



TIPS AND TRICKS

November 20, 2017

Did you know.....

.....there's more to purchasing technology than entering a requisition in Workday.

Ordering technology may not always be as simple as entering a requisition in Workday. **Obtaining new technology for your school or department is a multi-step process requiring proper planning and coordination.** When considering a technology purchase, ask yourself the following questions:

1. What type of technology do I want to purchase (tablet, laptop, desktop computer, interactive panel, etc.)?
2. Do I need to schedule a consult with Instructional Technology to determine the “best-fit” technology for the needs of my department or school?
3. Is the technology I want to order available via Workday online catalog (Dell or the DoIT Standard Hardware Purchase Item Group)?
4. Does the technology require installation once received?
5. When do I need the technology installed and/or available for use?

The answers to these questions will help you determine the steps you should take to procure the best technology for your academic or business needs.

Steps in the Technology Order/Delivery Process

Depending on the type of technology needed (tablet, laptop, desktop computer, interactive panel, etc.) and installation requirements (if needed), the following steps may be required.

1. **Consult with Instructional Technology:** A consult may be effective in helping you choose a technology solution that meets the needs of your day-to-day academic or business requirements now and in the near future.
2. **Technology Order Entry/Approval Process (Workday):** Once you have identified the technology you would like, a requisition must be entered in Workday to encumber funds and receive approval for the order. *(See Entering Technology Orders in Workday on page 4 of this document.)*
3. **Vendor Process (Build/Ship):** This process is initiated when the vendor receives the purchase order and completes the order. Order fulfillment includes build (if required), packaging, and shipment.



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4. **Inventory Process/Asset Tagging (Woodland):** All technology orders are required to go to Woodland for inventory processing which may include asset tagging and etching.
5. **Receive Goods (Workday):** When Woodland receives your technology products at the warehouse; your order is centrally received. This means the Woodland team will enter the technology receipt in Workday so there's no need for you to create a receipt for the technology you ordered.
 - **You will need to create a receipt for service** in Workday if you purchased services such as professional development or training along with your products.
6. **Configuration Process (EPC):** Most technology orders will need additional configuration to work effectively within the secure CMSD network. Configuration is usually done by the IT team at EPC. Once the configuration process is complete, all items are sent back to Woodland for final delivery.
7. **Technology Installation Process (Trades/Vendor):** A ticket is required for any technology order requiring installation within a school or department (Ex: interactive panels). A ticket should be entered for "New School Technology" or "Trades" (depending on the circumstance) to ensure the devices are properly installed once the equipment is delivered to your location. **NOTE:** "New School Technology" should be used for all non-trade requests.
 - [Click here](#) to login and create a ticket in Foot Prints (your login credentials are the same as your network login).
 - ❖ For detailed instructions, go to the CMSD Workday website/Quick Links/Tips & Tricks and review the **Submitting a Help Desk Ticket** job aid.

The screenshot shows the Workday@CMSD website interface. At the top, there is a blue header with the Workday@CMSD logo and the Cleveland Metropolitan School District logo. Below the header, there are navigation links for Workday@CMSD, Training, Resources, and Contact Us. The main content area is divided into two columns. The left column contains 'Quick Links' with items like 'Login to Workday@CMSD', 'Training Materials / Job Aids', 'Workday on Mobile', 'Tips & Tricks', 'What's New with Workday', 'FAQ's', and 'Reports'. The right column contains 'Tips and Tricks' with a sub-section for 'General Information' where the link 'Submitting a Help Desk Ticket' is highlighted with a red box. Below that, there is a 'Finance & Procurement' section with several links including 'Itemized Purchase Orders', 'Budget to Actual Report', 'Using the Search Field', 'Invoice Status Report', 'Available Fundraising Dollars', 'Ordering Food in Workday', and 'Why an Invoice Was Not Paid'.



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Getting the Technology that Best Fits Your Needs

Instructional Technology provides the expertise you need to make well-informed technology decisions. They offer services in three areas:



Pre-Purchase Technology Consult

- * "Best-fit" devices for your specific needs
- * Cost effective purchase planning
- * Procuring a quote for non-catalog items
- * Aligning technology with the goals of your school or department



Technology Training

Tailored training to help you:

- * Effectively use all applications on your device
- * Effectively integrate technology into day-to-day requirements
- * Leverage technology across multiple media sources



Technology Optimization

- * Device memory and storage capacity
- * Classroom or building setup
- * Assessment of wiring and access point capability
- * Integration of, tele-presence, virtual field trips, recording events, etc.
- * Data sharing and video conferencing

Best Fit Technology Recommendations

In addition to the services above, Instructional Technology has created a comprehensive list of "best-fit" technology recommendations based on job role.

CMSD Recommended Technology	Computer Preference				Device Preferences					
	Basic Desktop	Desktop (HP)	Basic Laptop	Laptop (HP)	Surface Pro	Surface Book	MacBook Pro	MacBook Air	iPad	iPad Pro
Principal		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
Network Leader		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
Chief Level		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
Vice Principal		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Secretary					<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Dean of Students	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
CIS	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Basic Teacher	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Art Teacher		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Gym Teacher	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Media Teacher		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
STEM Teacher		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Spanish Teacher	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Intervention Specialist	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Technology Teacher		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Action Team Coach		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Barrier Breaker	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Communications		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>



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If you're not sure which choice to make, contact Instructional Technology for an assessment of your needs. For more information about setting up a technology consult or to learn more about the services offered, contact:



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Once your technology consultation is complete, you should have a plan of action that includes device type, quantity, and specifications. The next step is to enter your technology order in Workday.

Entering Technology Orders in Workday

Technology orders require a '644' or '517' spend category which can only be used on requisitions (catalog, non-catalog, and supplier website). These spend categories will not work with direct purchase orders. Using them on a purchase order will generate an error which prevents the submission and processing of the purchase order.

For more information about entering a requisition, click [here](#) to access the job aid or go to the Workday website under **Quick Links/Training Materials/Job Aids/Finance & Procurement Self Service** to access the **Create Requisition** job aids.

Technology Processing Timeline

It is important to plan your technology purchases so that purchase, delivery, asset tagging, configuration, and installation are completed prior to your expected utilization date. To help with your planning process, Instructional Technology has provided the table below outlining processing days and estimated delivery dates.

For purchases below \$25,000, processing time can range from 45-90 days while processing time for purchases greater than \$25,000 can range from 75-120 days. During peak times (designated with an * in the table below) processing time is longer due to increased volume of orders across the district.



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Technology Purchase Timelines

Amount	PO Month	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Under \$25k	Processing Days	45	45	45	45	90*	90*	N/A	90*	90*	90*	90*	45
	Estimated Delivery Date	Mar	April	May	June	Aug	Sep	N/A	Nov	Dec	Jan	Feb	Feb

Amount	PO Month	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
\$25k & Over	Processing Days	75	75	75	75	120*	120*	N/A	120*	120*	120*	120*	75
	Estimated Delivery Date	April	May	June	July	Sep	Oct	N/A	Dec	Jan	Feb	Mar	Mar

***Peak Times:** Indicates the period of time with all orders will be delayed due to an increase in technology orders across the district.