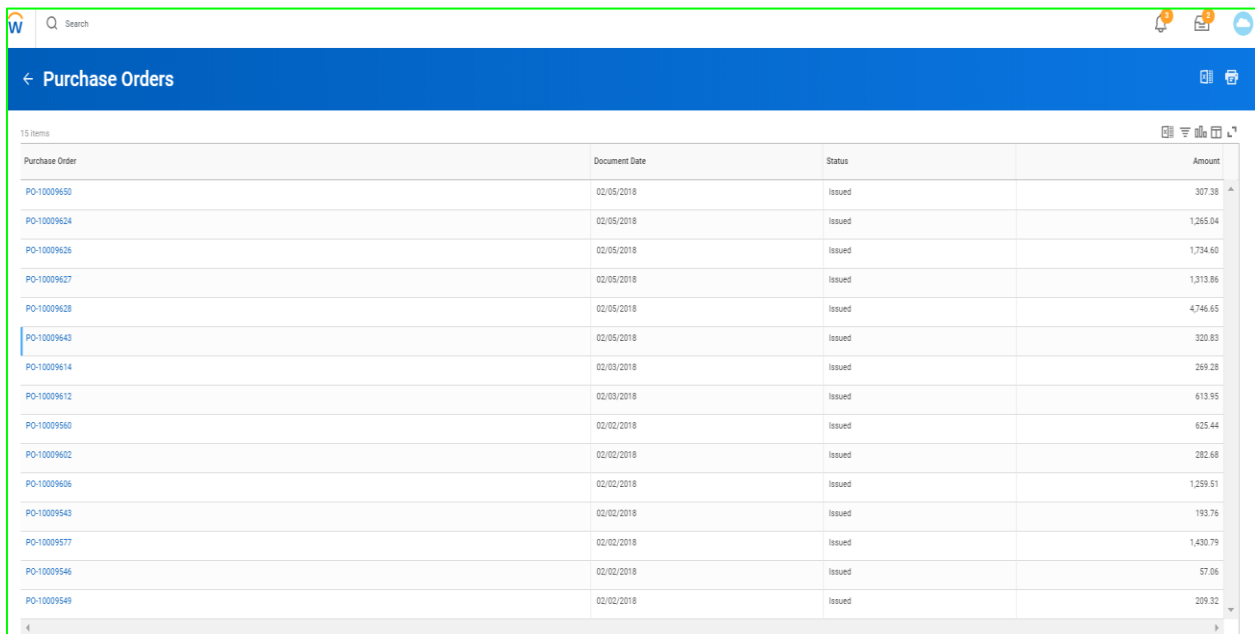
Below is an example of the results for a search based on date.

To view the purchase order details, click the purchase order number (in blue text). Below is an example of the results.

View Purchase Order

Purchase Order PO-10009650   PO Number   PO-10009650

Summary

Company	Cleveland Metropolitan School District
Document Date	02/05/2018
Supplier	Office Depot - Acct. 10798088
Payment Terms	Net 30
Due Date	(empty)
Currency	USD
Total Amount	307.38
Requisition Type	Regular
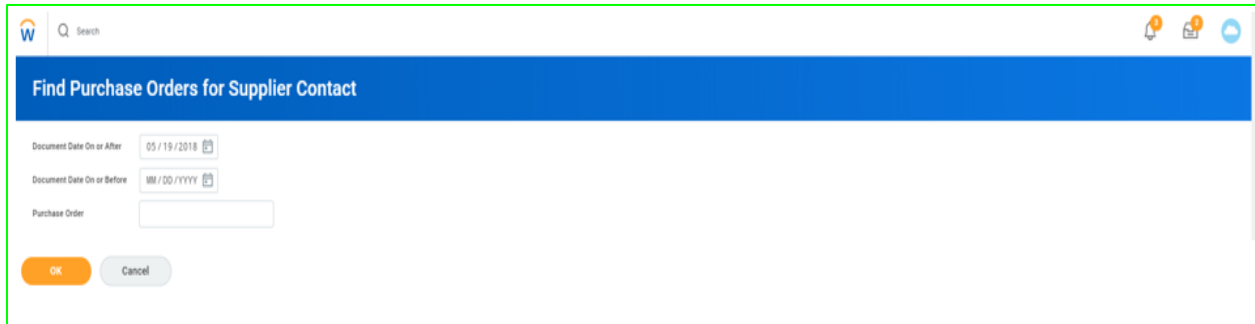
Contact Information

Issue Option	XML Auto
Buyer	Lyncoiya Parks (501389)
Buyer Email	Lyncoiya.Parks@clevelandmetroschools.org
Bill-To Contact	Lyncoiya Parks (501389)
Bill-To Contact Detail	Lyncoiya Parks (501389)
Bill-To Contact Email	Lyncoiya.Parks@clevelandmetroschools.org
Billing Address	1111 Superior Avenue E
Ship-To Contact	Nilda L Mendoza (499384)
Ship-To Contact Detail	Nilda L Mendoza (499384)
Ship-To Contact Email	Nilda.mendoza@clevelandmetroschools.org
Shipping Address	1701 Castle Avenue Cleveland, OH 44113 United States of America

Items 1 Item

Goods Order Line	Line	Item and Category	Supplier Item Identifier	Tax	Tax Recoverability	Quantity	Cost	Delivery	Retention	Prepaid	Ship-To Addre
🔍	1	Item Item Description Dell(TM) M11XH Return Program Black Toner Cartridge Spend Category 512SC Office Supplies	500609	Tax Applicability Tax Code		Ordered 2 Received 2 Invoiced 0	Unit of Measure Each Unit Cost 153.69 Extended Amount 307.38	Due Date Lead Time			1701 Cast OH 44113 Uni America

POs and Catalogs Application

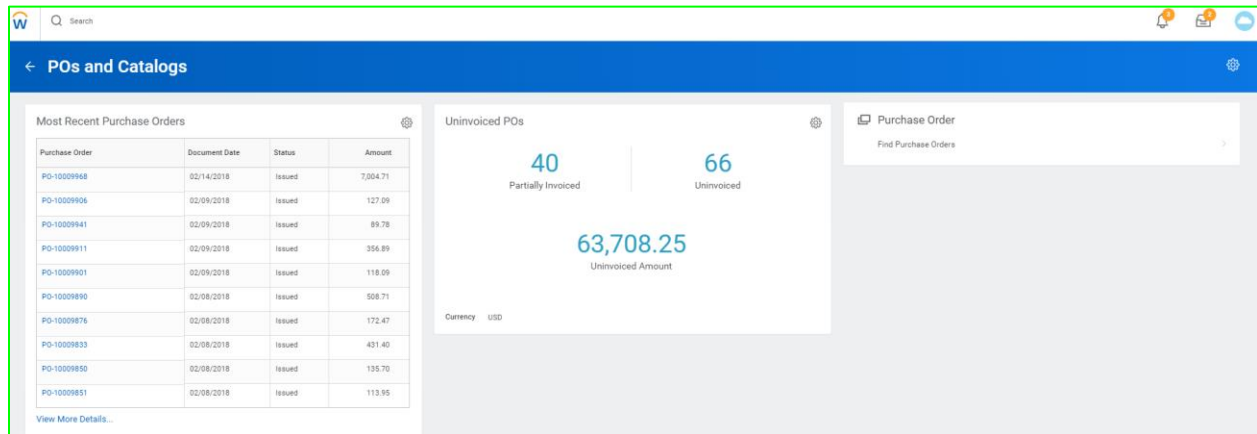|	
Purpose:	To provide instructions for viewing and searching most recent invoices and payments.
How to Access:	Log into the Supplier Self Service Portal and click **POs and Catalogs** under the Applications section of the home page.
Audience:	CMSD Approved Suppliers
Helpful Hints:	Clicking on the blue text on any screen will return additional information.
Procedure:	Follow the steps below to view and search PO and catalog items.
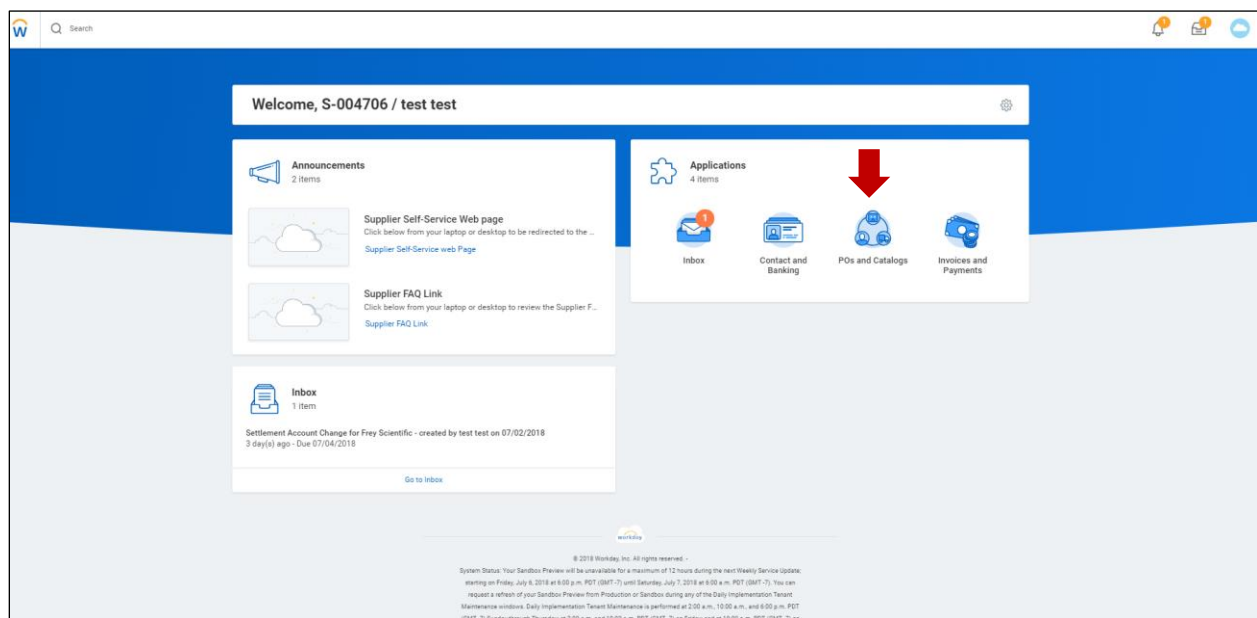
The **POs and Catalogs** application allows you to view your most recent purchase orders, view uninvoiced POs, and find purchase orders. Details include purchase order status, date, and amount, number of invoiced and partially invoiced POs, and amount of uninvoiced POs.

Viewing information for POs and Catalogs is very similar to viewing information for Invoices and Payments.

Most Recent Purchase Orders

To view a purchase order, click the PO number in the first column.

A sample report is shown below.

If the purchase order you seek is not listed, click **View More Details** to launch the search box. To search box below should appear. You may search by date or by PO number.
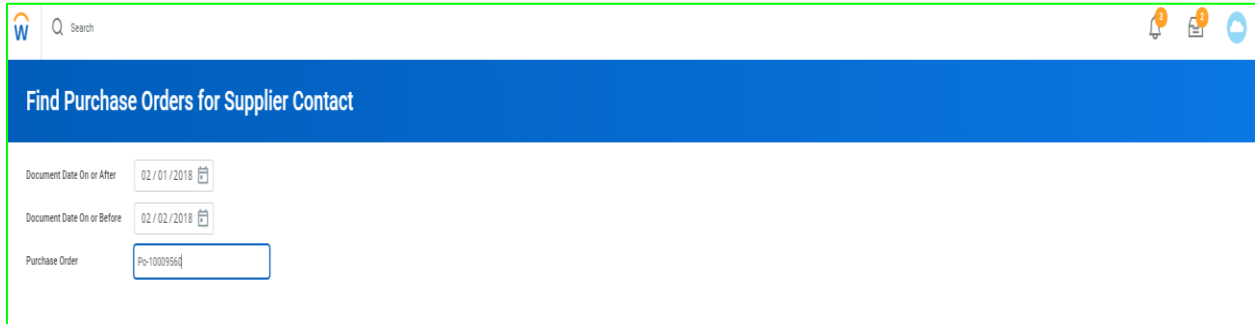
To perform a search, enter your search criteria and click ![OK] to continue or ![Cancel] to stop the search.

Helpful Hint: You must make sure to enter the correct date range when searching for a specific purchase order, otherwise you will not get results.

Below is an example of the search criteria for PO 10009560. Please note the date fields have been populated with a date range that coincides with the purchase order date.

Following is the result. Click the PO number (in blue) to see the details.

Following is a sample of the report you will see. You can scroll up and down (right side of the report) or left and right (bottom of the report) to view the full report. You can also export to Excel.

View Purchase Order

| Purchase Order | PO-10009560 | PO Number | PO-10009560 |

∨ Summary

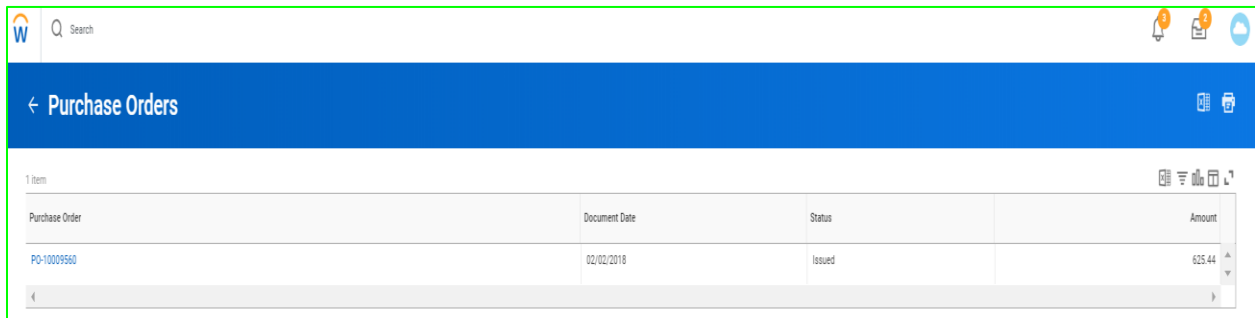|			**∨ Contact Information**	
Company	Cleveland Metropolitan School District		Issue Option	XML Auto
Document Date	02/02/2018		Buyer	Lyncoiya Parks (501389)
Supplier	Office Depot - Acct. 10798088		Buyer Email	✉ Lyncoiya.Parks@clevelandmetroschools.org
Payment Terms	Net 30		Bill-To Contact	Lyncoiya Parks (501389)
Due Date	(empty)		Bill-To Contact Detail	Lyncoiya Parks (501389)
Currency	USD		Bill-To Contact Email	✉ Lyncoiya.Parks@clevelandmetroschools.org
Total Amount	625.44		Billing Address	⌖ 1111 Superior Avenue E
Requisition Type	Regular		Ship-To Contact	Elizabeth Williamson (422881)
			Ship-To Contact Detail	Elizabeth Williamson (422881)
			Ship-To Contact Email	✉ Elizabeth.williamson@clevelandmetroschools.org
			Shipping Address	⌖ 9300 Quincy Avenue Cleveland, OH 44106 United States of America

Items 11 items

Goods Order Line	Line	Item and Category	Supplier Item Identifier	Tax	Tax Recoverability	Quantity	Cost	Delivery	Retention	Prepaid	Ship-To Addre
🔍	1	Item	416161	Tax Applicability		Ordered 1	Unit of Measure Each	Due Date			⌖ 9300 Quin OH 44106 Uni America
		Item Description Cuisinart PrecisionChef Bowl Digital Kitchen Scale		Tax Code		Received 0	Unit Cost 36.39	Lead Time			
		Spend Category 511SC Classroom Supplies				Invoiced 0	Extended Amount 36.39				
🔍	2	Item	853197	Tax Applicability		Ordered 2	Unit of Measure Each	Due Date			⌖ 9300 Quin OH 44106 Uni America
						Received		Lead Time			

Uninvoiced POs

This feature allows you to view partially invoiced POs and uninvoiced POs while providing the uninvoiced amount. Clicking on any of the blue text allows you to: view details, export to Excel, or export to a PDF.

Uninvoiced POs ⚙

14	7
Partially Invoiced	Uninvoiced

7,758.59
Uninvoiced Amount

Currency   USD
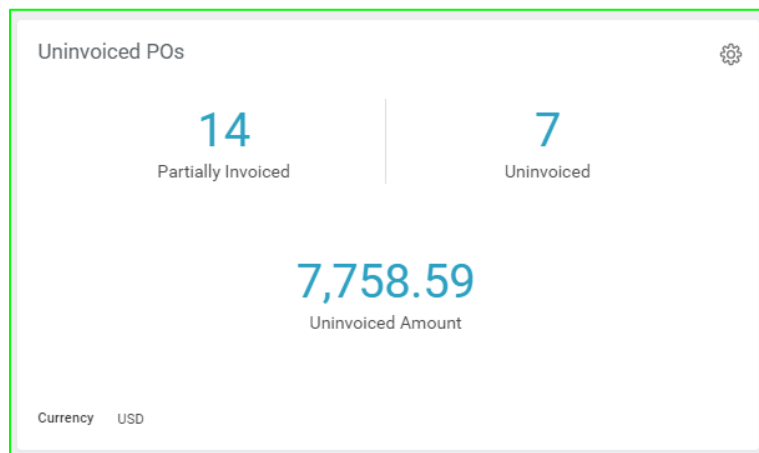
To illustrate this functionality, we will use the **Partially Invoiced** field. The example below shows the menu options for Uninvoiced Amount and the resulting reports that are generated.
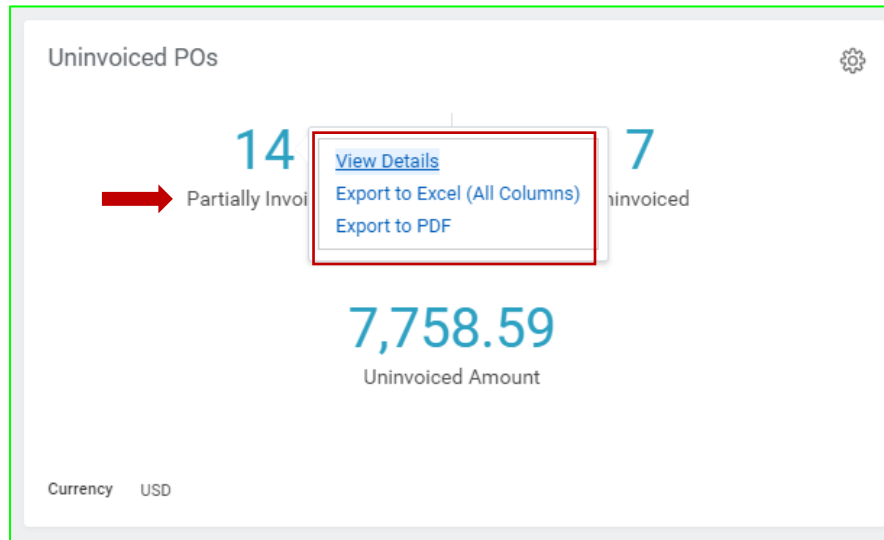
Helpful Hint: While the menu options are different (View Details, Export to Excel, Export to a PDF) for Partially Invoiced, the resulting reports will return the same information (PO#, document date, status, uninvoiced amount, and currency).

Sample Results: View Details

As shown in the upper right corner of the following report, tools are available to allow you to customize the report to fit your needs. Options include print, export to excel, filter, and create graphs.

View Details

To view the details, click any of the blue fields as shown above to pull up the menu. Click View Details on the menu to display the detailed report (see example on the next page).

Purchase Order	Document Date	Status	Uninvoiced Amount	Currency
PO-0524094	05/10/2017	Issued	36.99	USD
PO-0524759	05/16/2017	Issued	29.98	USD
PO-0525142	05/18/2017	Issued	559.94	USD
PO-0525153	05/18/2017	Issued	72.15	USD
PO-0526126	05/25/2017	Issued	2,212.19	USD
PO-0526342	05/26/2017	Issued	614.70	USD
PO-0527988	05/31/2017	Issued	1,799.90	USD
PO-10001647	08/16/2017	Issued	20.99	USD
PO-10002020	08/24/2017	Issued	35.96	USD
PO-10005646	11/02/2017	Issued	13.74	USD
PO-10006050	11/13/2017	Issued	126.30	USD
PO-10007939	12/21/2017	Issued	271.00	USD
PO-10009064	01/25/2018	Issued	23.29	USD
PO-10009393	01/31/2018	Issued	396.61	USD

14 items

Export to Excel

To export a file to Excel, click the ⊞ icon in the upper right corner of the data table (see above) or click Export to Excel (All Columns) as shown on the previous page. The Excel file will appear in the bottom left corner of the screen. Double click the file to open it.

Sample Results: Export to Excel

If you want to edit the Excel file, click Enable Editing once the file has downloaded. See example on the next page.

Export to PDF

If you prefer to export the Partially Invoiced POs to a PDF file, choose the Export to PDF option.
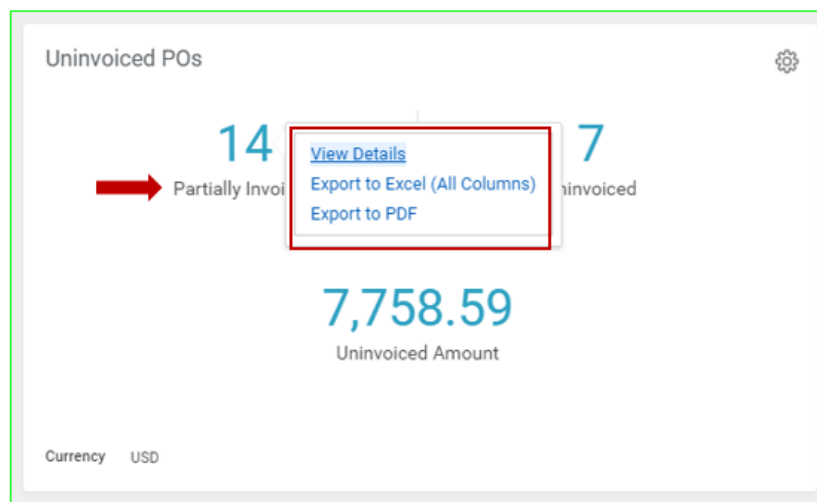
The resulting PDF report is shown on the next page.

Sample Results: Export to PDF

Purchase Order	Document Date	Status	Uninvoiced Amount	Currency
PO-0524094	05/10/2017	Issued	36.99	USD
PO-0524759	05/16/2017	Issued	29.98	USD
PO-0525142	05/18/2017	Issued	559.94	USD
PO-0525153	05/18/2017	Issued	72.15	USD
PO-0526126	05/25/2017	Issued	2,212.19	USD
PO-0526342	05/26/2017	Issued	614.70	USD
PO-0527988	05/31/2017	Issued	1,799.90	USD
PO-10001647	08/16/2017	Issued	20.99	USD
PO-10002020	08/24/2017	Issued	35.96	USD
PO-10005646	11/02/2017	Issued	13.74	USD
PO-10006050	11/13/2017	Issued	126.30	USD
PO-10007939	12/21/2017	Issued	271.00	USD
PO-10009064	01/25/2018	Issued	23.29	USD
PO-10009393	01/31/2018	Issued	396.61	USD

Helpful Hint: The View Details, Export to Excel and Export to PDF menu options shown below for Partially Invoiced, can also be used to display additional information for Uninvoiced and Uninvoiced Amount.
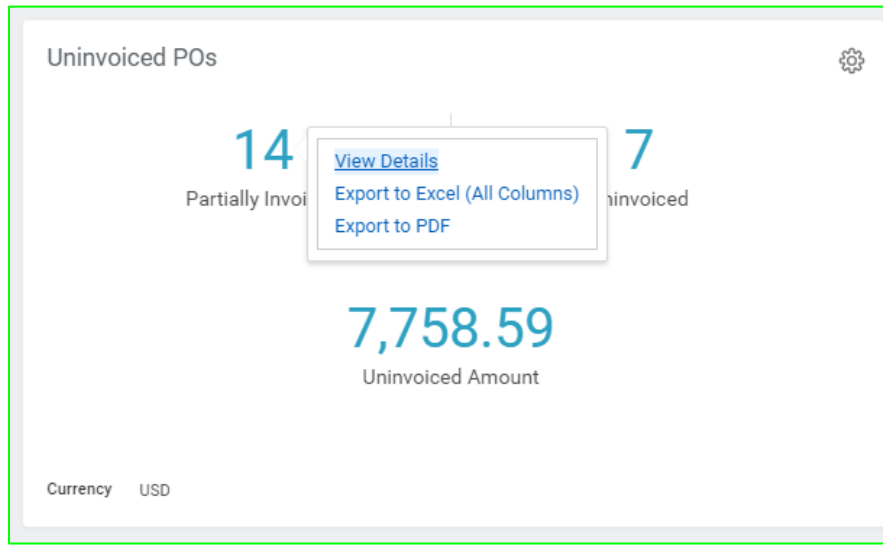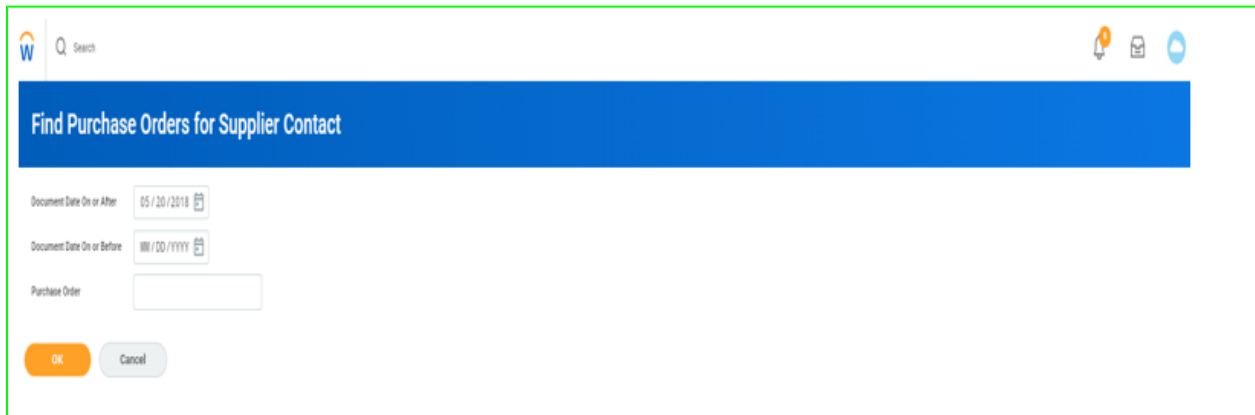
Purchase Orders

The Purchase Order option allows you to search for purchase orders by PO number and date.
To activate the search, click **Find Purchase Orders**.
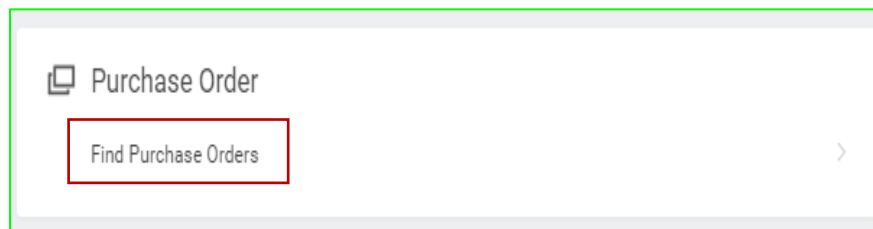
You will see the search criteria screen below. You can search by date range or by PO number.
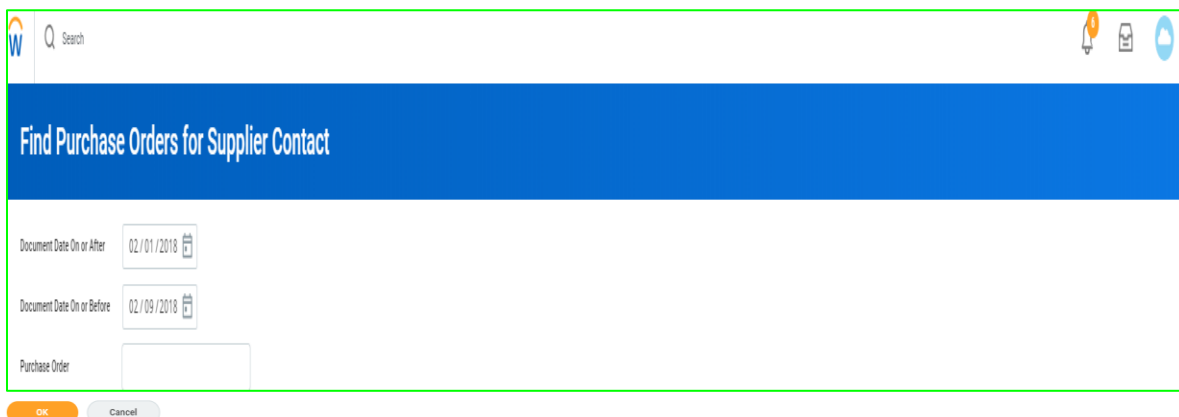
Helpful Hint: If you search by PO number, be sure to enter a valid date range. If the date range does not coincide with the date of the PO, your search by PO will fail.

Search by Date Range

To search by date, enter the dates for purchase orders you'd like to see. In the example below we used the following dates.
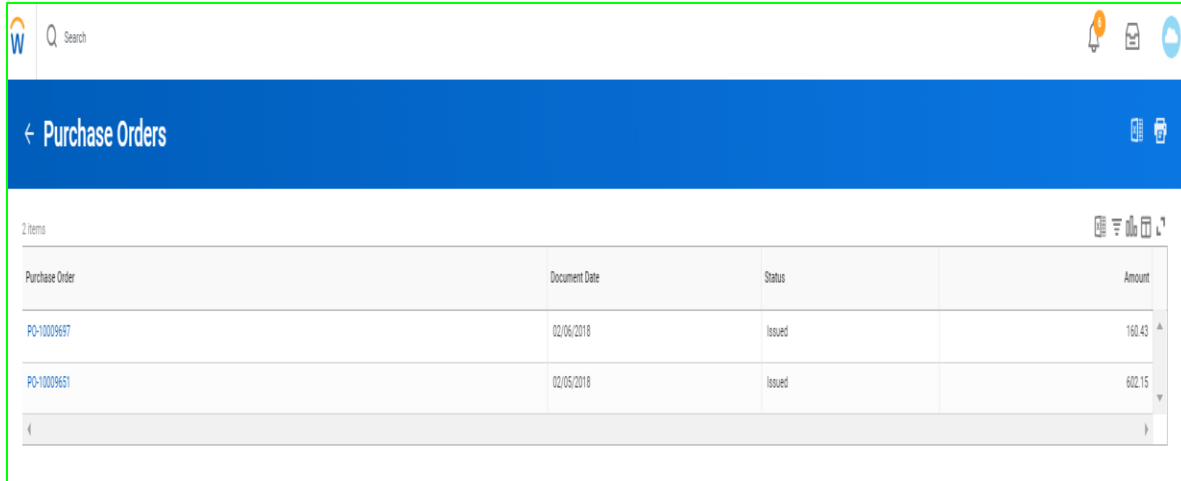
Click [OK] to continue or [Cancel] to stop the search. Clicking [OK] returned the results below. We see two POs that were issued within the specified period.

To view the purchase order details, click the Po number. We clicked the first PO on the list to generate the report below.

View Purchase Order

Purchase Order PO-10009697   PO Number PO-10009697

⌄ Summary

Company	Cleveland Metropolitan School District
Document Date	02/06/2018
Supplier	Staples Contract & Commercial Customer Id: 1065558DET
Payment Terms	Net 30
Due Date	(empty)
Currency	USD
Total Amount	160.43
Requisition Type	Regular

⌄ Contact Information

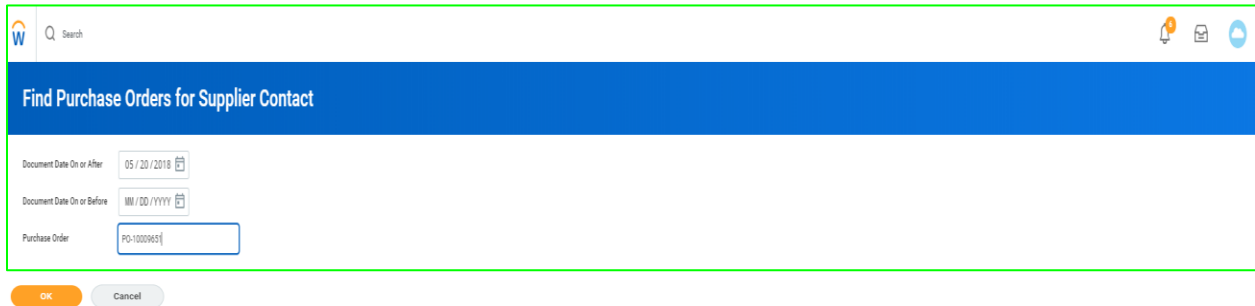|	
Issue Option	Print
Buyer	Ronisha Tremble (499359)
Buyer Email	Ronisha.tremble@clevelandmetroschools.org
Bill-To Contact	Ronisha Tremble (499359)
Bill-To Contact Detail	Ronisha Tremble (499359)
Bill-To Contact Email	Ronisha.tremble@clevelandmetroschools.org
Billing Address	1111 Superior Avenue E
Ship-To Contact	Ronisha Tremble (499359)
Ship-To Contact Detail	Ronisha Tremble (499359)
Ship-To Contact Email	Ronisha.tremble@clevelandmetroschools.org
Shipping Address	5100 Biddulph Avenue Cleveland, OH 44144 United States of America

Items 2 items

Goods Order Line	Line	Item and Category	Tax	Tax Recoverability	Quantity	Cost	Delivery	Retention	Prepaid	Ship-To Address	Ship-To Contact
🔍	1	Item Item Description Koss CS100 USB Communication Headset Staples Item # IM1RC2893 MFR Item #CS100 USB Spend Category 5129C Office Supplies	Tax Applicability Tax Code		Ordered 2 Received 0 Invoiced 0	Unit of Measure Each Unit Cost 29.29 Extended Amount 58.58	Due Date Lead Time			5100 Biddulph Avenue Cleveland, OH 44144 United States of America	Ronisha Tremble (499359)
🔍	2	Item Item Description Maxell HP - 100 Stereo Dynamic Open Air On-Ear Headphone, Black (190319) Staples Item # 213171 MFR Item #MXL190319 Customer Item #213171 Spend Category 5129C Office Supplies	Tax Applicability Tax Code		Ordered 15 Received 0 Invoiced 0	Unit of Measure Each Unit Cost 6.79 Extended Amount 101.85	Due Date Lead Time			5100 Biddulph Avenue Cleveland, OH 44144 United States of America	Ronisha Tremble (499359)

Search by Purchase Order

To reiterate, a search by purchase order requires both the purchase order number **_and_** a valid date range. If you choose a purchase order that was issued before or after the date range you enter, the search will not return valid results. Following are three search examples and the results.

Search by Purchase Order Number Only

In this example we use a valid PO number but did not change the default date range.

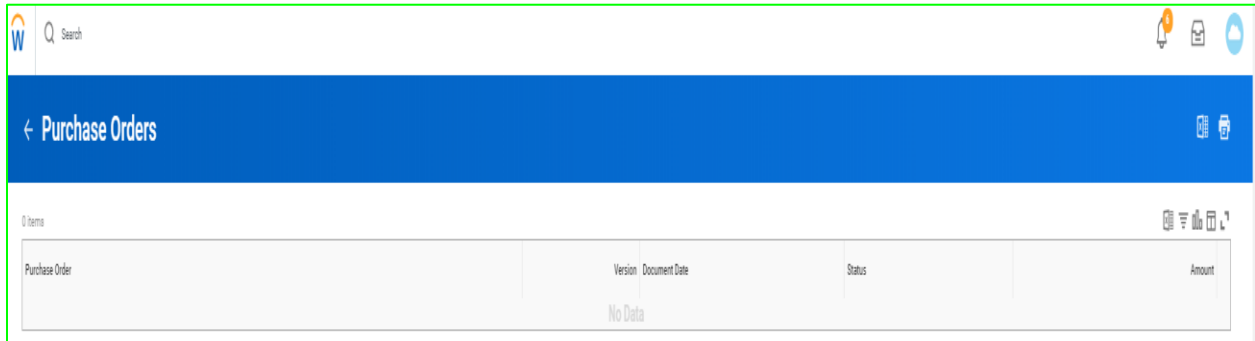While the PO number was valid, the date range was not (05/20/2018-MM/DD/YYYY). As a result, the purchase order search failed (see below).
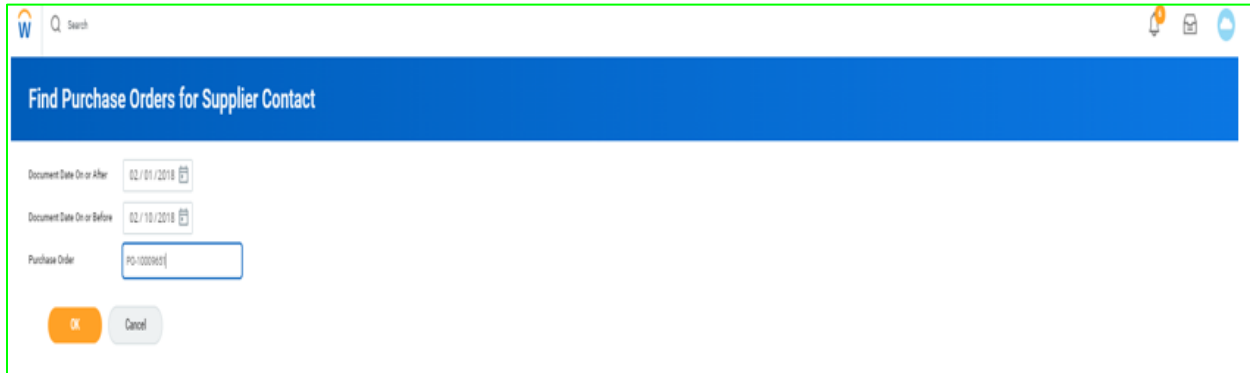

Search for a Specific PO within a Specific Date Range

In this example we will perform a search using a valid PO number (PO-10009651) and a valid date range (02/01/2018 – 02/10/2018).
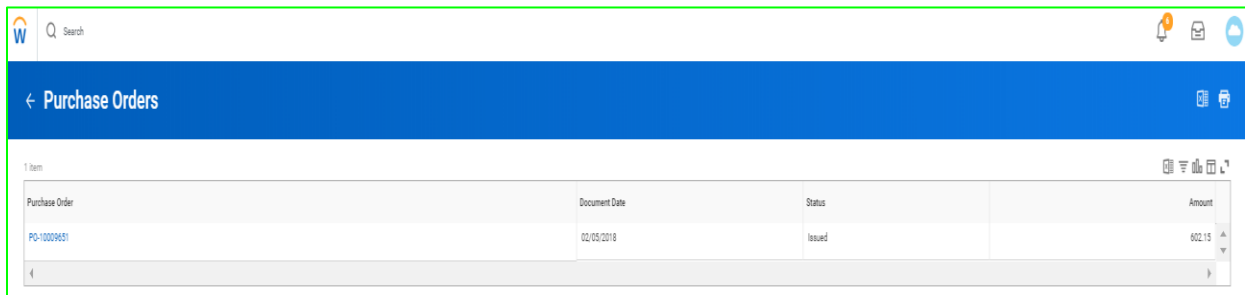
Because we used a valid search criteria, the purchase order search returned the PO we were looking for (see below).

Clicking the PO number (in blue) allows us to view the PO details (see below).

Search by Date Range Only

In most cases, date range searches are used for "open" searches. Open searches are used to identify all open purchase orders for a specific period of time. In this case, the date range used for the search will be: 02/01/2018-02/15/2018.

The search by date range (02/01/2018-02/15/2018) returned the results below.

Purchase Order	Document Date	Status	Amount
PO-10009697	02/06/2018	Issued	160.43
PO-10009651	02/05/2018	Issued	602.15

Training Notes

Version: Rev1