Documents showing the success of the program or process improvement within your agency

The Procurement department has begun utilizing Smartsheet to automate and digitize many processes. Smartsheet has eliminated many of our formally paper-based processes which led to inefficiencies and at times filling out forms multiple times due to being lost or misplaced. In a short period of time, Smartsheet has grown from just being used in the Procurement Services department to now ten departments throughout the organization and is even the tool used to collect COVID-19 cases through an intake form. Procurement Services has provided demonstrations to numerous internal departments and several fellow school districts on our use of Smartsheet and how we have used the tool to improve our processes and management of tasks. We also have a dashboard that is customizable with different data points that are important; currently, we have data on the number of expiring contracts and other data related to our scorecard metrics as shown in image 1.

**Procurement & Contracting Dashboard**

![Procurement & Contracting Dashboard](image1)

**Contract Management**

The use of Smartsheet originally began as a better means of tracking contract information. The previous method included a clunky Microsoft Access database that always seemed to crash and not save data correctly with multiple users working in it. In order to share bid and contract information with our internal departments, we uploaded a PDF to our Intranet page which only allowed 10 documents per page. With over 100 bench contracts that we needed to share the contract information, this created over 10 pages of documents users had to sift through to find what they needed. It also created manual work of procurement staff to continually manage the documents posted.

As shown in image 2, key data points are tracked and the paperclip icon on the far left indicates attachments for that item that are easily dragged and dropped. This information is available both to our internal customers on our department’s Intranet page and to our external customers on our public Internet page using a custom report and only shares information that is relevant to that audience since many data points tracked are used by the procurement office. The previous method to share contract information was time-consuming and clunky to manage and also for our users to find the information they needed.
To help buyers manage their contracts that are approaching expiration, notifications are sent to the assigned buyer six months out from expiration, then another at 30 days, another at seven days, and a final at one day. The color of the contracts also changes to easily identify which ones should take priority through renewing the agreement or conducting a re-procurement activity. If a contract is within six months of expiration, it will turn yellow and when it is within 30 days of expiration it turns orange.

As information is updated by Procurement staff, the information is automatically updated on the reports available on our Intra and Internet sites. This eliminates the need to manually update information on our sites which was previously a time-consuming task. We have also developed reports for specific departments, such as maintenance, so they only view contracts they will use. Image 3 shows an example of the public facing report that is pulled from data being entered and updated by Procurement staff.

**Workload Tracking**

Our use of SmartSheet has grown substantially in the last year to automate additional processes. One point that was another challenge for Procurement was to have a central place to see the status of our in-progress work and projects. SmartSheet allows us to see the status of all of our team’s work. When a new procurement item is assigned to a team member on the SmartSheet, they are sent an automated email notifying them that a new task has been assigned to them so they can begin working on it. The team adds notes on the status; this is helpful for when staff is out of the office on vacation so we can stay up to date on the status of items and also for our team to have an overview of their in-process assignments to keep them organized and on track so things don’t fall through the cracks. Image 4 shows how this is tracked and assigned.
Purchasing Card Program

We have converted our previous paper-based purchasing card application and change form to a SmartSheet intake form. The first section of the form is the agreement statement that cardholders are to abide as shown in image 5. The second section shown in image 6 is the application itself as is the information required for Procurement to process the application. One of the requirements is an upload of their training certificate. In the past, applications would be held up and we had to chase down people to get their certificates. Now, it is required to be uploaded or they will not even be able to submit the application.
Another benefit is that there are automations built into the form for approvals. The user inputs their supervisor’s email address and once submitted, the supervisor immediately receives an email to approve or deny their application which can be done anywhere at any time. Previously, a supervisor could only sign off on the paper application when they were in the office. There are also additional approval workflows in the process if there are grant funds being used. This is done by using highly customizable workflows and additional approvals can be added as needed.

Once an application is submitted, Procurement now has visibility into where that application is in the form of a database which a sample is shown in image 7. The training certificate is attached and can be viewed by clicking the paperclip icon to the far left. Comments can also be added by the Procurement staff who handles the applications such as reasons why the application was rejected or if incorrect information was entered by the applicant. Not visible on the form, there are additional fields that Procurement staff can track show in image 8 such as when the application was sent to the bank, when the card is received in our office, the date it is sent to the applicant, and the date we receive confirmation the card was received by the applicant. This gives us visibility into the status of all applications that we previously did not have.
These same types of workflow and controls are also used in our purchasing card change form which is used when a cardholder needs to make a change such as a one-time limit increase, a request to close the card, or a change of cost center. The date on this form is different from the application and is shown in image 9. As with the application, if grant funds are used on the card, a workflow is triggered to the grants finance office for approval and all changes go to the supervisor for approval.
Purchasing Card Change Form

This form is to be used by existing OCPS purchasing card holders when a change to the card is required.

Before the change is processed by Procurement Services, the form will require approval by the cardholder's supervisor which will automatically be sent when this form is submitted.

Card Type *
Select

Cardholder's Email Address *

Cardholder's First Name *

Cardholder's Last Name *

Cardholder's Cisco Ext. *

Supervisor's Email Address *

Work Location # *

Last 4 Digits of Card *

Requested Change *
Select all that apply
Select

Grant/Donation Fund?
If a grant or donation fund will be used, additional approval will be routed to the Grants Finance Office for approval.

File Upload
Attach supporting files or documents as needed

Drag and drop files here or browse files

Send me a copy of my responses
Vendor Performance Reports

Another area we have implemented SmartSheet is the collection of vendor performance issues. This was previously another paper-based process that required printing, scanning, and emailing. Image 9 shows the form a user would enter when they are reporting an issue. They have the capability of attaching files such as emails or photos to support poor performance. Once this is submitted, Procurement is emailed and the complaint is assigned to the appropriate buyer. As with the workload tracking sheet, the buyer receives an email notifying them they have been assigned something to follow up on. The report is also downloaded and saved in the contract file. This also creates a database of vendor issues to give Procurement visibility into who the vendors are that receive the most complaints and easily allows us to see a common thread of issues across the organization.
Vendor Performance Report

Prepared By *
Name of the person submitting this performance report.

Cisco Extension *

School/Department *
Name of the school or department submitting the report

Vendor Name *
Provide the name of the vendor for this performance report.

Vendor # *
Provide the vendor's SAP vendor number

Contract/Bid Number
Provide the contract/bid number of the vendor if known.

Purchase Order No. *

Type of Issue *
Select

Date of Issue *
Provide the date of the incident or issue being reported occurred.

Description of Issue *
Provide detailed information on the issue. Cite the specific paragraph from the vendor's contract that has been violated. Attach additional files as necessary.

File Attachments
Add attachments as necessary to include photographs of damage or additional supporting documentation of the issue being reported.

Drag and drop files here or browse files
Surplus Operations

SmartSheet has been implemented in assisting managing our surplus property that is available for redistribution internally to schools and work locations as shown in image 12. Internal departments now have visibility into what is in stock.
### Scorecards

The collection and roll-up of data used in our Strategic Plan Scorecard is also managed within SmartSheet. Individual buyers enter their savings for items they manage and cycle times for solicitations into a SmartSheet (image 13) that then aggregates the data using formulas for the department. This is

<table>
<thead>
<tr>
<th></th>
<th>Primary</th>
<th>Description of item requested</th>
<th>Image for reference only, actual items may vary</th>
<th>Quantity Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>Table, Horse Shoe, Used</td>
<td><img src="image" alt="Table, Horse Shoe, Used" /></td>
<td>12</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>Table, Science, 24” x 60”, Used</td>
<td><img src="image" alt="Table, Science, 24” x 60”, Used" /></td>
<td>47</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>Desk, Teacher's, Double Pedestal, Used</td>
<td><img src="image" alt="Desk, Teacher's, Double Pedestal, Used" /></td>
<td>122</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>Bookcase, 36” x 48”, Used</td>
<td><img src="image" alt="Bookcase, 36” x 48”, Used" /></td>
<td>27</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>Bookcase, 36” x 60”, Used</td>
<td><img src="image" alt="Bookcase, 36” x 60”, Used" /></td>
<td>129</td>
</tr>
</tbody>
</table>
then fed automatically into a master scorecard for the entire department and is summed for the entire year (image 14). The previous process required each buyer to have their own Excel file which then had to be copied and pasted into a different file where it was summed and then that was then copied to another file. This has reduced the chances of human error in calculations and the need for data entry in multiple areas.

![Image 13]

![Image 14]