

Accounts Payable Invoice Portal and Dashboard User Guide

Accounts Payable Supplier Invoice Upload Form

- 1 Navigate to <https://xforms.andrew.cmu.edu/APPOInvoiceUpload>

Home / Online forms / Accounts Payable Supplier Invoice Upload Only

Accounts Payable Supplier Invoice Upload Only

This form can only be completed by signed in users

Please sign in or register.

SIGN IN

- 2 If you are not already signed, you will see this sign in page. Click the "Sign in" button. This will have you sign in using the CMU Single Sign On.

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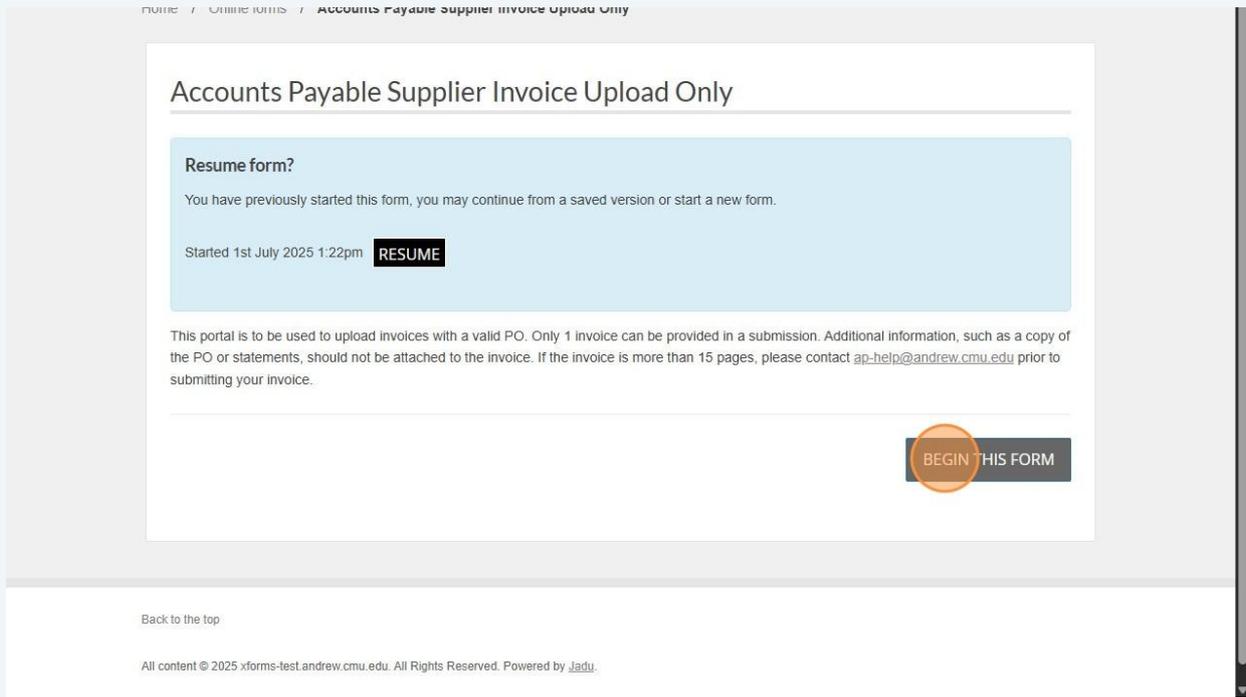
Accounts Payable Supplier Invoice Upload Only

This form can only be completed by signed in users

Please sign in or register.

SIGN IN

3 Click the "Begin this form" button to start the form.



4 At the top of the form the Submitter information will be displayed. It will either show the individual Andrew ID for the user or the Grouper group name they are associated with.

This determines the visibility of the information in the Dashboard. If it's the group name, all users in the Grouper group will be able to view the invoice in the Dashboard. If the submitter shows the user's Andrew ID only that person will see the information in the Dashboard.



5

Click the "Enter PO Number" field and type in your Purchase Order (PO) number associated with the invoice you will upload.

visibility, visit the [\[AP Dashboard FAQ page\]\(link\)](#).

Purchase Order (PO) Validation

In order to submit an invoice to Accounts Payable for processing, the Purchase Order (PO) number must be a valid PO number. The PO number you enter will be validated against PO data in Oracle to ensure only invoices with valid PO numbers are submitted.

Prior to submitting an invoice, POs must be fully approved, funded and open in Oracle. The following will cause your PO to be considered invalid and prevent you from submitting your invoice:

- The PO does not exist or is not fully funded or approved.
- The PO is closed. The PO closed date will be provided for your reference.

The PO number entered must match the PO number on the invoice. If the PO number on the invoice is incorrect, please contact the vendor to have it updated prior to submission. A mismatch may result in longer processing times.

If you feel the PO you are attempting to use is valid, please follow up with the Buyer of the PO. For additional resources please visit the [Procurement Services](#) website or reference their [FAQ](#) page.

Validate PO Number *Required*

Enter PO Number

PREVIOUS

NEXT

6

For this example we will use PO number 486752.

7

Once your PO number is typed in, click the "Lookup" button.

visibility, visit the [\[AP Dashboard FAQ page\]\(link\)](#).

Purchase Order (PO) Validation

In order to submit an invoice to Accounts Payable for processing, the Purchase Order (PO) number must be a valid PO number. The PO number you enter will be validated against PO data in Oracle to ensure only invoices with valid PO numbers are submitted.

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If you feel the PO you are attempting to use is valid, please follow up with the Buyer of the PO. For additional resources please visit the [Procurement Services](#) website or reference their [FAQ](#) page.

Validate PO Number *Required*

Enter PO Number

486752

LOOKUP

PREVIOUS

NEXT

8

The Status will be shown below the PO Number field.

- The PO does not exist or is not fully funded or approved.
- The PO is closed. The PO closed date will be provided for your reference.

The PO number entered must match the PO number on the invoice. If the PO number on the invoice is incorrect, please contact the vendor to have it updated prior to submission. A mismatch may result in longer processing times.

If you feel the PO you are attempting to use is valid, please follow up with the Buyer of the PO. For additional resources please visit the [Procurement Services](#) website or reference their [FAQ](#) page.

Validate PO Number *Required*

Enter PO Number

486752

LOOKUP

Status

Valid

PREVIOUS

NEXT

9 When the status is "Valid", click the "Next" button.

it updated prior to submission. A mismatch may result in longer processing times.

If you feel the PO you are attempting to use is valid, please follow up with the Buyer of the PO. For additional resources please visit the [Procurement Services](#) website or reference their [FAQ](#) page.

Validate PO Number *Required*

Enter PO Number

486752 **LOOKUP**

Status
Valid

PREVIOUS **NEXT**

Back to the top

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10 On the second page, answer the questions as they relate to the PO and Invoice.

Home / Online forms / **Accounts Payable Supplier Invoice Upload Only**

Accounts Payable Supplier Invoice Upload Only

Page 2 of 5 (possible) . You are 40% complete.

Invoice Upload

Is this associated with SEI? *Required*

Yes
 No

Is this related to Rwanda? *Required*

Yes
 No

Is this related to a subcontract or professional service agreement under a Sponsored Project Account? *Required*

Yes
 No

11

If you answer Yes for the question, "Is this associated with SEI?", you will see a second field appear where you will type in the IARS Number.

If you select "No," proceed to the next question.

Page 2 of 5 (possible) . You are 40% complete.

Invoice Upload

Is this associated with SEI? *Required*

Yes
 No

IARS Number *Required*

Enter number in the following format: xxxxx-x

Is this related to Rwanda? *Required*

Yes
 No

Is this related to a subcontract or professional service agreement under a Sponsored Project Account? *Required*

12

Answer the question, "Is this related to Rwanda?"

Page 2 of 5 (possible) . You are 40% complete.

Invoice Upload

Is this associated with SEI? *Required*

Yes
 No

Is this related to Rwanda? *Required*

Yes
 No

Is this related to a subcontract or professional service agreement under a Sponsored Project Account? *Required*

Yes
 No

Select 'Yes' if an agreement with a subawardee was negotiated by OSP and OSP created a PO number for the agreement and it will be charged to an award starting with 1.

Invoice Upload *Required*

13

Answer the question, "Is this related to a subcontract or professional service agreement under a Sponsored Project Account?"

IS THIS ASSOCIATED WITH SET? *Required*

- Yes
- No

Is this related to Rwanda? *Required*

- Yes
- No

IS THIS RELATED TO A SUBCONTRACT OR PROFESSIONAL SERVICE AGREEMENT UNDER A SPONSORED PROJECT ACCOUNT? *Required*

- Yes
- No

Select 'Yes' if an agreement with a subawardee was negotiated by OSP and OSP created a PO number for the agreement and it will be charged to an award starting with 1.

Invoice Upload *Required*

DROP FILE HERE OR CLICK TO UPLOAD



Note: If users select "Yes" to the SPA question, they will be directed to an error page that includes the email alias for submitting SPA subaward invoices.

14

To upload your invoice, drag and drop the file into the field or click the "Drop file here or click to upload" button. Only upload one invoice.

Note: No other supporting documentation should be included.

Is this related to a subcontract or professional service agreement under a Sponsored Project Account? *Required*

Yes

No

Select 'Yes' if an agreement with a subawardee was negotiated by OSP and OSP created a PO number for the agreement and it will be charged to an award starting with 1.

Invoice Upload *Required*

DROP FILE HERE OR CLICK TO UPLOAD

Upload one invoice only. No supporting documentation should be included. Accepted document types: .doc, .docx, .pdf, .odt

Is there any necessary information that is not on the invoice? *Required*

Yes

No

Should anyone else be made aware of this invoice upload to AP? *Required*

15

Answer the question, "Is there any necessary information that is not on the invoice?"

Invoice Upload *Required*

0.2 MB

Invoice fo P...

[Remove file](#)

Upload one invoice only. No supporting documentation should be included. Accepted document types: .doc, .docx, .pdf, .odt

Is there any necessary information that is not on the invoice? *Required*

Yes

No

Should anyone else be made aware of this invoice upload to AP? *Required*

Yes

No

16 If answered yes, type in your information in the "Additional Information" field.

[Remove file](#)

Upload one invoice only. No supporting documentation should be included. Accepted document types: .doc, .docx, .pdf, .odt

Is there any necessary information that is not on the invoice? *Required*

Yes
 No

Additional Information

Provide additional details that the AP team needs to know in order to process your invoice. Examples include: allocation of invoice lines to PO line numbers, fiscal year the invoice is to be recorded, etc.

Should anyone else be made aware of this invoice upload to AP? *Required*

17 Answer the question, "Should anyone else be made aware of this invoice upload to AP?"

Note: Additional contacts will receive a notification that the invoice has been uploaded through the portal, but will not be able to see the invoice status on the dashboard.

[Remove file](#)

Upload one invoice only. No supporting documentation should be included. Accepted document types: .doc, .docx, .pdf, .odt

Is there any necessary information that is not on the invoice? *Required*

Yes
 No

Should anyone else be made aware of this invoice upload to AP? *Required*

Yes
 No

PREVIOUS **NEXT**

[Back to the top](#)

18 If you answered yes, answer the next question, "Do they have an Andrew ID?"

Is there any necessary information that is not on the invoice? *Required*

Yes

No

Should anyone else be made aware of this invoice upload to AP? *Required*

Yes

No

Do they have an Andrew ID? *Required*

Yes

No

PREVIOUS **NEXT**

19 If they have an Andrew ID, type it into the field provided then click the "Lookup" button.

Should anyone else be made aware of this invoice upload to AP? *Required*

Yes

No

Do they have an Andrew ID? *Required*

Yes

No

Additional Contact *Required*

Enter Andrew ID

LOOKUP

PREVIOUS **NEXT**

20

If you answered "No" to the person having an Andrew ID, type in that contact person's email address.

Should anyone else be made aware of this invoice upload to AP? *Required*

- Yes
- No

Do they have an Andrew ID? *Required*

- Yes
- No

Contact Email *Required*

Confirm Email *Required*

21

Once all questions are answered, click the "Next" button.

Upload one invoice only. No supporting documentation should be included. Accepted document types: .doc, .docx, .pdf, .odt

Is there any necessary information that is not on the invoice? *Required*

- Yes
- No

Should anyone else be made aware of this invoice upload to AP? *Required*

- Yes
- No

PREVIOUS

NEXT

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Accounts Payable Supplier Invoice Upload Only

Page 3 of 4 . You are 75% complete.

Review your supplied details

Pressing "Submit Form" will send these details for processing.

Page: Purchase Order (PO) Validation

Validate PO Number

PO Number	486752
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Page: Invoice Upload

Is this associated with SEI? No

Is this related to Rwanda? No

23 Review your information.

Page: Purchase Order (PO) Validation

Validate PO Number

PO Number	493623
-----------	--------

Page: Invoice Upload

Is this associated with SEI? No

Is this related to Rwanda? No

Is this related to a subcontract or professional service agreement under a Sponsored Project Account? No

Invoice Upload Invoice_fo_PO.PDF

24 Review your information.

Page: Invoice Upload

Is this associated with SEI? No

Is this related to Rwanda? No

Is this related to a subcontract or professional service agreement under a Sponsored Project Account? No

Invoice Upload Invoice_fo_PO.PDF

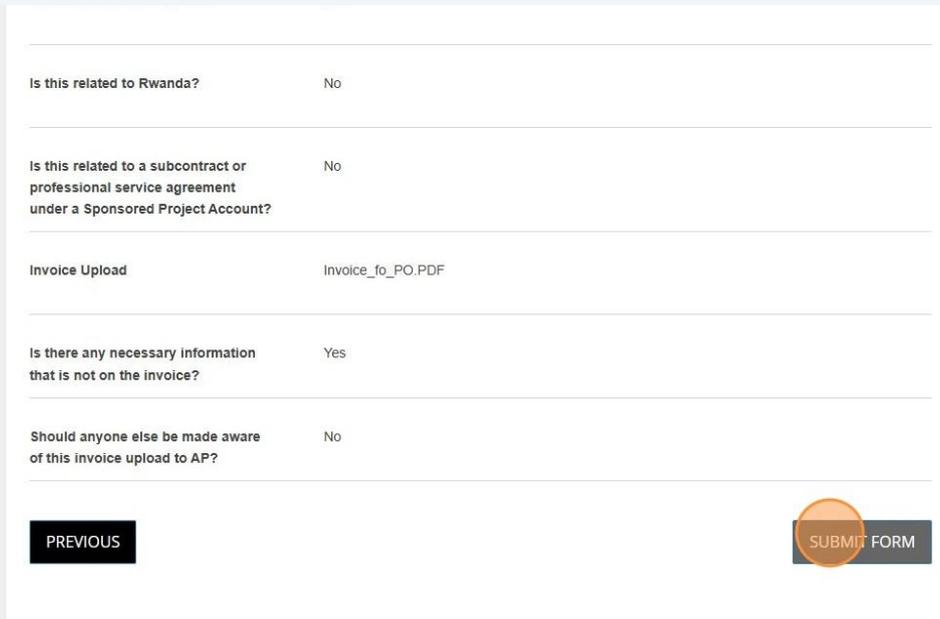
Is there any necessary information that is not on the invoice? Yes

Should anyone else be made aware of this invoice upload to AP? No

PREVIOUS

SUBMIT FORM

25 When you are finished reviewing the information click the "Submit Form" button.

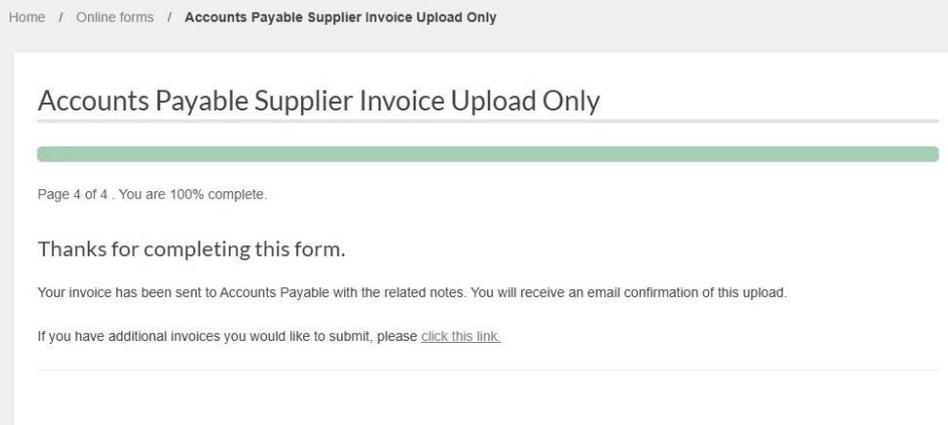


The screenshot shows a form with the following content:

Is this related to Rwanda?	No
Is this related to a subcontract or professional service agreement under a Sponsored Project Account?	No
Invoice Upload	Invoice_fo_PO.PDF
Is there any necessary information that is not on the invoice?	Yes
Should anyone else be made aware of this invoice upload to AP?	No

At the bottom of the form, there are two buttons: a black button labeled "PREVIOUS" on the left and a grey button labeled "SUBMIT FORM" on the right, which has an orange circle icon above the text.

26 A "Thanks for completing this form." message will appear letting you know the form is complete and submitted.



The screenshot shows a confirmation page with the following content:

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Accounts Payable Supplier Invoice Upload Only

Page 4 of 4 . You are 100% complete.

Thanks for completing this form.

Your invoice has been sent to Accounts Payable with the related notes. You will receive an email confirmation of this upload.

If you have additional invoices you would like to submit, please [click this link](#).

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If you need to submit another invoice, click the link to return to the start of a new form.

Home / Online forms / Accounts Payable Supplier Invoice Upload Only

Accounts Payable Supplier Invoice Upload Only

Page 4 of 4 . You are 100% complete.

Thanks for completing this form.

Your invoice has been sent to Accounts Payable with the related notes. You will receive an email confirmation of this upload.

If you have additional invoices you would like to submit, please click [this link](#).

[Back to the top](#)

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Invoice Status Dashboard

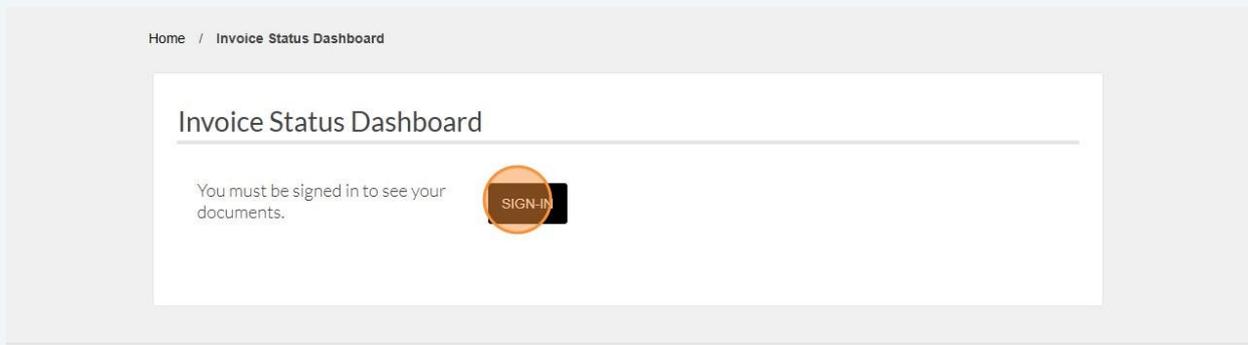


To access the Invoice Status Dashboard click the following link:

<https://xforms.andrew.cmu.edu/InvoiceStatusDashboard>

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If you are not already signed, you will see this sign in page. Click the "Sign in" button. This will have you sign in using the CMU Single Sign On.



Use the Invoice Status Dashboard to review the status of the invoices that you have submitted to Accounts Payable.

Invoice Status Dashboard

Invoices submitted through the [Accounts Payable Supplier Invoice Upload Only](#) portal will appear in this dashboard and are only visible to the user who uploaded them. Subaward invoices for Sponsored Awards that were approved via the Sponsored Projects Accounting Approval workflow will also appear in the dashboard and will be visible only to the individual who approved them. Invoices submitted to AP directly via email will not be shown. **Please allow up to 7 business days for processing.** If AP requires any additional information or has questions regarding your invoice, they will reach out to you directly.

The dashboard displays invoices that are currently in process. The statuses displayed in the dashboard indicate the current stage of processing for each invoice. Descriptions for each of the statuses can be found [here](#).

Once processing is complete, the invoices will be available in Oracle and the invoice will remain visible in the dashboard for 7 days. Oracle can be accessed by visiting the [BADs](#) website. In order to access invoices that have been processed, you will need to obtain access to the AP Inquiry module in Oracle and complete the required training(s) found [here](#). **Once your invoice is uploaded to Oracle it will be paid according to the established payment terms.**

SUBMISSION DATE	INVOICE NUMBER	SUPPLIER NUMBER	SUPPLIER NAME	STATUS	PO NUMBER	INVOICE AMOUNT	
07/10/2025	311807	10841	VOLKWEINS MUSIC	Oracle Integration Review	493638	1,795.00	C
07/07/2025				Initial Review	493438		
07/01/2025				Initial Review	486752		
06/03/2025				Initial Review	486752		



30

Use the scroll bar at the bottom of the table to see all of the details of the invoices.

Note: The download option will display only the first page of the attachment. If the first page is the invoice, it will show the invoice.

Once processing is complete, the invoices will be available in Oracle and the invoice will remain visible in the dashboard for 7 days. Oracle can be accessed by visiting the [BADS](#) website. In order to access invoices that have been processed, you will need to obtain access to the AP Inquiry module in Oracle and complete the required training(s) found [here](#). Once your invoice is uploaded to Oracle it will be paid according to the established payment terms.

INVOICE NUMBER	SUPPLIER NUMBER	SUPPLIER NAME	STATUS	PO NUMBER	INVOICE AMOUNT	INVOICE DATE	FILE
07	10841	VOLKWEINS MUSIC	Oracle Integration Review	493638	1,795.00	01/17/2025	Download
			Initial Review	493438			Download
			Initial Review	486752			Download
			Initial Review	486752			Download



Tip! A list of statuses and their descriptions can be found by clicking the link on the Dashboard.

31 Click the link to see what each status means.

Invoice Status Dashboard

Invoices submitted through the [Accounts Payable Supplier Invoice Upload Only](#) portal will appear in this dashboard and are only visible to the user who uploaded them. Subaward invoices for Sponsored Awards that were approved via the Sponsored Projects Accounting Approval workflow will also appear in the dashboard and will be visible only to the individual who approved them. Invoices submitted to AP directly via email will not be shown. **Please allow up to 7 business days for processing.** If AP requires any additional information or has questions regarding your invoice, they will reach out to you directly.

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INVOICE NUMBER	SUPPLIER NUMBER	SUPPLIER NAME	STATUS	PO NUMBER	INVOICE AMOUNT	INVOICE DATE	FILE
07	10841	VOLKWEINS MUSIC	Oracle Integration Review	493638	1,795.00	01/17/2025	Download
			Initial Review	493438			Download

Initial Review	Awaiting initial review by AP staff.
Duplicate Invoice	Has been identified as a potential duplicate and is under review. Multiple invoice submissions will delay processing.
Review of PO Needed	Please review your PO to ensure it is approved and fully funded and that the PO number is included on the invoice. Do not submit an invoice unless you have a fully funded and approved PO and the PO number is included on the invoice.
Invoice in Process	Invoice is currently being reviewed by AP staff.
Supplier Withholding Tax Review	Invoice is being reviewed to determine tax withholding requirements.
Supplier Site Maintenance	The supplier is being reviewed for changes made to remittance information.
AP Management Review	Under review with AP Management due to the amount of invoice.
Oracle Import in Progress	The invoice is awaiting import to Oracle.
Oracle Integration Review	The invoice has been validated but an unexpected error has occurred upon import. AP Management is working to resolve this.
Invoice Processing Complete	Your invoice has been imported into Oracle and will be paid according to the established payment terms.
Invoice Invalid	The invoice submission has been removed from the workflow. It was identified as a duplicate or AP was advised to remove from the workflow. Please contact the AP Helpdesk (ap-help@andrew.cmu.edu) if you have questions.