



# The Procurement Process

**Procurement Services**

**July 20, 2017**



## Procurement Department's Role-What We Do

- Use best practices to source and procure materials, equipment and services in accordance with state and federal laws and regulations
- Manage bid and procurement activities for goods and services for all commodities
- Consult with departments on sourcing strategies, supplier outreach and procurement process
- Ensure procurement and bidding compliance



# IMPORTANT POLICIES



## POLICY 2006 Purchasing Authority

Applies to the bid and purchase of goods such as supplies, furniture, fixtures, equipment, and material of any kind (including such purchases made by schools using site-based funding)





# IMPORTANT POLICIES

My boss told me to  
have a good day...



So I went home.

## POLICY 4002 Staff Ethics

Each employee serves as a representative of the District and should strive to maintain standards of ethical behavior which will not detract from the educational process.



# IMPORTANT POLICIES



## POLICY 4003 Conflict of Interest

Employees of Shelby County Schools shall conduct their associations with organizations and individuals both inside and outside the school district in a manner demonstrating the highest degree of integrity.





# STATUTORY BIDDING REQUIREMENTS

- All purchases over \$500 must be made by a valid SCS purchase order.
- Purchases with total amounts ranging from \$3,500-\$9,999.99 may be made in the open market, but shall, whenever possible, be based upon at least three (3) competitive quotes.
- Purchases totaling \$10,000 or more must be competitively bid.
- Bids or RFPs totaling \$100,000 or more must be presented for the approval of the SCBE Board Members.

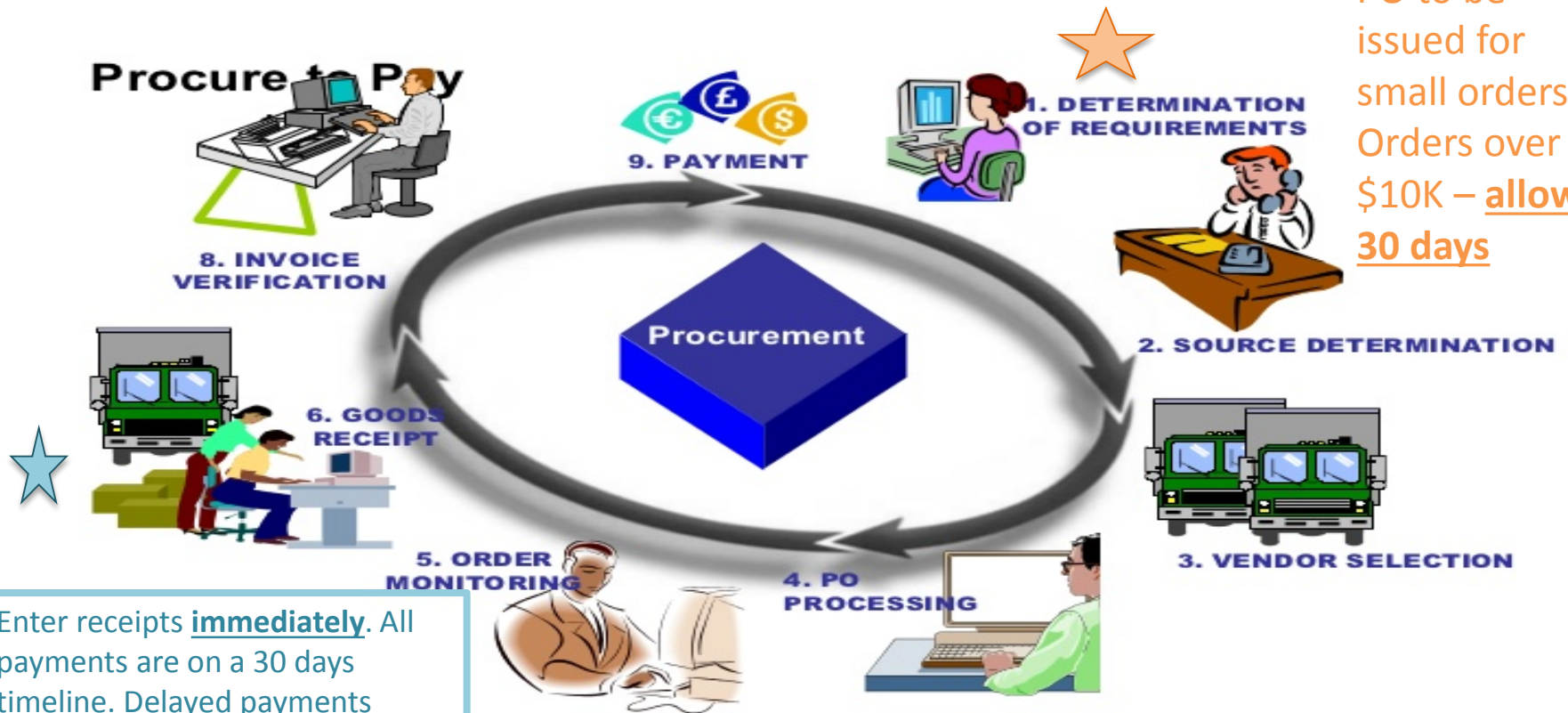


## SOLICITATION PROCESSES

- **RFQ-** Request for Quotes (\$3,500 - \$9,999.99)  
Business awarded to the **lowest qualified bidder.**
- **ITB-** Invitation to Bid (\$10,000 & above)  
Business awarded to **lowest qualified bidder.**
- **RFP-** Request for Proposal (\$10,000 & above)  
**Selection Committee** appointed to review and select supplier to be awarded the business, based on pre-established criteria that may include price, quality, references, demonstrations and other factors.
- **RFI-** Request for Information  
**Does not result in an award.** Issued to create a fair public process when we need to gather information about a potential future purchase.



# The Procurement Cycle



Please allow up to 2 weeks for a PO to be issued for small orders. Orders over \$10K – allow 30 days

Enter receipts immediately. All payments are on a 30 days timeline. Delayed payments could cause the vendor to freeze the district's purchasing account.





# APECS Requisitions

## Entering a Purchase Requisition is the first step.

- Enter requisition into APECS to initiate a purchase or bid process, or to request a contract (when applicable)
  - Add internal comments & attachments to help reviewers and Buyer understand your request.
- If your supplier is not already listed in APECS, have supplier complete a Vendor Registration Form.
- Purchases of \$10,000 or more must be bid out unless they qualify as a sole source or emergency purchase, or we can obtain the goods/services through an existing contract.
  - Attach Sole Source Letter or Emergency Purchase justification information to your requisition.
- Track the approval status of your requisition to ensure that it gets turned into a Purchase Order.



# HEADER'S TAB



R  
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**eS Business System** No Requisition selected Requisition Search **Shelby County Schools** 2018  
UNIFIED LIVE

Finance > Requisition > Header Options | E

Search **Header** Details Travel Requisition Approval Details

Req. Center: [ ] PO Type: [ ] Status: **Inactive**  
Req. No.: [ ] Req. Date: 07/19/2017 PO No.: [ ] PO Date: [ ]  
Description: [ ] PO Dispatch Method: EM - Email [ ]

Ship To: [ ] Date Needed: 08/18/2017 [ ] Buyer Code: [ ]  
Requestor Name: Felts, Paris Mark For: [ ]  
FOB: D - Destin [ ] Ref. No.: [ ] Bid No.: [ ] Aprvl. Hold: [ ]  
Campus/Bldg/Room: [ ] [ ] [ ] Ext. Req.: [ ] Ext. PO: [ ]

**Vendor Information**

Type: Vendor [ ] Name: [ ]  
ID: [ ] Address1: [ ]  
Address2: [ ]  
Address3: [ ]  
City: [ ] State: [ ]  
Zip: [ ] Country: [ ]

**Vendor Contact**

Attention: [ ]  
Phone No.: [ ] Ext.: [ ]  
US Fax No.: [ ]  
Email: [ ]

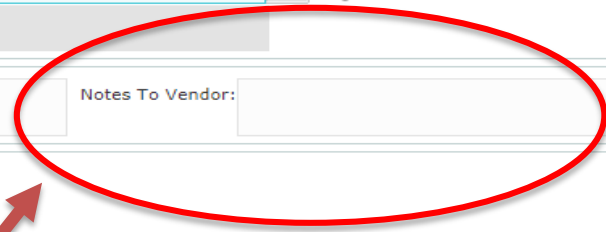
Bid/Terms and Conditions: [ ] [more...](#)  
Shipping Notes: [ ]

Notes (Internal): [ ] Notes To Vendor: [ ]

Session active for 00:54:54

<< Req Suspend Save & Continue Save & Post Clear Clone

Do **NOT** leave this section blank. Please include justification for order.



Place the requestor's contact info here!!



# DETAILS TAB



Search Header **Details** Travel Requisition Approval Details

Req. No.: 801364 Req. Date: 07/19/2017 PO No.: PO Date: Ship To: [Dropdown] Distribution Type: [Dropdown]

Grp. No.: 1 of 1

Account Info					
<input type="checkbox"/>	Account No	Percentage	Amount	Action	
<input type="checkbox"/>				<input type="radio"/>	
<input type="checkbox"/>				<input type="radio"/>	
<input type="checkbox"/>				<input type="radio"/>	
<input type="checkbox"/>				<input type="radio"/>	
<input type="checkbox"/>				<input type="radio"/>	
<input type="checkbox"/>				<input type="radio"/>	

Line Items Info							
<input type="checkbox"/>	Qty	UOM	CmdtyCd/Item/ISBN No	Description	Unit Cost	Ext Cost	Dis <input type="checkbox"/>
<input type="checkbox"/>		★	★	★			<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>
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ALWAYS place the correct commodity code for each line item. This crucial code will route the order to the appropriate buyer. (you can find more codes by searching "Texas Commodity Codes" in your search engine.)  
 Note: Be sure to check if the code is in APECS. If not, use the code number closest to the code you received when searching for the item.

Leave "Ship To" blank on this page. The location was already entered on the "Header's Tab". Entering a location may cause the system to generate an incorrect address for shipment.

Vendor Discount:	S & H %	Amt	Net
Distribution Total:			0.00
Line Amount:		0.00	0.00
Tot. Req. Amount:		0.00	0.00



# APPROVAL DETAILS TAB

Finance > Requisition > Approval Details Options

Search Header Details Travel Requisition **Approval Details**

Zip: **84037**

**Bid/Term and Conditions**

Bid/TC No	Description	Vendor Notes
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Shipping Notes:

**Group 1: Ship To: Knight Road Elementary**

Account No	Account Name	Short Name	Amount
01-71100-39900-215500-2385-0000	OTHER CONTRACTED SERVICES		3,091.16

Qty	UOM	PCode	Description	Unit Cost	Ext Cost
6.0000	each	785-32	ITEM NUMBER H480-500(annual fee)	100.0000	600.00
2.0000	each	785-32	ITEM NUMBER C500-00 (DISCOVERY GRADES 1-3)	649.0000	1,298.00
2.0000	each	785-32	ITEM NUMBER C610-000(STUDENTS AGES 10)	499.0000	998.00
1.0000	each		shipping and handling	195.1600	195.16

Tax: **0.00** Discount: **0.00** Shipping: **0.00** Group Total: **3,091.16**

Grand Total: **3,091.16**

Notes (Internal): supplies will be used to help student comprehension. It will also be utilized for the professional development of teachers while gaining student involvement. Notes to Vendor: QUOTE # 38893

**Approval Details**

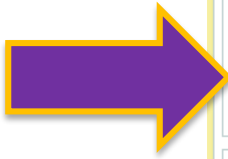
Approver Action: **None**  
Comments:

Approver	Action taken by	Date	Comments	Action
!Procurement Cost Center H...	Gray, Femetres	07/13/2017 12:03 PM		Approved
Buyer	Felts, Paris	07/14/2017 08:41 AM	please attach the quote	Returned
Johnson, Jannita		07/17/2017 12:21 PM		Approved
Buyer				
FELTSPD - Felts, Paris				

Session active for 00:54:47

Clear Save

Check the status of your order using this page. The current approver is ALWAYS highlighted in yellow.





# PO RECEIVING

Finance > PO Receiving > Post Receiving Detail

Options

Search **Post Receiving Detail** Item Level Receiving Details Fixed Asset Receiving Detail

### Details

Recv. Date: 07/21/2017  Shipping Doc. No.:  Mark For:   
Recv. Location: 8805 - Bond Building  Requested By: **MEMMA** Ship To: **Bond Building**  
PO Recv. Status: O - Open  Recv. Close Date:  Fill Qty Recv:   
Show Outstanding Items Only:

Click the note icon



### PO Internal Notes

### PO External Notes

❌	Item Description	Product ID	Last Recv Stat	Order Qty	Prev Qty Recv	Qty Recv	Recv Stat	Asset Rec
	FACILITY USE FOR RETREAT FOR ART...			1.0000		1.0000	C - Complete	None
				0.0000				

Receiving Notes: AP - PLEASE SEE LINE ITEM # 1 NOTES BEFORE RELEASING PAYMENT.

Comments:  
This item is Damaged. Please do not pay until replacement has been received. PF 7/21/2014

When receiving damaged items, please enter the receipts but make a note for Accounts Payable in the 2 (two) circled sections seen above.



# APECS Statistics



- 9,500 Vendors in APECS
- Annual Spend approximately \$242.5 million
- Process/approve 45,000 POs per year
- Seven (7) Buyers support entire District

The screenshot displays the APECS Business System interface for a requisition header. The browser address bar shows the URL: [https://apecs.scsk12.org/biz/bus\\_fi\\_reqn\\_reqn\\_ent\\_hdr.aspx](https://apecs.scsk12.org/biz/bus_fi_reqn_reqn_ent_hdr.aspx). The page title is "No Requisition selected" and the user is logged in as "Shelby County Schools 2015". The interface includes a navigation menu on the left and a main form area with the following fields:

- Req. Center:** [Dropdown]
- Req. No.:** [Text]
- Req. Date:** 06/03/2015
- PO Type:** [Dropdown]
- Status:** Inactive
- Description:** [Text]
- PO No.:** [Text]
- PO Date:** [Text]
- PO Dispatch Method:** EM - Email
- Ship To:** [Dropdown]
- Date Needed:** 07/03/2015
- Buyer Code:** [Dropdown]
- Requestor Name:** Locklyn, Victoria Elaine
- Mark For:** [Text]
- FOB:** D - Destinat
- Ref. No.:** [Text]
- Bid No.:** [Text]
- Aprvl. Hold:** [Text]
- Campus/Bldg/Room:** [Text]
- Ext. Req.:** [Text]
- Ext. PO:** [Text]

**Vendor Information:**

- Type:** Vendor
- ID:** [Text]
- Name:** [Text]
- Address1:** [Text]
- Address2:** [Text]
- Address3:** [Text]
- City:** [Text]
- State:** [Text]
- Zip:** [Text]
- Country:** [Text]

**Vendor Contact:**

- Attention:** [Text]
- Phone No.:** [Text]
- Ext.:** [Text]
- US Fax No.:** [Text]
- Email:** [Text]

**Bid/Terms and Conditions:** [Text]

**Shipping Notes:** [Text]

Buttons at the bottom: << Req, Suspend, Save & Continue, Save & Post, Clear.



## ON-LINE RESOURCES



Go to the SCS Procurement Services website for:

- Vendor Registration Information
- Notice of Bids and RFPs
- Request for Proposal Instructions and Forms
- APECS Resources and Training Schedule
- Commodity Code Information
- Cell Phone Requisition Form
- Pricing Catalogs and more

