



THE EDUCATED WAY TO PURCHASE

ED-DATA ROLLOUT PLAN & NEXT STEPS FOR ADMINISTRATORS



WELCOME!

AS THE COOPERATIVE'S ADMINISTRATIVE AGENT, ED-DATA WORKS FOR YOU. AS SUCH WE ARE HERE TO SUPPORT YOU AND YOUR STAFF.

Congratulations! You've joined over 600+ school districts to form the most cost-effective school supply purchasing cooperative available!

Ed-Data will:

1. Reduce workload, simplify and streamline purchasing.
2. Reduce cost on common supplies your staff needs to run their classrooms.
3. Provide compliance with state regulations & peace of mind.
4. Provide ongoing customer service support & advocate for our members.

The Ed-Data system will be setup and ready for your staff shortly. This document contains next steps for successful implementation. Please feel free to reach out to us with any questions along the way. We look forward to working with you!



REDUCE WORKLOAD

- ED-DATA IS A ONE-STOP SHOP FOR VIRTUALLY ALL SUPPLY NEEDS.
- DOZENS OF MAJOR SCHOOL SUPPLY VENDORS WITH LOW BID PRICING.
- BID CATEGORIES SETUP TO ADDRESS VARIOUS NEEDS ACROSS GRADE LEVELS AND DEPARTMENTS.

20+ school-based supply categories

Athletics, Audio Visual, Copy Paper, Cosmetology, Custodial, Elementary Science & Grade Level Materials, Family Consumer Science, Fine Art, General Classroom, Furniture, Health & Trainer, Library, Math, Music, Office, Photography, Physical Education, Rocketry, Science, Special Needs, Teaching Aids, Technology, World Languages.

Access over 100 major supply vendors



SUPPLY CATEGORIES & SAMPLE VENDOR LIST

BASIC SUPPLY NEEDS

GENERAL CLASSROOM
OFFICE

DEPARTMENTAL SUPPLY NEEDS

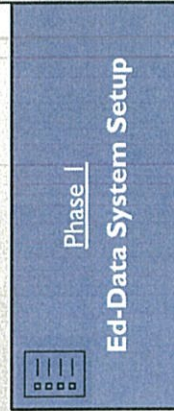
FINE ART
SCIENCE
ELEMENTARY SCIENCE
TEACHING AIDS
PHYSICAL EDUCATION
FAMILY/CONSUMER SCIENCE
MATH
LIBRARY
ROCKETRY
SPECIAL NEEDS
TECHNOLOGY (INDUSTRIAL ARTS)
HEALTH
WORLD LANGUAGE
ATHLETICS
CUSTODIAL

Awarded Vendors List

Athletic Supplies	BSN Sports, LLC/Passons Sports, FLAGHOUSE INC., LONGSTRETH SPORTING GOODS, LLC PIONEER MANUFACTURING COMPANY, S&S WORLDWIDE, INC., UNITED SUPPLY CORP.
Audio Visual Supplies	ACCO BRANDS USA LLC, CAMCOR, INC., PAPER CLIPS, INC., UNITED SUPPLY CORP.
Cosmetology	THE BURMAX COMPANY, INC.
Custodial Supplies	INTERBORO PACKAGING CORPORATION
Elementary Science Grade Level Materials List	CAROLINA BIOLOGICAL SUPPLY COMPANY, EAI EDUCATION / ERIC ARMIN INC. SCHOOL SPECIALTY, LLC., WARD'S SCIENCE / VWR International, LLC
Elementary Science Supplies	CAROLINA BIOLOGICAL SUPPLY COMPANY, EAI EDUCATION / ERIC ARMIN INC. NASCO EDUCATION LLC, SCHOOL SPECIALTY, LLC. WARD'S SCIENCE / VWR International, LLC
Family / Consumer Science Supplies	NASCO EDUCATION LLC, S.A.N.E.
Fine Art Supplies	BLICK ART MATERIALS LLC, CASCADE SCHOOL SUPPLIES, INC., CERAMIC SUPPLY, INC. NASCO EDUCATION LLC, SCHOOL SPECIALTY, LLC., UNITED SUPPLY CORP. W.B. MASON CO., INC.
General Classroom Supplies	CASCADE SCHOOL SUPPLIES, INC.
Health and Trainer Supplies	HENRY SCHEIN, INC. / Henry Schein Medical, School Health Corporation
Library Supplies	ACCO BRANDS USA LLC, CASCADE SCHOOL SUPPLIES, INC., DEMCO, INC. THE LIBRARY STORE, INC.
Math Supplies	EAI EDUCATION / ERIC ARMIN INC., NASCO EDUCATION LLC, UNITED SUPPLY CORP.
Music	K&S MUSIC INC., MUSIC IN MOTION, SHAR PRODUCTS COMPANY
Office/Computer Supplies	STAPLES CONTRACTS & COMMERCIAL LLC
Physical Education Supplies	BSN Sports, LLC/Passons Sports, NASCO EDUCATION LLC, S&S WORLDWIDE, INC. School Health Corporation DBA Palos Sports, SCHOOL SPECIALTY, LLC., UNITED SUPPLY CORP.
Rocketry	MIDWEST TECHNOLOGY PRODUCTS, PITSCO EDUCATION, LLC
Special Needs	FLAGHOUSE INC, NASCO EDUCATION LLC, School Health Corporation SCHOOL SPECIALTY, LLC., SUPER DUPER INC dba SUPER DUPER PUBLICATIONS UNITED SUPPLY CORP.
Teaching Aids	CASCADE SCHOOL SUPPLIES, INC., Charles J. Becker & Bro. INC DISCOUNT SCHOOL SUPPLY/EARLY CHILDHOOD LLC, EAI EDUCATION / ERIC ARMIN INC. KAPLAN EARLY LEARNING COMPANY, KURTZ BROS., INC. Lakeshore Equipment Company/LLM, NASCO EDUCATION LLC, REALLY GOOD STUFF, LLC S&S WORLDWIDE, INC., SCHOOL SPECIALTY, LLC., UNITED SUPPLY CORP.
Technology Supplies	ELECTRONIX EXPRESS (R.S.R. Electronics Inc.), IDESIGN SOLUTIONS INC. MIDWEST TECHNOLOGY PRODUCTS, PAXTON/PATTERSON LLC, PITSCO EDUCATION, LLC
World Languages	TEACHERS DISCOVERY, INC.



ED-DATA PROCESS: INITIAL SETUP TO SUPPLY DELIVERY & NEXT STEPS



- 1- **Ed-Data Account Setup** – In order for Ed-Data to setup user accounts for your staff, each administrator will complete a User List Form. Include teachers/staff who order supplies. Ed-Data user accounts can be setup by teacher, by grade, by department or group. Each user will have their own website to compile their supply needs. Supplies will be boxed, shipped and labeled by user account name. Therefore, if you would like each teacher to receive their own shipment, then your user list should be compiled by teacher. Please complete the attached User List Form to establish your list.
- 2- **Submit user list(s) to the Business Office.**
- 3- **Ed-Data will setup user accounts based on your user list(s).**



- 4- Ed-Data sends a "Welcome Email" to each user containing a brief training video, and instructions with Ed-Data customer service contacts.



- 5- Teachers login to Ed-Data to create their supply wishlists.
- 6- Teachers submit supply wishlists electronically in Ed-Data.
- 7- Administrators approve wishlists in Ed-Data.



- 8- POs are uploaded to district's accounting software package.
- 9- POs are sent to vendors.
- 10- Vendors deliver supplies.



PHASE I: USER LIST SETUP

Your user list should contain all staff that need to order supplies.

- Include the administrator name. The administrator will have access to review, modify, and approve requisitions users listed.
- Include the following information for each user:
 - USER NAME
 - SUPPLY BUDGET CODE(S)
 - Include supply account codes only.
 - A user can have more than one supply budget code if necessary.
 - USER'S SCHOOL EMAIL
 - SPENDING LIMIT (optional)
- After initial setup, your user list can be revised as needed by contacting your Ed-Data rep or we can provide you with online access to make revisions as needed.
- Any administrator with users across multiple locations (HS, MS, elementary schools) such as a Special Services Director, should fill out one User List Setup Form per shipping location.

User List Setup Form Online Supply Procurement



Please complete this worksheet including all users who will be accessing the online system. Each user will be setup with the access to their own website to complete their supply needs. Supplies will be boxed, shipped and labeled by user.

District: Dunder Mifflin UFSD_

School Name: Dunder School_

City: Scranton_

Address: 234 Main Street_

Zip Code: 18503_

Administrator (Principal/Chair/Supervisor): Principal Michael Scott_

User Name	Account Code	Email	Allocation Spending Limit	EDS USE ONLY School #
Jim Halpert	11-190-100-610-22-400	JimH@dm-sample.com	\$300	
Stanley Hudson	11-190-100-610-28-400	StanleyH@dm-sample.com	\$250	
Dwight K. Schrute	11-190-100-610-23-400	DwightS@dm-sample.com	\$100	
Pam Beesly	11-190-100-610-28-400	PamB@dm-sample.com	\$1,000	
Toby Flenderson	11-190-100-610-22-400	TobyF@dm-sample.com	\$200	
Andy Bernard	11-190-100-610-28-400	AndyB@dm-sample.com	\$150	
Kelly Kapoor	11-190-100-610-20-400	KellyK@dm-sample.com	\$100	
Phyllis Vance	11-190-100-610-22-400	PhyllisV@dm-sample.com	\$750	
Kevin Malone	11-190-100-610-28-400	KevinM@dm-sample.com	\$200	
Creed Bratton	11-190-100-610-22-400	CreedB@dm-sample.com	\$100	
Erin Hannon	11-190-100-610-28-400	ErinH@dm-sample.com	\$100	
Angela Martin	11-190-100-610-22-400	AngelaM@dm-sample.com	\$100	
Jan Levinson Gould	11-190-100-610-28-400	JanL@dm-sample.com	\$300	
Ryan Howard	11-190-100-610-28-400	RyanH@dm-sample.com	\$250	
Holly Flax	11-190-100-610-28-400	HollyF@dm-sample.com	\$200	
Meredith Palmer	11-190-100-610-28-400	MeredithP@dm-sample.com	\$200	
			\$300	



PHASE 2: ROLLOUT TO STAFF

- An introductory “Welcome Email” will be sent to each user.
- Email will be sent to the users’ school email account.
- Administrators will receive a similar “Welcome Email”, along with a complete user list. The user list will contain login codes, budgets codes, and optional spending limits if applicable.

“Welcome Email”
will contain...

Introduction, Tips &
Best Practices

Training video

Video is accessible via link on
“Welcome Email”, and within the Ed-
Data System.

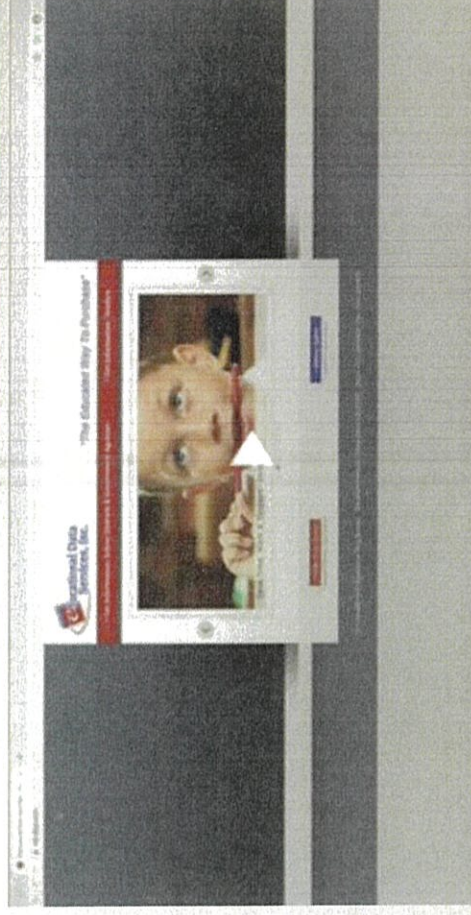
Instruction packet

Containing user login information,
Ed-Data customer service contact
information.



PHASE 2: ROLLOUT TO STAFF

- **Training demo video** provides a brief overview detailing...
 - Login to Ed-Data
 - How to create an order
 - How to submit orders for approval



PHASE 2: ROLLOUT TO STAFF



A customized instruction packet will be sent to each user via the "Welcome Email", and is accessible within the Ed-Data System

- Instruction Packets contain...
 - User Name
 - Login Information
 - District Code
 - User Number
 - Customer Service Contact

Ten High School District
MAIN STREET SCHOOL
MRS. JONES

Ed-Data Procurement Management System Supply Requisition Instructions - User

New Jersey Comprehensive Requisition Calendar NJ Group 3

Event	Date
Requisitions submitted by staff	05/01/2020
Requisitions approved by administrators	05/08/2020
Requisitions sent to District	05/22/2020

District Code: K4
User Number: 90001
Password: (see Login instructions below)

Important Note: For optimal viewing, please ensure that your screen resolution is set to 1024 x 640 or higher and your browser zoom is set no higher than 100%. You may also check a [tutorial video](#) of the system by clicking on the link below. If you are having trouble with the system, please contact your vendor. The system will not work with Internet Explorer. If you are using a mobile device, you may need to copy the video link to another browser such as Chrome.

Login

1. Enter eds.ed-data.com in the address bar of your web browser.
2. Click on the red "Order Entry System" button on the bottom of the page.
3. Type in the following information:
 - a. DISTRICT CODE: Enter the 2-character code located in the upper right-hand corner of this packet.
 - b. USER NUMBER: This 5-digit code is located in the upper right-hand corner of this packet. Enter the 5-digit code for the USER NUMBER.
 - c. PASSWORD (FIRST TIME USERS): If this is the first time you have used this system enter your 5-digit user number in the password cell. (If you have previously used the EDS system and created a unique password, enter that password.)
 - d. PASSWORD (EXISTING USERS): If you have previously used the EDS system and created a unique password, enter that password.
4. Click the "Login" button. Your user name and password must be entered correctly. If you are having trouble logging in, please contact your vendor. Your user name and password must be entered correctly. If you are having trouble logging in, please contact your vendor.
5. Click "Login".

Forgot your password? You can recover your password from the Ed-Data Login screen. See steps 1-4 above. If you are having trouble recovering your password, please contact your vendor. Your user name and password must be entered correctly. If you are having trouble logging in, please contact your vendor.

Requisition Creation & Modification "My Requisitions"

New requisitions can be created, and existing requisitions can be accessed and modified from the "My Requisitions" tab.

Create a New Requisition

1. From the "My Requisitions" tab, click the "Show Category Menu" button to access a listing of all supply categories.
2. Click on the desired supply category. A new requisition will appear.
3. Select the account code for your order by clicking on the drop down menu next to "ACCT".

You are now ready to add items to your requisition. Skip to "Adding Item To My Requisition" below.

Open and Modify an Existing Requisition

From the "My Requisitions" tab click the gray "MODIFY" button to open an existing requisition. You may add, delete or modify quantities from the requisition.

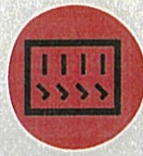
- **Change Quantity:** Change the number in the "Current Qty" column; then hit enter on your keyboard.
- **Delete Items:** Click the "x" under the Delete column.

Add Items to Your Requisition from Order-EZ

Order-EZ is a quick and simple way to add items to your requisition. If you have an awarded vendor's item number or an Ed-Data number from an Order Book, Vendor Item numbers can be found in a catalog or in some cases the vendor's website.

1. On the Requisition tab, Select the vendor from the "Select Awarded Vendor" dropdown.
2. Type the item number in the cell marked "Item #".

If you need additional assistance your Ed-Data Customer Service Representative is Mary Cannizzo and can be reached at Phone: (973) 321-9385 or Email: maryc@ed-data.com



PHASE 2: ROLLOUT TO STAFF

- **Introduction, Tips & Best Practices** provides supplemental information for efficient ordering.

Welcome to Educational Data Services!! We service a local, statewide school supply purchasing cooperative. Ed-Data currently serves 600+ school districts, and over 100,000 teachers who employ a simple, web-based system to cost effectively procure school supplies.

Ed-Data is not a supply vendor. We work for you, our cooperative members, by managing the largest supply cooperative of its kind in the state. Many of the 100+ supply vendors in the Ed-Data System will be familiar to you such as School Specialty, Staples, Carolina, Nasco, Blick, etc. Your annual school supply orders will be prepped and submitted through the Ed-Data System for summer delivery. Items such as textbooks, class trips, professional development and other non-school supply related items will be ordered outside of the Ed-Data System, in the same manner as before.

We offer a web-based system to simply put together a cart of your supply needs. It's similar to online shopping, while focusing on your recurring consumable supply needs. Our system offers over 100 supply categories which satisfies virtually all your school supply requirements:

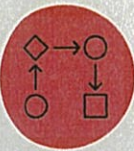
Ed-Data Supply Category List			
Athletic	Elementary Science	Music	Science
Audio Visual	Family Consumer Sci.	Office	Special Needs
Copy Paper	General Classroom	Photocopying	Teaching Aids
Cosmetology	Health & Trainer	Physical Education	Technology
Custodial	Library	Rec. Activity	World Language

It's typically best for a classroom teacher to start the ordering process with the **General Classroom** supply bid. This is where you will get the best overall pricing on common school supplies. Many teachers buy most of, if not all of their supplies here. Beyond General Classroom, there are other categories for departmental areas like Elementary Science, etc. More "boutique" type items for elementary grades can be found under the teaching category. Here you will see companies like Really Good Stuff and Lakeshore amongst others. Secretaries often order from the **Office Supply** bid which is awarded to Staples. Toner cartridges are found under office supplies. We also have a **Copy/Duplicator** bid for purchasing assets of copy paper. Copy paper pricing will be lower in the Copy/Duplicator category versus the Office Supply bid. In general, most teachers stick to one or two categories. Limiting the number of categories used will reduce the number of POs created and make receiving orders a breeze. All orders will be boxed, labeled and shipped by teacher. Some categories offer a total award (one vendor), while others contain multiple vendors to provide selection and value.

This is the last year that staff will need to start their annual school supply orders from scratch. Starting next year, we will preload your prior year's order for revision. Just tweak quantities, delete items or add new products from your previous year's cart.

A few key points:

- Pricing includes shipping for virtually all consumable supply items for summer delivery.
- Do not create multiple requisitions for a single supply category.
- Try to stick to your key supply category or categories. Teachers typically stick to one or two categories for their supply needs.
- Submit all of your requisitions by the deadline which is either printed on your instruction packet or given to you by your administrator.



PHASE 3: ORDER PREP & APPROVAL

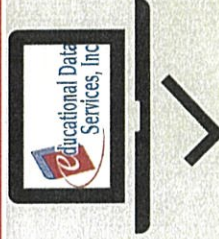
Step 1

1. Teacher logs-in.
2. Create wishlist.
3. Submit wishlist.



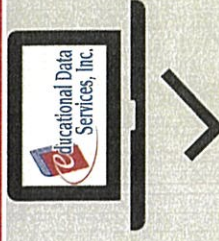
Step 2

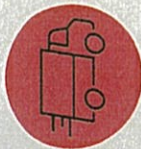
1. Admin reviews, modifies & approves wishlists.
2. System routes approved wishlists to the business office.



Step 3

Business office reviews and approves wishlists in Ed-Data.





PHASE 4: PO PROCESSING & SHIPPING

Orders are electronically uploaded by business office into district accounting software, saving administrative work for staff.



POs are sent by business office to vendors.
Hardcopy or electronic transmittal.



Vendors ship orders, boxed and labelled by teacher, making back to school a breeze.



CALENDAR

THE FOLLOWING TIMELINE IS TENTATIVE. FINAL CALENDAR WILL BE SUPPLIED SHORTLY.

EXACT DATES TO BE DETERMINED & COMMUNICATED SHORTLY

- Admin. submit user list(s) to the business office.....January
- “Welcome emails” sent to all users..... April 1
- Users submit orders to admin in Ed-Data..... June
- Administrators approve orders in Ed-Data..... June
- POs prepared and sent to vendors..... June/July
- Supplies delivered..... July/August



Welcome to Educational Data Services!! We service a local, statewide school supply purchasing cooperative serving 600+ school districts, and over 100,000 teachers to cost effectively procure school supplies and adhere to state purchasing laws.

ED-DATA INTRODUCTION

What is Ed-Data? Ed-Data is not a supply vendor. Instead, we work for you, our cooperative members, by organizing the largest supply cooperative of its kind in the state. We manage the co-op's day-to-day needs and developed a web-based platform to simplify and streamline the buying process. Our platform facilitates competition between vendors to reduce pricing and provides you with a website to organize and submit your supply needs for approval. This simplifies the ordering process for all.

- Our web-based system is just like online shopping, while focusing on your recurring consumable supply needs. Just simply shop for the supplies you need, with no need for bidding or quoting.
- Each user (teacher, secretary, etc.) is provided with their own website to organize supply needs.
- Our co-op stretches your supply budget and offers the best value of low pricing, simplicity, and legal purchasing according to state law.
- Our system offers 20+ supply categories which satisfies virtually all your school supply requirements.
- Many of the 100+ supply vendors in the Ed-Data System will be familiar to you such as School Specialty, Staples, Carolina, Lakeshore, NASCO, Sargent Welch, Sax, Triarco, etc.
- Your annual school supply orders will be prepped and submitted through the Ed Data System for summer delivery.
- Items such as textbooks, class trips, professional development and other non-school supply related items will be ordered outside of the Ed-Data System, in the same manner as before.

Ed-Data Supply Categories

Athletic	Elementary Science	Library	Science
Audio Visual	Family Consumer Sci.	Office	Special Needs
Copy Paper	Fine Art	Photography	Teaching Aids
Cosmetology	General Classroom	Physical Education	Technology
Custodial	Health & Trainer	Rocketry	World Language, and more...

BEST PRACTICES

Supply Requisitioning Basics: Ed-Data contains multiple supply categories to address a wide variety of school supply requirements. In general, most teachers stick to one or two categories. Limiting the number of categories used will make receiving orders a breeze and reduce the number of POs. All orders will be boxed, labeled, and shipped by teacher. Some categories, like *General Classroom* Supplies or *Office* offer a total award (one vendor), while others contain multiple vendors to provide selection and value.

Elementary Needs and Ordering: It's typically best for classroom teachers to start with the *General Classroom* supply category. This is where you will get the best overall pricing on common school supplies. Many teachers buy most, if not all, of their basic supplies here. More "boutique"-type items

can be found under the *Teaching Aids* category. Here you will see companies like Really Good Stuff and Lakeshore amongst others. Departmental areas are available as needed such as Fine Art, Science, P.E., etc.

High School and Middle School Needs/Ordering: Depending on your school's arrangement *General Classroom* supplies may be ordered by your department head or main office. If you are unsure of your school's procedure, please check with your administrator. Departmental areas like *Fine Art, Science*, etc. are available for our departmental needs.

Secretary Needs/Ordering: The *Office* or *General Classroom* categories are typically the most frequently used categories. Toner cartridges for personal printers (such as HP) are available in the *Office* category. The best pricing for purchasing cases of copy paper is in the *Copy Duplicator* category.

This is the last year that staff will need to start their annual school supply orders from scratch. Starting next year, we will preload your prior year's order for revision. Just tweak quantities, delete items or add new products from your previous year's order.

A few key points:

- Pricing includes shipping for virtually all consumable supply items for summer delivery. Some exceptions may apply like HAZMAT items or heavy items. If this is the case, a truck icon will appear next to the item.
- Try to stick to your key supply category or categories. Teachers typically use one or two categories for their supply needs.
- Submit all of your requisitions by the deadline, which is either printed on your instruction packet or provided by your administrator.
- Do not create multiple requisitions for a single supply category.
- Remember, next year you will not need to research your items all over again. Instead, we will preload your prior year's order for revision. This is the last time you'll be required to create your annual supply order from scratch!!

Step-by-step instructions and a brief training video are available via your introductory email, and within the Ed-Data system. They cover accessing ed-data.com, logging into your Ed-Data account, and creating and submitting your supply orders. Please reach out to Ed-Data if you need further assistance. Your customer service representative's contact information is available at the bottom of your instruction packet.

PLEASE RETURN THIS COMPLETED FORM TO THE BUSINESS OFFICE BY / /20

Administrator (Principal/Chair/Supervisor): _____

[illegible]

[illegible]

User List Setup Form

Online Supply Procurement



Please complete this worksheet including all users who will be accessing the online system. Each user will be setup with the access to their own website to compile their supply needs. Supplies will be boxed, shipped and labeled by user.

District: Dunder Mifflin UFSD

School Name: Dunder School City: Scranton

Address: 234 Main Street Zip Code: 18503

Administrator (Principal/Chair/Supervisor): Principal Michael Scott

				EDS USE ONLY
User Name	Account Code	Email	Allocation Spending Limit	School #
Jim Halpert	11-190-100-610-22-400	JimH@dmsample.com	\$300	
Stanley Hudson	11-190-100-610-28-400	StanleyH@dmsample.com	\$250	
Dwight K. Schrute	11-190-100-610-23-400	DwightS@dmsample.com	\$100	
Pam Beesly	11-190-100-610-28-400	PamB@dmsample.com	\$1,000	
Toby Flenderson	11-190-100-610-22-400	TonF@dmsample.com	\$200	
Andy Bernard	11-190-100-610-28-400 11-190-100-610-20-400	andyB@dmsample.com	\$150 \$100	
Kelly Kapoor	11-190-100-610-22-400	KellyK@smample.com	\$750	
Phyllis Vance	11-190-100-610-28-400	Pvance@dm.com	\$200	
Kevin Malone	11-190-100-610-28-400	Kmalone@dm.com	\$100	
Creed Bratton	11-190-100-610-22-400	Cbratton@dm.com	\$100	
Erin Hannon	11-190-100-610-28-400	Ehannon@dm.com	\$100	
Angela Martin	11-190-100-610-22-400	Amartin@dm.com	\$100	
Jan Levinson Gould	11-190-100-610-28-400	JLG@dm.com	\$300	
Ryan Howard	11-190-100-610-28-400	Ryan@dm.com	\$250	
Holly Flax	11-190-100-610-28-400	Hflax@dm.com	\$200	
Meredith Palmer	11-190-100-610-28-400 11-190-100-610-22-400	Mpalmer@dm.com	\$200 \$300	