

# All-Liaison COMMBUYS Meeting



October 21, 2015

## Headlines

### Recording Purchases in COMMBUYS

- Trends and Gaps
- Focus on Statewide Contract Purchases
  - ✓ RPA Enabled Statewide Contracts
  - ✓ Standard Purchase Orders and Partial Receiving

## Updates

### Ongoing Readiness Activities

- Training program and calendar
- Quality Assurance

## APPENDIX

Object Code Review

# Headlines

- OSD is relaxing the requirement for Executive Departments agencies to record purchases from RPA Release-enabled Statewide Contracts in COMMBUYS using RPA Release Requisitions.
- OSD has launched a new initiative to improve the COMMBUYS customer experience, with a focus on ordering and search.
- The focus NOW is closing the gap in Statewide Contact purchases going through COMMBUYS.

Now the details.....



# Recording Purchases in COMMBUYS

## Trends and Gaps

OSD has been analyzing purchasing and spending data to understand how well Executive Departments agencies have adopted use of COMMBUYS for their purchasing.

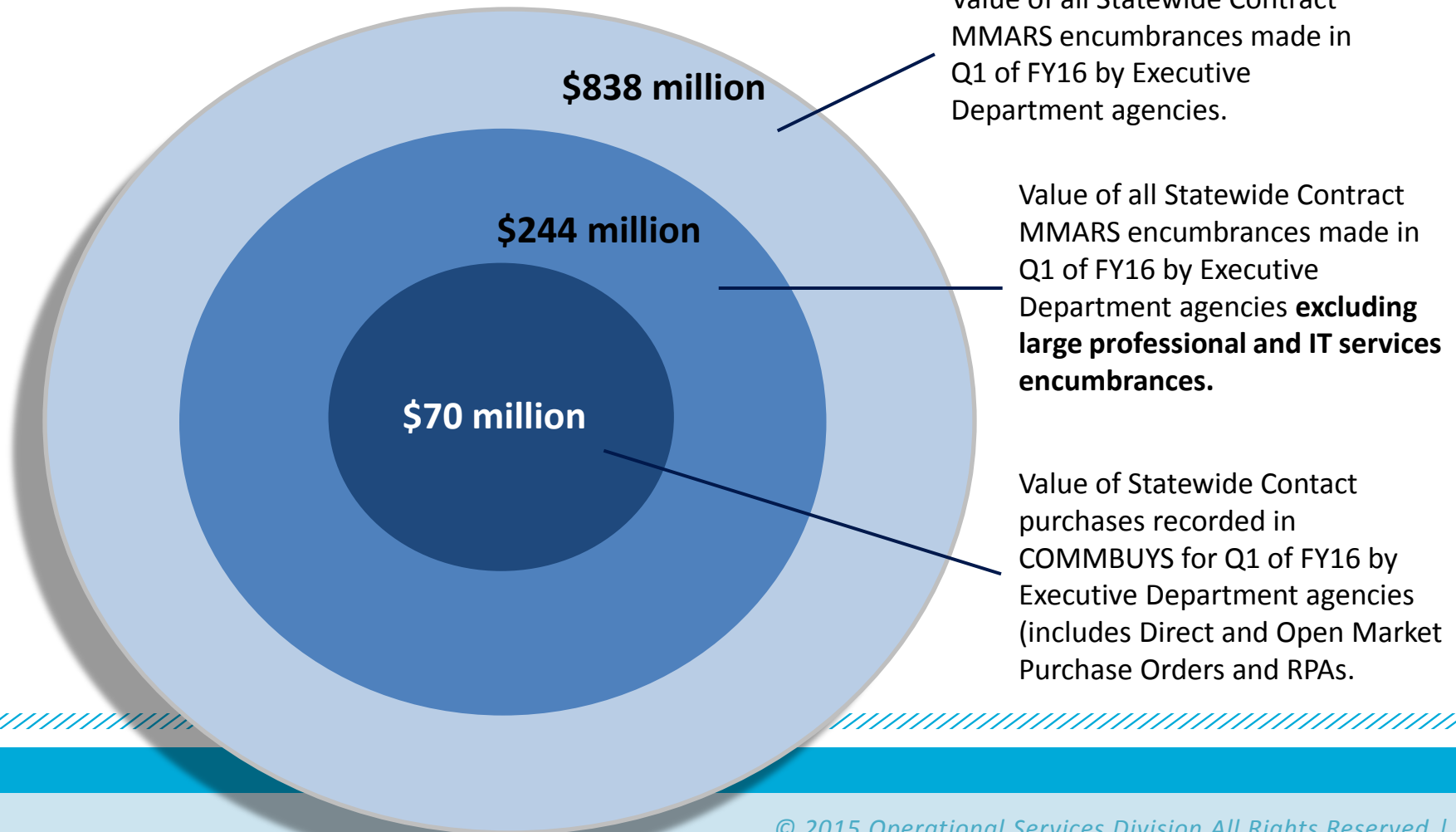
- We have reviewed purchases recorded in COMMBUYS through Open Market and Direct Release Purchase Orders and via RPAs and are comparing that information to MMARS encumbrances and payments for purchases made under qualifying object codes.
- The data reveals that there are significant gaps indicating that many purchases which should be made through COMMBUYS are being made outside of the purchasing system.
- We are working with vendors to resolve system issues and to understand how they are taking orders from buyers. This information should help us further pinpoint barriers to COMMBUYS adoption so that they can be resolved.

**OSD is finalizing a training targeted specifically for Secretaries and Department Heads which provides an overview of OSD's role, delegated purchasing authority, COMMBUYS use, and adoption to date. We will roll this training out in November.**

# Recording Purchases in COMMBUYS

## Trends and Gaps

Near term goal: Close the gap in compliance with Statewide Contract purchases made through COMMBUYS.



# Focus on Statewide Contracts

## Why record purchases in COMMBUYS?

OSD serves as the Purchasing Agent for the Commonwealth, and is mandated to negotiate contracts for a wide range of goods and services used by state agencies. This service saves buyers time and money, and ensures public buyers a range of fully-vetted goods and services at advantageous prices.

### Why record purchases in COMMBUYS?

- To obtain a comprehensive, detailed and accurate record of goods and services being purchased all in one system
- To have an electronic record of all of your agency's purchases
- So that OSD can use comprehensive, detailed purchasing data to drive contract improvements
  - ✓ Better meet user needs
  - ✓ Achieve more favorable pricing
- To enable agencies to track spending in support of new, higher Supplier Diversity benchmarks

# Focus on Statewide Contracts

## Recording Statewide Contract Purchases in COMMBUYS

Some Statewide Contract purchases to date, particularly those associated with staff augmentation, temporary help services, fuel oil and energy bills, have not been recorded in COMMBUYS, or have been recorded using an “Open Market” RPA. *Buyers have two new methods for recording those purchases going forward.*

### RPA Release Requisitions Against Statewide Contracts

Thirteen Statewide Contracts have been RPA Release enabled so that buyers can record their purchases off of these contracts after the fact.

- Contracts that have been enabled represent goods that are not usually ordered in a standard fashion.
- The RPA Release Requisition, which functions in a manner similar to a standard requisition, is the transaction in COMMBUYS that buyers use to record these purchases after the fact.

### Purchase Orders and Partial Receiving

OSD encourages departments to record their services purchases in COMMBUYS using a standard Purchase Order and record a full or partial receipt of those services in COMMBUYS as vendor invoices are submitted and accepted by the agency.

- POs can be set up to receive on quantity or on dollars
- Users with Purchaser roles perform the Receiving function in COMMBUYS



# Focus on Statewide Contracts

## Using the RPA Release Requisition to Record Purchases

### Best Practice, But Not Mandatory At This Time

Given the uncertainty in timing concerning the planned MMARS/COMMBUYS interface, and in response to user feedback, OSD is relaxing the requirement that all qualified Statewide Contract purchases be recorded in COMMBUYS using an RPA Release Requisition.

- For those RPA Release-enabled Statewide Contract purchases that happen on an occasional basis, we strongly encourage departments to record those purchases in COMMBUYS after the fact using an RPA Release (which we will demo momentarily)
- We understand the burden of entering high-volume invoices in COMMBUYS and are not going to mandate use of RPA Release Requisitions for those types of purchases at this time

The need for dual data entry would be eliminated with a COMMBUYS interface to MMARS and OSD will revisit the mandate to record purchases after the fact with an RPA Release Requisition at a later time.

So that buyers understand the level of effort and process associated with entering RPA Release Requisitions, we have prepared an overview and demo for several contract purchase types.



# Statewide Contracts “How To”

## Using the RPA Release Requisition to Record Purchases

### RPA Release Enabled Statewide Contracts

SWC	What’s on Contract	How to Record a Purchase in COMMBUYS
VEH97	New Tires, Retreads/Retreading and Total Tire Management Program	Standard PO or RPA Release Requisition
OVM08	Windshield and Glass Replacement for Vehicles	Standard PO or RPA Release Requisition
MED38	Pharmaceutical Prime Vendor	Standard PO or RPA Release Requisition
MED44	Reference Laboratory Services	Standard PO or RPA Release Requisition
FAC82	Hazardous, Medical and Hard-to-Manage Waste Collection, Disposal and Emergency Response	Standard PO or RPA Release Requisition
ENE35	Propane	RPA Release Requisition
ENE33	Biodiesel	RPA Release Requisition
ENE34	No. 2 Heating Oil	RPA Release Requisition
ENE37	Electricity	RPA Release Requisition
ENE38	Natural Gas	RPA Release Requisition
ENE39	No. 4 & No. 6 Residual Fuel	RPA Release Requisition
ENE40	Ultra Low Sulfur Diesel	RPA Release Requisition
ENE41	Gasoline	RPA Release Requisition

Note: ENE33 is being eliminated and Biodiesel will be folded into ENE40 as a new category.

# Statewide Contracts “How To”

## Using the RPA Release Requisition to Record Purchases

### RPA Release Requisition Process At-A-Glance for Energy Statewide Contracts

- Eight energy Statewide Contracts have been RPA Release enabled
- All of the Energy Statewide Contracts and Catalog have been set up in the same way to make using the contracts and entering RPA Release Requisitions as simple and easy as possible

**Required Information:** Vendor invoice

**Complexity:** Low

**RPA Transaction Frequency:** Varies (mostly monthly)

**Other attributes:** User can enter multiple invoices on a single RPA Release Requisition

SWC	What's On Contract	Agencies Using the Contract
ENE33	Biodiesel	4 - DCR, DOC, DOT, DPH
ENE34	No. 2 Heating Oil	14 - CHE, DCP, DCR, DMH, DMR, DOC, DOT, DPH, DYS, ENV, FWE, PAR, POL, VET
ENE35	Propane	12 - DCP, DCR, DFS, DMR, DOC, DOT, DPH, DYS, ENV, FWE, POL, VET
ENE37	Electricity	13 - CDA, CHE, DCP, DCR, DMH, DMR, DOC, DOT, DPH, DYS, EQE, FWE, POL
ENE38	Natural Gas	5 - CHE, DMH, DMR, DOC, POL
ENE39	No. 4 & No. 6 Residual Fuel	3 - DCP, DCR, DOC
ENE40	Ultra Low Sulfur Diesel	11 - DCP, DCR, DFS, DMH, DMR, DOC, DOT, DPH, DYS, FWE, VET
ENE41	Gasoline	7 - DCR, DFS, DMH, DOC, DOT, DPH, POL

# Statewide Contracts “How To”

## Using the RPA Release Requisition to Record Purchases

### DEMO

Entering an RPA Release Requisition for:

- VEH97
- ENE37
- ENE41

# Statewide Contracts “How To”

## Using the PO and Partial Receipt to Record Purchases

### Focus on Services Contracts

- Departments can record purchases for IT and professional services in COMMBUYS using a standard Purchase Order and receive against that Purchase Order when vendors submit their invoices.

Receipt Information					
<a href="#">Create Receipt</a> <a href="#">PO Receipts Summary</a>					
Receipt #	Status	Description	Dept/Loc	Receipt Owner	Entered Date
<a href="#">0002512</a>	SCA - Approved for Invoice	ITS53StaffAugCat2	OSD01/OSD10	Elaine McGrath	10/06/2015 01:06:20 PM
<a href="#">0002514</a>	SCA - Approved for Invoice	ITS53StaffAugCat2	OSD01/OSD10	Paul Short	10/06/2015 03:25:55 PM

Invoice Information	
There are no invoices.	

Item Information	
<b>Print Sequence # 1.0, Item # 1:</b> Application Architect - Senior (Rate Card 5) - Responsible for the translation and construction of complex business problems into sound technical solutions; provide technical and architectural direction to the software development team; ensure that development efforts are adhering to analysis, design, and development standards; provide insight and guidance on overall system design; responsible for business object architecture and application technical architecture; document and communicate architectural requirements. Maximum Hourly Rate \$110.00 unless a higher rate is approved. See Contract User Guide for detailed instructions on how to use this contract and how to request a higher Hourly Rate if needed. Statewide Contract ITS53, IT Staff Augmentation Category 2b, Low Overhead.	3PPR - Partial Receipt
UNSPSC Code: <a href="#">81-11-16</a> Computer programmers <a href="#">81-11-16-00</a> Computer programmers <a href="#">81-11-16-00-0000</a> Computer programmers	
Req # / Item #: <a href="#">RQ-15-1080-OSD01-OSD10-00000017908</a> / 1	

Blanket or Contract # / Line #	Receipt Method	Qty	Unit Cost	UOM	Discount %	Total Discount Amt.	Tax Rate	Tax Amount	Freight	Total Cost
<a href="#">PO-14-1080-OSD01-OSD10-0000000970</a> / 2	Quantity	1,000.0	\$111.55	EA - Each	0.00	\$0.00		\$0.00	\$0.00	\$111,550.00

# Statewide Contracts "How To"

## Using the PO and Partial Receipt to Record Purchases

UNSPSC Code Browse | My Account | Customer Service | About      Current Organization: Operational Services Division      October 20, 2015 2:07:33 PM EDT

Home   Items   Documents   Vendors   Quick Buy   Find It   Paul St

**Receipt # 0002514 (Approved for Invoice) - Purchase Order # PO-14-1080-OSD01-OSD10-0000000970:8**

**Header Information**

Receipt Number:	0002514	Receipt Status:	SCA - Approved for Invoice	Receipt Description:	ITS53StaffAugCat2
PO Number:	<a href="#">PO-14-1080-OSD01-OSD10-0000000970:8</a>	PO Status:	3PPR - Partial Receipt	Alternate ID:	PRCOSD010016229J0006
Department:	OSD01 - Operational Services Division	Location:	OSD10 - Ashburton RM1017	Receipt Owner:	Paul Short
User Created:	Paul Short	Date Created:	10/06/2015 03:25:55 PM	User Last Updated:	Paul Short
Date Last Updated:	10/06/2015 03:32:38 PM	Received Date:	10/06/2015 03:25:55 PM		

**Attachments**  
Files:   
Forms:   
Item Information:   
Show 5 entries

**Forms:**

**Item Information**  
Show 5 entries      First   Previous   1   Next   Last

Selected	Unit Cost	UOM	Ordered Quantity/Dollars Receipt Total(PO Receipts Total)	Receipt Type	Quantity / Dollars	Comments
<input checked="" type="checkbox"/>						Application Architect - Senior (Rate Card 5) - Responsible for the translation and construction of complex business problems into sound technical solutions; provide technical and architectural direction to the software development team; ensure that development efforts are adhering to analysis, design, and development standards; provide insight and guidance on overall system design; responsible for business object architecture and application technical architecture; document and communicate architectural requirements. Maximum Hourly Rate \$110.00 unless a higher rate is approved. See Contract User Guide for detailed instructions on how to use this contract and how to request a higher Hourly Rate if needed. Statewide Contract ITS53, IT Staff Augmentation Category 2b, Low Overhead.
1	\$111.55	EA - Each	1000.00 (72.00)	Receive 10/20/2015 02:07:06 PM	928.0 Quantity Remaining: 928.0	
1:1	\$111.55	EA - Each	1000.00 (72.00)	Receiving 10/06/2015 03:25:56 PM	33.0 Remaining: 928.0	Vendor Invoice 51546

Show 5 entries      First   Previous   1   Next   Last

**Approval Paths**

There are no approval paths found for this receipt.

See balance following receipt.

# Updates

## Initiative to Improve the User Experience for Ordering

OSD has launched an initiative to look systematically at the purchasing lifecycle to find ways to improve the buyer's experience ordering in the system.

### **COMMBUYS Enhancements**

We are working with Periscope Holdings on our next quarterly COMMBUYS release to improve usability and address known system issues.

Search – Efforts are underway to improve the search function in COMMBUYS to provide better search results and make it easier to refine search results to find what you need to buy.

### **Order Fulfillment**

OSD is working directly with vendors to improve order fulfillment and delivery.

Technical Issues – We are working with vendors to help ensure that they are mapping COMMBUYS data accurately to their system and have trained their staff to receive and fulfill COMMBUYS orders properly.

Contract Compliance – We are working to ensure that all vendors understand and are meeting their contract obligations for customer service and order fulfillment.

# Updates

## New Features and Coming Enhancements

### Ship-to / Bill-to Address Updates

- A system update has been made to improve address processing and COMMBUYS will now process punch-out orders which contain addresses beginning with either a numeral or a letter.
- We **strongly** recommend Organization Administrators adhere to the following guidelines when entering Ship To and Bill To information:
  - ✓ “Ship-to” Addresses must be physical locations. If UPS or FedEx would deliver to it, it is a real physical address; they don’t deliver to PO boxes;
  - ✓ The physical address should start with a street address in Line 1;
  - ✓ Make sure the address is not preceded or followed by a space;
  - ✓ P.O. Box addresses may be used in Line 1 for Bill-to addresses.

### REMINDER

With the availability of the Special Instructions field on the Purchase Order, Purchasers should use that field, rather than lines in the address, to convey specific instructions about delivery.



# Updates

## New Features and Coming Enhancements

### Customizing the P.O. Print Form with Your Agency Logo

- Agencies may choose to update the P.O. print form with their agency's logo.
- The Organization Administrator must take action to customize the P.O. print form.
- OSD will offer a webcast and job aid to assist Organization Administrators in customizing the P.O. print form for their organization.

### Additional Print Form Improvements

- We are currently working on updates to the Requisition Print Form and the Bid Print Form so that they better address user needs.
- We have engaged the Core Team to review prototypes and provide feedback to make these forms useful for purchasers.

# Ongoing Readiness Activities

## Training Calendar

### Training

OSD continues to offer comprehensive training opportunities including:

- Instructor-led training classes
- Webinars
- Webcasts
- Outreach meetings
- Updated job aids

Visit the [OSD Training and Event Calendar](#) for a complete list of classroom and webinar training and links to registration.

Liaisons may reference and share all Liaison meeting presentations and related video recordings which are available on the OSD website at:

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

# Announcements

## Quality Assurance

OSD is revamping the Quality Assurance (QA) program to include departmental use of COMMBUYS in the QA process.

- The QA group is currently in the process of finalizing their program and schedule for the rest of the fiscal year.
- We will plan to discuss the program in detail at a future Liaison meeting.

If departments are interested in discussing their COMMBUYS adoption progress to date and ways to further improve your team's use of the system, we would be happy to schedule a meeting to review your COMMBUYS use to date and develop a plan with you to address any adoption gaps.

Please contact Chris Swistro, COMMBUYS Readiness Coordinator at [christine.swistro@state.ma.us](mailto:christine.swistro@state.ma.us).



## 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



# APPENDIX



## Review of Object Codes and COMMBUYS Purchasing Guidance

# Recording Purchases in COMMBUYS

## The Object Code Perspective

Thinking about purchases in terms of object codes may help guide when a purchase needs to be reflected in COMMBUYS and, therefore, reflected in COMMBUYS using a standard Purchase Order, or an RPA when a purchase needs to be recorded after the fact. In general, the purchase of goods or services within these object codes are covered under 801CMR21 and should be made through COMMBUYS:

Object Class	Codes
Administrative Expenses – Office and Printing Supplies; Exhibits; Bottled Water; Conference Space	E01, E02, E14, E15, E22,
Programmatic Facility Operational Supplies and Related Expenses – Food/Beverages; Pharmaceuticals; Lab/Med Supplies; Clothing; Facility Furnishings; Library/Teaching Supplies; Manufacturing Supplies; Vehicle Maintenance/Repair Parts; Law Enforcements Supplies; Wholesale Supplies	F01, F03, F04, F05, F06, F07, F08, F09, F10, F11, F13, F16, F18, F19, F21, F24, F27, F28
Energy Costs - Vehicle and Building Fuel; Energy Savings; Natural Gas Supply; Electricity Supply	G05, G06, G10, GG1, GG3
Consultant Service Contracts- Legal Services; Exam Developers; Management Consultants and Related Travel Reimbursements; Recruiters; Program Coordinators; Financial, Engineering Research, Media and Communications, and Health and Safety Services	H09, H13, H19, H21, H22, H23, H30, H98, HH1, HH2, HH3, HH4
Programmatic Operational Services – Legal Support, Auxiliary and Non-Medical Services; Appraisers; Examiners; Laboratory and Laundry Services; Surveyors; Foods Services; Reimbursement for Prog. Expenses	J07, J10, J16, J25, J27, J33, J44, J46, J50, J54, J56, J58, J98, JJ1, JJ2, JJ3
Programmatic Equipment Purchases – Education and Facility Equipment; Vehicle Equipment; Office Equipment; Medical Equipment; Law Enforcement and Heavy Equipment; Broadcasting Equipment	K02, K03, K04, K05, K06, K07, K09, K10, K11, K12
Equipment Maintenance and Repair – Maintenance and Repair of Educational, Vehicle, Office, Printing, Medical, Law Enforcement and Heavy Equipment; Maintenance and Repair of Office Furnishings	L42, L44, L45, L46, L47, L49, L50, L51, L52, L63
Construction Services, Engineering , Research and Scientific Services; Waste and Snow Removal – Appraisers; Construction Management; Cost Estimators; Lateral Construction Planning and Engineering; Lawn and Grounds Equipment/Repair; Facilities Maintenance Supplies; Cleaners, Janitors, Exterminators, Snow Removal; Hazardous /Non-Hazardous Waste Removal	N04, N05, N06, N12, N13, N14, N51, N52, N60, N61, N64, N70, N71, N72, N73, N74, N98, NN1
Information Technology Expenses – Voice/Data Telecomm Services; IT and Software Licenses; IT Professionals; Cabling; IT Equipment Purchases, Maintenance and Repair; IT Contract Services	U01, U02, U03, U05, U06, U07, U10, U11, U98

# Recording Purchases in COMMBUYS

## The Object Code Perspective

In general, agencies purchasing goods or services within these object codes, though covered under 801CMR21, are not currently required to reflect those purchases in COMMBUYS.

Object Class	Codes
Reimbursement for Travel and Other Expenses for Board Members	E98
Honoraria, Labor Negotiators	H15, H17, H78
Board and Commissioner Fees	J62
Programmatic Equipment TELP, Lease and Rental	L03, L04, L05, L06, L07, L09, L10, L11, L22, L23, L24, L25, L26, L27, L29, L30, L31, L32
Purchased Client Human and Social Services; Medical and Non-Medical Services Provided by Individuals	M01, M03, M04, M10, M11, M1M, M2M, M78, M98, MM1, MM3
Initial Furnishing and Equipment Purchases; Highway/Lateral Maintenance Materials; Non-Major Facility Maintenance and Repair; TELP Lease Purchase of Facility Infrastructure, Lawn and Grounds Maintenance	N18, N23, N50, N62
IT Equipment TELP, Lease or Rental	U08, U09





# Recording Purchases in COMMBUYS

## The Object Code Perspective



Agencies purchasing goods or services within these object codes not covered under 801CMR21 are not required to reflect those purchases in COMMBUYS.

Object Class	Codes
Object Classes AA, BB, CC, DD, PP, RR, SS, TT	All codes
Postage; Periodical and Cable Subscriptions; Advertising Expenses; Fees, Fines, Licenses, Permits, Chargebacks; Employee Travel Expenses; Conference, Training and Registration Fees	E06, E12, E13, E19, E21, E25, E41, E42, E43, E53, E80, EE2
Municipal Taxes	F22
Office Space Rental; Electricity; Water and Sewer; Late Penalty Interest for Utilities	G01, G03, G08, G97
Court Investigators; Guardians ad litem; Jury Fees; Law Enforcement, Sherriff Services, Work Study	J13, J19, J24, J28, J41, J57
Reimbursements for expenses incurred on behalf of clients; Tuition and Educational Fees; Tax Reportable Reimbursements	M02, M07, MM2
Major Construction, Renovation, Building Alteration and Land Improvements; Legislatively Mandated Purchases Other Than Land; Highway/Lateral Construction and Maintenance Improvements; Relocation Costs for Land Taking; Late Payments on Construction Projects	N16, N20, N21, N22, N30, N95
Initial Prize Payments	T05