



OPERATIONAL SERVICES DIVISION



COMMBUYS Phase II

All-Liaison Update Meeting on Departmental Contracts



April 21, 2014

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Departmental Master Blanket Purchase Orders (MBPOs) and Catalogs

- Overview of Classroom Training
- Thinking Through Catalog Options
- Review of Upcoming Training Schedule
- Reminder About Cooperative Purchasing

Vendor Registration

- Overview and Demo
- Available Vendor Support

Readiness Review

- Calendar – Next Meetings
- Liaison Resources

Next Steps and Q&A



Departmental MBPOs and Catalogs

Class Objectives



After taking the “Setting Up Your Departmental Master Blanket Purchase Order” class, attendees will be able to:

- Define the different types of MBPOs
- Define types of Catalogs
- Create a single vendor MBPO
- Create a Distributor Model MBPO
- Create catalogs in MBPOs

Departmental MBPOs and Catalogs

What is a Master Blanket Purchase Order (MBPO)?

- The term Purchase Order (PO) represents any agreement with a vendor to provide goods or services, including term contracts, orders against contracts, or one-time purchases.
- The Master Blanket Purchase Order (MBPO) is the COMMBUYS equivalent to a “Contract.”
- When a contract is awarded the MBPO should be created in COMMBUYS.
- Once an MBPO is created and we begin to purchase, individual purchases are “released” from the MBPO.
- All purchases are linked back to the MBPO.



Departmental MBPOs and Catalogs

MBPO Information



The MBPO includes information such as:

- The organization that “owns” or administers the contract
- Contract begin/end dates
- Vendors/distributors
- Catalog listing
- Important contract guidance or information/RFRs and other attachments deemed necessary



Departmental MBPOs and Catalogs

MBPO Ownership



The MBPO includes information such as:

- Contracts designated as Statewide are owned by OSD. In COMMBUYS they are coded **SW**.
- Departmental contracts are owned by the department that conducted the procurement and created the contract. In COMMBUYS they are coded **NC**.
- Departments can choose to allow other individual agencies to utilize the department contract under cooperative purchasing.
- Departments must not create or designate contracts as statewide without consent in writing from OSD.

Departmental MBPOs and Catalogs

MBPO Types

- **Single Vendor MBPOs-**
 - Upon award of the contract, a unique MBPO is created for each awarded vendor
- **Distributor Model MBPOs**
 - Multiple awards but only one Master Blanket is created
 - All awarded vendors are contained in the same MBPO and designated as distributors

Departmental MBPOs and Catalogs

Distributor Model

- **Solicitation Enabled**
 - Is used primarily when quotes are required prior to purchase
 - The process allows users to directly request quotes from distributors
 - Is set up as Standard Release
 - Requires the requisition and purchase order documents to be approved
- **Non Solicitation Enabled**
 - This does not allow the solicitation of quotes
 - set up as a Direct Release. **A Direct Release** MBPO only requires approval at the requisition level.



Departmental MBPOs and Catalogs

Definition of Catalogs



- The catalog in a COMMBUYS MBPO consists of the items (commodities or services) that can be purchased from that contract.
- Catalogs maybe set up in several different ways depending on the specifics of the contract.
- A catalog must contain at least one line item.
- All MBPOs must have a catalog.



Departmental MBPOs and Catalogs

Catalog Types



- **Specific Line Item (Specific Pricing):** All items offered by the vendor are listed with the negotiated price in COMMBUYS.
- **Specific Line Item (No Pricing):** All items offered by the vendor are listed in the catalog but without fixed pricing (\$00.00).
- **General Line item:** An MBPO that has a line item or items with zero dollar amounts and which are keyword-rich to facilitate searching.
- **Punch Out (G2B):** A vendor hosted website, which is specific to the contracted items and contains contracted pricing



Departmental MBPOs and Catalogs

Creating MBPOs: Training Schedule



Departmental MBPO Class

Morning Session: 9:00 AM – 12:30 PM Class Instruction and Exercises

Afternoon Session 1:30 PM – 4:00 PM Hands-on Assistance (optional sign-up session)

April

- Thursday, April 23, Boston
- Monday, April 27, Shirley

May

- Monday, May 4, Boston
- Wednesday, May 6, Bridgewater
- Monday, May 11, Shrewsbury
- Wednesday, May 13, Boston
- Monday, May 18, Shrewsbury
- Thursday, May 21, Boston
- Tuesday, May 26, Shrewsbury

June

- Tuesday, June 2, Shrewsbury
- Thursday, June 4, Boston
- Tuesday, June 9, Shrewsbury
- Thursday, June 11, Boston
- Friday, June 19, Boston
- Wednesday, June 24, Boston

Departmental MBPOs and Catalogs

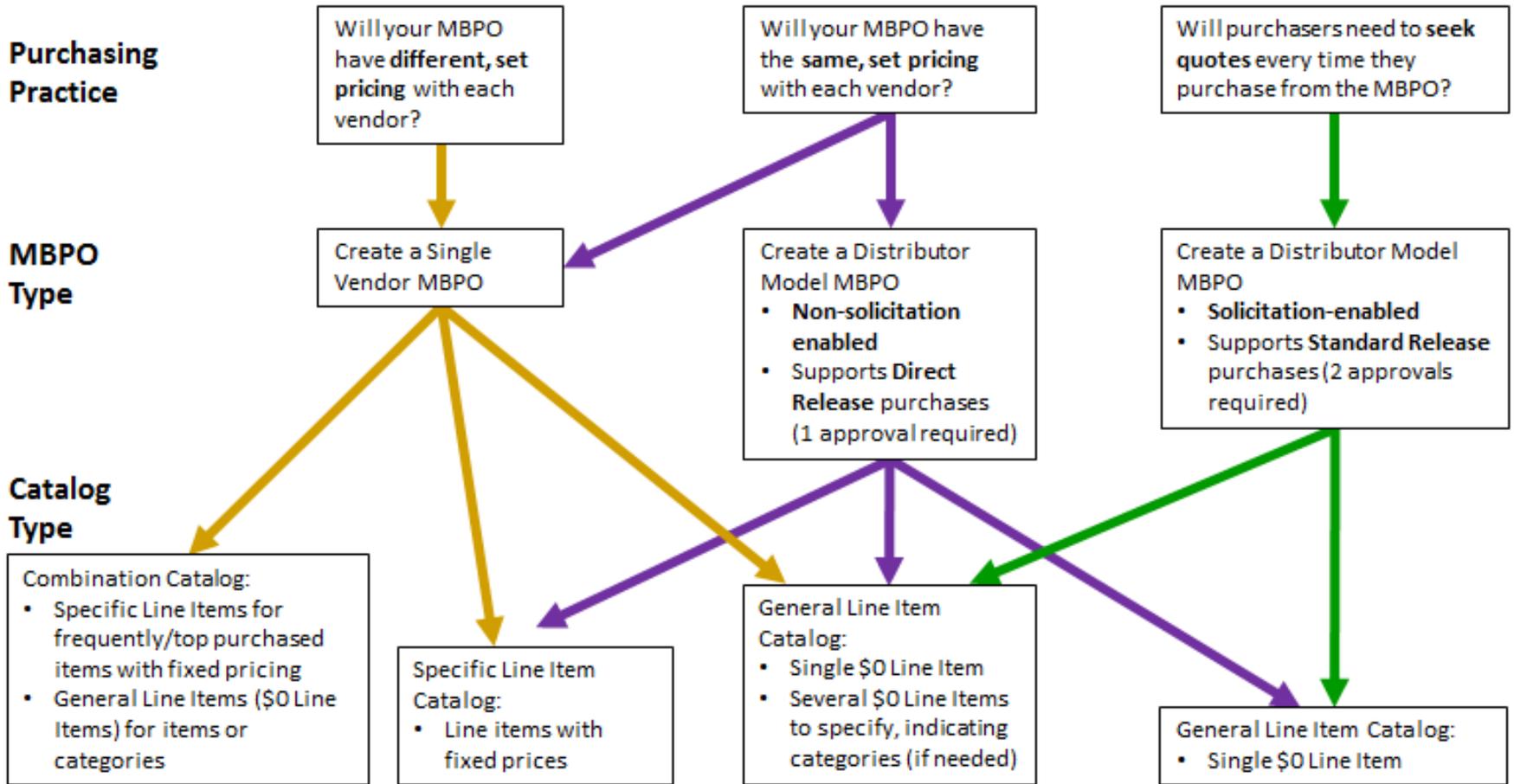
Thinking Through Options

How you purchase goods and services will govern the type of MBPO you create and the way you set up the associated catalogs.

- Do you buy items on contract with specific unit prices, or do you seek quotes from vendors on the contract?
- Do you have contract vendors with large, disparate catalogs or price sheets, or vendors with only a few items in their catalog?
- Do you purchase most contract items on a regular basis, or do you purchase a few items frequently, and most other items infrequently?
- Will you want to be able to receive orders at the item level, or would receiving orders by dollar value suffice for your business process?
- Does your contract have numerous vendors all of whom sell the same things at the same price? Or do you have contract vendors who sell very different items at different costs within the same general category?

Departmental MBPOs and Catalogs

Thinking Through Options

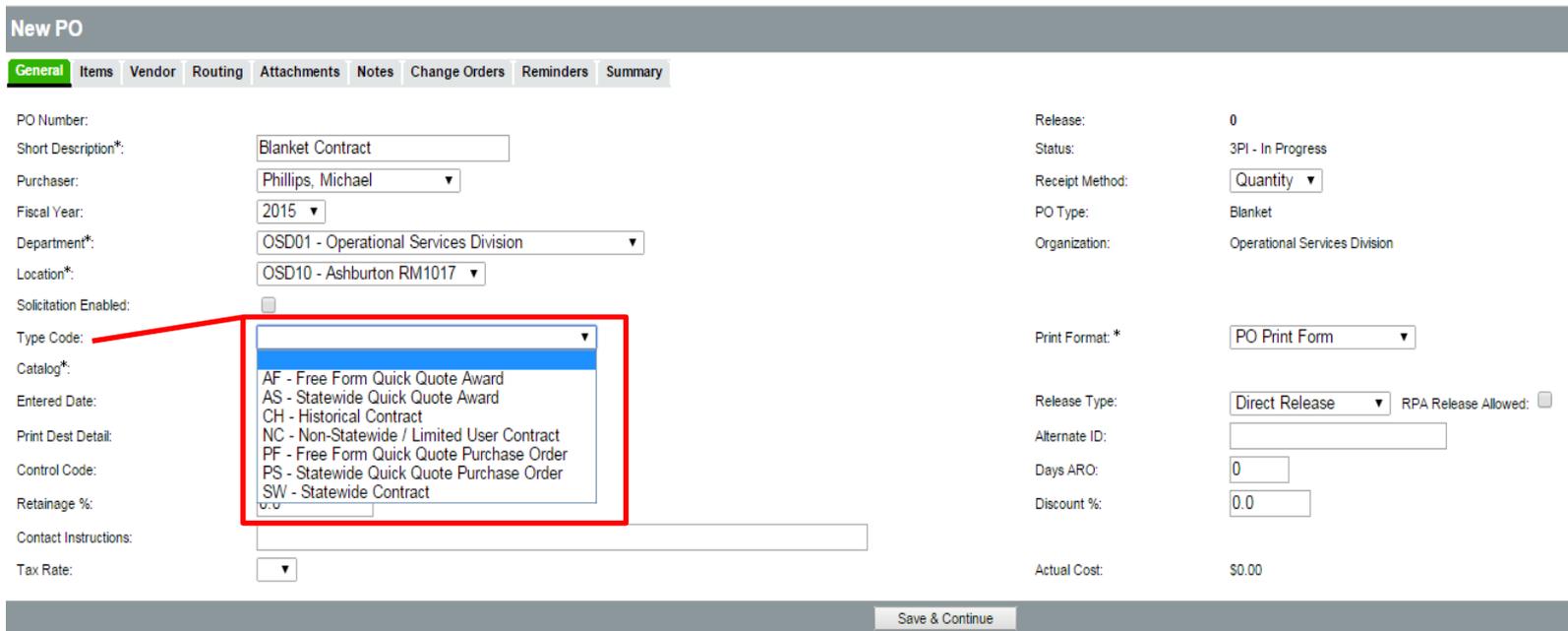


Departmental MBPOs

Reminder: Use of “Cooperative Purchasing Allowed” Checkbox

When creating a new Master Blanket Purchaser Order, remember to select the Type Code “NC – Non-Statewide / Limited User Contract.”

For further information, please refer to instructions the **COMMBUYS Policy** available at this link:
<http://www.mass.gov/anf/docs/osd/policy/commbuys-use-policy-for-purchasing-organizations.docx>



New PO

General | Items | Vendor | Routing | Attachments | Notes | Change Orders | Reminders | Summary

PO Number: []
 Short Description*: Blanket Contract
 Purchaser: Phillips, Michael
 Fiscal Year: 2015
 Department*: OSD01 - Operational Services Division
 Location*: OSD10 - Ashburton RM1017
 Solicitation Enabled:
 Type Code: **NC - Non-Statewide / Limited User Contract**
 Catalog*: []
 Entered Date: []
 Print Dest Detail: []
 Control Code: []
 Retainage %: []
 Contact Instructions: []
 Tax Rate: []

Release: 0
 Status: 3PI - In Progress
 Receipt Method: Quantity
 PO Type: Blanket
 Organization: Operational Services Division
 Print Format: * PO Print Form
 Release Type: Direct Release RPA Release Allowed:
 Alternate ID: []
 Days ARO: 0
 Discount %: 0.0
 Actual Cost: \$0.00

Save & Continue

NOTE: “Free Form Quick Quote” and “Statewide Contract Quick Quote” are referenced in the drop-down selection as a historical record **only** and are not utilized in COMMBUYS.



Departmental MBPOs

Reminders: Use of “Cooperative Purchasing Allowed” Checkbox



When establishing the **Controls** related to the MBPO, the following fields are required:

Master Blanket/Contract Begin Date: the effective start date

Master Blanket/Contract End Date: the effective end date

Organization: Defaults to the Organization creating the MBPO and governs which COMMBUYS Organizations can purchase from the MBPO

Department: Defaults to AGY - Agency Umbrella Master Control of the Organization creating the MBPO and governs which COMMBUYS Departments can purchase from the MBPO.

Departmental MBPOs

Reminders: Use of “Cooperative Purchasing Allowed” Checkbox

Optionally, the Cooperative Purchasing Allowed feature can be enabled to allow other Organizations specified in the original RFR to purchase from the MBPO.

Prior to enabling this feature, Purchasers should review and comply with **COMMBUYS Policy** Section 8: CREATING AND MANAGING CONTRACT RECORDS IN COMMBUYS.

Master Blanket Purchase Order PO-15-1080-OSD01-OSD10-00000002248

General Items Vendor Routing **Control** Attachments Notes Change Orders Reminders Summary

General Vendor

Confirmation Messages

- Changes saved successfully.

Master Blanket/Contract Begin Date*: 04/16/2015 Master Blanket/Contract End Date*:

Cooperative Purchasing Allowed

Organization	Department	Dollar Limit
1080 - Operational Services Division	AGY - Agency Umbrella Master Control	0.00
1080 - Operational Services Division	Add New: <input type="text"/>	0.0

Dollar Limit set to 0 indicates no limit.

Save & Continue Reset



Vendor Registration

Demonstration



Demonstration of the vendor registration process so that agencies can understand the steps in the process and level of complexity involved

- Information required for registration
- Questions to consider in advance of registration
- Steps in the registration process



Vendor Registration

Available Vendor Support



Training for Vendors

How to Locate and Respond to Bids

Monday, May 4 from 10:00-11:00 a.m. (one-hour webinar)

Monday, May 11 from 10:00-11:00 a.m. (one-hour webinar)

Thursday, May 28 from 1:30-2:30 p.m. (one-hour webinar)

Tuesday, June 9 from 9:30 a.m.- noon (Instruction-Led Training in Boston)

Tuesday, June 23 from 10:00-11:00 a.m. (one-hour webinar)

COMMBUYS Essentials of Navigation, Searching and UNSPSC

Friday, May 8 from 9:00 a.m.-12:30 p.m. (Instructor-Led Training) **SOLD OUT**

Friday, June 5 from 9:00 a.m.-12:30 p.m. (Instructor-Led Training) **SOLD OUT**

Friday, July 17 from 9:00 a.m.-12:30 p.m. (Instructor-Led Training)

We also plan to offer Vendor Registration webinars over the coming weeks.

To view the full Training Calendar, visit:

<http://www.mass.gov/anf/budget-taxes-and-procurement/procurement-info-and-res/osd-training-events-and-outreach/osd-event-calendar.html>



Vendor Registration

Available Vendor Support



Webcasts

COMMBUYS Vendor Registration (Including Instructions for Application to the Small Business Purchasing Program)

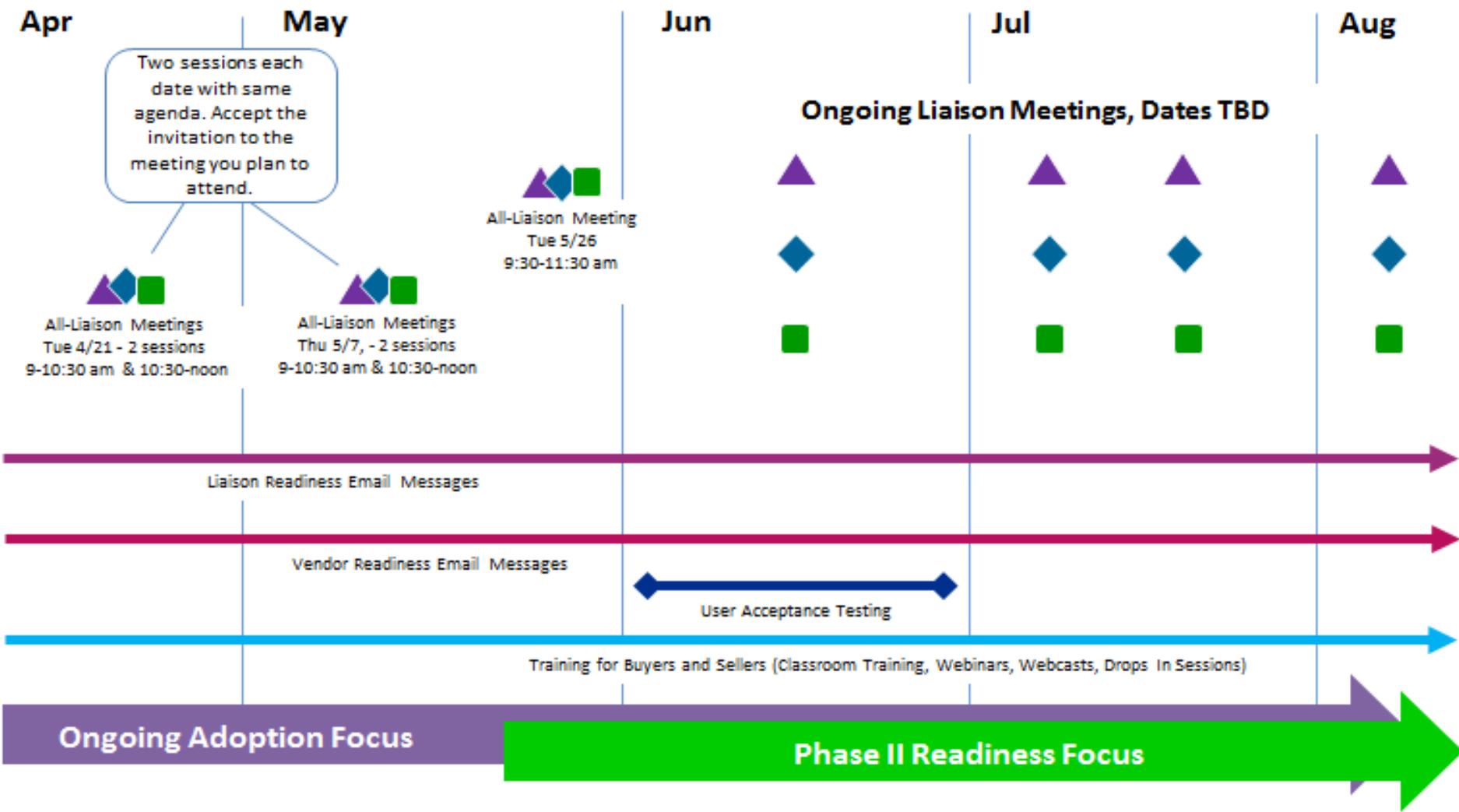
<https://www.youtube.com/watch?v=mWMLx4UgHtQ&feature=youtu.be&list=PL247E2162C4B2F10A>

Job Aids

Covering COMMBUYS vendor registration, creating quotes, and purchase order topics. See the full set of available vendor job aids here:

<http://www.mass.gov/anf/budget-taxes-and-procurement/procurement-info-and-res/conduct-a-procurement/commbuys/job-aids-for-sellers.html>

Readiness Review: Updated Calendar





Readiness Review

Liaison Resources



Dedicated Liaison Web Page

We've created a web page dedicated to providing Liaisons access to meeting presentations, meeting recordings and links to Liaison Updates sent through Constant Contact.

From the OSD main page, select "Learn About COMMBUYS" under OSD Programs, then select "COMMBUYS Liaisons" under "Find Your COMMBUYS Community."

Or simply click: <http://www.mass.gov/anf/budget-taxes-and-procurement/procurement-info-and-res/conduct-a-procurement/commbuys/resources-for-all-commbuys-liaisons.html>



The screenshot shows the Mass.gov website interface. At the top, there are navigation links for "State Offices & Courts", "State A-Z Topics", and "State Forms". Below this is the "Administration and Finance" header. A search bar is visible on the right. The main navigation menu includes "Budget, Taxes & Procurement", "Employment, Equal Access, Disability", "Property Management & Construction", and "Hearings and Appeals". A breadcrumb trail shows the path: Home > Budget, Taxes & Procurement > Procurement Information > Conduct a Procurement > CO. The "COMMBUYS" section is highlighted, with a sub-section titled "Find Your COMMBUYS Community". This section contains a list of options: "Commonwealth Agencies", "Local Governments", "Sellers", and "COMMBUYS Liaisons". A red arrow points to the "COMMBUYS Liaisons" link. To the right of this list is a promotional banner for the "Small Business Purchasing Program (SBPP)", which includes text about finding benefits information and a call to action for registration and status verification.

Departmental Contract Lists

- By May 1, we will send Liaison a list of qualified Departmental contracts with end dates beyond July 1, 2015.
- Departments will need to review, prioritize and prepare to implement or activate these contracts as Master Blanket Purchase Orders in COMMBUYS if they have not yet been implemented.
- **All active Departmental contracts must be in COMMBUYS by August 15, 2015.**





Contacts



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