



OPERATIONAL SERVICES DIVISION



# All-Liaison Meeting on COMMBUYS User Roles



May 26, 2015

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# Agenda

## **Understanding COMMBUYS User Roles**

- Roles Defined
- Organization Administrator
- Current COMMBUYS Buyer Roles and their Functions

## **Mapping Roles to Purchasing Business Processes**

- Current COMMBUYS Roles in the Ordering Process
- Current COMMBUYS Roles in the Receiving Process

## **Maintaining Users and Approval Paths**

- Maintaining and Adding Users
- Approval Paths

## **Training Tracks by Role**

## **COMMBUYS Navigation “Tips and Tricks”**

## **Readiness Updates**

- Calendar – Next Meeting
- Liaison Resources

# Understanding Roles

## Roles Defined

- A **role** defines what business functions you can perform within the system.
- **Users** are assigned roles that are appropriate for their work responsibilities.



# Understanding Roles

## User Roles in COMMBUYS



- Organization Administrator
- Basic Purchaser
- Department Access

# Understanding Roles

## Organization Administrator (OA)

Users with the **Organization Administrator** role can:

- Maintain an organization and set up the procurement process for an organization, including its Departments, Locations, Users, and Approval Paths
- The OA role is not a Purchasing role

# Understanding Roles

## Department Access

Users with the Department Access role can:

- Generate requisitions or solicitations off SWC/ blankets.

Several options are available to provide additional capability for a user.

<input checked="" type="checkbox"/> Department Access	Department Access Role Privilege Type: (A department/location superuser must be a requisitioner)	<input type="text"/>
	If Department Access user, set up this user as	<input type="text" value="Contract Shopper"/>
<input checked="" type="checkbox"/> User is an Approver	<input type="checkbox"/> Disallow Ad-Hoc Reporting	
<input type="checkbox"/> Allow PO Receipts for Department Access Role		
<input type="checkbox"/> User May Create Bids		
<input type="checkbox"/> Can Open Formal Bids		
<input checked="" type="checkbox"/> Enable Change Order Creation		
<input type="checkbox"/> Department Buyer Enabled		
<input type="checkbox"/> Allow Requisition Item Import		

# Understanding Roles

## Basic Purchaser

Users with the **Basic Purchaser** role can:

- Create all documents such as requisitions, purchase orders, receipts, RPAs, bids, and their related documents (e.g. amendments and revisions).

Basic Purchasing  Can Open Formal Bids  Can Create Demand Requisition  BP Supervisor  Allow Requisition Item Import  Allow Contract Import  Disallow Ad-Hoc Reporting  Enable PO Item Upload

# Understanding Roles

## Approver

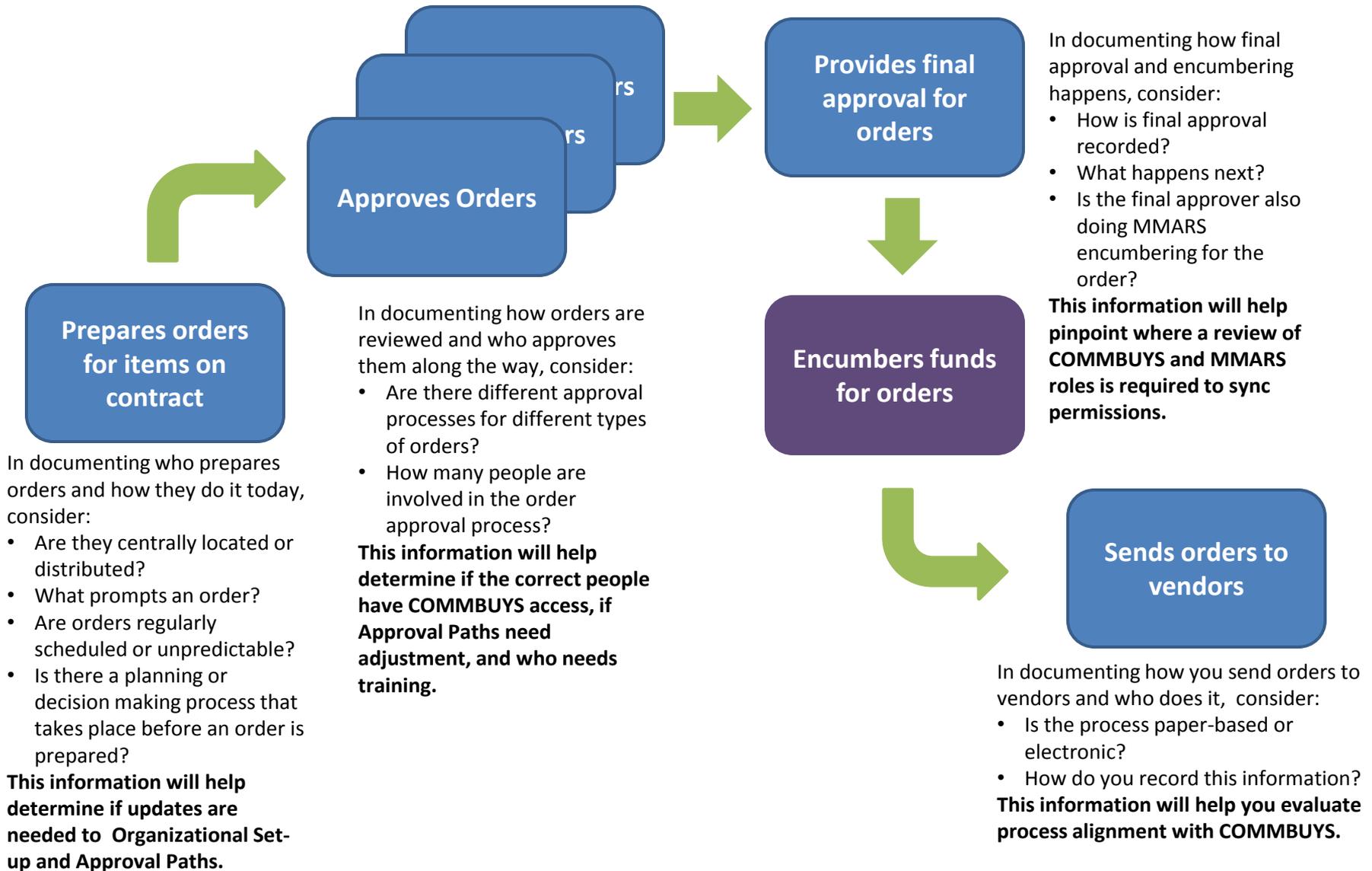
This setting gives a user approval rights and enables the OA to put that user on an approval path.

- Basic Purchasing role – already included
- Department Access role – a box needs to be checked to enable this role to serve as an approver

Multi Org Approver – This is a separate role that needs to be assigned when setting up a user. The multi-org approval capability is used in a scenario where a user from one organization shall act as an approver for another organization.

 Grant Multiorg Approval Rights

# Mapping Roles to Process: Ordering



# Mapping Roles to Process: Ordering

## Function

Prepares orders  
for items on  
contract

**WHO:** Think about who identifies the need for a good or service and all those involved in the requisitioning process.

**WHAT:** In documenting who prepares orders and how they do it today, consider:

- Are they centrally located or distributed?
- What prompts an order?
- Are orders regularly scheduled or unpredictable?
- Is there a planning or decision making process that takes place before an order is prepared?

**This information will help determine if updates are needed to your agency's Organizational Set-up and Approval Paths.**

## COMMBUYS Roles

COMMBUYS offers Organization Administrators flexibility in assigning and configuring roles, but here is some basic guidance.

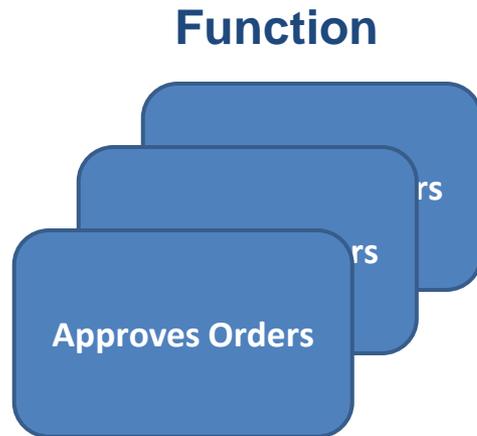
### Department Access

- Appropriate for those preparing requisitions for purchases off of existing contracts.
- Enables the OA to assign the user to purchasing functions specific to their COMMBUYS department and location.
- Can be configured so that the user in an approver and can be added to approval paths as appropriate.

### Basic Purchaser

- Appropriate for those preparing more complex orders or preparing RFRs for existing contract vendors.
- Provides the highest degree of flexibility in configuration for the purchaser role.
- Is an approver and can be added to approval paths as appropriate.

# Mapping Roles to Process: Ordering



## COMMBUYS Roles

### Basic Purchaser

- Provides Organization Administrator the highest degree of flexibility in configuration for the purchaser role.
- Is an approver and can be added to approval paths as appropriate.
- This role is often assigned to a unit or district manager.

**WHO:** Think about all the people involved in reviewing and approving a purchase.

**WHAT:** In documenting how orders are reviewed and who approves them along the way, consider:

- Are there different approval processes for different types of orders?
- How many people are involved in the order approval process?

**This information will help determine if the correct people have COMMBUYS access, if Approval Paths need adjustment, and who needs training.**

# Mapping Roles to Process: Ordering

## Function

Provides final approval for orders

## COMMBUYS Roles

### Basic Purchaser (Supervisor)

- Is an approver and is located at the end of an approval path in order to be the final approver.
- Has the ability to review and update a document that has been created by someone else, and then submit (send) the order.
- Would be assigned to a user with a MMARS procurement UAID with the authority to process MMARS PCs and CTs to final.

**WHO:** Think about who provides final approval of an order and would process the order to “final” in MMARS today.

**WHAT:** In documenting your agency’s final approval process, consider:

- How is final approval recorded?
- What happens next?
- Is the final approver also doing MMARS encumbering for the order?

**This information will help pinpoint where a review of COMMBUYS and MMARS roles is required to sync permissions.**

# Mapping Roles to Process

## Examples

WHAT	Prepares orders for items on contract	Approves Orders (can be multiple)	Provides final approval for orders
ROLE	Dept. Access or Basic Purchaser	Basic Purchaser	Basic Purchaser set up as a Supervisor
WHO	Clerk in a district office	District Manager	Central Purchasing
WHO	Project team member	Project Manager	Finance Office

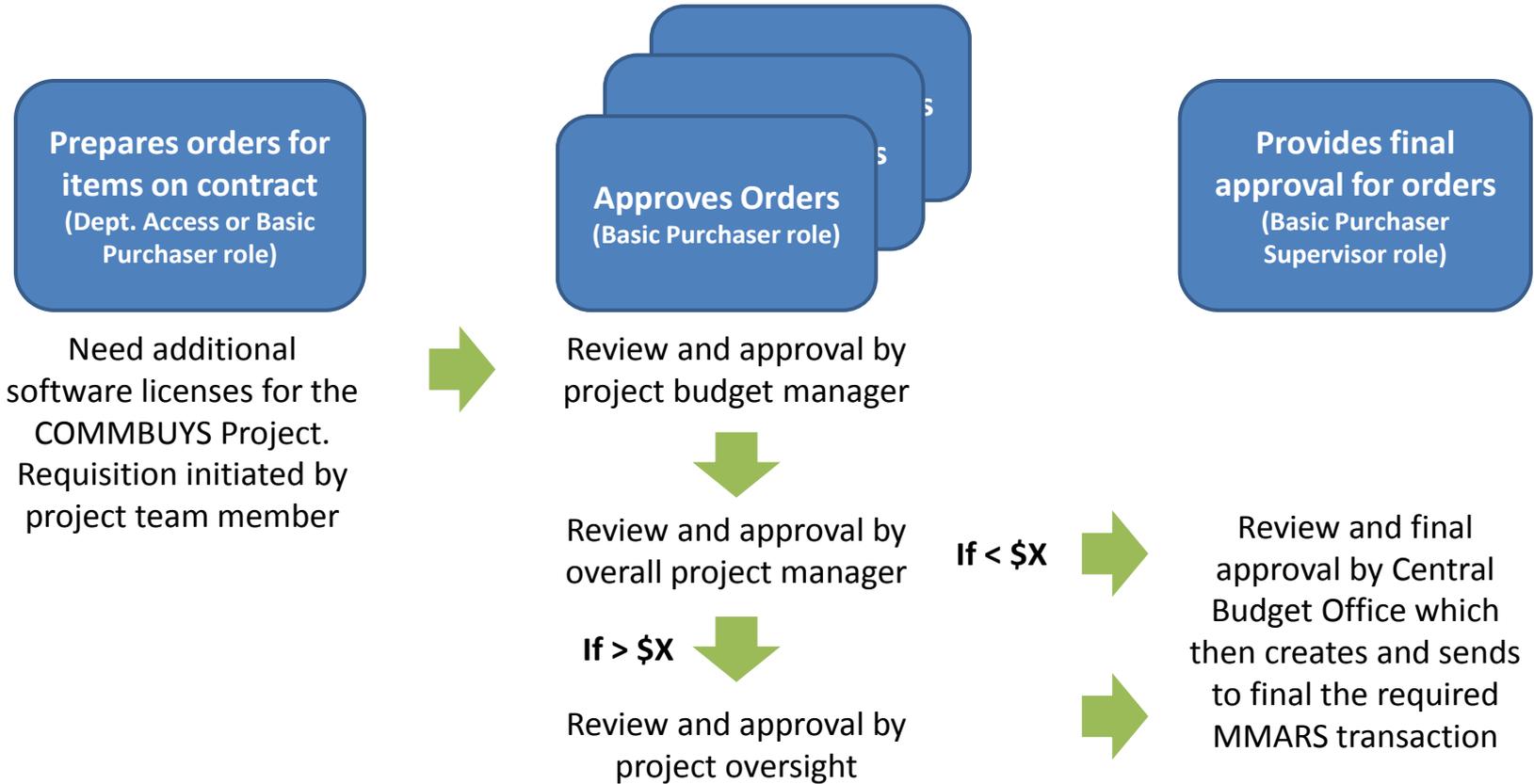
Although agencies may have paper-based or automated processes or systems in place for requisitioning, COMMBUYS can handle each step online.

- ✓ COMMBUYS is flexible to accommodate both simple and complex approval processes.
- ✓ These approval processes are implemented in COMMBUYS as approval paths.

At final approval, a requisition becomes a Purchase Order in COMMBUYS. Orders **must** be in COMMBUYS by this point in the workflow.

# Mapping Roles to Process

## OSD COMMBUYS Project Example



# Adding COMMBUYS Users

## Home Page – Maintain Agency Users

The screenshot shows the 'Organization Administrator Home' interface. At the top, there is a navigation bar with tabs: 'Department/Approval/Users' (selected), 'Document Settings', 'System Configuration', 'Maintenance Tables', and 'Dashboard'. Below the navigation bar, there are six main sections, each with an icon and a description:

- Maintain Agency Organizations/Departments/Locations**: This section is used to administer agency organization, department and location information.
- Configure Approval Settings**: This section is used to configure system settings for approval path maintenance.
- Maintain Agency Approval Paths**: This section is used to administer agency approval paths.
- Maintain Agency Users**: This section is used to maintain agency users. (This section is circled in red in the image.)
- Maintain Assignment of Commodity-EPFS to Purchasers**: This section is used to administer the association of purchasers with commodity codes.
- Maintain Document Attachment Repository**: This section is used to maintain files in the document attachment repository.

# Adding COMMBUYS Users

## Add New User Page

User Maintenance for: Department of Revenue

Search Using: ALL of the criteria

Search Fields:

First Name  Last Name

Login ID  Status

Department

Location

User Role

- Vendor Administrator
- Basic Purchasing
- Internal Administrator
- Agency Administrator
- Program Administrator
- Organization Administrator
- Department Access
- Inquiry
- Accounts Payable
- Inventory Administrator
- Inventory User
- Template Administrator

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z  
 0 1 2 3 4 5 6 7 8 9 10

Find It Clear **Add User**

<a href="#">Login ID</a>	<a href="#">First Name</a>	<a href="#">Last Name</a>	<a href="#">Status</a>	<a href="#">Role(s)</a>
<a href="#">ALYSSAA</a>	Alyssa	Arnold	Active	Basic Purchasing

# Adding COMMBUYS Users

## Maintain Agency Users – Add User Screen

**Add New User for: Operational Services Division**

**User Information (fields marked with \* are required)**

Salutation:  Alternate ID:

First Name\*:  Last Name\*:

Phone\*:

Mobile Phone:

Email\*:

Job Title\*:

Login ID\*:  Status\*:  Active

Password\*:  Verify Password\*:

---

**User Defaults**

Organization: **Operational Services Division**

**Department, Location and Default Bill-to are required if the user has a role of Basic Purchasing, Department Access, Accounts Payable or Inventory User:**

Department:  Location:

Default Ship-to Address:   Default Bill-to Address:

Default Account Code:  Default Purchaser:

---

**Purchasing Rules**

Open Market Req Limit:  0.00 Direct Release/All RPA Types Limit:  0.00 Direct Open Market Limit:  0.00

---

**Roles:**

**For a user with department access role, default location privilege(s) will be added on save.**  
**For a department super user, Default location privileges are privileges for all the locations of the user's default department.**  
**For a location super user or an ordinary department access user, default location privilege is privilege for the user's default location.**  
 Click 'Save & Maintain Location Privilege' (exists only if the user has department access role) to add the user and go to the user's location privilege maintenance page.  
 Click 'Save & Maint Inv Location Privilege' (exists only if the user has inventory user role) to add the user and go to the user's inventory location privilege maintenance page.

Basic Purchasing     Can Open Formal Bids     Can Create Demand Requisition     BP Supervisor     Allow Requisition Item Import     Allow Contract Import     Disallow Ad-Hoc Reporting     Enable PO Item Use

Program Administrator     Program Coordinator     Program Auditor     Program Approver

Organization Administrator

Department Access    Department Access Role Privilege Type:   
 (A department/location superuser must be a requisitioner)  
 If Department Access user, set up this user as:   
 User is an Approver     Disallow Ad-Hoc Reporting  
 Allow PO Receipts for Department Access Role  
 User May Create Bids  
 Can Open Formal Bids  
 Enable Change Order Creation  
 Department Buyer Enabled  
 Allow Requisition Item Import

Inventory

Accounts Payable    Accounts Payable Role Privilege Type:      Disallow Ad-Hoc Reporting

Inventory Administrator

Inventory User

Grant Form Builder Rights

Grant Multiorg Approval Rights

# Adding COMMBUYS Users

## Add User Screen – User Information Section

Add New User for: Operational Services Division

(User Information (fields marked with \* are required))

Salutation:  Alternate ID:

First Name\*:  Last Name\*:

Phone\*:  -

Mobile Phone:

Email\*:

Job Title\*:

Login ID\*:  Status\*:

Password\*:  Verify Password\*:

User Defaults

Organization: Operational Services Division

Department:  Location:

Default Ship Address:  Default Billing Address:

Default Account Code:  Default Purchase Order:

Purchasing Rules

Open Market Req Limit: 0.00 Direct Requisition Mkt Types Limit: 0.00 Direct O:

Roles

For a user with department access role, default requisition location privileges will be added on save.  
 For a department super user, default requisition privileges and privileges for all the locations of the user.  
 For a location super user or an on-line department access user, default location privilege is privilege.  
 Click 'Save & Retain Location Privilege' privilege only if the user has department access role to add the role.  
 Click 'Save & Inherit the Location Privilege' privilege only if the user has inventory user role to add the role.

Basic Purchasing  Can Open Formal Bids  Can Create Demand Requisition  Can Create Requisition  Can Open Formal Bids

Program Administrator  Program Coordinator  Program Auditor  Program Approver

Organization Administrator

Department Access

Department Access Role Privilege Type (A department/location supervisor must be a requisitioner)  
 If Department Access user, set role user as:  
 User is an Approver  Create  
 Allow PO Receipts for Department Access Role  
 User May Create Bids  
 Can Open Formal Bids  
 Enable Change Order Creation  
 Department Buyer Enabled  
 Allow Requisition Item Input

Inquiry

Accounts Payable

Accounts Payable Role Privilege Type:   Create

Inventory Administrator

Inventory User

Grant Form Builder Rights

Grant Working Approval Rights

Save & Exit Save & Add New User Cancel & Exit

Add New User for: Operational Services Division

User Information (fields marked with \* are required)

Salutation:  Alternate ID:

First Name\*:  Last Name\*:

Phone\*:  -

Mobile Phone:

Email\*:

Job Title\*:

Login ID\*:  Status\*:

Password\*:  Verify Password\*:

User Defaults

# Adding COMMBUYS Users

## Add User Screen – User Defaults Section

**Add New User for: Operational Services Division**

**User Information (Fields marked with \* are required)**

Selection:  Alternate ID:   
 First Name\*:  Last Name\*:   
 Phone\*:   
 Mobile Phone:   
 Email\*:   
 Job Title\*:   
 Login ID\*:  Status\*:  Authn:   
 Password\*:  Verify Password\*:

**User Defaults**

Organization: Operational Services Division  
 Department, Location and Default Bill-to are required if the user has a role of Basic Purchasing, Department Access, Accounts Payable or Inventory User.  
 Department:  Location:   
 Default Ship-to Address:  Default Bill-to Address:   
 Default Account Code:  Default Purchaser:

**Purchasing Rules**

Basic Purchasing  
 Program Administrator  
 Organization Administrator  
 Department Access  
 Inventory Administrator  
 Inventory User  
 Grant Form Builder Rights  
 Grant History Approval Rights

Can Open Formal Bid  
 Program Coordinator  
 Department Access Role (A department/location and if Department Access user)  
 User is an Approver  
 Allow PO Receipts to  
 User May Create Bids  
 Can Open Formal Bids  
 Enable Change Order  
 Department User: Exp  
 Allow Requisition Item

Heavy  
 Accounts Payable  
 Accounts Payable Role

Open Market Req Limit: 0.00 Direct Requisition

**User Defaults**

Organization: Operational Services Division  
 Department, Location and Default Bill-to are required if the user has a role of Basic Purchasing, Department Access, Accounts Payable or Inventory User  
 Department:  Location:   
 Default Ship-to Address:  Default Bill-to Address:   
 Default Account Code:  Default Purchaser:

**Purchasing Rules**

# Adding COMMBUYS Users

## Add User Screen – Purchasing Rules

Add New User for: Operational Services Division

User Information (fields marked with \* are required)

Organization: Operational Services Division

Department: [Dropdown] Location: [Dropdown]

Default Ship-to Address: [Dropdown] Default Bill-to Address: [Dropdown]

Default Account Code: [Dropdown] Default Purchaser: [Dropdown]

Purchasing Rules

Open Market Req Limit: 0.00 Direct Release/All RPA Types Limit: 0.00 Direct Open Market Limit: 0.00

Roles

Basic Purchasing  
 Program Administrator  
 Organization Administrator  
 Department Access  
 Priority  
 Accounts Payable  
 Inventory Administrator  
 Inventory User  
 Grant Form Builder Rights  
 Grant History Approval Rights

Can Open Formal Bids  
 Program Coordinator  
 Department Accounts Receivable Privilege Type: [Dropdown]  
 User is an Approver  
 Allow PO Receipts for Department Access  
 User May Create Bids  
 Can Open Formal Bids  
 Enable Change Order Creation  
 Department Buyer Enabled  
 Allow Requisition Item Input  
 Disable Admin Reporting

Save & Exit Save & Add New User Cancel & Exit

**Purchasing Rules**

Open Market Req Limit:  Direct Release/All RPA Types Limit:  Direct Open Market Limit:

**Roles**

# Adding COMMBUYS Users

## Add User Screen – Roles Section

**Add New User for: Operational Services Division**

**User Information (Fields marked with \* are required)**

Selection:  Alternate ID:   
 First Name\*:  Last Name\*:   
 Phone\*:   
 Mobile Phone:   
 Email\*:   
 Job Title\*:   
 Login ID\*:  Status\*: Active   
 Password\*:  Verify Password\*:

**User Defaults**

Organization: Operational Services Division

Department, Location and Default Bills are required if the user has a role of Basic Purchasing, Department Access, Accounts Payable or Inventory User.

Department:  Location:   
 Default Ship-to Address:   Default Bills Address:    
 Default Account Code:   Default Purchaser:

**Purchasing Defaults**

Open Market Req Limit: 0.00 Direct Requisition Bids Types Limit: 0.00 Direct Open Market Limit: 0.00

**Roles**

For a user with department access role, default requisition location privileges will be added on save.  
 For a department super user, default location privileges are privileges for all the locations of the user's default department.  
 For a location super user or an ordinary department access user, default location privilege is privilege for the user's default location.  
 Click 'Save & Maintain Location Privilege' (available only if the user has department access role) to add the user and go to the user's location privilege maintenance page.  
 Click 'Save & Maint in Location Privilege' (available only if the user has inventory user role) to add the user and go to the user's inventory location privilege maintenance page.

Basic Purchasing  Can Open Formal Bids  Can Create Demand Requisition  RF Supervisor  Allow Requisition Item Input  Allow Contract Input  Disable AD-Hoc Reporting  Enable PO Item Input  
 Program Administrator  Program Coordinator  Program Auditor  Program Approver  
 Organization Administrator  
 Department Access Department Access Role Privilege Type:   
(A department/location supervisor must be a requisitioner)  
 #Department Access user, set up this user as:   
 User is an Approver  Disable AD-Hoc Reporting  
 Allow PO Receipts for Department Access Role  
 User May Create Bids  
 Can Open Formal Bids  
 Enable Change Order Creation  
 Department Buyer Enabled  
 Allow Requisition Item Input  
 Inquiry  
 Accounts Payable Accounts Payable Role Privilege Type:   Disable AD-Hoc Reporting  
 Inventory Administrator  
 Inventory User  
 Grant Form Builder Rights  
 Grant Workflow Approval Rights



# Time for Questions about Roles

# Approval Paths

## Why We use Approval Paths

- Segregation of Duties
- Audit Trail
- Accounting

# Approval Paths

## Creating Approval Paths

The screenshot shows the 'Organization Administrator Home' dashboard. At the top, there are navigation tabs: 'Department/Approval/Users', 'Document Settings', 'System Configuration', 'Maintenance Tables', and 'Dashboard'. The 'Department/Approval/Users' tab is selected. Below the tabs, there are several administrative sections, each with a small icon and a description:

- Maintain Agency Organizations/Departments/Locations**: This section is used to administer agency organization, department and location information.
- Configure Approval Settings**: This section is used to configure system settings for approval path maintenance.
- Maintain Agency Approval Paths**: This section is used to administer agency approval paths. This section is highlighted with a red oval.
- Maintain Agency Users**: This section is used to maintain agency users.
- Maintain Assignment of Commodity-EPPs to Purchasers**: This section is used to administer the association of purchasers with commodity codes.
- Maintain Document Attachment Repository**: This section is used to maintain files in the document attachment repository.

# Approval Paths

## Creating Approval Paths

Approval Path Maintenance for: Department of Revenue

No Approval Paths found for organization: Department of Revenue .

**Add New Approval Path** Global Approver Replace Exit

# Approval Paths

## General Tab

### New Approval Path

General
Change Order
Misc/Freight
Department/Location
Email
Vendor
Summary

Approval Path ID\*:

Organization: 1080 - Operational Services Division

Dollar Range\*:  to

Roles:

- Basic Purchasing
- Department Access
- Inventory User
- Accounts Payable

Description\*:

Approval Type\*:

Status:

#### Approval Doc/Doc Sub Types

<input checked="" type="checkbox"/> Requisition	<input checked="" type="checkbox"/> Unposted Bid	<input checked="" type="checkbox"/> Evaluated Bid	<input checked="" type="checkbox"/> Purchase Order	<input checked="" type="checkbox"/> PO Change Order	<input type="checkbox"/> Vendor Performance	<input type="checkbox"/> PO Receiving	<input type="checkbox"/> Invoice	<input type="checkbox"/> Credit Memo
<input checked="" type="checkbox"/> RPA Release	<input checked="" type="checkbox"/> Blanket	<input checked="" type="checkbox"/> Blanket	<input checked="" type="checkbox"/> Blanket				<input type="checkbox"/> Invoice with Change Order	
<input checked="" type="checkbox"/> Inventory	<input checked="" type="checkbox"/> Contract	<input checked="" type="checkbox"/> Contract	<input checked="" type="checkbox"/> Contract				<input type="checkbox"/> Invoice-Regular	
<input checked="" type="checkbox"/> Demand	<input checked="" type="checkbox"/> Open Market	<input checked="" type="checkbox"/> Open Market	<input checked="" type="checkbox"/> Direct Open Market					
<input checked="" type="checkbox"/> Open Market			<input checked="" type="checkbox"/> Open Market					
<input checked="" type="checkbox"/> RPA			<input checked="" type="checkbox"/> G2B Blanket					
<input checked="" type="checkbox"/> Release			<input checked="" type="checkbox"/> Release					

#### Approvers

Approver User	Level	Type	Delete
<input type="text" value=""/>	<input type="text" value=""/>	<input checked="" type="radio"/> Primary <input type="radio"/> Alternate	
<input type="text" value=""/>	<input type="text" value=""/>	<input checked="" type="radio"/> Primary <input type="radio"/> Alternate	

**i** If you don't select any roles(doc type/doc sub types), the approval path will be associated with all the roles(doc type/doc sub types).

# Approval Paths

## Change Order tab

**Approval Path IT001 - IT Purchases**

General	Change Order	Misc/Freight	Department/Location	Email	U N S P S C Code	Vendor	Summary
<p>Apply approval path for all changes to document <input checked="" type="checkbox"/></p> <p>Dollar Increase: The value entered should be a dollar(\$) amount. This value will identify the dollar amount change from the original PO that triggers this approval path.</p> <p>Dollar Increase (\$) <sup>†</sup> : <input style="width: 150px;" type="text" value="0.00"/></p> <p>Cumulative : <input type="checkbox"/></p> <p>Percent Increase: The value entered should be a percentage (%). This value will identify the percent change from the original PO that triggers this approval path.</p> <p>Percentage Increase (%) <sup>†</sup> : <input style="width: 100px;" type="text" value="0.00"/></p> <p>Cumulative : <input type="checkbox"/></p>							
<p><b>i</b> Note: Selecting 'Cumulative' will trigger the approval path based on the sum of all change orders created against a single Purchase Order. If Cumulative is not selected, the approval path will trigger separately.</p>							
						<input type="button" value="Save &amp; Continue"/>	<input type="button" value="Reset"/>

# Approval Paths

## Department/Location Tab

### Approval Path IT001 - All IT-related Approvals

General Change Order Misc/Freight **Department/Location** Email U N S P S C Code Vendor Summary

No specific departments/locations found for this approval path, therefore the approval path is considered to be associated with all the departments/locations.

Add Depts/Locs

### Approval Path IT001 - Search Departments/Locations

General Change Order Misc/Freight **Department/Location** Email U N S P S C Code Vendor Summary

Search Using:	ALL of the criteria ▾
Search Fields:	Department ID <input type="text"/> Department Name <input type="text"/>
	Location ID <input type="text"/> Location Name <input type="text"/>
Browse by:	A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9 10
Result Type:	Department ▾
<input type="button" value="Find It"/> <input type="button" value="Clear"/>	

Select	Department ID	Department Name
<input type="checkbox"/>	XYZ01	Purchasing Department

# Approval Paths

## UNSPSC Code Tab

### Approval Path IT001 - IT Purchases

[General](#) | 
 [Change Order](#) | 
 [Misc/Freight](#) | 
 [Department/Location](#) | 
 [Email](#) | 
 **[UNSPSC Code](#)** | 
 [Vendor](#) | 
 [Summary](#)

#### Confirmation Messages

- Changes saved successfully.

### Approval Path U N S P S C Segment-Family List

<a href="#">Segment-Family ID</a>	<a href="#">Description</a>	Delete
43-19	Communications Devices and Accessories	<input type="checkbox"/>
43-20	Components for information technology or broadcasting or tel	<input type="checkbox"/>
43-21	Computer Equipment and Accessories	<input type="checkbox"/>
43-22	Data Voice or Multimedia Network Equipment or Platforms and	<input type="checkbox"/>
43-23	Software	<input type="checkbox"/>

### Approval Path U N S P S C Class List

Segment-Family-Class	Description	Delete
There are no U N S P S C Class found for this approval path.		

Save & Continue

Add U N S P S C Segment-Family/Class

Delete All U N S P S C Segment-Family/Class

Reset

# Approval Paths

## Summary Tab

Approval Path IT001 - IT Purchases								
General		Change Order	Misc/Freight	Department/Location	Email	U N S P S C Code	Vendor	Summary
<b>General Information</b>								
<b>Approval Path ID:</b>	IT001	<b>Description:</b>	IT Purchases		<b>Organization:</b>	1080 - Operational Services Division		
<b>Approval Type:</b>	IT001 - IT Approval	<b>Dollar Range:</b>	\$0.00 to \$150,000.00		<b>Roles:</b>	Basic Purchasing Department Access		
<b>Status:</b>	Active							
<b>Send Email:</b>	Yes	<b>Customize Email Content:</b>	No					
<b>Doc Types (Doc Sub Types):</b>	Requisition Unposted Bid Evaluated Bid Purchase Order PO Change Order							
<b>Approvers</b>								
<b>Approver User</b>			<b>Level</b>		<b>Type</b>			
Alyssa Arnold			0		Primary			
<b>Change Order</b>								
Apply approval path for all changes to document was selected by the user from the Change Order Tab.								
<b>Misc/Freight</b>								
No Misc/Freight options have been set								
<b>Approval Departments/Locations</b>								
No threshold was specified for the Miscellaneous or Freight Charges for this the Invoice Approval Path therefore this approval path will be attached to any invoice that meets the other criteria and has any Miscellaneous or Freight Charges.								
<b>Approval U N S P S C Codes</b>								
<b>U N S P S C Segment-Family List:</b>								
<u>Segment-Family ID</u>	<u>Description</u>							
43-19	Communications Devices and Accessories							
43-20	Components for information technology or broadcasting or tel							
43-21	Computer Equipment and Accessories							
43-22	Data Voice or Multimedia Network Equipment or Platforms and							
43-23	Software							
<b>U N S P S C Class List:</b>								
<b>Segment-Family-Class</b>	<b>Description</b>							
There are no U N S P S C Class found for this approval path.								
<b>Vendors</b>								
No vendors have been selected								
Add New Approval Path		Clone Approval Path		Print		Exit		



# Training Tracks by Role

## Courses for Department Access Users and Some Basic Purchaser Users



### **Public Purchasing Track (12.75 Core Training Hours)**

The Purchasing Track is designed for those who are responsible for buying goods and services from established contracts on behalf of their Executive Department/Agency. Ideal candidates for this learning track are either new to purchasing within state government or have been newly appointed to a purchasing role. Learners will gain an understanding of the policies and regulations that govern purchasing practices in the Commonwealth. Participants in this track will also learn how to perform various purchasing activities within COMMBUYS, the Commonwealth of Massachusetts' eProcurement and purchasing system.

### **Courses**

- Essentials of State Procurement
- How to Use Statewide Contracts (*Online*)
- COMMBUYS Purchasing: Creating Release Requisitions & Purchase Orders

# Training Tracks by Role

## Courses for Basic Purchaser Users Preparing Bids

### **Public Procurement Track (46 Core Training Hours)**

The Procurement Track is designed for public procurement professionals who are responsible for various procurement and sourcing activities such as developing RFRs, posting bids, establishing Departmental contracts, and managing contracts. This training track is ideal for those who are new to state procurement, have been newly placed into a procurement role, or those who would like to build upon their professional procurement experience. Learners will gain an understanding of the policies and regulations that govern procurement practices in the Commonwealth. Participants in this track will also learn how to build and manage their contracts in COMMBUYS, the Commonwealth of Massachusetts' eProcurement and purchasing system.

### **Courses**

- Essentials of State Procurement (*Prerequisite for the Strategic Sourcing Certificate Program*)
- COMMBUYS Procurement
- Strategic Sourcing Certificate Program
- How to Create a MBPO/Departmental Contract in COMMBUYS

# Training Tracks by Role

## Course for Organization Administrators

### **COMMBUYS Organization Administration Track (6 Core Training Hours)**

The COMMBUYS Organization Administration Track is designed for those who are charged with setting up and maintaining their Department/Agency's organization within COMMBUYS. Learners in this track will acquire the skills necessary to establish workflows, approval paths, and user profiles for their Department or Agency.

#### **Courses**

- **Organizational Administrator: Set-Up and Maintenance** - This is an intensive class for those identified as Organization Administrators in COMMBUYS. Organizational Administrator training provides an in-depth review of and hands-on practice with COMMBUYS, including the Organization information, approval, workflow, and user profile set-up activities. Upon completion of this training, Organization Administrators will be prepared to fulfill their roles in COMMBUYS, including set-up activities and maintenance tasks.



# COMMBUYS Tips and Tricks

## Locating Vendors



### SDO Certified

- WBE
- MBE
- DBE
- SDVOB

### Small Business Purchasing Program

# COMMBUYS Tips and Tricks

## Statewide Contract Search

- Public View
- Logged in Purchaser

SSS

### CONTRACT USER GUIDE



#### How to Use the Office Supplies, Recycled Paper and Envelopes Statewide Contract

Contract #: OFF36

Contract Duration: 01/01/2014 to 12/31/2016

MMARS #: OFF36\* - Options to renew: until 2018

Contract Manager: Maryellen Osborne 617-720-3139

[Maryellen.Osborne@state.ma.us](mailto:Maryellen.Osborne@state.ma.us)

This contract contains: **Supply Diversity Office Certification (SDO), Supplier Diversity Program (SDP), and Environmentally Preferable Products Program (EPP)**

**Last Change Date: November 13, 2014**

# COMMBUYS Tips and Tricks

## Additional Resources

Welcome To **COMMBUYS**



**COMMBUYS** is the only official procurement record system for the Commonwealth of Massachusetts' Executive Departments. COMMBUYS offers free internet-based access to all public procurement information posted here in order to promote transparency, increase competition, and achieve best value for Massachusetts taxpayers.

#### COMMBUYS INFORMATION:

For more information on COMMBUYS please visit the [COMMBUYS](#) support pages.

[Training and Registration for Purchasers](#)

[Training and Registration for Sellers](#)

[Job Aids for Purchasers](#)

[Job Aids for Sellers](#)

#### Information about Statewide Contract Purchasing

[Statewide Contract Index](#), [Contract User Guides and Procurement Schedule](#)

If you have any questions or concerns contact the COMMBUYS Help Desk at [COMMBUYS@state.ma.us](mailto:COMMBUYS@state.ma.us) or ring us during normal business hours (8AM – 5PM Monday – Friday) at 1-888-627-8283 or 617-720-3197.

#### **Register**

Register here to begin using COMMBUYS.

Vendors, please read this [disclaimer](#) prior to registering.

#### **Complete Registration**

Complete registration here to begin using COMMBUYS.

Vendors, please read this [disclaimer](#) prior to completing registration.

#### **Open Bids**

Browse open bid opportunities.

#### **Active Contracts**

Browse active Contracts/Blankets.

#### **Contract & Bid Search**

Search for Bids and active Contracts/Blankets.

#### **Registered Vendor Search**

Search for registered vendors.

### What is QuickBuy?

- Requisitions
- Favorite Items
- More efficient



# The Help Desk Team

## Need assistance?

The COMMBUYS Help Desk is available Monday through Friday from 8:00 am until 5:00 pm.

Email: [commbuys@state.ma.us](mailto:commbuys@state.ma.us)

Phone: 1-888-627-8283





# Readiness Calendar Updates

## Next All-Liaison Meetings



### **Thursday, June 11 from 2-4 pm**

#### **AGENDA**

- An overview of the NEW COMMBUYS roles coming online for Phase II
- Demo of the UNSPSC Crosswalk tool

### **Tuesday, June 23 from 9:30-11:30 am**

#### **AGENDA**

- An overview of COMMBUYS Phase II Features and Functions



# 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 content area is divided into several sections. On the left, there are four menu items: "Budget, Taxes & Procurement", "Employment, Equal Access, Disability", "Property Management & Construction", and "Hearings and Appeals". Below these is a breadcrumb trail: "Home > Budget, Taxes & Procurement > Procurement Information > Conduct a Procurement > CO". The main heading is "COMMBUYS", followed by a description: "COMMBUYS is the Commonwealth's state-of-the-art electronic Market Center supporting business." Below this is a "Connect to COMMBUYS Market Center" section with the "CB" logo. A "Find Your COMMBUYS Community" section is highlighted with a red arrow, containing a list of categories: "Commonwealth Agencies", "Local Governments", "Sellers", and "COMMBUYS Liaisons". To the right of this section is a "Small Business Purchasing Program (SBPP)" banner with the text "Find benefits information, eligibility criteria, and online resources." and "Registration and status verification available on COMMBUYS! Sign up for SBPP today!". At the bottom of the banner are navigation buttons labeled 1, 2, 3, 4, and II.

# Liaison Resources

Links to Presentations, Emails and Meeting Recordings

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

Budget, Taxes & Procurement	Employment, Equal Access, Disability	Property Management & Construction	Hearings and Appeals	Research & Technology	Employee Insurance & Retirement Benefits
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Home > Budget, Taxes & Procurement > Procurement Information > Conduct a Procurement > Resources for All COMMBUYS Liaisons

## Resources for All COMMBUYS Liaisons




OPERATIONAL SERVICES DIVISION

[Back to COMMBUYS Home Page](#)

We have built this online "toolkit" for COMMBUYS Liaisons to serve as a resource for organizations preparing to features of COMMBUYS Ph II. The toolkit contains copies of Liaison meeting presentations, links to email communications and other tips and tools developed through the readiness period.

- [Phase II All Liaison Kickoff Meeting Presentation - March 30, 2015](#)  1MB
- [Phase II All Liaison Kickoff Meeting Video Presentation - March 30, 2015](#)
- [Phase II All Liaison Meeting with Project Updates - April 13, 2015](#) 
- [Phase II All Liaison Meeting with Project Updates Video Presentation - April 13, 2015](#)
- [CB Phase II Liaison Meeting on Departmental Contracts - April 21, 2015](#) 
- [Phase II All Liaison Meeting on Department Contracts Video Presentation - April 21, 2015](#)
- [Sample Letter to Departmental Contractors Urging Registration in COMMBUYS](#) 
- [All Liaison Message #1 - Welcome + Resource Links](#)
- [All Liaison Message #2 - Schedule Update + Business Process Review](#)
- [All Liaison Message #3 - Departmental MBPOs and Catalogs](#)

YouTube

Now Sharing



**COMMBUYS**  
OPERATIONAL SERVICES DIVISION

### COMMBUYS Phase II All-Liaison Update Meeting on Departmental Contracts



April 21, 2014

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0:21 / 50:12

Phase II Liaison Meeting on Departmental Contracts 21 Apr, 2015



# Contacts



## **COMMBUYS Readiness**

Chris Swistro

[christine.swistro@state.ma.us](mailto:christine.swistro@state.ma.us)

## **Operational Services Division Training**

[www.mass.gov/osd](http://www.mass.gov/osd)

[osdtraining@state.ma.us](mailto:osdtraining@state.ma.us)

## **COMMBUYS Helpdesk**

[commbuys@state.ma.us](mailto:commbuys@state.ma.us)

Phone: 1-888-627-8283