**COMMBUYS Terms & Definitions**

**Basic Purchaser and Basic Purchasing (BP) Users**

 Basic Purchasers can create and view all purchasing documents including Requisitions, Receipts, Purchase Orders, Bids and their related documents such as Amendments and Change Orders. With the exception of “direct” documents, BP users are responsible for sending documents to the appropriate vendors. Procurement personnel have the BP role.

 Those designated BP Supervisors can view and edit the Bids of the BP users assigned to them in COMMBUYS Workflow.

**Department Access (DA) Users**

 Department Access users can be given the ability to create on and off-contract Requisitions and/or approve the Requisitions of others. Those given Superuser authority are able to take control of any document in their Department(s) and/or Locations(s).

 DA users can also be given the rights to receive, conduct Informal Quotes, create Change Orders for their own documents and /or create “direct” documents, which are sent directly to the vendor without going through purchasing. End users or customers have the DA role.

**Inquiry Users**

 Inquiry users have the ability to see every document in the system for their Organization, but are unable to control or edit any document. Auditors are given the Inquiry role.

**Organization Administrator**

Organization Administrators are able to manage the procurement process for an organization, including its Departments, Locations, users and approval paths. Procurement managers have the role of Organization Administrator.

**Internal Administrator**

 Internal Administrators serve as the top-level administrator within the system and are able to determine which organizations and vendors have access to the system, as well as to manage centralized document and accounting settings, access restrictions and the look and architecture of the system.

**Seller**

Seller is the role for vendor users accessing the system to view and respond to solicitation opportunities (Bids) and acknowledge received Purchase Orders.

**Seller Administrator**

Seller Administrators manage the users and data for their vendor account.

**Requisition**

Requisition documents enable Basic Purchasing and Department Access users to initiate the purchasing process. Users complete Requisitions by designating the requisition type, adding items, and indicating ship-to and bill-to addresses and accounting information.

**Bid**

Bid documents enable Basic Purchasing users to conduct solicitations. Users complete Bids by defining the solicitation process to be used, indicating the relevant dates, creating the item(s) that can be bid upon, identifying vendors to notify, and attaching the appropriate terms, conditions, instructions, etc.

 Once approved, Bids can be published on the web to enable electronic response by registered vendors. After the response time has ended, Bid responses can be viewed, evaluated and awarded via the Bid Tab.

**Quote**

 Quote documents are the mechanism used by vendors to respond to solicitation opportunities. Users complete Quotes by providing price quotes for solicited items, answering any posed questions and denoting acceptance/non-acceptance of the Terms and Conditions of the solicitation.

**Purchase Order**

 Purchase Order (PO) documents represent any agreement with a vendor to provide goods or services, including term contracts, orders against contracts, or one-time purchases. POs are completed by indicating the type of PO, adding items, and indicating ship-to and bill-to addresses and accounting information. Unilateral and bilateral amendments can be processed via Change Orders created from within the PO.

**Receipt**

Receipt documents allow users to document which ordered products/services have been received by the agency. Receipts are often referenced to determine the appropriate amount to pay a vendor. Users complete receipts by identifying either the quantity or dollar amount received of the item.

**Open Market Requisitions**

Open Market requisitions provide Department Access users with the ability to create requests for products/services that do not exist on agency contracts. The user must define the products/services, provide commodity information, indicate shipping and billing addresses, and select/verify funding sources.

 The Informal Quote process imbedded in Open Market Requisitions provides the capability to select vendors and publish an informal solicitation opportunity to them. The vendors can respond online to the quote request, or the user can document quotes received outside of the system. The price quotes from the vendor can then be applied to the Requisition items in order to provide a valid price estimate for the document. The user may also recommend the vendor(s) with the lowest pricing (or best value) for award. See also Direct Open Market Requisition.

**Direct Open Market Requisition**

Direct Open Market requisitions provide a Department Access user with the ability to create requests for products/ services that do not exist on agency contracts and to send the resulting PO directly to the vendor without Purchasing user involvement.

**Release or Release Order**

Releases provide an ordering method for products/services currently on-contract. Standard Releases must route through Purchasing before being sent to the vendor. Department Access users can send Direct Releases to the vendor without Purchasing user involvement.

**Request for Payment Authorization or RPA**

 Requests for Payment Authorization (RPAs) in COMMBUYS are used to request funds for a product that has already been purchased, or services that have already been provided. Once approved, RPAs immediately become completely received POs with In-Progress Invoices.

**Open Bid**

 Open Bids are those that allow any vendor to submit a response, even those not originally notified of the Bid upon publication. Open Bids are also viewable to users without a login ID from the Login Screen using the Open Bids link.

**Closed Bid**

 Closed Bids are visible only to those vendors originally notified of the Bid upon publication. Only these vendors will be able to submit a response through the system.

**Formal Bid**

 Formal Bids prohibit Basic Purchasing users from viewing any submitted responses until the Opening Date/Time has been reached. Bids are “formal” by default. No action is required to make a Bid formal. Formal Bids can be either Open or Closed. A Formal Bid is used for conducting a standard procurement and for “Open Enrollment” Qualified Contractor Lists, as described in How to Draft a Request for Response.

**Informal Bid**

 Bids marked as Informal allow Basic Purchasing users to view vendor responses prior to the Opening Date/Time. An Informal Bid can be either Open or Closed. An Informal Bid is used for conducting “Rolling Enrollment” Qualified Contractor Lists, as described in How to Draft a Request for Response.

**Open Market Purchase Orders (POs)**

 Open Market POs support the one-time purchase of off-contract commodities/services by Basic Purchasing users. Open Market POs can be created from scratch, converted from Requisitions or Bids, or cloned from previous POs. BP users can award Open Market POs to the vendor of their choice without utilizing a formal solicitation process.

 Open Market POs require accounting information and will create an encumbrance based on the Organization’s settings.

**Blanket Purchase Orders (POs)**

 Blanket POs capture term contract agreements and allow for the processing of Release Requisitions against them for the life of the contract. Blanket POs record all Releases against the contract, including which items were ordered and how much was spent.

 BP users can limit which Organizations and Departments are able to process Releases off each Blanket PO, as well as how much each can spend.

**Contract Purchase Orders (POs)**

 Like Blankets, Contract POs capture term contract agreements and allow for the processing of Release Requisitions for the life of the contract. However, Contract POs require users to associate every item on the contract with an 11-digit UNSPSC Commodity Code. Contracts must also be associated with a Catalog.

**Change Orders**

Change Order documents are the mechanism by which BP users can process both standard PO change orders and contract amendments for Blanket and Contract POs. Any type of PO that has reached “Ready to Send” status can have a Change Order processed against it. Change Orders marked as “bilateral” require vendor approval before they can be applied to the PO. Change Orders can be created against a PO until it has reached “Closed” status or it has been cancelled.

 DA users can be allowed to create Change Orders against POs resulting from their own Requisitions. However, BP users must apply and send Change Orders to the vendor, except for those against Direct Open Market and Direct Release Orders, which are sent to the vendor by the DA user.

**Department**

 Work unit, at least one department is required by to be set up in COMMBUYS, for each Organization.

**Location**

 Work unit, at least one location is required by to be set up in COMMBUYS, for each Organization.

**Type Code**

Used to identify document types, (need clarification on type codes to be used in COMMBUYS).

**Short Description**

 Open field for Buyers to enter reference information for a document in COMMBUYS. Will be used for Comm-PASS contract schema for Master Blanket POs (ex: GRF37), yet going forward each organization can utilize their own contract schema.

**Status**

The following Status options are available:

 In Progress - The initial status of new documents. The document is still being completed by the creator.

 Ready for Approval - The document has been submitted for approval and is travelling down an approval path.

 Returned - The document was disapproved by an approver.

 Ready for Purchasing - The document has been approved and the department must decide whether to conduct a solicitation (for off-contract Requisitions), purchase the items or disapprove the request.

 Ready to Send - The document has been approved and is ready to be sent to a vendor or vendors.

 Sent - The document has been sent to a vendor or vendors.

 Cancelled - The document has been cancelled by the creator or an authorized user for the document’s business units.

 Gone to Bid - Requisition has been converted to a Bid

 Gone to PO - Requisition had been converted to a PO

 Bid to PO - Bid has been awarded and converted to a PO.

**Control Center**

 For non-administrative users, your Homepage consists of the area below the Home – Welcome Back (Your Name) label on your monitor that features a series of tabs. This is the user's Control Center. Each tab provides links to the most recent items and documents that may require user action. The number in parentheses within each tab is the total number of items within that tab that may require action.

**Header Bar**

 The Header Bar is the gray bar that always appears along the top of screen. It contains a series of links and icons enabling the user to access various types of information within the system. The Header Bar also displays the official clock of the system. This date and time is used when time stamping documents and approvals, as well as managing solicitation available and opening times.

**Navigation Bar**

 The Navigation Bar is the colored bar that always appears along the top of the screen directly below the Header Bar. Non administrative users can see dropdowns enabling the user to access items and documents, create new documents and contact vendors. Depending upon the non-administrative role you are currently in, your Navigation Bar will feature different dropdowns, however all roles will see a link back to the Homepage.