

	Technology Services Service Center and Repair	SOP #	TS-AAS-004
		Revision #	
		Implementation Date	10-09-2014
Page #	1 of 7	Last Reviewed/Update Date	
SOP Owner	Kim Bowlin	Approval	
SOP Name	Process for Purchasing Technology		

Standard Operating Procedure

1. Purpose

The purpose of this guideline is to establish a uniform process for ordering technology product in Cypress Fairbanks ISD. 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 technology product.

2. Scope

This procedure is for any district staff member that needs to purchase technology product.

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 and following sound ethical business practices. The Acquisition team is committed to providing quality instructional products and services at the best value to Cypress Fairbanks ISD.

The campus is responsible for following district purchasing and financial guidelines. The campus will need to provide exact information regarding the request and will also need to provide a funding source. The campus will need to have money in their account or a transfer completed prior to a PO being issued.

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

	Technology Services Service Center and Repair	SOP #	TS-AAS-004
		Revision #	
		Implementation Date	10-09-2014
Page #	2 of 7	Last Reviewed/Update Date	
SOP Owner	Kim Bowlin	Approval	
SOP Name	Process for Purchasing Technology		

5. Procedure

#	Step	Responsibility
1	The Customer identifies a need for instructional product. The customer determines if the item is a technology item. If the item is a technology item, the customer would continue with step 2. If the item is not a Technology item and the item's value is under \$1000, the customer can purchase using the district's Instructional Materials Contract (CFISD\Depts\Purchasing). If the item is not a Technology item and over \$1000 then the customer would have to contact the Purchasing department.	Customer
2	Customer identifies the need for technology. Most Technology products are standardized. This allows the district to provide lower pricing, faster acquisition processing and better support service. If the item is a standard technology item designated as a supply and its purchase price is under \$300, the campus financial secretary can issue the PO. A list of these items is found on the Inside CFISD web site. Select Depts and then Technology Services. The link is called "Technology Items Schools Can Order". Vendor information, item price and the district contract number is provided on this link.	Customer
3	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
4	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	Customer

	Technology Services Service Center and Repair	SOP #	TS-AAS-004
		Revision #	
		Implementation Date	10-09-2014
Page #	3 of 7	Last Reviewed/Update Date	
SOP Owner	Kim Bowlin	Approval	
SOP Name	Process for Purchasing Technology		

	<p>“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.</p> <p>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 only four supply items on our store. The other items are standard capital items that schools can purchase.</p>	
5	PunchOut orders are mass converted to district POs for approvals.	Purchasing
6	If the item is over \$300 and not hosted on a vendor’s PunchOut catalog, then the customer will submit an ISupport Ticket. These items are defined as capital and a capital outlay budget code will need to be submitted on the ticket. An order will not be able to be processed unless money is in the account. Standard capital items are found on the Inside CFISD web site under the links for Depts and Technology Services (“Technology Items Must Be Ordered Via ISupport”). If a non-standard item is needed, then the customer will need to submit an ISupport ticket indicating the quantity and a detailed description of the needed item.	
7	Approvals and testing are required for non-standard items by Instructional Technology and DII.	Instructional Technology / DII
8	An analysis is conducted of the request for best pricing, procurement standards, budget availability, etc. Questions are answered about the	Acquisition Team

	Technology Services Service Center and Repair	SOP #	TS-AAS-004
		Revision #	
		Implementation Date	10-09-2014
Page #	4 of 7	Last Reviewed/Update Date	
SOP Owner	Kim Bowlin	Approval	
SOP Name	Process for Purchasing Technology		

	<p>request. The Acquisition team confirms with the customer that he/she is ready to order. Otherwise, the ISupport ticket is closed.</p> <p>If the need can be addressed with existing district equipment, the ticket is escalated to the Asset Team.</p>	
9	<p>If the requested item is on an existing district contract or the Acquisition team has secured competitive pricing through a Co-Op vehicle then a PO is issued for the item. The ticket is escalated for delivery and / or installation. Delivery paperwork is created for the vendor. If the customer ordered an iPad for teacher or admin use, instructions will be sent for creating an Apple ID.</p>	Acquisition Team
10	<p>If the requested item is provided by a district sole source vendor, then a PO is issued for the item. If the vendor is determined to be a sole source vendor and not on the district's sole source contract, then paperwork is submitted to Purchasing for the review of sole source.</p>	Acquisition Team
11	<p>If the value of the requested item is between \$1 and \$4999.99 (based upon the 12 month aggregate expenditures for the commodity), no quotation is needed. Being a good steward of the district's monies, the Acquisition team exceeds this expectation by using competitive bid Co-op contracts for obtaining pricing.</p>	Acquisition Team
12	<p>If the value of the requested item is between \$5000 and \$24,999.99 (based upon the 12 month aggregate expenditures for the commodity), three written quotations are needed or the item can be secured through a competitive bid Co-op contract. The Acquisition team obtains three quotes from registered CyFair vendors that are awarded Co-op vendors and checks pricing from multiple co-op contracts.</p>	Acquisition Team
13	<p>If the value of the requested item is between \$25,000 and \$49,999.99 (based upon the 12 month aggregate expenditures for this commodity), an informal bid is required or the item can be secured through a competitively bid Co-op contract. The Acquisition team will prepare an informal bid that will be submitted to the Purchasing department or obtain competitive pricing from registered CyFair vendors that are also</p>	Acquisition Team

	Technology Services Service Center and Repair	SOP #	TS-AAS-004
		Revision #	
		Implementation Date	10-09-2014
Page #	5 of 7	Last Reviewed/Update Date	
SOP Owner	Kim Bowlin	Approval	
SOP Name	Process for Purchasing Technology		

	awarded Co-op vendors. If using Co-op contracts, the Acquisition team will check pricing from multiple district used co-ops.	
14	<p>If the value of the requested item is \$50,000 or above (based upon the 12 month aggregate expenditures for the commodity), then a formal bid is required or the item can be secured through a competitively bid Co-op contract. The Acquisition team will prepare a formal bid that will be submitted to the Purchasing department or obtain competitive pricing from registered CyFair vendors that are also awarded Co-op vendors. For Co-op contracts, the Acquisition team will check multiple district used Co-ops.</p> <p>If the single purchase was \$100,000 or greater, then the Acquisition team would submit paperwork to obtain board approval prior to issuing the PO.</p>	Acquisition Team
15	If the vendor is not in the district's EFinance Plus vendor list, the Acquisition team would complete and submit the New Vendor Request Form.	Acquisition Team
16	PO is issued.	Acquisition Team
17	POs go through the approval process.	District PO approvers
18	The order is placed with the vendor.	EFinance Plus / PunchOut Or Purchasing
19	Paperwork is provided to the Technology Asset team or Windfern Annex so assets tags can be sent to the campus	Acquisition Team (PunchOut Orders) or Purchasing

	Technology Services Service Center and Repair	SOP #	TS-AAS-004
		Revision #	
		Implementation Date	10-09-2014
Page #	6 of 7	Last Reviewed/Update Date	
SOP Owner	Kim Bowlin	Approval	
SOP Name	Process for Purchasing Technology		

20	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 is under \$1000 and the item is defined as being capital, the Asset team will send tags.	Asset Team / Windfern Annex
21	The Purchase Order is entered into the Hayes Inventory System.	Acquisition Team
22	The delivered items are checked in and 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 with a value over \$1000 will be returned to Windfern Annex.	Customer / Service Center / Campus Technician
23	<p>If the delivery is accurate and complete, the Acquisition team or the campus financial secretary will close 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.</p> <p>PO will only remain open if:</p> <ol style="list-style-type: none"> 1. The items have not been delivered 2. The order is partial and not complete 3. The order is damaged <p>If an order is damaged or incomplete, the buyer 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.</p>	Campus or Acquisition Team (depending on who issues PO)
24	If the campus needs assistance with installation (drop ship items), the campus will submit an ISupport ticket. The Acquisition team will escalate or create ISupport tickets if installation is needed.	Campus or Acquisition Team
25	A Technology Service Technician (TST) will respond to the ISupport ticket either completing the ticket and closing it or escalating it in the	Technology Service Technician

	Technology Services Service Center and Repair	SOP #	TS-AAS-004
		Revision #	
		Implementation Date	10-09-2014
Page #	7 of 7	Last Reviewed/Update Date	
SOP Owner	Kim Bowlin	Approval	
SOP Name	Process for Purchasing Technology		

	department for support. For network printers, the TST will escalate the ticket to NMO and attach printer configuration pages.	
26	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
27	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
28	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
29	Maintain the campus technology inventory in Hayes. This includes all technology tagged items.	Technology Service Technician