

# Buy the Way

The Official Newsletter of the Operational Services Division



September 8, 2015

COMMBUYS Edition



## COMMBUYS Enhancements

When OSD launched the COMMBUYS Market Center back in March 2014, we were excited to introduce the latest incarnation of the Commonwealth's procurement system, a 21st century software solution that provides a purchase to payment platform equipped with dynamic reporting capabilities to analyze spending trends and drive business decisions. Unlike its predecessors, COMMBUYS is nimble and allows frequent releases of new features.

OSD is proud to bring you several COMMBUYS enhancements that will improve the user experience. Many of these enhancements were suggested by COMMBUYS users through listening sessions, surveys, inquiries received by the COMMBUYS Help Desk, training classes, and Liaison meetings. We continue the business process evolution journey, working to assist agencies and vendors as they adapt to and adopt COMMBUYS.

Today, we're introducing a step forward and new guidance – motivated by the Request for Payment Authorization (RPA) Release feature – on the path to capturing purchasing detail in COMMBUYS for the goods and services on our Statewide Contracts (SWCs). Having had the opportunity to think in more depth about purchases of certain goods and services which may have seemed to fall in a “gray” area before, we're clarifying guidance around the use not only of RPAs, but of standard COMMBUYS purchase orders for goods and services in those gray areas. We understand that some of this will represent a change in current agency practices – but it's time to take this step.

We appreciate your time, effort, and feedback. Working together helps us to improve COMMBUYS functionality to meet business process needs, which results in increased system adoption and utilization. Here's a quick look at the newest COMMBUYS enhancements, along with associated training resources.

### Grant-specific UNSPSC Commodity Code

A dedicated United Nations Standard Products and Services Code (UNSPSC) for Grants enables Grantor organizations to clearly identify their bid posting as a Grant opportunity, making it easy to search for Grants using COMMBUYS. Grantee organizations should add the Grant UNSPSC code to their Vendor Profiles to receive automatic Grant posting

notifications. Learn more about this new feature. Locate our Grant job aids in the COMMBUYS Resource Center.

“Creating the UNSPSC Code for Grants makes great sense for us – COMMBUYS can act as an all-in-one location for us to post Grants. Plus, municipalities now have another easy way to be notified of the Grant opportunities available to them.”

Stephen White  
Chief Operating Officer  
Department of Energy Resources

### Open and Rolling Enrollments

This enhancement provides the flexibility to set up bids that may be opened periodically to allow new bidders to submit responses, or permit the bid to stay open to enable vendor enrollment on an ongoing basis. Buyers will indicate whether a bid will have an open or rolling enrollment by selecting the appropriate option on the bid's General tab. Sign up to attend a webinar.

### PO Print Form Improvements

The new format enables buyers to provide instructions to the vendor in a new “Special Instructions” field; accommodates the name, phone number, and email address of the purchaser; removes the

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# COMMBUYS Enhancements (cont.'d)

text box referring to duplicate invoices; and corrects formatting so all information appears on the printed form. Details regarding use of the "Special Instructions" field have been incorporated into the COMMBUYS Requisition job aids available in the COMMBUYS Resource Center. Effective October 1st, Department Organization Administrators may customize the PO print form with their organization's logo.

“ I really like the addition of the Special Instructions. This was discussed during the listening session I participated in on June 11 - a space to add department name and organization code to help the Storeroom when they receive goods. ”

Jennifer Fennell  
Purchasing Supervisor  
Shattuck Hospital

## RPA Release

OSD has identified SWCs that, by the nature of some of the items and services offered, may necessitate entering purchases in COMMBUYS after the requested items have been acquired. As of September 14th, buyers may use a new Requisition type, RPA Release, to document these SWC purchases. Learn which SWCs are RPA Release eligible, and get updated guidance on "Open Market" RPAs and the standard PO process.

## New Receiving Screens

Enhancements to the Receiving screen streamline the Receiving process through consolidation of a series of tabs onto one screen/tab. OSD currently is offering webinars on the Receiving function. Consult the OSD Training Schedule for webinar dates and times. Find several Receiving job aids in the COMMBUYS Resource Center.

## Additional Resources

Find our COMMBUYS Enhancement messages for agency buyers dated September 1st and September 2nd.

Find our COMMBUYS Enhancement message for Local Government Purchasers dated September 2nd.

Find our COMMBUYS Enhancement message for the Business Community dated September 2nd.

Please note that not all enhancements are available to municipalities and/or vendors.

## COMMBUYS Quick Stats 3/24/14 through 8/31/15

- **21,000** orders valued at **\$157 million**
- **4,768** bids entered
- **12,471** registered vendors



OPERATIONAL SERVICES DIVISION

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**Gary Lambert**  
Assistant Secretary for  
Operational Services

## September Training

To register, please see the full Training calendar. Dates are subject to change as courses are added or removed through September.

### COMMBUYS Enhancements: Organization Administrators Readiness

September 9, 11, 18, 29 (Webinar)

### Bids with Open and Rolling Enrollments

September 8, 10, 14, 16, 18, 22 (Webinar)

### Release RPAs for Statewide Contract Purchases

September 14, 17, 21, 24 (Webinar)

### COMMBUYS Organization Administrator Training

September 9, 30

### COMMBUYS Purchasing Training

September 14, 30

### COMMBUYS Procurement Training

September 24

### COMMBUYS Receiving

September 16 (Webinar)

### Strategic Sourcing Certificate Program: One Day Update

September 14

### How to Create a Departmental MBPO

September 21

### How to Use MBPOs

September 10, 25 (Webinar)

### Essentials of State Procurement

September 18

### How to Use Statewide Contracts/MBPOs

September 28

### Small Business Purchasing Program Overview

September 15 (Webinar)

### Connecting Your Business to the Commonwealth

September 16 (New Bedford)

### COMMBUYS How to Locate and Respond to Bids

September 17 (Webinar)

### COMMBUYS Essentials of Navigation, Searching and UNSPSC

September 18

### Basic Supplier Diversity Plan Overview

September 22 (Webinar)

### SDO Pre-Certification Session

September 25 (Boston), 30 (New Bedford)

## Liaisons Offer Key Insights

This past winter, OSD sought to assemble a group of agency business experts to serve as COMMBUYS Liaisons. While a core team of departmental users had participated in early COMMBUYS requirements definition and design, it was time to expand the circle. Representing varying business functions ranging from purchasing and procurement to finance and security, COMMBUYS Liaisons have served a dual role. They form a key link back to COMMBUYS users in Departments, disseminating news and updates about the system features and business impacts to their colleagues. They also provide insight and feedback to OSD and the COMMBUYS project team regarding unique departmental business processes and how COMMBUYS aligns with them, helping to pinpoint areas for system improvement.

The COMMBUYS Liaison engagement program to date has included eight Liaison meetings and a series of email newsletters with program updates, important readiness information, and links to online resources and training. A dedicated webpage houses Liaison meeting recordings and companion presentations as well as other helpful documents. Today, there are 270 COMMBUYS Liaisons from across Massachusetts state government forming a comprehensive network of users. According to COMMBUYS Readiness Coordinator, Christine Swistro, "having a COMMBUYS Liaison network has really accelerated our ability to reach out to departments, engage everyday business users, and ensure they have the tools and information they need to take advantage of all COMMBUYS has to offer."



## COMMBUYS Milestones

**October 30, 2013**

Gary Lambert announces COMMBUYS to the public purchasing community



**November 4, 2013**

Gary Lambert announces COMMBUYS to Statewide Contractors

**November 18, 2013**

Buyer Kickoff Meeting held in the MA State House Great Hall of Flags

**March 28, 2014**

First Punch-Out Catalog goes LIVE and first Purchase Order Issued by Sandra Mann, Department of Corrections, from Rosev Dairy Foods

**March 24, 2014**

COMMBUYS goes LIVE, first Bid is posted by Stephen White, Department of Energy Resources, and first vendor is registered (Star Printing Corp.)

**March 3, 2014**  
First COMMBUYS class held for buyers



**May 13, 2014**

First Bid awarded to R. Mullen & Associates, Inc., by Karen Robitaille, Executive Office of Public Safety & Security

**June 23, 2014**

First General Vendor Registration Webinar held



**November 24, 2014**

Small Business Purchasing Program/ Dept. of Revenue verification goes LIVE

**May 19, 2015**

ITD issues the order pushing COMMBUYS purchase order values over \$100M

**March 25, 2015**  
Number of registered vendors reaches 10,000

**March 24, 2015**  
OSD celebrates first anniversary of COMMBUYS

**July 29, 2015**  
Number of registered vendors reaches 12,000

**August 7, 2015**  
First Use of New Grant UNSPSC code by Stephen White, Department of Energy Resources



# An Adventure in Training

When they return to school in September, many children are tasked with describing how they spent their summer vacations. For Scott Jones, Director of Training for OSD, and his team of 11 training professionals, much of this summer has been devoted to reviewing, updating, testing, and putting the finishing touches on the full curriculum of COMMBUYS training classes to ensure that they include the recent COMMBUYS enhancements. While they may not have visited new and exotic places, developing the tools that help users navigate their way through COMMBUYS is an adventure for the OSD Training team. This is their story.

The journey began back in the late spring, as the COMMBUYS project team outlined the COMMBUYS enhancements that would be implemented in early September. From there, the Training team did a review of the existing curriculum of COMMBUYS training classes and job aids for buyers and vendors, identifying areas that needed adjustment to reflect the new features and functionality of the Commonwealth's procurement system.



“As we reviewed the curriculum, it soon became apparent that updating the training materials, which includes webinars, webcasts, and instructor-led classes, as well as job aids, for the COMMBUYS enhancements would be a large undertaking.”

Scott Jones  
Director of Training

While the curriculum review was underway, the team explored the COMMBUYS enhancements by working within the system to learn how they functioned and how to navigate the changes. Once Trainers understood how the enhancements worked, their next foray was to take screen shots and create training scenarios associated with various Purchasing and Procurement activities so that these enhancements could be incorporated into each course for hands-on classroom training, live webinars, or pre-recorded webcasts.

The existing classes were updated, new classes were built from scratch, and then the Trainers went to school! To validate that the updates to the training classes were accurate, a “Teach Back” review of each class was conducted, with three to five Trainers, including subject matter experts, attending the class. A Teach Back review allows the Training team to present the course to an audience and, based on feedback received from “students,” work out any kinks and make changes as needed.

Job aids were the next step on their journey. Similar to the review conducted for the training classes, each job aid was reviewed to determine if updates were needed to reflect the COMMBUYS enhancements. Once the updates were made, the revised job aids were tested by a Trainer to ensure that all of the steps were accurate, the screen shots were correct, and that the navigation performed as described on the job aid. Finally, the revised job aids were reviewed to ensure that they were ADA compliant.

The next stage of this adventure included a legal review of all classes and job aids. Once legal approval was obtained, the training schedule was updated, and classes began; ending the journey...for now. Similar to “Charlie on the MTA,” the training process is a continuous journey and the Training team looks forward to the next round of COMMBUYS enhancements.

*In the end, four classes were updated, three webinars were created, and six new job aids were added to the arsenal of training tools for buyers. The COMMBUYS curriculum for buyers now entails seven Instructor-led classes, five webinars, and 32 job aids. Additionally, the COMMBUYS purchasing course (currently a one-day offering) is undergoing a complete overhaul and will be offered in three tiered courses designed for beginners, Intermediate, and Advanced users of the Commonwealth's procurement system. It is expected that the revamped courses will be available later in the fall. Vendors have not been overlooked. Currently, the training curriculum for vendors includes four instructor-led classes, three webinars, and 16 job aids. Finally, the COMMBUYS training curriculum includes 29 webcasts that are available for viewing on YouTube for both the buyer and vendor communities.*

## COMMBUYS

### Help Desk Assistance

Questions about COMMBUYS?  
Contact us for help.  
**1-888-627-8283**

**COMMBUYS@state.ma.us**

Staff are available  
8:00 a.m. to 5:00 p.m. ET,  
Monday through Friday.

## Stay in Touch!



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### About

The Operational Services Division (OSD) administers the procurement process for the Commonwealth of Massachusetts' Executive Agencies by establishing Statewide Contracts for commonly purchased goods and services. OSD's mission is to help our government and business customers succeed in meeting their goals by providing outstanding customer service, competent advice and guidance, objectivity in our work, and to make available to our customers high quality products and services that exceed the expectations of those whom we serve.