

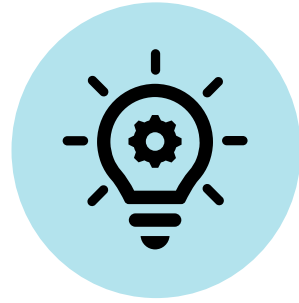
Purchasing

Administrative Assistant Training – Fall 2023

Technology Updates

Tonya Hodges

Technology Updates



- It's wise to **plan ahead**.
- Some **supply chain disruptions** continue to affect technology purchases.

HP & Canon OEM Ink, Toner, & Supplies



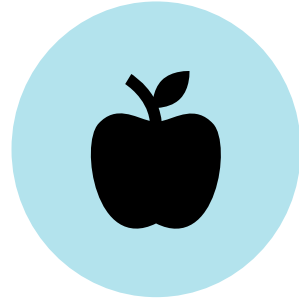
- Ink and toner supplies for HP and Canon have been awarded to [multiple vendors](#).
- HP and Canon each have [5 vendors](#) you can select from.
- See the vendor list for contract 23THo4-5 on the Purchasing website under Contracts & Pricing / [District Contracts](#).
 - <https://purchasing.jordandistrict.org/>

HP Updates



- Chromebooks
 - Order now for better pricing
 - Basic / ~4 weeks
 - Touchscreen / 6-8 weeks
 - Touchscreen & Flip / 12+ weeks
- Desktops & Desktop Minis
 - Stock models / 4-8 weeks
 - Custom models / 8-12 weeks
- Mounting Brackets & Docking Stations / 6-12 weeks
- Monitors (varies by model)
 - P27h / 3-4 weeks
 - Other models / may be 4-12 weeks
- Laptops (varies by model) / 4-12 weeks
- Printers / 4-8 weeks (for most printers)

Apple Updates



- iPads / 2-5 weeks
 - Varies by model
- MacBook Airs / 2-4 weeks
 - M2 Chip 5-packs / 4-6 weeks
- MacBook Pros / 2-4 weeks
 - 14-inch 5-packs / 7-9 weeks
- Mac Minis / 2-4 weeks
- iMacs / 2-4 weeks

Receiving Ridiculousness



- **Inspect** all packages upon arrival
 - Do you **still want it?** (Don't open it if not!)
 - Is anything **damaged?**
 - Is the order **complete?**
 - If there is an **invoice** included, has it been stamped and sent to Accounting?
- **Contact Purchasing** with any issues or questions
 - **Returns** or **exchanges** (keep all packaging materials)
 - **Missing** or **damaged** items
 - **Haven't received** within 4-8 weeks of the PO being approved

Requisition Reminders

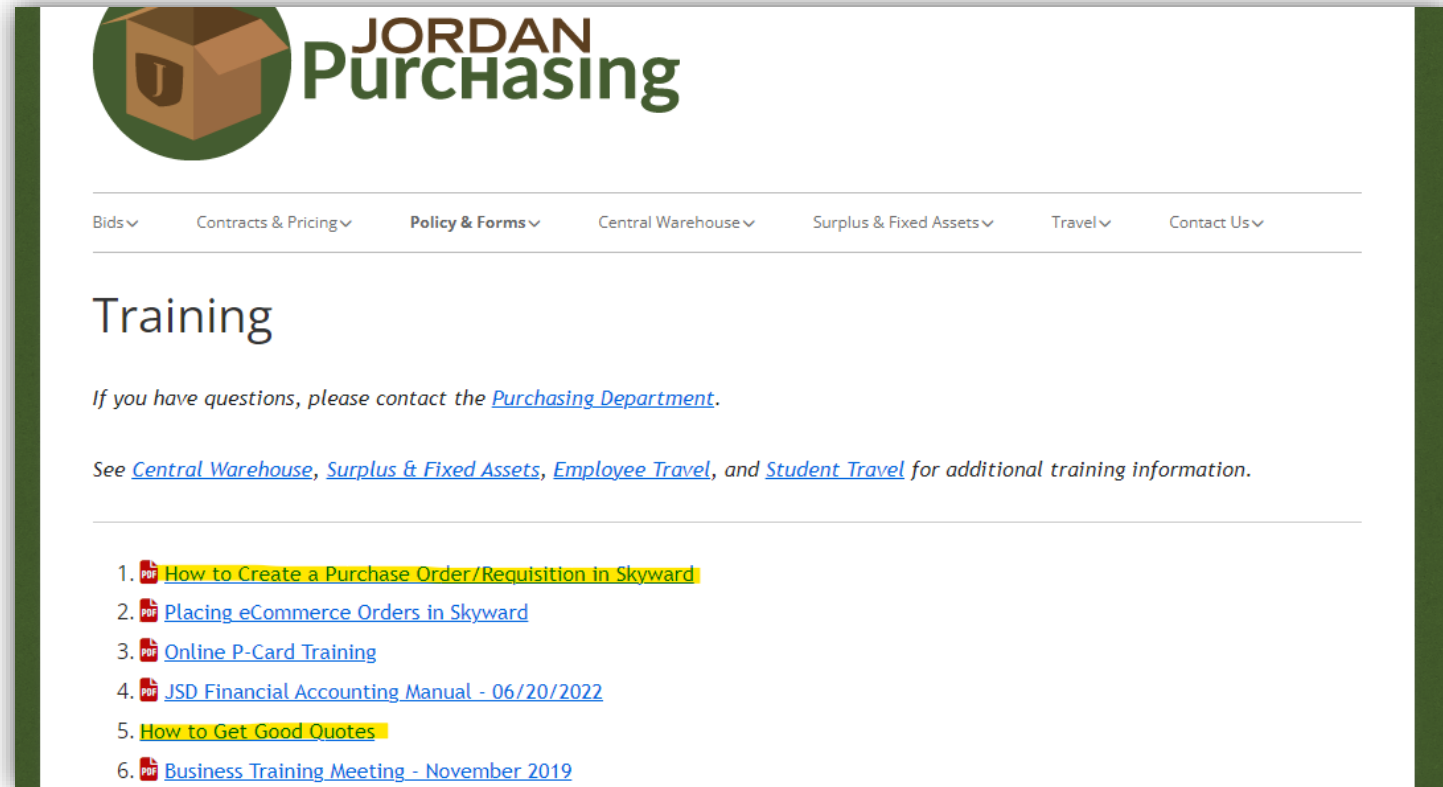
Rachel Mariano

Requisition Reminders



- Requisition Master
 - Description of item/service (useful for finding POs later on)
- Requisition Body
 - Description of item/service (mirror the quote)
 - Shipping
 - Quote number
- Attachments
 - Attach all written quotes
 - For the rare "For Payment Only" POs, attach the signed invoice
- Notes
 - Written record of all verbal quotes
 - Details the Vendor doesn't need to know (notes to self, notes to Purchasing)

Additional Resources



The screenshot shows the Jordan Purchasing website. At the top left is a logo featuring a brown cardboard box with a green circle containing a white letter 'J'. To the right of the logo, the text 'JORDAN Purchasing' is displayed, with 'JORDAN' in a smaller, bold, green font and 'Purchasing' in a larger, bold, green font. Below the logo and text is a horizontal navigation menu with several items: 'Bids', 'Contracts & Pricing', 'Policy & Forms', 'Central Warehouse', 'Surplus & Fixed Assets', 'Travel', and 'Contact Us'. Each item has a small downward-pointing arrow. Below the navigation menu is a large heading 'Training'. Underneath the heading is a paragraph of text: 'If you have questions, please contact the [Purchasing Department](#).' Below this is another paragraph: 'See [Central Warehouse](#), [Surplus & Fixed Assets](#), [Employee Travel](#), and [Student Travel](#) for additional training information.' At the bottom of the page is a numbered list of six items, each starting with a small red PDF icon. The items are: 1. [How to Create a Purchase Order/Requisition in Skyward](#), 2. [Placing eCommerce Orders in Skyward](#), 3. [Online P-Card Training](#), 4. [JSD Financial Accounting Manual - 06/20/2022](#), 5. [How to Get Good Quotes](#), and 6. [Business Training Meeting - November 2019](#).

- Training on the Purchasing website (under “Policy & Forms”)
 - purchasing.jordandistrict.org/links/training
- Contact Purchasing if you have any questions!

P-Cards & Amazon

Kris Wishart

P-Card Prohibitions



- Please **do not**...
 - Split orders of any kind
 - Purchase Fixed Assets
 - Purchase software that's not on the [JSD Learning Platform](#)
 - Make travel purchases such as hotel, airfare, or ride fees from your home to the airport
 - Approved travel charges are baggage fees, parking fees, and ride fees between airport and destination if no rental car/shuttle has been approved.
 - Give your P-Card to other employees

P-Card Prohibitions: Fixed Assets

Items that Need Asset Tags (generally \$150+)

Revised 1/24/2023

Technology	Audio Visual Equipment	Custodial Equipment	Kitchen Equipment (Industrial Type)	CTE Equipment	Copy Room Equipment	Misc.	Items Tracked by your School Tech
3D Printers	Amplifiers / Sound Systems / Speakers	Air Compressors	Deep Fryers	Auto Repair Equipment	Copiers	Base Stations	<i>The following items are NOT fixed assets, but are still tracked by Info Systems. Talk to your school tech if you receive these items.</i>
Charging Carts	Broadcasting Equipment	Blowers	Dishwashers	Clay / Molding Equipment	Electric Paper Cutters	Clothes Dryers	
Computers (Desktops) *	Cameras - Video & Photo	Buffers / Grinders	Freezers	Industrial Saws	Fax Machines	Clothes Washers	
Document Scanners	Document Cameras	Cutters / Trimmers / Shredders / Edgers	Ice Machines	Jointers	Laminators	Electronic Whiteboards (Smart Boards)	Apple TVs
Graphic tablets	Drones	Floor Machines	Kettles	Kilns	Paper Folding Machines	Evacuation Chairs	Chromebooks
Hotspots (use IMEI # for serial)	DVD / Blu-ray Recorders	Genie Lifts	Milk Coolers	Lathes	Paper Joggers	Exercise Machines (weight machines, treadmills, etc.)	Chromeboxes
iPads / Tablets	Learning Systems (such as VR, Nintendos, and other gaming systems)	Golf Carts / Mules	Mixers	Milling / Boring Machines	Plotters / Cricut Machines	Pianos *	
iPods	Lenses	High Pressure Washers	Ovens *	Planers	Postal Machines	Time Clocks	
Laptops *	Lighting Controls	Infield Drags	Proofers / Warming Cabinets	Presses		Any other items that cost \$5,000+	
POS Systems	Projectors	Key Machines	Refrigerators *	Sanders			
Printers	Receivers	Motor Scrubbers	Slicers	Sergers			
Robots †	Swivls	Mowers	Steam Cookers	Sewing Machines			
Walkie Talkies	Televisions	Tractors		Shapers / Routers			
Scanners	Tuners / Mixers / Switchers	Vacuums		Welders			
Servers							
* Chromebooks & Chromeboxes are tracked by school techs			* Household ovens and refrigerators you would find in a foods class or break room typically do not need tags		* Traditional pianos are the only musical instrument we tag.		
† Call before tagging.							
We do not tag any computer accessories (i.e. keyboard, mouse, stylus, docking station, etc.)							

This list is not exhaustive. If you are not sure if something needs a tag, especially if it's not listed—please give us a call. We are happy to answer questions!

Lesia Patterson - ext. 88717
Sandy Martinez - ext. 88719

P-Card Limits



- Single purchase limit
 - Email Kurt Prusse for requests for increase
 - Be specific -- what is it for?
 - Is it over \$5,000?
- Monthly credit limit
 - Email Kurt Prusse for requests for increase

P-Card Reminders



- Check each **billing cycle** to see if you have **any charges**
- Submit your **P-card statement to Accounting** by the **19th**
 - Must include **receipts** and **signatures**
- **Reconcile** on the US Bank website **before the 19th**
 - Write a **detailed description**
 - You can **start reconciling** as soon as a transaction posts to your account
- Reconciling a **Principal's/Director's P-card**
 - **Don't** use their login info.
 - Instead, contact **Dan Ellis** if you already have a P-card of your own, or contact **Kris Wishart** if not.



Amazon:

Teacher Groups, School Accounts, and Finding Orders



Teacher Groups



- Teacher Groups...
 - Save time for the Administrative Assistant
 - Give administration control over teacher ordering
 - Can include just specific teachers, such as leads



Adding People to a Teacher Group

Adding People to a Teacher Group (1 of 3)

To add to your Teachers Group you do the same thing BUT you must be in the Teachers Group. To get there you need to be on your school's account page. Then instead of clicking on people click on **Group** in the Member section.

The screenshot shows the Amazon Business Prime interface for Mountain Ridge High School. The 'Members' section is expanded, and the 'Groups' link is circled in red. A red arrow points from the 'Groups' link to the next screenshot.

This is what the next screen will look like. Now you will click on the group name. Here it is **MRHS Teachers**

The screenshot shows the Amazon Business Prime interface for Mountain Ridge High School. The 'MRHS Teachers' group is highlighted with a red arrow. The group has 102 members and is located under Mountain Ridge High School.

Adding People to a Teacher Group (2 of 3)

This is the next screen that you will see. You will follow the same steps as above for adding people to your teachers' group.

1. Click on People

Jordan School District | MRHS Teachers

MRHS Teachers

Jordan School District / High Schools / Mountain Ridge High School / MRHS Teachers

Billing & shipping
Manage your checkout preferences for employees by adding payment and shipping info.

- Shared settings
- Payment methods
- Address and delivery preferences
- Budgets (Blanket POs)
- Receiving (3-Way Match)
- Checkout defaults
- Your Invoices for Pay by Invoice

Members
Invite others to join the business account and organize them into groups with common settings.

- People
- Invitations
- Spend Visibility roles
- Groups

Group admin

- All admin
- Add an admin

Then this screen comes up and you go through the same process as before. Click the orange box that says “**Add people**” and choose – invite by email -

Back to MRHS Teachers

MRHS Teachers

Displaying 50 of 102

Add people

Download list of people Manage via spreadsheet

Refine by

Find a person

Groups

- This group only
- This group and subgroups
- This group and parent groups

Role

	ALISON LAVERY alison.lavery@jordandistrict.org Requisitioner Shared approval settings	Actions
	ANDRE ASHTON andre.ashton@jordandistrict.org	Actions

Adding People to a Teacher Group (3 of 3)

And you come to this screen: : 1. Enter the person's district email address 2. Select "Buyer" 3. Click the orange box "Invite People"

Jordan School District | MRHS Teachers ▾

[Back to MRHS Teachers](#)

Add People to MRHS Teachers

[Invite by email](#) [Upload a spreadsheet](#) [Share an invite link](#)

Enter their email addresses

Assign their roles

Role	Able to
<input checked="" type="checkbox"/> Buyer (requisitioner)	Place orders or request order approvals.
<input type="checkbox"/> Admin	Manage people and approvals. Perform Finance and Tech roles.
<input type="checkbox"/> Tech	Set up system integrations.
<input type="checkbox"/> Finance	Access order history, invoices, and credit notes.

Tip - You can change people and roles at any time on the People page.

[Invite people](#)

❖ You now have added a teacher to your Amazon Teachers Group

Whether you are added a person to your school account or your teachers' group please watch for the green box that shows up at the top of the page. (It is only there for a few seconds)

It will say one of the following:

A person has been invited to your group – The person will receive an email with a link to join the school account they have been invited to.

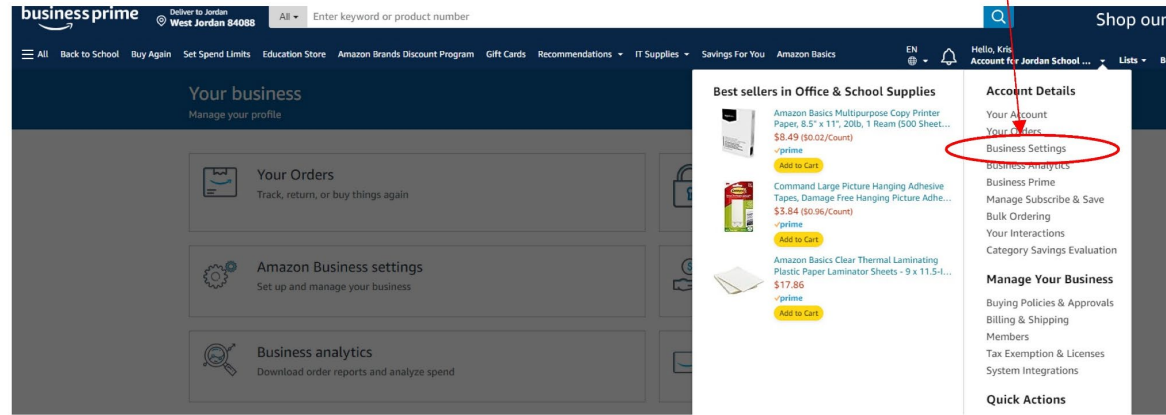
A person has been added to your group – This person is a member of another group as well so please reach out to Kris Wishart to find out how to move them from the other group.



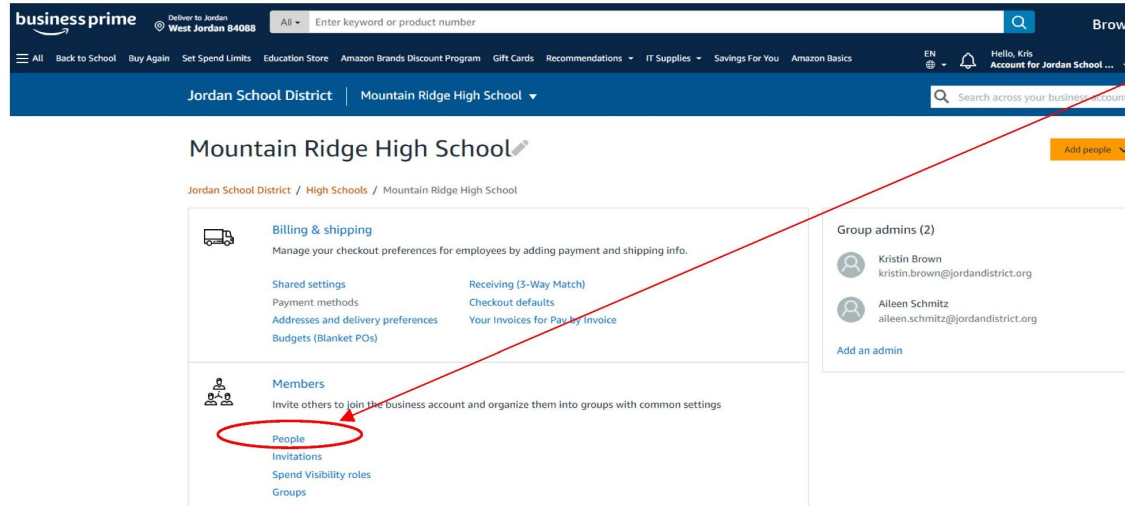
Adding People to a School Account

Adding People to a School Account (1 of 2)

When you log into Amazon – make sure you are on your school page – To do this go to **Business Settings**



It should look like this – To add someone to the school account (this should only be people who have P-Cards) click on the **People** under the Members section.



Adding People to a School Account (2 of 2)

The screen should look like this – here you can add people to your school by clicking the orange box that says “Add people” and choose – *invite by email* -

Back to Mountain Ridge High School

Mountain Ridge High School

Displaying 14 of 14

Add people ▼

Refine by

Find a person

Groups

- This group only
- This group and subgroups
- This group and parent groups

Role

- Requisitioner
- Administrator
- Finance
- Tech

Download list of people Manage via spreadsheet

	Aileen Schmitz aileen.schmitz@jordandistrict.org Administrator Requisitioner Member of subgroups MRHS Teachers and Skyward Punchout Group Shared approval settings	Actions ▼
	Corie Johnson Corie.Johnson@jordandistrict.org Requisitioner Shared approval settings	Actions ▼
	Elizabeth Easton elizabeth.easton@jordandistrict.org Requisitioner Shared approval settings	Actions ▼

This is the screen that will come up: **1. Enter the person’s district email address** **2. Select “Buyer”** **3. Click the orange box “Invite People”**

Add People to Mountain Ridge High School

Invite by email Upload a spreadsheet Share an invite link

Enter their email addresses

Assign their roles

Role	Able to
<input checked="" type="checkbox"/> Buyer (requisitioner)	Place orders or request order approvals.
<input type="checkbox"/> Admin	Manage people and approvals. Perform Finance and Tech roles.
<input type="checkbox"/> Tech	Set up system integrations.
<input type="checkbox"/> Finance	Access order history, invoices, and credit notes.

Tip - You can change people and roles at any time on the People page.

Invite people


Unlock these benefits by adding people to your team.

Save time by delegating purchases.

Maintain control with spending guardrails.

Keep track of purchases in one place.

❖ You have now added someone to your school account.

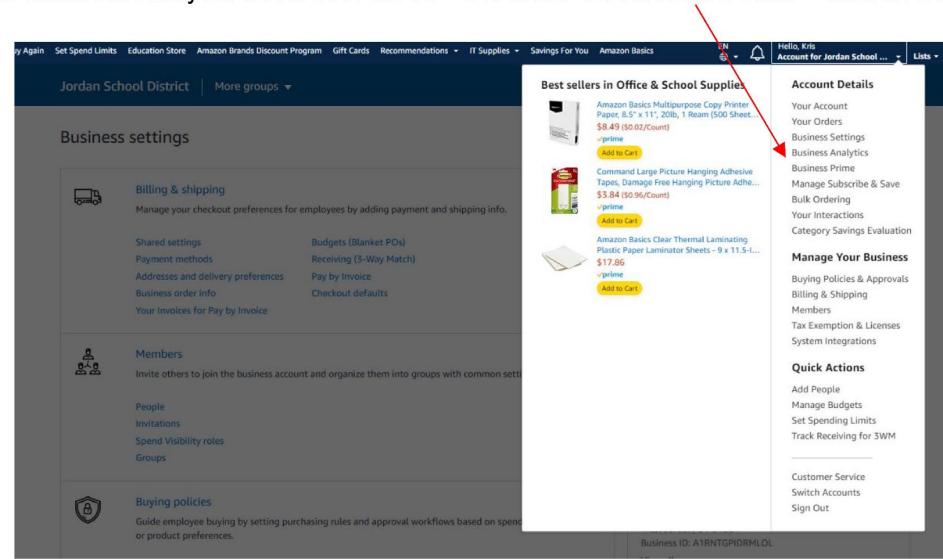


How to Locate Orders Placed in a Teacher Group or School Account

Business Analytics Orders

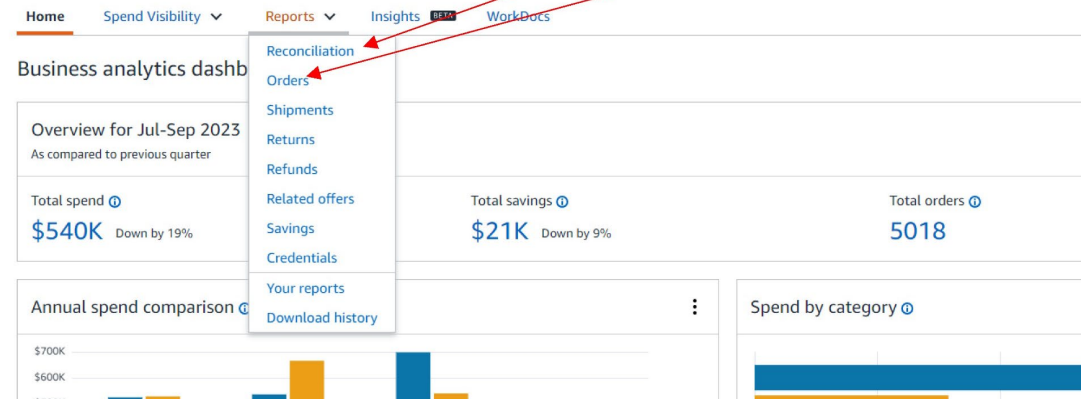
How to locate an order for you or someone in your school account.

Business Analytics – to get to Business Analytics hover over the Hi – it is under the Account Details – click on Business Analytics.



This is the next screen to come up – hover over Reports and choose **Reconciliation** or **Orders**

Business analytics



Business Analytics Reconciliation

Reconciliation – This will show you all orders month to date. You can customize the dates by clicking on the gray box labeled **Time period** and selecting the range you are looking for or you can create a custom range. You can scroll across and see **Transaction Date** (date it charged to your card) **Payment Amount**, **Account Group**, **Payment Identifier** (last four digits of the P-Card), **Account User** (Name of the person who placed the order) and as you scroll over you will find **Order Id** (order number) and other details. All of this should help you locate the information you are trying to locate.

Reconciliation report Time period Month to date Downloads Generate report [Download histo](#)

[Add title and save to your templates](#) [Compare order and payment history to your records.](#)

<input type="checkbox"/>	Transaction Date	Payment Reference ID	Transaction Type	Payment Amount	Account Group	Payment Instrument Type	Payment Identifier	Account User	Order Id
<input type="checkbox"/>	09/10/2023	3K44Ppwu1CJq6TYJ581I	Charge	\$204.91	MRHS Teachers	Visa	6578	Cris Stiles	09/07/2
<input type="checkbox"/>	09/10/2023	3F9GRJFm8E52FQ6Rjimu	Charge	\$1,451.44	MRHS Teachers	Visa	6578	Cris Stiles	09/07/2
<input type="checkbox"/>	09/10/2023	1vTVXNJ1rB67HpI5G0Ly	Charge	\$49.98	MRHS Teachers	Visa	6578	Cris Stiles	09/07/2
<input type="checkbox"/>	09/09/2023	3NRqkZJJx0BmXUN5WjVc	Charge	\$105.46	Mountain Ridge High School	Visa	1287	Katie Wall	09/07/2
<input type="checkbox"/>	09/09/2023	mAGJwOUF95Cw1Mpztrr	Charge	\$29.98	MRHS Teachers	Visa	6578	Cris Stiles	09/07/2
<input type="checkbox"/>	09/09/2023	2UGD1XEU2QT	Charge	\$3.94	MRHS Teachers	Visa	6578	TAYLOR THOMAN	08/31/2
<input type="checkbox"/>	09/09/2023	4KU5RPY72ZKI	Charge	\$56.32	Mountain Ridge High School	Visa	0009	Kristin Brown	09/07/2
<input type="checkbox"/>	09/09/2023	1hjgkxm4YKodtdlomgI9	Charge	\$36.28	MRHS Teachers	Visa	6578	TAYLOR THOMAN	08/31/2
<input type="checkbox"/>	09/08/2023	75H5HGLYQYL	Charge	\$122.31	Mountain Ridge High School	Visa	6578	Aileen Schmitz	08/21/2
<input type="checkbox"/>	09/08/2023	3QnN4XQEiyLPufSzB6XR	Charge	\$25.09	MRHS Teachers	Visa	6578	Blaikly Lever	09/05/2
<input type="checkbox"/>	09/08/2023	YEB4pC1pgx7I56P9c4sR	Charge	\$29.98	MRHS Teachers	Visa	6578	Cris Stiles	09/07/2
<input type="checkbox"/>	09/08/2023	NexNkenByfRiv6FQDMdi	Charge	\$11.19	Mountain Ridge High School	Visa	1287	Katie Wall	09/07/2

Filter Get order documents

Account Groups Adjust columns

equals

Mountain Ridge High School

Add new filter

Submit

Remove all filters x

Your Orders

The last way to find orders is to go to **Your Orders** (hover over Hi and under the Account Details you will see Your Orders) This is what that screen will look like. You will need to change the **View Your Orders** option to **View All Orders: Jordan School District**. This will bring up all order placed by your school and teachers' groups. You can scroll down and look for the item. The default is for **last 30 days** but you can select past 3 months or for the year.

Your Orders **Search Orders**


View Your Orders: Paid by You **Orders** Buy Again Not Yet Shipped Digital Orders Local Store Orders Cancelled Orders

1 order placed in last 30 days

ORDER PLACED	SHIP TO	PLACED BY	TOTAL	PO# Lisa Cook
August 18, 2023	Jordan School District	Kris Wishart	\$13.12	ORDER # 111-2471787-2733062



View order details | Printable Order Summary

Delivered Aug 22, 2023
It was handed directly to a receptionist or someone at a front desk.
Signed by: Front Desk

 Texas Instruments TI-1795 SV Standard Function Calculator
Sold by: Amazon.com Services LLC
Return eligible through Sep 20, 2023
\$13.12
Buy it again

Track package
Get product support
Print packing slip
Return or replace items
Share gift receipt

Buy it again

-  Amazon Basics Freezer Gallon Bags, 90 Count (Previous purchase)
Purchased Feb 2023
See all buying options
-  Scotch Magic Tape, 3 Rolls, Numerous Applications, Invisible, Engineer...
See all buying options

These three (3) options should help you find those missing orders, payment amounts and order numbers.

Questions?



- Visit the Purchasing website & review the [Training under Policy & Forms](#)
- If you can't find an answer there, please call me: [Kris Wishart, ext. 88708 \(801-567-8708\)](#)

Please contact us if you have questions!

purchasing.jordandistrict.org