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	Technology Services Service Center and Repair	**Revision #**	
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SOP Owner	Kim Bowlin	**Approval**	
SOP Name	Process for Acquiring (Purchasing) Technology Via PunchOut		

Standard Operating Procedure

1.   Purpose

The purpose of this guideline is to establish a uniform process for ordering Cypress Fairbanks Independent School District (CFISD) technology product using a vendor's PunchOut On-line store. Technology Services recognizes and complies with procurement requirements as established by federal code, state code and local board policy. This procedure is designed solely to extend the District guidelines to meet the specific needs of procuring product through a vendor's on-line store using the District's financial software and PunchOut.

2.   Scope

This procedure is for any district staff member that needs to purchase technology product using a vendor's PunchOut catalog.

3.   Prerequisites

All product purchased will be for district use and will be considered district property.

4.   Responsibilities

The Technology Services Acquisition team is responsible for securing competitively priced product that meets federal, state and district guidelines for procurement. The Acquisition team will work with vendors to ensure that sites maintain current production product and will continually work to provide additional vendor on-line stores for our customers.

The campus is responsible for following district purchasing and financial guidelines.

The Service Center is responsible for assisting with on-site installation (if needed) and servicing the equipment after installation (if needed).

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5.   Procedure

#	Step	Responsibility
1	The customer identifies the need for technology. If the desired product is a standard technology item available from a vendor's PunchOut catalog (items listed on Inside CFISD\Depts\Technology Services), the campus financial secretary may order the technology item.	Customer
2	The customer logs into EFinance Plus. The customer selects the following: Applications; Purchasing; Purchase Order Processing; Purchase Orders. PunchOut Shopping will now appear on the menu bar. The customer will select PunchOut Shopping. At this time, only one vendor, CDWG, is available for technology products. The following are required fields (indicated by red asterisk) for the customer to complete (heading of the PO): vendor interface, approval group, ship to, default budget unit, default project/grant, freight, comments, buyer, attn., default account. All pricing is through the TCPN contract (14-01-3727) and the freight for CDWG is "Paid by Vendor". The customer will click the button "Submit to Vendor". This will redirect the customer to the vendor's on-line store. The customer can shop adding or deleting items to their on-line cart. Once shopping is completed, the customer will select "Checkout". On the next menu screen, they will select "Transfer Shopping Cart" to complete their order. Note: If there is not enough money in your account, you will get an error message and your cart will not transfer back to the PO system. The customer needs to ensure that they use capital accounts for defined capital items and supply accounts for supply items. At this time, PunchOut Shopping only allows for one budget code to be entered. Separate orders will have to be placed for capital and supply items or if a different budget code is needed. At this time, there are	Customer

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	only four supply items on our store. The other items are standard capital items that schools can purchase.	
3	PunchOut orders are mass converted to district POs for approvals.	Purchasing
4	POs go through the approval process.	District PO approvers
5	The order is placed with the vendor.	EFinance Plus / PunchOut
6	A report is provided to the Technology Asset team or Windfern Annex so assets tags can be sent to the campus	Acquisition Team
7	Tags are sent to the customer and notification is provided to the campus Technology Service Technician. If the value of the asset is over $1000, then Windfern Annex will send the asset tag(s) to the customer. If the value if under $1000 and the item is defined from the store as being capital, the Asset team will send tags.	Asset Team / Windfern Annex
8	The delivered items are verified against the PO to make sure all items are correct. Issued asset tags for capital items are affixed to the product and serial numbers are recorded. Paperwork for items will be returned to the Technology Asset Team. Additional paperwork for items with a value over $1000 will be returned to Windfern Annex.	Customer
9	If the delivery is accurate and complete, the campus financial secretary will receive the PO in EFinance Plus and send the invoice to the Finance Department. The invoice is paid to the vendor and the request is complete. Packing invoices will remain with the campus unless the value of the item was over $1000. In those instances, all paperwork will be sent to Windfern Annex. PO will only remain open if:	Campus

(logo) Technology Services K-12 Technology Service Systems Building World-Class Quality	**Technology Services Service Center and Repair**	**SOP #**	TS-AAS-003
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	1. The items have not been delivered 2. The order is partial and not complete 3. The order is damaged If an order is damaged or incomplete, the school's financial secretary will hold the invoice and contact the vendor for resolution. The PO will be received in the system once there is resolution and the PO is complete.	
10	If the campus needs assistance with installation, the campus will submit an ISupport ticket.	Campus
11	A Technology Service Technician (TST) will respond to the ISupport ticket either completing the ticket and closing it or escalating it in the department for support. For network printers, the TST will escalate the ticket and attach printer configuration pages.	Technology Service Technician
12	Capital asset tags will be entered into the inventory system. Items over $1000 will be entered into both the district inventory system and the Technology inventory system.	Asset Team / Windfern Annex
13	If the school needs assistance with the vendor, the Technology Acquisition team will contact the vendor and work with them until resolution is found.	Acquisition Team
14	If software is installed during installation, the software media will be returned to the Technology Support Software Specialist who will log and store the software media in the software library.	Technology Support Software Specialist
15	Maintain the campus technology inventory in Hayes. This includes all technology tagged items.	Technology Service Technician