

The Operational Services Division's (OSD) Purchasing, Procurement, and eProcurement Training Catalog



OPERATIONAL SERVICES DIVISION

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The Function of the Operational Services Division

The Operational Services Division (OSD) administers the procurement process by establishing Statewide contracts for goods and services that ensure best value, provide customer satisfaction, and support the socioeconomic and environmental goals of the Commonwealth.

OSD's Events, Training, and Outreach Team provides State agencies, authorities, cities/towns, regional school districts, county officials, and other eligible entities with a wide variety of training on procurement policy, OSD's programs and services, Statewide contracts, and COMMBUYS.

In compliance with Executive Order 533, OSD established minimal procurement training requirements for Executive Agency procurement staff.

FOR QUESTIONS PLEASE CONTACT:

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FOR A CALENDAR OF TRAINING INFORMATION:

[OSD Events Calendar](#)
Mass.gov/osd > OSD Events & Training

The Operational Services Division
Events, Training, and Outreach Department
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Boston, MA 02108

osdtraining@state.ma.us
617-720-3300

Website: www.mass.gov/osd

Twitter: @Mass_OSD

LinkedIn: http://www.linkedin.com/groups/MASSbuys-EXPO-4252266?trk=my_groups-b-grp-v

YouTube: <http://www.youtube.com/playlist?list=PL247E2162C4B2F10A>

Training

In accordance with EO533, the Operational Services Division developed training for the State's purchasing professionals who expend public funds for public purposes. OSD's classes help purchasing professionals effectively, efficiently, and economically meet the needs of their customers, the government agencies, and the citizens they serve.

Our goal is to train public purchasing professionals with the knowledge and skills to:

- Effectively design, solicit, negotiate, award, and manage government contracts in Massachusetts.
- Properly purchase goods, services and post documents.

BUYERS & SELLERS

For procurement staff: The Operational Services Division designed training specific to the execution of the traditional duties and responsibilities of Executive Branch procurement and contracting to ensure that contracts for goods and/or services are in compliance with governing laws, rules, and regulations.

For purchasing staff: The Operational Services Division created training to encourage purchasing officials to effectively, efficiently, and proactively purchase supplies, equipment, or services from Statewide or departmental contracts as needed for agency operations.

For organization administrators: The Operational Services Division provides training for Organizational Administrators relating to approvals, workflow and user profile set-up activities in COMMBUYS.

COURSES

The following courses are required training for Executive Agency procurement and purchasing staff, and recommended for those electing to follow 801 CMR 21.00.

Instructor-Led Sessions:

****COMMBUYS Systems Training****

1. Organizational Administrator: Set-Up and Maintenance (1 Day)

This is an intensive class for those identified as Organization Administrators in the COMMBUYS system. 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.

2. Procurement in COMMBUYS (1 Day)

This session is recommended for staff with the responsibility of conducting procurements for goods and/or services not available on a Statewide contract. The class will cover:

- The creation of a bid.
- The use of templates.
- How to manage attachments.
- Online bid evaluation and contract award.
- Posting awarded contracts online in COMMBUYS.

3. Purchasing in COMMBUYS - Requisitions & Purchase Orders (4 Hours)

This session is designed for staff responsible for purchasing goods and/or services from Statewide and departmental contracts. It provides an introduction to COMMBUYS, system navigation, policy and instruction on how to purchase from Statewide or Department contracts. Participants will learn to:

- Use COMMBUYS to search for items and/or services.
- Create a request using a requisition document.
- Search for specific items and/or services using a line item or a punch-out catalog.
- Convert the approved requisition to a purchase order or bid depending on the intent of the purpose.
- Create change orders.

OSD Core Courses

1. Essentials of State Procurement (1 Day)

The Operational Services Division manages more than 130 contracts for commonly purchased goods and services, saving you time and money. Purchase items such as office supplies and fuel cards through a Statewide Contract. This session provides a comprehensive overview of the Commonwealth’s procurement process for both how to use Statewide Contracts/Master Blanket Purchase Orders and what to do if an item is not on a Statewide contract. Learn:

- How to search for a commodity or service using COMMBUYS.
- How to conduct your Department’s own procurements in compliance with all applicable statutes, regulations, and policies.

The Essentials of State Procurement is required for all new and existing department staff responsible for:

- Purchasing commodities, supplies, equipment, or services for agency operations from Statewide or other established contracts.
- The preparation, review, evaluation, and negotiation of contracts for the procurement of goods and services.

*This class is a prerequisite for the Strategic Sourcing Certificate Program.

2. Strategic Sourcing Certificate Program (5 Full Days)

Strategic sourcing is the planned, systematic, and enterprise-wide procurement process that allows for continuous improvement and re-evaluation of the enterprise’s purchasing activities to maximize spending efficiency, standardize processes, reduce total costs, and assist in meeting socioeconomic goals. OSD designed this program to help departments conduct effective procurements on behalf of their agencies. It outlines the laws, rules, and regulations governing bid postings and contract awards for goods and services to ensure a fair, open, and competitive bidding process. Attendance is required at all sessions. Topics covered throughout this Program include:

- Preparing solicitations, reviewing evaluations and vendor negotiation.
- Analyzing bid responses and related documents.
- Monitoring the execution of contracts.
- Preparing documents and reposts.
- Conferring with agency staff, vendors and potential contractors.

3. Discovering Statewide Contracts/Master Blanket Purchase Orders: Information, Demonstration & Application (3.5 Hours)

Through hands-on exercises, this course covers how to use Statewide Contracts and COMMBUYS (the first half of Essentials of Procurement).

Trainees will learn how to locate Statewide Contracts in COMMBUYS and become familiar with the tools and resources available on the OSD website. We will also provide information on some OSD cost saving programs that buyers can take advantage of.

Webinar:

1. How to use Statewide Contracts (1 hour)

This one-hour introductory class includes an overview of the Operational Services Division and Statewide contracts. Attendees will learn how to locate Statewide contracts in COMMBUYS, and what resources and tools are available on the OSD website. We will also provide information on some OSD cost saving programs that buyers can take advantage of.

Registration

All department employees register for Instructor-Led Classes through PACE, the Commonwealth Learning and Management System. PACE is the portal to access user training and ensures that users can track their training progress. Students registering via PACE should list reasonable accommodations needed to participate in training events in his/her User Profile.

To register for a class:

- Go to www.mass.gov/pace.
- Select **PACE Login**.
- Select Your Agency (If your agency is not listed, select Human Resources Division).
- Enter your User Login ID (EMPID) and Password. If you are a first time user, your login ID is your Employee ID, and your password is your last name as it appears on your pay advice, case sensitive – e.g. “Smith” not “smith.”
- Select **Student Learning Center**.
- Select **Course Catalog**.
- Type in the keyword “OSD” and leave the dropdown boxes as “All” to find the applicable course.

***Exception:** Register for the **How to Use Statewide Contracts Webinar and COMMBUYS specific classes** through EventBrite

ENROLLMENT

All courses are free. Seating is limited. Procurement staff should always meet with and seek the approval of the CPO and/or designee prior to attending training. Staff should check the online schedule and PACE for specific dates and times and for any other optional training.

Cancellations

If you need to cancel your registration, notify OSD online no later than 2 business days prior to the class date. In an emergency, contact OSD at 617-720-3300 or osdtraining@state.ma.us.

In the event that OSD postpones or cancels a class, OSD will notify the students no later than 2 business days prior to the class.

EXTREME WEATHER CONDITIONS

All classes will be held as scheduled unless the Governor has instructed state employees not to report to work or Boston Public Schools are cancelled. Watch for announcements on channels 5 or 7 or listen to radio station WTAG (580AM) for cancellations.

Custom classes at specific departmental or other facilities will be cancelled if the local public schools are cancelled.

Directions to Training Location

The McCormack State Office Building
One Ashburton Place
Boston, MA 02108

The central training site at One Ashburton Place, Boston, has several conference rooms and a PC lab. All classrooms (unless otherwise indicated) are located on the 10th floor in Room 1017.

BY PUBLIC TRANSPORTATION

Take the MBTA to Park Street. Walk up Park Street towards the State House.
 Turn right onto Beacon Street.
 Turn left onto Bowdoin Street.
 Ashburton Place is one block down on the right.

DRIVING

From the South:	From the North:	From the West:
<ul style="list-style-type: none"> • Take 93 North to Exit 23, Government Center. • Keep left on the ramp • Turn left onto Congress Street. • Turn right onto State Street. <i>State Street becomes Court Street.</i> • Turn left onto Tremont Street. • Turn right onto Beacon Street. • From Beacon, turn right on Somerset Street and then left onto Ashburton Place. 	<ul style="list-style-type: none"> • Take 93 South to Exit 24A • Take Exit 24A towards Government Center. • Turn left onto Surface Road • Turn right onto State Street. <i>State Street becomes Court Street.</i> • Turn left onto Tremont Street. • Turn right onto Beacon Street. • From Beacon, turn right on Somerset Street and then left onto Ashburton Place. 	<ul style="list-style-type: none"> • Take Interstate 90 East toward Boston. • Take Exit 22 toward Copley Square • Turn slight Right onto MA-9 East / Stuart Street. • Turn Left onto Charles Street / MA-28 North • Turn Right onto Beacon Street • Turn Left onto Somerset Street • Turn Left onto Ashburton Place.

Directions to One Congress Street

This training location is situated in the same building as the Government Center Garage. The conference room is located on the 11th floor.

BY PUBLIC TRANSPORTATION

Take the MBTA to Haymarket. One Congress Street located on the opposite side of the street to the right as you exit the station. Sign in at the Security Desk in the lobby.

DRIVING

From the South:	From the North:	From the West:
<ul style="list-style-type: none"> • Take route 93 North • Exit 23 Government Center • Keep left on the Ramp • Continue straight on North Street • Turn right onto Congress Street • Go under the Government Center garage over pass • Take a left onto New Chardon Street • The garage entrance is immediately on the left 	<ul style="list-style-type: none"> • Take Route 93 South • Exit 24A Government Center • Keep right on the ramp • Turn right onto Clinton Street • Turn left onto North Street • Turn right onto Congress Street • Go under the Government Center garage over pass • Turn left onto New Chardon Street • The garage entrance is immediately on the left 	<ul style="list-style-type: none"> • Take Mass Pike Route 90 East • Take Exit 24B to 93 North • Exit 23 Government Center • Keep left on the Ramp • Continue straight on North Street • Turn right onto Congress Street • Go under the Government Center garage over pass • Turn left onto New Chardon Street • The garage entrance is immediately on the left

NOTE: Parking in Boston is available at a substantial daily rate at the Somerset Street Garage, the Boston Common Garage, the Government Center Garage, and the Cambridge Street Garage.