



# PartnerNet User Guide

January 2014

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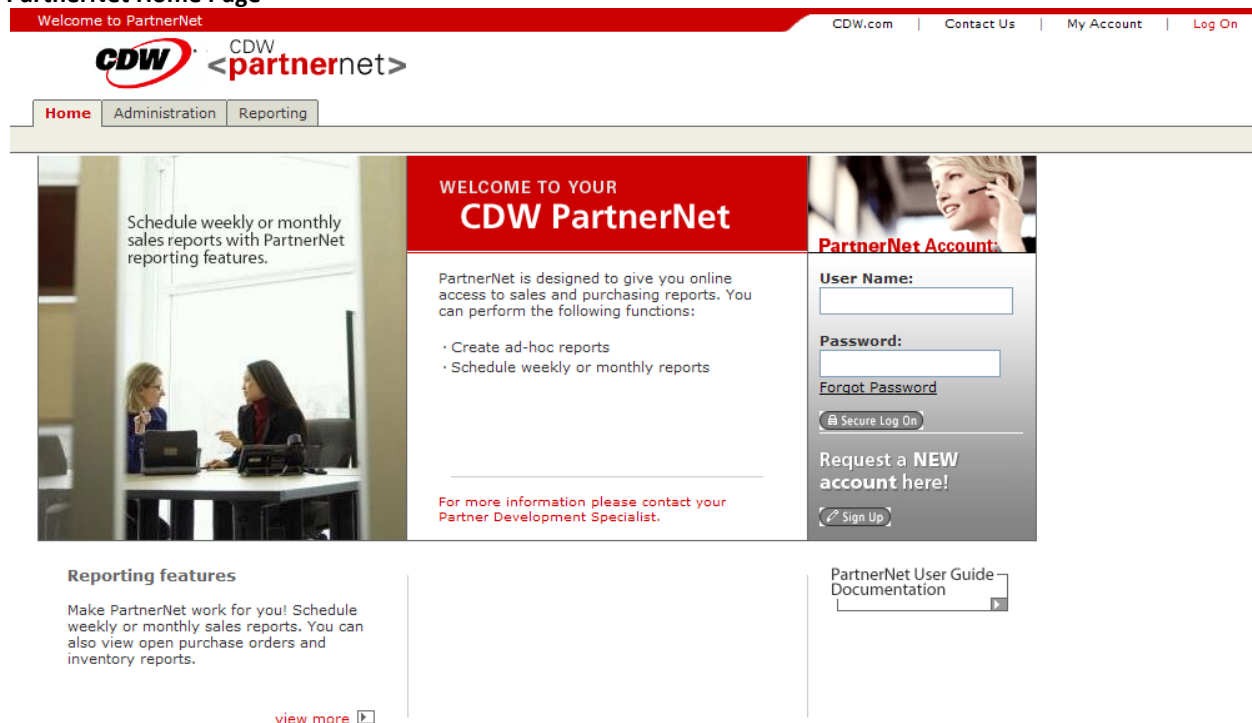
## Introduction to PartnerNet

By utilizing PartnerNet, partners can easily view, print, and download 5 different purchasing reports. In the **Reporting** section, a partner has access to a variety of reports that enables them to assess inventory, sales, POS, open quotes, and open purchase orders. These reports run from CDW's Enterprise Data Warehouse and are returned to the partner in either a PDF or Excel (CSV) format via the web browser.

## Starting the PartnerNet Application

CDW Partners can access the PartnerNet application from the Internet at <http://partnernet.cdw.com>. From the PartnerNet Welcome page, a CDW partner can log into the site. If a partner does not have access to PartnerNet, they can request an account by emailing [partnerrelations@cdw.com](mailto:partnerrelations@cdw.com), or by contacting their PartnerNet administrator. The request will be reviewed by CDW personnel that will determine if a User account can be created. The opening screen has general information about the PartnerNet Application and how to contact CDW.

## PartnerNet Home Page



The screenshot shows the CDW PartnerNet Home Page. At the top, there is a red navigation bar with the text "Welcome to PartnerNet" and links for "CDW.com", "Contact Us", "My Account", and "Log On". Below this is the CDW PartnerNet logo. A secondary navigation bar contains "Home", "Administration", and "Reporting" tabs. The main content area is divided into three columns. The left column features an image of two women at a desk with the text "Schedule weekly or monthly sales reports with PartnerNet reporting features." The middle column has a red header "WELCOME TO YOUR CDW PartnerNet" and lists functions: "Create ad-hoc reports" and "Schedule weekly or monthly reports". It also includes a link to "For more information please contact your Partner Development Specialist." The right column is titled "PartnerNet Account:" and contains login fields for "User Name:" and "Password:", a "Forgot Password" link, a "Secure Log On" button, and a "Request a NEW account here!" section with a "Sign Up" button. Below the main content area, there is a "Reporting features" section with a "view more" link and a "PartnerNet User Guide-Documentation" link.

Welcome to PartnerNet

CDW.com | Contact Us | My Account | Log On

CDW <partnernet>

Home Administration Reporting

Schedule weekly or monthly sales reports with PartnerNet reporting features.

WELCOME TO YOUR  
CDW PartnerNet

PartnerNet is designed to give you online access to sales and purchasing reports. You can perform the following functions:

- Create ad-hoc reports
- Schedule weekly or monthly reports

For more information please contact your Partner Development Specialist.

PartnerNet Account:

User Name:

Password:

Forgot Password

Secure Log On

Request a NEW account here!

Sign Up

Reporting features

Make PartnerNet work for you! Schedule weekly or monthly sales reports. You can also view open purchase orders and inventory reports.

view more

PartnerNet User Guide-Documentation

The User enters their Username and password and clicks **Secure Log On** from the welcome page. The User must agree to the Legal Agreement the first time they log on. This will not appear again after they log on the first time (unless the Legal Agreement has been updated). The User must click the **Submit** button, and they will be logged on to the PartnerNet application. Once a User successfully logs on, the PartnerNet home page will display. To return back to the PartnerNet home page from anywhere within the application, the User should click on the PartnerNet logo in the top left hand corner of the screen.

## PartnerNet User Types

There are two types of PartnerNet Users:

- PartnerNet User
- PartnerNet Administrator

A **PartnerNet Administrator** is the main point of contact within the partner's organization that has the ability to create and maintain PartnerNet Users and Groups within their organization, as well as assign and restrict User and group rights. CDW Brand Managers can also be added as PartnerNet Administrators. To become a PartnerNet Administrator, please email [partnerrelations@cdw.com](mailto:partnerrelations@cdw.com), or contact your brand's existing PartnerNet Administrator.

A **PartnerNet User** is an employee of the partner and can access limited areas of PartnerNet based on parameters set by their PartnerNet Administrator. A User is anyone the PartnerNet Administrator deems appropriate for accessing PartnerNet. PartnerNet Users are able to maintain and update their personal account information. PartnerNet allows partners an unlimited amount of Users.



The PartnerNet Application has two sections, **Administration & Reporting**:

- The **Administration** section is for management of the PartnerNet system. Only Partner Administrators have access to the Administration section. In the Administration section, the partner Administrator is able to grant other PartnerNet Users access to their site, as well as determine which reports Users are able to access.
- The **Reporting** section can be accessed by both Users and Administrators, and is for scheduling, viewing, and downloading the available reports. The User selects a report to run, enters the necessary parameters, and queries the report for generation. The report runs from CDW's Enterprise Data Warehouse and will be returned to the partner in either a PDF or Excel (CSV) format via the web browser.

## PartnerNet Administration Section

Below you will find the Partner Overview page. The Partner Overview page gives the Administrator the option to change the Partner Information, and lists the first five Users and first five groups. To show all of the Users or groups, click the **List All** buttons.

### PartnerNet Administration Overview Page

test11

Home Administration Reporting

Overview Applications Groups Users Reports

Home > Administration

### Partner Overview

Welcome to the PartnerNet Overview page. This page allows the Partner Administrator to manage the organization's users and groups. Here you will be able to add users and groups to your organization.

- Partner Name: test11
- Description:

First 5 Users

User Name	First Name	Last Name	Email Address
<a href="#">jacecaspn</a>	Jacey	Castaneda	jacecas@cdw.com
<a href="#">pnkrismcc</a>	Kristy	McCreight	krismcc@cdw.com
<a href="#">pnmsimeone</a>	Michelle	Simeone	michjam@cdw.com

LIST ALL USERS

First 5 Groups


Group Name	Description
<a href="#">AdWorks</a>	
<a href="#">AP_Contacts</a>	AP Reports
<a href="#">PartnerNet Administrator</a>	Group for Users who Administer the PartnerNet Organization.

LIST ALL GROUPS

Actions

Create New User

Create New Group

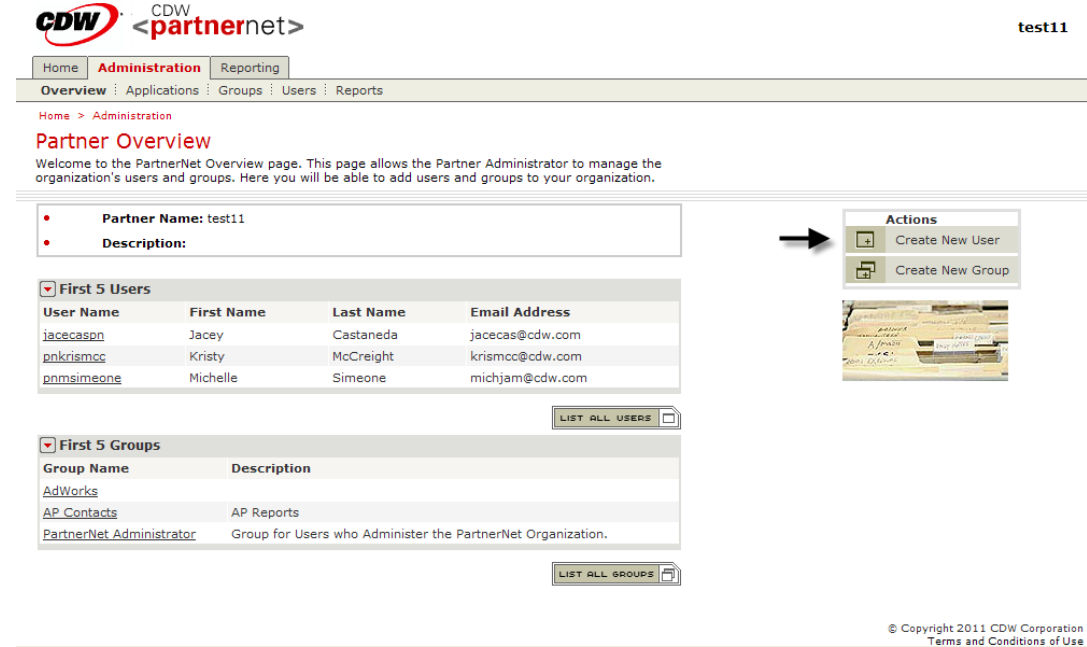


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Terms and Conditions of Use

## Creating a User/Group

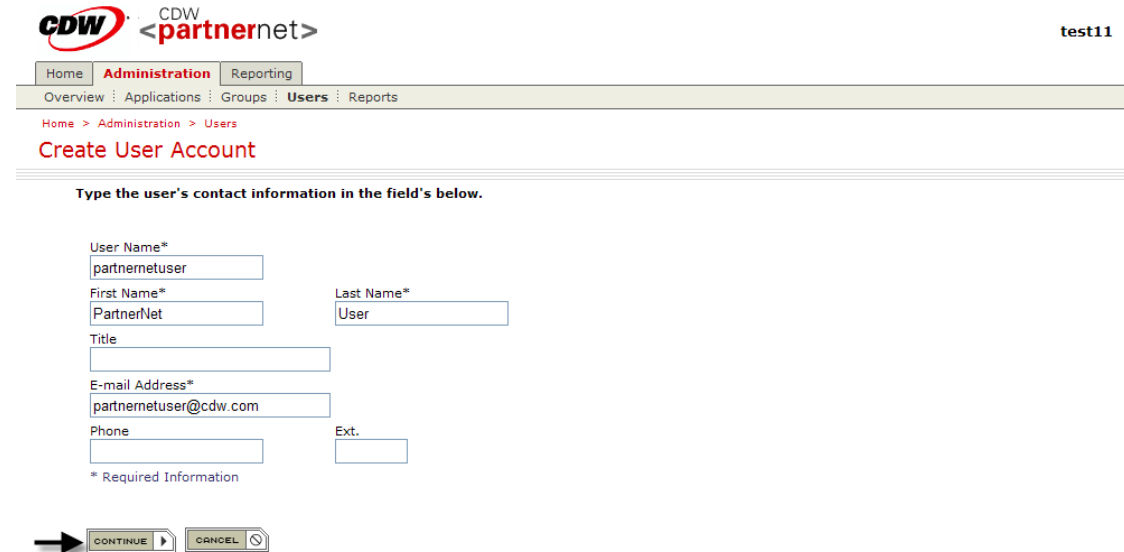
To grant a new User access to PartnerNet, click **Create New User** from the Action menu on the right side of the Partner Overview page.

### Create New User



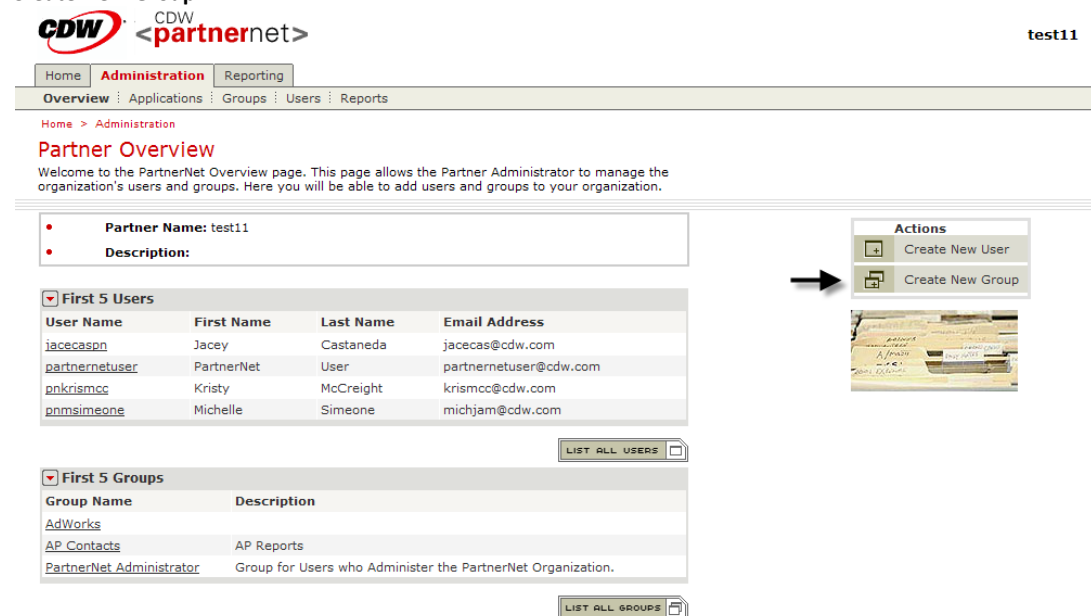
When the **Create User Account** page loads, type in the required information, click **Continue** and a new User is created.

### Create User Account



In order for a User to be able to access the reporting section, they must be assigned to a group. All Users within a group share the same access rights to PartnerNet. To create a group, click on **Create New Group** from the Action menu on the right side of the **Partner Overview** page.

#### Create New Group



**CDW** **<partnernet>** test11

Home Administration Reporting

Overview Applications Groups Users Reports

Home > Administration

### Partner Overview

Welcome to the PartnerNet Overview page. This page allows the Partner Administrator to manage the organization's users and groups. Here you will be able to add users and groups to your organization.

- Partner Name:** test11
- Description:**

**First 5 Users**

User Name	First Name	Last Name	Email Address
jacecaspn	Jacey	Castaneda	jacecas@cdw.com
partnernetuser	PartnerNet	User	partnernetuser@cdw.com
pnkrismcc	Kristy	McCreight	krismcc@cdw.com
pnmsimeone	Michelle	Simeone	michjam@cdw.com

[LIST ALL USERS](#)

**First 5 Groups**

Group Name	Description
AdWorks	
AP Contacts	AP Reports
PartnerNet Administrator	Group for Users who Administer the PartnerNet Organization.

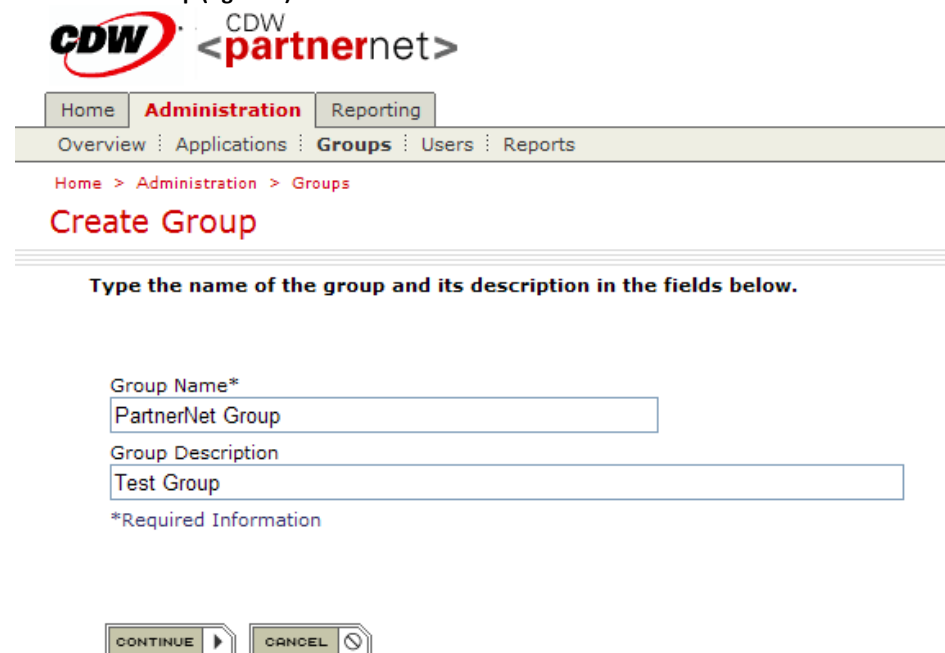
[LIST ALL GROUPS](#)

**Actions**

- Create New User
- Create New Group

Type in a group name and a group description and click **Continue**.

#### Create New Group (figure 2)



**CDW** **<partnernet>**

Home Administration Reporting

Overview Applications **Groups** Users Reports

Home > Administration > Groups

## Create Group

Type the name of the group and its description in the fields below.

Group Name\*

PartnerNet Group

Group Description

Test Group

\*Required Information

[CONTINUE](#) [CANCEL](#)

To add Users to a group, click **Groups** tab and check the Users to add to the group. Click **Add**.

#### Edit Group Users

CDW **partnernet**

Home Administration Reporting

Overview Applications **Groups** Users Reports

Home > Administration > Groups > Group Overview

### Edit Group Users

The Group Users tab displays the users assigned to the group and users available to be assigned.

• **Group Name:** PartnerNet Group | • **Description:** Test Group

Group Overview Group Users Group Report Rights

**Assigned Users**  
User Name Name  
This group does not have any assigned users.  
REMOVE

**Available Users**  
User Name Name  
jacecaspn Jacey Castaneda ✓  
partnernetuser PartnerNet User ✓  
pnkrismcc Kristy McCreight ✓  
pnmsimeone Michelle Simeone ✓  
ADD +

To add reports to a group, click the **Groups** tab and click the **Group Report Rights** tab. Click on the report to add, and place checks in Run, Schedule and View. An Administrator can restrict a group to any combination of the three options.

#### Add Reports to a Group

CDW **partnernet**

Home Administration Reporting

Overview Applications **Groups** Users Reports

Home > Administration > Groups > Group Overview

### Edit Group Report Rights

The Group Report Rights tab displays the reporting area and reports to which the user has rights. To edit and assign report rights, click the name of the report in the list below.

• **Group Name:** PartnerNet Group | • **Description:** Test Group

Group Overview Group Users Group Report Rights

**Reports**  
Report Area Report Name  
Purchasing Reports [COR Open Purchase Orders](#)  
Purchasing Reports [PCT Open Purchase Orders](#)  
Purchasing Reports [MGR Open Purchase Orders](#)  
Purchasing Reports [CLC Open Purchase Orders](#)  
Purchasing Reports [PCL Open Purchase Orders](#)  
Purchasing Reports [SFG Open Purchase Orders](#)  
Purchasing Reports [CRD Open Purchase Orders](#)  
Purchasing Reports [CDG Open Purchase Orders](#)  
Purchasing Reports [CDL Open Purchase Orders](#)  
Purchasing Reports [MMM Open Purchase Orders](#)  
Purchasing Reports [ADR Open Purchase Orders](#)  
Purchasing Reports [DGL Open Purchase Orders](#)

**Assigned Rights**  
Name  
This report does not have any assigned rights.  
REMOVE

**Available Rights**  
Name  
✓ Run Report  
✓ Schedule Report  
✓ View Report  
ADD +







## PartnerNet Reporting Section

The Report Overview Page contains **Submitted Reports**, **Reports Available to Run**, and **Current Report Schedules**.

- **Reports Available to Run** is a list of the reports the User can generate as determined by the PartnerNet Administrator.
- **Submitted Reports** lists the reports that are in process or completed. These reports can be viewed, printed, and downloaded.
- **Current Report Schedules** are reports the User has scheduled to run weekly, monthly, or both. See below.

### PartnerNet Reporting Overview Page

Home Administration Reporting E-Invoicing

Select Partner : [ CDW PartnerNet Admin ] : Overview Applications Groups Users Reports

Home > Administration > Partner Overview

### Select Report

The Maintain Organization's Report page allows the Partner Administrator to add and delete Reports. You can also edit Report information by clicking the Report's name in the list below.

Inventory/Sales by Manufacturer CREATE REPORT

All Reports		
Report Name	Description	Disabled/Enabled
<input type="checkbox"/> <a href="#">FUJ POS Report</a>	POS Report	Enabled
<input type="checkbox"/> <a href="#">Sample Inventory/Sales by Manufacturer</a>	The Inventory and 30/60/90 report summarizes the current inventory count of a particular item and its sales activity within the last 30/60/90 days.	Enabled
<input type="checkbox"/> <a href="#">Sample Sales by Manufacturer</a>	The Sales Out Report summarizes the total sales of a particular item over a period of time (either weekly or monthly).	Enabled
<input type="checkbox"/> <a href="#">Sample POS Report</a>	POS Report	Enabled
<input type="checkbox"/> <a href="#">Sample Open Purchase Orders</a>	The Open Purchase Order report summarizes all the unfilled P.O.S that CDW has submitted to your organization.	Enabled
<input type="checkbox"/> <a href="#">LEX POS Report</a>	POS Report	Enabled
<input type="checkbox"/> <a href="#">Peoplesoft-Remittance by Date</a>	Peoplesoft-Remittance by Date	Enabled
<input type="checkbox"/> <a href="#">KIN Sales by Manufacturer</a>	The Sales Out Report summarizes the total sales of a particular item over a period of time (either weekly or monthly).	Enabled

### Reports Available to Run

Based on User rights granted by the PartnerNet Administrator and CDW, there are five types of reports available:

- Inventory/Sales by Manufacturer
- Point-of-Sales (POS)
- Sales by Manufacturer
- Open Purchase Orders
- Open Quote

### Inventory/Sales by Manufacturer

The Inventory and 30/60/90 report summarizes the current inventory count of a particular item and its sales activity within the last 30/60/90 days. This report includes the following information:

- Manufacturer Description and Code
- CDW Item Code (EDC)
- Sold in (Country)
- CDW Item Rank (an internal code assigned by CDW ranking an item within CDW inventory)
- Manufacturer Part Number
- CDW Item Description
- Vendor Returns
- Open Purchase
- On Hand
- Logistics Standard Cost
- On Hand – COGS
- Open Sales Order
- CDW Item of Days Supply (a calculated number based on historical sales and inventory levels that determines the number of days of supply that CDW has on hand)
- Sales History – Month to Date
- Sales History Quantity – Trailing 30 Days
- Sales History Quantity – Trailing 60 Days
- Sales History Quantity – Trailing 90 Days

### Inventory/Sales by Manufacturer (figure 1)



### CDW Corporation Inventory and Sales Report

Selection Criteria:

Effective Date: 12/31/2010

Manufacturer Code: Mfg Code

Manufacturer Combination

CDW Mfg Code	Manufacturer Description	CDW Item Code	Sold in	CDW Item Rank	Mfg Part Number	CDW Item Description
CDW Mfg CD	CDW Manufacturer Description	1692077	US	C3	Mfg Part #	CDW description of Part
CDW Mfg CD	CDW Manufacturer Description	713052	CA	-	Mfg Part #	CDW description of Part
CDW Mfg CD	CDW Manufacturer Description	634508	CA	-	Mfg Part #	CDW description of Part
CDW Mfg CD	CDW Manufacturer Description	1082335	CA	-	Mfg Part #	CDW description of Part

### Inventory/Sales by Manufacturer (figure 2)

Vendor Returns Qty	Open Purchase Qty	Qty On Hand	Logistics Standard Cost	On Hand Cost of Goods	Open Sales Order Qty	CDW Item Days of Supply	Sales History - MTD	Sales History Quantity - T30D	Sales History Quantity - T60D	Sales History Quantity - T90D
	2		.	.						
			.	.	3					
	6		.	.						
	1		.	.						

## Point-of-Sales (POS) Reports

The POS report includes the following information:

- Company
- Invoice
- Invoice Date
- Order
- EDC
- Customer
- Bill to Customer
- Ship to Customer
- Shipped to Customer
- Bill to City
- Ship to City
- Manufacturer Code
- Bill to State
- Ship to State
- Manufacturer Part Number
- Bill to Postal Code
- Ship to Postal Code
- Bid Desk Rebate
- Sales Segment/AM Location
- EDC Description
- Agency
- Quantity
- Logistics Standard Cost

### Point-of-Sales (figure 1)



#### CDW Corporation Point of Sales Invoice Report

From Invoice Date: 12/01/2010 To 12/15/2010

Manufacturer Code: CDW Mfg Cd

Manufacturer Combinations: No

Segment: ALL

Company	Invoice	Invoice Date	Order	EDC	Customer	Billed To	City	State
CDW Direct	VR29245	12/01/2010	WCR5075	1213090	1880144	Billed to Customer Name	RACINE	WI
	VSX1721	12/08/2010	1B3MJYK	1213090	1780937	Billed to Customer Name	GLENVIEW	IL
	VTX8202	12/10/2010	1B3RGGH	1213090	9367353	Billed to Customer Name	SUNNYVALE	CA
	VSC4840	12/01/2010	1B3LXC2	1673838	2456046	Billed to Customer Name	MUSKEGON HEIGHTS	MI

### Point-of-Sales (figure 2)

Shipped To						
Customer	City	State	Postal Code	Mfg Code	Mfg Part #	EDC Description
Shipped to Customer Name	STURTEVANT	WI	53177	CDW Mfg Code	Mfg Part Number	CDW description of the Part
Shipped to Customer Name	DEWITT	IA	52742	CDW Mfg Code	Mfg Part Number	CDW description of the Part
Shipped to Customer Name	SUNNYVALE	CA	94080-1323	CDW Mfg Code	Mfg Part Number	CDW description of the Part
Shipped to Customer Name	MUSKEGON HEIGHTS	MI	49444-0348	CDW Mfg Code	Mfg Part Number	CDW description of the Part

### Point-of-Sales (figure 3)

Trans Type	Bid Desk Rebate	Logistics Standard Cost	Sales Segment	Agency	AM Location
Invoice		1,163.16	Medium Large Business		Chicago-Riverside (CH120)
Return		-1,163.16	Medium Large Business		Woodland Falls (WF)
Invoice		1,163.16	Small Business		Chicago-Riverside (CH120)
Invoice		3,580.02	Small Business		Woodland Falls (WF)

## Sales by Manufacturer

The Sales Out Report summarizes the total sales of a particular item over a period of time (either weekly or monthly). This report includes the following information:

- Manufacturer Description
- EDC Code
- Manufacturer Part Number
- Item Description
- PGM
- Class
- Type
- Drop Ship
- Quantity Sold
- Logistics Standard Cost
- Sales Out Invoice Dollars

### Sales by Manufacturer (figure 1)



CDW Corporation

SSRS-PM-PNN002

#### Sales by Manufacturer Report

Selection Criteria: From Invoice Date: 02/01/2011 to 02/04/2011

Company Code:

Manufacturer: CDW MfgCD Mfg Combinations: No

Product Type/Class/Group: ALL/ALL/ALL

Manufacturer Description	EDC Code	Manufacturer's Part#	Item Description	PGMJ
CDW Manufacturer Description	1706600	Manufacturer's Part#	CDW description of the Part	Product Group Description
CDW Manufacturer Description	1213090	Manufacturer's Part#	CDW description of the Part	Product Group Description
CDW Manufacturer Description	1213105	Manufacturer's Part#	CDW description of the Part	Product Group Description
CDW Manufacturer Description	1319744	Manufacturer's Part#	CDW description of the Part	Product Group Description

### Sales by Manufacturer (figure 2)

Class	Type	Drop Ship	Quantity Sold	Logistics Standard Cost	Sales Out Invoice Dollars
Printer Memory Upgrades (PM)	Memory/System Components (U)		10	4,724.50	473.58
Laser/LED Printers (LP)	Printers (P)		1	1,101.78	1,269.77
Laser/LED Printers (LP)	Printers (P)	Y	2	2,712.52	3,015.88
Dot Matrix Printers (DP)	Printers (P)		13	4,015.31	4,563.47

## Open Purchase Orders

The Open Purchase Order report summarizes all the unfilled purchase orders that CDW has submitted to your organization. This report includes the following information:

- Purchase Order Number
- Type
- Drop Ship
- Order Date
- Aging Day (number of days since PO was placed)
- Due Date
- EDC
- CDW Item Rank (an internal code assigned by CDW ranking an item within CDW inventory)
- Manufacturer Part Number
- Description
- Ordered
- Open
- Unit Cost
- Open Value

### Open Purchase Orders (figure 1)



### CDW Corporation Open Purchase Orders by Manufacturer/Supplier

Requesting Manufacturer

	PO#	Type	Drop Ship	Order Date	Aging Day	Due Date	EDC	CDW Item
Suppliers Code and Name								
	HSR8972	F	Y	2/2/2011	13	2/14/2011	1521945	DX
	HSM2392			1/31/2011	15	2/15/2011	1630616	B2
	HSM2392			1/31/2011	15	2/15/2011	2164995	A3
	HSY0773			2/4/2011	11	2/21/2011	1727536	B2

### Open Purchase Orders (figure 2)

Mfg Part #	Description	Ordered	Open	Unit Cost	Open Value
Mfg Part Number	CDW description of Part	1	1	12,030.0	12,030.0
Mfg Part Number	CDW description of Part	2	2	2,449.30	4,898.60
Mfg Part Number	CDW description of Part	10	10	367.50	3,675.0
Mfg Part Number	CDW description of Part	1	1	5,477.50	5,477.50

## Open Quote

The Open Quote report includes the following information:

- Manufacturer Code
- Manufacturer Description
- Quote Number
- Quote Date
- Customer
- Item EDC
- Manufacturer Part Number
- Item Description
- Sales Segment
- Quantity on Quote
- Account Manager
- Sales Out Quote Dollars
- Account Manager Email Address
- State
- Account Manager Direct Phone

### Open Quote (figure 1)



#### CDW Corporation Open Quotes Report

From Invoice Date: 01/01/2011 To 01/19/2011

CDW Quotes are normally closed after 90 days

Manufacturer Code: Mfg Code

Manufacturer Combinations: No

Segment:

Mfg Code	Mfg Description	Quote	Quote Date	Customer	Item	Mfg Part Number	Item Description
Mfg CD	CDW Manufacturer Description	BWQD589	01/03/2011	CDW Customer Requesting Quote	1833214	Mfg Part Number	CDW Description of the Part
Mfg CD	CDW Manufacturer Description	BWQD963	01/03/2011	CDW Customer Requesting Quote	1726782	Mfg Part Number	CDW Description of the Part
Mfg CD	CDW Manufacturer Description	BWQD963	01/03/2011	CDW Customer Requesting Quote	1726015	Mfg Part Number	CDW Description of the Part
Mfg CD	CDW Manufacturer Description	BWQD963	01/03/2011	CDW Customer Requesting Quote	1858531	Mfg Part Number	CDW Description of the Part

### Open Quote (figure 2)

Qty on Quote	Sales Out Quote Dollars	Sales Segment	State	Account Manager	Acct Mgr Email	Direct Phone
1	392.96	Medium Large Business	TX	BRIAN HOEKSTRA (8750)	briahoe@cdw.com	(312) 705-6934
1	127.00	Medium Large Business	IL	TIMOTHY HAGWELL (9468)	timh@cdw.com	(312) 705-0354
1	130.00	Medium Large Business	IL	TIMOTHY HAGWELL (9468)	timh@cdw.com	(312) 705-0354
1	490.00	Medium Large Business	IL	TIMOTHY HAGWELL (9468)	timh@cdw.com	(312) 705-0354

## Creating and Scheduling Reports

To schedule a report to run on a weekly or monthly basis, click the **List All** in the **Reports Available to Run** section of the **Reporting Overview** tab.

### Reports Available to Run

☒ Submitted Reports

Report Name	Area	Status	Date Ran	Schedule Name
<input type="checkbox"/> <a href="#">AME Open Quotes</a>	Purchasing Reports	Completed	2/16/2011 3:47 PM	
<input type="checkbox"/> <a href="#">IOGEAR Open Purchase Orders</a>	Purchasing Reports	Completed	2/16/2011 10:27 AM	
<input type="checkbox"/> <a href="#">Nortel POS Report</a>	Purchasing Reports	Completed	2/11/2011 3:02 PM	
<input type="checkbox"/> <a href="#">AME Open Quotes</a>	Purchasing Reports	Completed	2/10/2011 10:37 AM	
<input type="checkbox"/> <a href="#">SOD Open Purchase Orders</a>	Purchasing Reports	Completed	2/10/2011 10:25 AM	
<input type="checkbox"/> <a href="#">ACE Sales by Manufacturer</a>	Purchasing Reports	Completed	2/10/2011 10:12 AM	
<input type="checkbox"/> <a href="#">Epson POS Report</a>	Purchasing Reports	Completed	2/10/2011 9:20 AM	
<input type="checkbox"/> <a href="#">Epson POS Report</a>	Purchasing Reports	Completed	2/10/2011 9:11 AM	
<input type="checkbox"/> <a href="#">ACE Inventory/Sales by Manufacturer</a>	Purchasing Reports	Completed	2/10/2011 8:43 AM	
<input type="checkbox"/> <a href="#">ACE Inventory/Sales by Manufacturer</a>	Purchasing Reports	Completed	2/9/2011 3:54 PM	

DELETE REPORTS

LIST ALL

☒ Reports Available to Run

Report Name	Area
<a href="#">IOGEAR Open Purchase Orders</a>	Purchasing Reports
<a href="#">3WARE Open Purchase Orders</a>	Purchasing Reports
<a href="#">Xerox Open Purchase Orders</a>	Purchasing Reports
<a href="#">SIT Open Purchase Orders</a>	Purchasing Reports
<a href="#">SGN Open Purchase Orders</a>	Purchasing Reports



LIST ALL

☒ Current Report Schedules

Schedule Name	Type
No Scheduled Reports were found.	

DELETE SCHEDULES

LIST ALL

Select your report from the list. On the right hand side of the **Report Details** page, it allows you to run or schedule a report.

### Run or Schedule a Report

[Home](#) | [Administration](#) | [Reporting](#)

[Overview](#) | [Reports](#) | [Schedules](#) | [History](#)

Home > Reporting > Reports

## Report Overview

The Report Overview tab displays a general description of the report.

Report Name: AME Open Quotes

Area: Purchasing Reports

Report Overview

Report Schedules

Report History

Report Name: AME Open Quotes

Area: Purchasing Reports

Description: Open Quotes

Actions

 Run Report


 Schedule Report



To run the report, click the **Run Report** icon. The **Run Report** page provides the name and description of the report. You may also select the Output Format – either Excel CSV or Adobe PDF. (**Note:** If running the POS report, the output format selected *must* be CSV. Any other reports can be run either in CSV or PDF.) Enter any **Report**

**Parameters**, if necessary. Below that is **Report Notifications**, which allows the User to set an e-mail alert to be sent to the recipient(s) when a report has completed processing. This eliminates the need for the User to continue logging-on to see if a report is ready for viewing, printing, or downloading. Place a check mark next to the User(s) if notification is desired and click **Continue**. The report name will now display in the **Submitted Reports** section and the status will be **Pending Processing Request**. After the report has been processed, the report status is **Completed** and notifications, if set up, are sent.

## Run Report



[Home](#)
[Administration](#)
[Reporting](#)

[Overview](#)
[Reports](#)
[Schedules](#)
[History](#)

Home > Reporting > Reports > Report Overview

### Run Report

The Run Report page allows you to view the report parameters and select the group(s) and/or user(s) to be notified when the report is ready to view.

---

Name: AME Open Quotes  
 Description: Open Quotes  
 Output Format: ☒ Adobe PDF ☐ CSV (Comma delimited)


Report Parameters:  
 From Date: 12 / 01 / 2010 MM/DD/YYYY  
 To Date: 12 / 31 / 2010 MM/DD/YYYY

Report Notifications:

Groups		Users	
AdWorks	<input type="checkbox"/>	jacecaspn	<input checked="" type="checkbox"/>
AP Contacts	<input type="checkbox"/>	partnernetuser	<input checked="" type="checkbox"/>
E-Invoicing	<input type="checkbox"/>	pnkrismcc	<input checked="" type="checkbox"/>
PartnerNet Administrator	<input checked="" type="checkbox"/>	pnmsimeone	<input checked="" type="checkbox"/>
PartnerNet Group	<input checked="" type="checkbox"/>		

To schedule a report, select **Schedule Report** from the Actions menu on the right side of the **Report Overview** page. Enter the frequency of the report (weekly or monthly) and other all necessary details on the Schedule Report page. When finished, click **Continue** and the report is scheduled.

## Schedule Report



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Home > Reporting > Reports > Report Overview

### Schedule Report

The Schedule Report page allows you to schedule a report to run either weekly or monthly. Name the schedule, select the frequency, supply any parameters and select the group(s) and/or user(s) to be notified when the report is ready to view.

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Name: Weekly AME Open Quotes

Frequency: ☒ Weekly ☐ Monthly

Description: Open Quotes  
 Output Format: ☒ Adobe PDF ☐ CSV (Comma delimited)

Report Parameters:

Report Notifications:

Groups		Users	
AdWorks	<input type="checkbox"/>	jacecaspn	<input checked="" type="checkbox"/>
AP Contacts	<input type="checkbox"/>	partnernetuser	<input checked="" type="checkbox"/>
E-Invoicing	<input type="checkbox"/>	pnkrismcc	<input checked="" type="checkbox"/>
PartnerNet Administrator	<input checked="" type="checkbox"/>	pnmsimeone	<input checked="" type="checkbox"/>
PartnerNet Group	<input checked="" type="checkbox"/>		



The scheduled report will be listed on the Reporting Overview page under Scheduled Reports. To change any settings on the report, click on the scheduled report.

A report can be scheduled weekly, monthly, or both. Weekly reports are run on Mondays and monthly reports are run on the first business day of each month. To schedule the same report to be run both weekly and monthly, create two schedules to run the report – one schedule for weekly and one schedule for monthly.

### View, Print, and Download Reports

Once a report is complete, the User can view, print, or download the report from the PartnerNet application. From the **Report Overview** page, click the report listed in **Submitted Reports**. If the report is not listed, click **List All** to see a full listing of the completed reports. Clicking on the report will display the Report Output page. The status and information about the report is shown along with buttons for downloading, viewing, and printing the report. To view or print the report, the User needs to click the **View/Print Report** button (only appears if the report format is Adobe PDF). The report will load in Adobe Acrobat Reader. From here, the User can view and print the report. To download the report, click the **Download Report** button (either PDF or CSV format). This will prompt the User to either save it or open it from its current location.

### New Password Functionality

New password requirements have gone into effect on PartnerNet as part of an ongoing effort to ensure the security of our online data. All PartnerNet Users were required to change their passwords to comply with the below password updates:

New Password Requirements	Old Password Requirements
<ul style="list-style-type: none"><li>• Passwords are <u>case sensitive</u></li><li>• Must be a minimum of 6 characters</li><li>• Must be different from your User name</li><li>• Must contain at least one letter and one number</li><li>• May contain symbols (&amp;, *, etc.), but not spaces</li></ul>	<ul style="list-style-type: none"><li>• Passwords must include at least 4 characters and may not include spaces or be the same as the User name.</li><li>• Passwords are case-sensitive.</li></ul>

In addition to the new requirements, PartnerNet Users are now able to reset their own passwords via the Forgot Password link below the Password field when logging in to PartnerNet. Users will receive an email confirming the change. A secret question/answer is no longer required.