Pittsburgh Public Schools
Standard Operating Procedure

Hardware Purchasing Norms
Office of Information and Technology

OIT-007

Hardware Purchasing Process

Overview

This document describes the process for district to receive technology equipment through five options; direct connect portal within financial system, vendor quotes, donations, grants and PTO/fund raisers. All technology asset purchases should fall under hardware supported policy (…..).

This document is organized into five purchasing options:
1. Direct connect portal within financial system.
2. Quote from Vendor to upload into financial system.
3. Donations for Technology
4. Grants for Technology
5. PTO/Fund raiser funds for Technology

Purchasing of technology assets
Option 1:
Direct Connect Portal – screen within PeopleSoft (connects to All Lines)
They go into PeopleSoft direct connect portal and select from list of approved items. If purchase is over threshold (21,000 -?) req needs board approval. *–must get board approval prior to becoming purchase order.*

User provides:
- Vendor number (defaults to All Lines vendor number when in All Lines portal)
- Ship to location (doesn't matter what they put in the system overrides it and sends technology object codes to South Side warehouse)
- Category (computer hardware, software, supplies, etc.)
- Budget Line – fund, department, function, object
    - 010 – PPS General Fund number
    - 5400 – technology department
    - 2240 – IT function code (departments have different function codes for different types of purchases)
    - 758 – object code (district wide – same object code for same types of purchases district wide)

When user saves and submits they are given a requisition number.
PeopleSoft has a workflow approval process:
- Req goes to Joe Charnock (based on object codes it knows that the req is a technology purchase). When Joe logs into PS he has a worklist that includes reqs that require his approval. He gets about 50 in an average week. Peak weeks he can get as many as 150.
    - Joe approves – he'll check with Mark or Scott if purchase seemed questionable. He's mostly looking at if hardware is "approved". *–outstanding question as to why anything on the approved list is not really approved.*

- If denied, workflow goes back to requestor. Requester can change req and will still have same req number. Joe emails requester that req has been denied. User can also see it in their PS worklist.
    - o Once Joe approves the req goes to Finance/Budget. They check that the money is available in the correct budget lines.
        - If denied, workflow goes back to requestor. Requester can change req and will still have same req number. User can also see it in their PS worklist.
    - o Now req is considered valid and approved.
- Once req is valid and approved it is available to become a purchase order.
- PS has a process that runs twice a day (noon and overnight) that automatically takes a valid and approved req and makes it a purchase order.
- Purchase orders are sent to All Lines (in this example)
- All Lines fills the Purchase Order and ships to South Side warehouse.
- In the past a spreadsheet was sent (custom build by PPS- backend process that created spreadsheet of purchase orders coming to south side – put on a network drive) –*not sure if this is still happening*
- Shipment shows up at SS warehouse
- Mark's team checks PO number when accepting shipment
    - o Shipments typically have a PPS PO numbers on them
    - o If shipment doesn't have our PO number on it then Mark's team send packing slip information to vendor and asks for PPS PO number
    - o Once we have the PPS PO number: Marks team alerts Accounts Payable (Leah Taylor) of all received equipment – PO may not be fully met at this point. It may be partial delivery of equipment requested in PO. If PO not fully met than Leah doesn't "receipt" the PO in full. Acct Payable won't pay invoice until we received everything included in the PO.
    - o Marks team emails requester (by looking in PS at the PO number and seeing whose name is on it) and asks where it goes and who it is for (staff? Student? If staff then they need staff name)
    - o Once Marks team have the necessary information they configure the hardware and dray (ship) to where ever it needs to go.
    - o Company providing equipment should send an invoice to PPS Accounts Payable – sometimes they send the invoice to other people.
    - o Company's only get paid if (1) equipment is marked received in PeopleSoft (typically marked by whoever created requisition. For hardware Marks team emails Leah and lets her know that equipment has been received) –*can Mark and his team mark this as received in PeopleSoft?* (2) company sends Invoice
- At the end of the year Finance rolls over all open reqs and POs

Options 2:
Get a quote from the company (if they aren't on the direct connect portal)
If item can't be purchased through All Lines requester goes to Mark, Scott, Joe, Dave Moore, Dave Skalniak to get quote on purchase.

State Pricing – vendors apply to be approved vendors at the state level. Once they are on that list (state wide list of approved vendors and prices) they get a contract number that needs to be put on the quote. If the vendor is not on the state pricing list than purchasing would need to get additional quotes (3?)

They go into PeopleSoft requisition module and creates purchase requisition (free form text box). Quote needs to be emailed to purchasing (Mark Jordan). If purchase is over threshold ($21,000 -?) req needs board approval. –*must get board approval prior to becoming purchase order. Some gray area in how this works….*

Only certain people have rights to create PS requisitions. At least one person in every school, department has rights to create purchase reqs (300-400 staff members)

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    - o Now req is considered valid and approved.
- Once req is valid and approved it is available to become a purchase order.
- Reqs from quotes aren't automatically turned into Purchase Orders – purchasing has a process for handling these and making them purchase orders.
- Purchase Orders are sent (email, fax, us mail) to vendor

- Vendor fills the Purchase Order and ships to address on Purchase Order (if hardware automatically goes to SS warehouse – PS overwrite address for hardware object codes)
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If software or supplies or other:
- Product is sent to shipping address
- Requester marks as received in PeopleSoft
- Once finance gets invoice, vendor gets paid